Salesforce Release Notes

Salesforce, Winter '25

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

Last updated: September 6, 2024

CONTENTS

SALESFORCE WINTER '25 RELEASE NOTES

See how the Winter '25 release helps teams work smarter with new product innovations built on CRM + AI + Data + Trust.

IN THIS SECTION:

Customization

New and improved access summary views make managing permissions simpler. Manage list view items more easily with improved performance, usability, and other enhancements. Add impact to your Lightning records by augmenting your fields with conditional formatting.

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.

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

Upgrade existing LWR sites and CMS workspaces to enhanced sites and enjoy better performance and new features. Offer site builders an improved experience with a new navigation component, upgraded record components, and improved SEO. Capture more site events and send them to Data Cloud with the updated Data Cloud integration. Make your sites work for you with new Salesforce CDN features, additional custom domain support, and more.

Field Service

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

Hyperforce

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

Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Get the most out of your assets by using Asset Service Lifecycle Management. Automotive Cloud optimizes vehicle loans and leases with Digital Lending for Automotive. Consumer Goods Cloud helps tour drivers sell directly from their trucks. Financial Services Cloud gets more service process templates and introduces business relationship plans. Health Cloud improves the scheduling experience for Home Health and Intelligent Appointment Management. Life Sciences Cloud helps organizations make trials more accessible with support for financial assistance programs. Salesforce for Education integrates with Data Cloud and expands its generative AI capabilities. We also have plenty of changes for Manufacturing Cloud, Loyalty Management, Industries common features, and much more.

Marketing

Salesforce marketing products and features streamline and supercharge your promotional campaigns. Find out what improvements are arriving in our Winter '25 release.

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

Keep up with deals while on the go with the new Seller-Focused Sales Mobile Experience, which is now generally available. Improve productivity when working with records offline, customer messaging, or reports with the latest features available on the Salesforce mobile app. Create a mobile app built on Lightning Web Runtime (LWR) with Mobile Publisher for Experience Cloud LWR sites, which is now generally available. Validate the records available offline to a user with the new Total Unique Records field available in Briefcase Builder.

Omnistudio

In the Winter '25 release, Omnistudio Standard offers new designers and list views for all components. It also offers customization of Omniscript elements.

Revenue Cloud

Revenue Cloud brings a suite of enhancements to boost efficiency and elevate user experience. Get notified when orders are created. Product Catalog Management now supports CSV file imports, templates for qualification decision tables, and category and product qualification elements in rule procedures. Use ramp deals for dynamic pricing and other enhancements to support informed decision-making. Your customer community users can access quoting capabilities. The new Invoice Management feature automates and scales invoice generation, ensuring accuracy, compliance, and improved financial reporting. Salesforce Contracts can now compare documents, lock sections, and generate documents in real-time. Learn more about these and other enhancements in Revenue Cloud.

Sales

Boost your teams' results with new features across Sales Cloud. Nurture existing relationships and grow key accounts with Account Plans. Keep your pipeline healthy by using AI to help identify your next customer. Submit forecast numbers at a point in time. And create quota plans that incorporate stamped territory hierarchy, owner, and attribute data.

Salesforce CMS

Publish enhanced CMS content to more channels, including Aura sites. As you add these channels to your enhanced CMS workspace, remove old ones from the workspace, and delete unused channels from your org. Share and reuse content across your enhanced CMS workspaces with workspace sharing and content cloning.

Salesforce Flow

Compose intelligent workflows with Flow Builder and Flow Orchestration. Integrate across any system with MuleSoft Composer for Salesforce.

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

Migrate your local connected apps to local external client apps. Monitor vital data from custom objects by creating custom metrics. Legacy My Domain URLs are no longer redirected in most non-production orgs. And Salesforce now supports TLS 1.3 for outbound HTTPS callouts from the Salesforce Platform.

Service

Explore the latest advancements in AI and customer service technology with Salesforce's new offerings. These include the generally available Einstein Data Library for grounding generative AI responses, the beta version of Einstein Case Management for real-time insights, and enhanced messaging capabilities across various platforms. Additionally, new tools like Employee Service streamline HR processes, while features like post-chat surveys and Einstein Copilot enhance feedback collection and supervisor efficiency. These innovations help optimize data integration and analysis, ensuring a unified view across all engagement 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 these new features.

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!

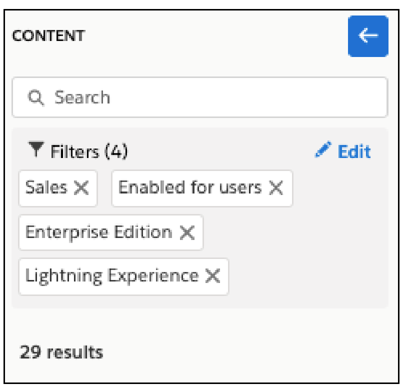
Find Release Note Changes More Easily

Release Note Changes has a helpful redesign. Scan the landing page by date—most recent first—and then by product area. For example, if Analytics and Sales have changes to any of their release notes the week of February 1, 2025, those product areas are listed alphabetically under the "February 1, 2025" heading. Within the sections, find the details you need for each change. Previously, Release Note Changes grouped changes by date only.

How to Use the Release Notes

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

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



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

- **Trailblazer Community**—Post your feedback in the Release Readiness Trailblazers group. To help us track and respond to your feedback, use a hashtag that indicates the release, such as #Winter25Feedback.
- **Feedback forms**—As you're working with documentation in Salesforce Help, release notes, or developer guides, look for the feedback buttons and vote up or down. Add comments if you have them.
- **Twitter/X**—When you follow @salesforcedocs on X, you receive notices whenever we publish new documentation or make significant updates to existing documentation. Contact us at @salesforcedocs.

Note: Until the new release is available to you, links from release notes to Salesforce Help, implementation guides, developer guides, and other documentation don't work. And sometimes the links point to material from the previous release.

Some documentation have 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.

Winter '25 Highlights for Admins

Check out this video for a preview of key features for admins in Winter '25. This video goes live the week of August 26, 2024.

Watch a video

What's New This Release

- Release Milestones. See key dates for the release.
- Release Overview Deck (ROD). Create internal training for your users, review setup screens, and learn how to use features.
- Release Matrix. Quickly see which features immediately affect your users.
- Winter '25 Pre-release Signup. Sign up for a pre-release org to get early access to the new features.

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 Winter '25 release to your instance.

For example, the Winter '25 release begins rolling out to customer instances in mid-September of 2025. Release notes for features released in September or October are linked to from a topic called "September '24 Release." Release notes for features released in October 2024 are linked to from a topic called "October '24 Release."

IN THIS SECTION:

September '24 Release

Learn about features released in September '24. Features included in the September '24 monthly release become available when Winter '25 rolls out to your instance.

- Data Cloud Features Released by Month
- Einstein Features
- Einstein Platform

Release Note Changes

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

IN THIS SECTION:

Week of September 9, 2024

IN THIS SECTION:

Salesforce Overall Updates

Inbound Email Limit Increased

Correction: The inbound email limit isn't increased. Salesforce limits the number of inbound email messages that can queue after you reach your daily limit if you use the Requeue Message failure response option.

Added September 9, 2024.

API Updates

New and Changed Objects

Added a release note to announce the new `ArchivedTerritoryName` and `Territory2Id` fields on the OpportunitySplit and OpportunityLineItemSplit objects.

Added September 9, 2024.

Customization Updates

Some Supported Time Zones No Longer Available

Added a release note to announce changes to the currently supported timezones.

Added September 9, 2024.

Sort List Views by Multiple Columns (Beta)

Added a release note about the sort by multiple columns (beta) feature.

Added September 9, 2024.

Update Apex Code and Sharing Rules in Metadata Deployments that Target Roles and Subordinates

Added a release note about resolving issues related to the Roles and Internal Subordinates group.

Added September 9, 2024.

Development Updates

Streaming API Versions 23.0 Through 36.0 Are Now Retired

Added a release note to announce the retirement of some Streaming API versions.

Process Platform Events at Scale with Parallel Subscriptions for Apex Triggers (Generally Available) on page 223

Updated the release note to mention the format of the partition key and to fix the partition key format in the example.

Use Custom Generative AI to Power your Salesforce Development with Einstein for Developers (Generally Available)

Added a release note to announce the general availability of Einstein for Developers.

Added September 3, 2024.

Revenue Updates

Changed Connect REST API Request Bodies

Added a release note to announce the updates to the record attributes to support the grouping of quote line items or order items.

Added September 9, 2024.

New Invocable Actions

Added a release note to announce the new invocable actions available with Invoice Management.

Added September 9, 2024.

New Metadata Types

Added a release note to announce the new `actionType` field values, which are on the Flow metadata type, available with Invoice Management.

Added September 9, 2024.

Changed Connect REST API Request Body

Added a release note to announce a new input property of the Global Search API for Product Discovery.

Added September 9, 2024.

Streamline Financial Reporting with Accounting Periods

Added a release note about accounting periods for legal entities.

Added September 9, 2024.

Sales Updates

Change Einstein Activity Capture Permissions for Sales Engagement Basic Users (Release Update)

Updated the timing of the release update from Winter '25 to Spring '25.

Added September 9, 2024.

Enable New Order Save Behavior (Release Update)

Moved from the section of release updates called "Automatically Enabled in This Release" to "Recommended But Not Enforced." Though enabling the feature is recommended, it won't be automatically enabled or enforced in existing orgs created before Winter '25.

Added September 9, 2024.

Optimize Your Strategic Planning with Account Plans

Updated the Where section to indicate that the feature is available in the listed editions with Sales Cloud.

Added September 9, 2024.

Review and Update Settings to Capture Leads from LinkedIn (Release Update)

Updated the Why section with more information about the change to LinkedIn's APIs, and the How section with a recommendation.

Added September 9, 2024.

Security, Identity, and Privacy Updates

Salesforce Authenticator Users Are Automatically Guided to a Workaround if Push Notifications Time Out on page 639

Added a release note about a change to the user experience when using Salesforce Authenticator for identity verification.

Added September 9, 2024.

Week of September 3, 2024

IN THIS SECTION:

- Industries Updates
- OmniStudio Updates
- Revenue Updates
- Sales Updates
- Einstein Search Updates
- Security, Identity, and Privacy Updates

API Updates

Metadata API

Added release note entries for the new `enableCrossDomainPreviewCookies` and `enableLegacyRedirections` fields in the MyDomainSettings type.

Added September 3, 2024.

New and Changed Objects

Added a release note entry for the new Permission Update event type.

Added September 3, 2024.

Customization Updates

Track Permission Changes with Event Monitoring

Added a release note about the Permission Update event type.

Added September 3, 2024.

Development Updates

Understand SOQL Error and Functionality Changes to Update Your Code

Specified that this change applies only to dynamic SOQL queries.

Added August 27, 2024.

DevOps Center

Use Bitbucket Cloud as your source control system (beta).

Added August 29, 2024.

Field Service Updates

Accept On-Site Payments with Tap-to-Pay on page 307

Updated that the feature is available later in Winter ’25.

Added September 3, 2024.

Start Your Journey with Einstein for Field Service on page 312

Added a release note to highlight the addition of the Einstein for Field Service section.

Added September 3, 2024.

Industries Updates

Streamline Delivery with Van Sales Delivery Execution **on page 334**

Added See Also link.

Added September 3, 2024.

Ensure Accurate Inventory Reconciliation **on page 336**

Added See Also link.

Added September 3, 2024.

New Connect REST API Resources

Added a release note to announce with new resources available with Context Service.

Added September 3, 2024.

Digital Lending—India

Added release notes to announce the enhancements to Digital Lending—India.

Added September 3, 2024.

Revise Information Library Snippets via Einstein Generative AI

Added release notes to announce the Einstein embedded AI capabilities for revising Information Library snippets in Net Zero Cloud.

Added September 3, 2024.

Enhance Scope 3 Emissions Calculations with Einstein Generative AI (Beta)

Added release notes to announce the Einstein embedded AI capabilities for enhancing Scope 3 emissions calculations in Net Zero Cloud.

Added September 3, 2024.

Generate First Draft of ESG Disclosure Automatically (Beta)

Added See Also links.

Added September 3, 2024.

Boost Scheduler Efficiency with the Appointment Scheduling Home Page

Added a release note about the Intelligent Appointment Management Home page.

Added September 3, 2024.

Simplify Transformation of Large Data by Using CSV Files (Pilot)

Updated release note to indicate that the CSV upload feature is in pilot and will go GA early October 2024.

Added September 3, 2024.

Get Notified When You Exceed Data Pipelines Usage Limits

Updated release note to indicate that the Data Pipelines limits notification alerts feature is generally available.

Added September 3, 2024.

Industry Integration Solutions Has a New Name

Added a release note to announce the name change and the setup navigation change for Industry Integration Solutions.

Added September 3, 2024.

Preview Your Processing Service

Added a release note to announce the availability of Processing Service preview.

Added September 3, 2024.

OmniStudio Updates

Effortlessly Build Omnistudio Components By Using New Designers **on page 480**

Updated information about how to enable new Omnistudio designers in Winter '25.

Added September 03, 2024.

Other Improvements in Omnistudio **on page 483**

Added a release note about improvements to Omnistudio after Summer '24.

Added September 03, 2024.

Revenue Updates

Connect REST APIs

Added release notes to announce the new resources and updated request and response bodies available with Product Catalog Management.

Added September 3, 2024.

New Connect REST API Resource

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

Added September 3, 2024.

New Connect REST API Resource

Added a release note to announce a new resource available with Rate Management.

Added September 3, 2024.

Renew Assets Early in Revenue Cloud

Added a release note for a new feature in Transaction Management for Revenue Cloud.

Added September 3, 2024.

New Connect REST API Resources

Added a release note to announce the new resources available with Transaction Management.

Added September 3, 2024.

New Connect REST API Resources

Added a release note to announce the new Invoices By Using Billing Schedules (POST) and Billing Schedule Recovery List (POST) resources available with Invoice Management.

Added September 3, 2024.

New Invocable Action in Rate Management

Added a release note to announce the `invokeRatingService` invocable action available with Rate Management.

Added September 3, 2024.

New Metadata Type in Rate Management

Added a release note to announce the `invokeRatingService actionType` field value, which is on the Flow metadata type, available with Rate Management.

Added September 3, 2024.

New Connect REST API Resources

Added a release note to announce the new resources available with Salesforce Pricing.

Added September 3, 2024.

Configure Lookup Fields Efficiently in a Transaction

Added a release note to announce the new enhancement of editability of lookup fields in a quote or order from the Transaction Line Editor component.

Added September 3, 2024.

Summarize Quotes with Einstein on page 518

Added a release note for a new feature in Transaction Management for Revenue Cloud.

Generate Quote Emails with Einstein on page 518

Added a release note for a new feature in Transaction Management for Revenue Cloud.

Sales Updates

Revamp Your Follow-Up Game in Less Time

Added a release note to announce the new Add Record to Cadence copilot action.

Added September 3, 2024

Organize and Quickly Find Records by Using Custom Labels with Einstein

Added a release note to announce the addition of Create a Label and Label a Record copilot actions.

Added September 3, 2024

Establish Action Items with Einstein

Added a release note to announce two new Create a To-Do copilot action.

Added September 3, 2024

Discover Key Contacts, Their Roles in Influencing Deals, and the Deals They've Impacted

Added a release note to announce three new Contact Relationship copilot actions.

Added September 3, 2024

Get Instant Access to Pricing Information

Added a release note to announce the new Get Product Pricing copilot action.

Added September 3, 2024

Log Calls with Customers with Einstein Copilot

Added a release note to announce the new Log a Call copilot action.

Added September 3, 2024

Optimize Your Strategic Planning with Account Plans

Updated the title to indicate that Account Plans is a delivered idea.

Added September 3, 2024.

Increase Efficiency by Using the Gmail Integration in the Chrome Side Panel

Added a release note for the ability to use your Gmail integration in the Chrome side panel.

Added September 3, 2024.

Access Einstein Copilot From Your Gmail Integration

Added a release note for the ability to use your Gmail integration in the Chrome side panel.

Added September 3, 2024.

Focus on the Deals That Matter Most

Announced the addition of the Prioritize Opportunities copilot action.

Added September 3, 2024.

Einstein Search Updates

Search Query Limit Is Applied to Improve Performance

Corrected search query limits and removed the when section to avoid confusion with release schedule.

Added August 29, 2024.

Security, Identity, and Privacy Updates

Manage Encryption Keys for Data Cloud

Added a release note announcing customer-managed root keys for encrypting Data Cloud with Shield Platform Encryption.

Added September 3, 2024.

Get Information About Permission Changes

Added a release note about the Permission Update event type.

Added September 3, 2024.

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

Added a release note about the availability of the event log object framework (beta) for US Hyperforce customers.

Added September 3, 2024.

Disable Redirections for Legacy Hostnames

Added a release note for a new setting to control redirections of legacy (non-enhanced) hostnames.

Added September 3, 2024.

Week of August 26, 2024

IN THIS SECTION:

Salesforce Overall Updates

Manage Service Resource Capacity at the Shift Level

Added a When section stating that capacity is supported for overlapping shifts and will be available starting in September 2024.

Added August 13, 2024.

Test Restrictions on Salesforce Cookie Use on page 82

Added a When section that details the instances in which the settings are enabled by default.

Added August 26, 2024.

Save on Storage and Boost Performance with Salesforce Archive (Pilot) on page 92

Updated the announcement based on a new release roadmap for this product.

Added August 26, 2024.

Analytics Updates

Improve Snapshot Data Recipe Performance with Advanced Append Output (Beta) on page 119

You can now select a date configuration to format dates output to the dataset.

Added August 22, 2024.

API Updates

New and Changed Objects on page 238

Added the CurrentStage, Duration, and TriggeringRecordId fields for the FlowOrchestrationInstance object.

Added August 21, 2024.

New and Changed Objects on page 238

Added information about the new fields `ApiName` and `ContentTypeFullyQualifiedName` on the existing ManagedContent object. Added information about the new field `ContentTypeFullyQualifiedName` on the existing ManagedContentVariant object.

Added Agust 26, 2024.

Salesforce Flow Updates

Deselect Data Table Rows When in Single-Row Selection Mode on page 599

Added a release note about being able to deselect rows in a Data Table screen component when in single-select mode.

Added August 26, 2024.

Commerce Updates

Use Business Accounts for B2B Store Guest Checkout on page 142

Added release note about the new option for account creation in B2B store guest checkout.

Added August 26, 2024.

Salesforce Data Pipelines Updates

Improve Snapshot Data Recipe Performance with Advanced Append Output (Beta) on page 90

You can now select a date configuration to format dates output to the dataset.

Added August 22, 2024.

Experience Cloud Updates

Fine-Tune the Look and Feel of Your LWR Site with More Design and Layout Controls on page 271

Added cross-references to two knowledge articles related to the removal of the Button Active color property from the Theme | Buttons panel in LWR sites.

Added August 26, 2024.

Industries Updates

Einstein for Health Cloud

Added release notes to announce the Einstein embedded AI capabilities in Health Cloud.

Added August 26, 2024.

Marketing Cloud Growth Updates

Save Time with Grounded Einstein AI Tools on page 470

Added that Einstein Copilot can draft and revise SMS messages as well as emails.

Added August 26, 2024.

Revenue Updates

Changed Connect REST API Response Bodies

Added a release note to announce the new properties available with the CPQ Base List and CPQ Base Details response bodies for Product Discovery.

Added August 26, 2024.

New Metadata Type

Added a release note to announce the new IndustriesRatingSettings metadata type available with Rate Management.

Added August 26, 2024.

Partially Load Fulfillment Plans on page 523

Corrected the title to say Fulfillment Plans instead of Decomposition Plans.

Corrected August 26, 2024.

New Connect REST API Resources

Added a release note to announce the new resources available with Invoice Management.

Added August 26, 2024.

New Metadata Type

Added a release note to announce the new BillingSettings metadata type available with Invoice Management.

Added August 26, 2024.

New Objects for Invoice Management

Added information about the PaymentTerm object and the PaymentTermItem object to the list of new objects for Invoice Management.

Added August 26, 2024.

Security, Identity, and Privacy Updates

Manage the Start URL for External Client Apps

External client app admins set custom and OAuth start URLs from the Policies tab. Previously, the start URL for OAuth flows was configured from the Settings tab when OAuth was enabled for the external client app.

Added August 22, 2024.

Verify SAML Integrations (Release Update)

Added a release note that announces a release update for a maintenance change that can impact SAML integrations.

Added August 26, 2024.

Adopt Updated Content Security Policy (CSP) Directives (Release Update) **on page 653**

This release update is canceled. However, Salesforce continues to encourage you to enable the Adopt updated CSP directives setting.

Added August 26, 2024.

Update References to Your Previous Salesforce Domains

Updated the release note to reflect that the legacy redirections stop in demo orgs in Spring '25, not Winter '25.

Added August 26, 2024.

Week of August 19, 2024

IN THIS SECTION:

Salesforce Overall Updates

Test Restrictions on Salesforce Cookie Use

Updated the note to reflect that the My Domain setting, Require first-party use of Salesforce cookies, isn't enabled by default in Winter '25.

Added August 19, 2024.

API Updates

New and Changed Objects

Added a behavior change for the `Body` field on the PromptVersion object.

Added August 12, 2024.

Metadata API

Added a behavior change for the `body` field on the Prompt metadata type.

Added August 12, 2024.

Industries Updates

New and Changed Objects in Education Cloud

Added IndividualApplicationTaskItem to the list of new and changed objects for Education Cloud.

Added August 9, 2024

Sales Updates

Optimize Your Strategic Planning with Account Plans

Updated the feature release date from October 29, 2024 to mid- to late November 2024.

Added August 19, 2024.

New and Changed Objects

Added new external record share objects and updated existing objects for Partner Connect.

Added August 19, 2024.

New and Changed Standard Platform Events

Added new external record share platform events for Partner Connect.

Added August 19, 2024.

Quickly Identify Which Builder Created Each Cadence

Added a release note about the new Version field on Sales Engagement cadence records and list views.

Added August 19, 2024.

Security, Identity, and Privacy Updates

Restore Files from a Backup

Added a release note announcing support for restoring files with the Salesforce Backup managed package.

Added August 19, 2024.

Supported Browsers

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

IN THIS SECTION:

Supported Browsers and Devices for Lightning Experience

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

Supported Browsers and Devices for Salesforce Classic

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

Supported Browsers for CRM Analytics

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

Supported Browsers and Devices for Lightning Experience

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

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 Winter '25 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
Test Restrictions on Salesforce Cookie Use		✓		
Add the New Setup Domain	✓			
Create and Verify Your Default No-Reply Organization-Wide Email Address to Send Email (Release Update)		✓		
Verify Your Return Email Address for Sender Verification (Release Update)			✓	
Enable LWC Stacked Modals (Release Update)			✓	
Get Flexible Access to Custom Apps with the Salesforce Platform Login License		✓		
Inbound Email Limit Increased		✓		
Review Your Integrations for a Change to Email Handling		✓		
Sender ID Deprecated for Email Security Compliance		✓		
Salesforce Scheduler				
Manage Service Resource Capacity at the Shift Level			✓	
Verify Your Queue Position with QR-Code-Based Check-In	✓			
Einstein Search				
Search Query Limit Is Applied to Improve Performance	✓			
Salesforce Data Pipelines				
Transfer Your Snowflake Data to CRM Analytics Using VPC on AWS (Generally Available)	✓			
Give Users Read-Only Access to Recipes (Beta)	✓			
Add Billing Information for Google BigQuery Connections	✓			
Download Data Sync Job Logs in Data Manager	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improve Snapshot Data Recipe Performance with Advanced Append Output (Beta)	✓			
Other Enhancements to Data Pipelines	✓			
Event Monitoring Platform Events Connector (Pilot)			✓	
Salesforce Archive				
Save on Storage and Boost Performance with Salesforce Archive (Pilot)				
Trust Site Enhancements	✓			

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				
Export from Data Cloud-connected CRM Analytics Assets (Beta)				✓
Reports and Dashboards				
Add Calculated Fields to Your Lightning Reports with Einstein Generative AI			✓	
Do More with Custom Report Types (Beta)			✓	
Data Cloud Reports and Dashboards				
Create Data Cloud Reports with a Single Click	✓			
Include Smart Totals Only in the Reports You Want	✓			
Highlight Min and Max Aggregates for Date Fields (Beta)	✓			
CRM Analytics				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Analytics Experience and Visualizations				
Download Directly from Dashboard Widget Action Menus	✓			
Mark Downloaded Images and Exported Data as Confidential			✓	
Add Greater Precision to Your Queries with More Filter Operators	✓			
Control Tooltip Visibility on Link Widgets	✓			
Make Dashboard Metrics Stand Out with Number Widget Enhancements	✓			
Manage Action Menus on the Repeater Widget	✓			
Get More Table Widget Options with Header Formatting and Column Sorting	✓			
Launch a Flow with a Dashboard Interaction (Generally Available)		✓		
Data Integration				
Transfer Your Snowflake Data to CRM Analytics Using VPC on AWS (Generally Available)	✓			
Give Users Read-Only Access to Recipes (Beta)	✓			
Add Billing Information for Google BigQuery Connections	✓			
Download Data Sync Job Logs in Data Manager	✓			
Improve Snapshot Data Recipe Performance with Advanced Append Output (Beta)	✓			
Control Access to Data Based on a User's Assigned Territories (Beta)	✓			
Analyze Data Across Multiple Data Spaces	✓			
Event Monitoring Platform Events Connector (Pilot)				✓
Analytics Development				
Test CRM Analytics Endpoints in Postman		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Intelligent Analytics Apps	✓			
		Einstein Discovery		
Externally Built Models in Einstein Discovery Are Retired		✓		
Tableau	✓			
Marketing Cloud Intelligence	✓			
Accessibility Enhancements in Analytics	✓			

Commerce

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
		Salesforce B2B and D2C Commerce		
Commerce App				
Get Contextual Guidance When Setting Up a B2B or D2C Store	✓			
Work More Efficiently with the Updated Commerce UI	✓			
Organize Products with the Enhanced Category Workspace		✓		
Access Product Variation Settings in One Click		✓		
Access Lowest Unit Price from Your Store Settings		✓		
Troubleshoot Product Visibility Issues Right from the Commerce App		✓		
Automate Order Confirmation Emails	✓			
Experience Refreshed Workspaces with Quick Filters and Bulk Actions	✓			
Add Design Elements to Your Store Without Leaving the Commerce App	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Smoothly Transition Between Your Store and a Record Page	✓			
Start Selling Online with Salesforce Starter and Pro Suite	✓			
Data Cloud for Commerce				
See Analytics Dashboards and Set Goal Targets in the Insights Workspace	✓			
Set Up Intelligence Analytics with a Few Clicks		✓		
Commerce Cart and Checkout				
Let Customers Complete Purchases on Any Page	✓			
Streamline the Shopping Experience with Continuous Scrolling	✓			
Address Fields Now Autocomplete for D2C Stores	✓			
Offer Weight-Based Shipping Prices		✓		
Turn Off Shipping for Non-Physical Products		✓		
Switch Between Managed and Custom Checkout Without Losing Settings		✓		
Use Business Accounts for B2B Store Guest Checkout	✓			
Commerce Promotions				
Offer Customers Shipping Rate Promotions		✓		
Manage Promotions with a Refreshed Promotion Workspace	✓			
Commerce Components				
Display Hi-Res Images and Alternative Views with the Enhanced Product Image Gallery	✓			
Faster Image Loads for Enhanced Shopping Experiences	✓			
Keep Customers Informed About Orders with Real-Time Updates		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Control Last Name Visibility in the Order Lookup Page		✓		
Reapply Your Customizations to the Updated Reorder Modal		✓		
Commerce Search				
Resolve Errors on the Redesigned Search Index Page	✓			
Displayable Product Fields Toggle Has a New Name and Location (Beta)	✓			
Additional Commerce Features				
Bundle Products to Increase Average Order Value	✓			
Set Targets to Track the Progress of Your Goals	✓			
Use Salesforce Tax to Automate Tax Processes for Custom Checkout	✓			
Simplify Tax Transactions with Flows	✓			
Use Enhanced Domains to Serve Your Salesforce CDN for LWR Commerce Stores		✓		
Improve Performance and Security of the Content Delivery Network (CDN) for LWR Commerce Stores			✓	
Access Product Media from Any CMS Workspace (Beta)	✓			
Omnichannel Inventory				
Add and Edit Inventory SKUs			✓	
Salesforce Order Management				
Provide Customers Estimated Delivery Dates			✓	
Tailor Service Flow Bulk Actions to Your Store's Needs	✓			
Salesforce Payments				
Set Up Your Pay Now Store Quickly and Easily		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Deliver an Improved Pay Now Experience to Your Customers			✓	
Create Pay Now Links with an Improved Flow			✓	
Gain More Control of Payment Processing Using Manual Capture			✓	
Salesforce Payments Is Now Available in Developer Edition		✓		
Expand Customer Payment Options with Merchant-Initiated Payments			✓	
Monitor Payment Processing to Track Your Business's Financial Health			✓	
Boost Sales by Offering More Payment Options			✓	
Let Shoppers Receive Their One-Time Passcode via Email			✓	
View Payment Shipping and Billing Information to Improve Operations			✓	

Customization

New and improved access summary views make managing permissions simpler. Manage list view items more easily with improved performance, usability, and other enhancements. Add impact to your Lightning records by augmenting your fields with conditional formatting.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Permissions				
Delivered Idea: Get Insight into How a User's Permissions Are Granted		✓		
Delivered Idea: See How Object Access Is Granted in Object Manager		✓		
Track Permission Changes with Event Monitoring		✓		
List Views				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Delivered Idea: Make Inline Edits with the Enhanced User List View			✓	
Get Better Performance for List Views on Custom and Standard Objects	✓			
Sort List Views by Multiple Columns (Beta)			✓	
Manage List Views with New Lightning Web Component (LWC) Wire Adapters		✓		
Enforce View Roles and Role Hierarchy Permission When Editing Public List View Visibility (Release Update)			✓	
Lightning App Builder				
Delivered Idea: Configure Record Highlights in Lightning App Builder		✓		
Delivered Idea: Make Record Fields Stand Out with Conditional Formatting		✓		
Sharing				
Manage Public Group Membership More Easily		✓		
Delivered Idea: Add a Description for Public Groups		✓		
Reference Multiple Picklist Values in Restriction and Scoping Rules		✓		
Update Apex Code and Sharing Rules in Metadata Deployments that Target Roles and Subordinates		✓		
Globalization				
Discover 11 New Regional English Variations			✓	
Enjoy a Streamlined State and Country Picklist Setup Process			✓	
Review Updated Label Translations	✓			
Enable ICU Locale Formats (Release Update)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Some Supported Time Zones No Longer Available		✓		
Salesforce Connect				
Use a Private Connection with the Salesforce Connect SQL Adapter for Snowflake			✓	
Enhance Your Custom Adapter for Salesforce Connect with More External Data Types			✓	
Salesforce Connect OData 2.0 Adapter HTTP Library Is Updated	✓			
General Setup				
Manage Details About a User in One Place		✓		
Enable Dynamic Highlights Panel and Dynamic Forms on Mobile with One Click		✓		
Restore Only the Latest Entity History Records for a Deleted Entity	✓			

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				
Data Cloud Setup is Streamlined		✓		
Data Cloud Includes More Third-Party Connectors (Beta)			✓	
Include More Attributes in Your Activation to LinkedIn	✓			
Batch Data Transforms Are Updated Incrementally				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lock and Protect Your Custom Metadata in a Data Kit	✓			
Create Dedicated Data Cloud Packages	✓			
Add Identity Resolution Rulesets to Data Kits		✓		
Expand Identity Resolution With Cross-Object Matching		✓		
Get Optimized Segment Results with Einstein Data Prism			✓	
Focus on Relevant Attributes When Creating Einstein Segments			✓	
Ingest Company Data into Data Cloud with ZoomInfo Connector (Generally Available)				
Cross Cloud Updates for Data Cloud				
Share Data in Near Real-Time Between Data Cloud and Amazon Redshift	✓			

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				
LWC API Version 62.0				
Manage Styles with Class Object Binding		✓		
Access the Parent Element on a Component		✓		
Access the Component's Style Information		✓		
Stricter ESLint Rules for Imports and Exports		✓		
Create Components with Larger JavaScript File Sizes		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improve Accessibility with Base Lightning Components			✓	
Lightning Web Security Enablement Rollout Remains Postponed			✓	
Gain Insight into Component Code by Switching LWS Distortions Off and On			✓	
API Distortion Changes in Lightning Web Security			✓	
Develop Lightning Web Components with TypeScript (Developer Preview)		✓		
Quickly Develop Lightning Web Components in a Real-Time Preview (Beta)		✓		
Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support		✓		
Lightning Design System				
Lightning Design System Component Blueprints Updates	✓			
Visualforce				
Update References to Visualforce Pages Served on Salesforce.com	✓			
Apex				
Track Apex Unexpected Exceptions with Free-Tier Event Monitoring		✓		
Get More Coverage for Unexpected Exceptions in Apex Code Execution		✓		
Understand SOQL Error and Functionality Changes to Update Your Code		✓		
See Improved Consistency When Iterating Sets		✓		
Write Mock SOQL Tests for External Objects		✓		
API				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Update API Calls to Use Your My Domain Login URL		✓		
Benefit from Faster Metadata API Deployment Cancellations		✓		
Service Protection Limit on Enqueued Apex Metadata API Deployments		✓		
Enforce the CORS Allowlist on More Salesforce APIs		✓		
Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)	✓			
DevOps Center				
Get Started with Bitbucket Cloud (Beta)			✓	
Celebrate Extensibility and Performance Enhancements			✓	
Development Environments				
Create Your Own Libraries for Masking Data		✓		
Set Up and Administer Data Mask Jobs More Easily		✓		
Changes to Selective Sandbox Access for Developer and Developer Pro Sandboxes		✓		
Platform Development Tools				
Salesforce CLI				
Keep Up with the Latest Salesforce CLI Enhancements		✓		
Salesforce Extensions for Visual Studio Code				
Salesforce Extensions for Visual Studio Code Has a New Documentation Site		✓		
Code Builder				
Code Builder Has a New Documentation Site		✓		
Einstein for Developers				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein for Developers Has a New Documentation Site		✓		
Use Custom Generative AI to Power your Salesforce Development with Einstein for Developers (Generally Available)	✓			
Scalability				
Scale Test				✓
Scale Center				✓
ApexGuru				✓
Heroku				
Explore Your Heroku Apps in Salesforce Setup (Pilot)		✓		
Salesforce Functions				
Salesforce Functions Is Being Retired				✓
Change Data Capture				
Receive Change Event Notifications for More Objects		✓		
Platform Events				
Process Platform Events at Scale with Parallel Subscriptions for Apex Triggers (Generally Available)		✓		
Standard-Volume Platform Events Are Being Retired		✓		
Streaming API Versions 23.0 Through 36.0 Are Now Retired		✓		
Event Bus				
Delivered Idea: Use a Filtered Channel to Relay Events to Amazon EventBridge		✓		
Delivered Idea: Send Enriched Change Events to Amazon EventBridge		✓		
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				
Understand Customers More Accurately with Strict Recognition (Generally Available)			✓	
Translate Dialogs Easily to Different Languages (Generally Available)	✓			
Save Time with New Messaging Components for Enhanced Bots (Generally Available)	✓			
Get to Know Customers Faster with Improved Intent Recognition (Generally Available)	✓			
Reach More Customers with Multi-Language Support for Messaging Components (Generally Available)		✓		
Connect Enhanced Bots to LINE Messaging Channels (Generally Available)		✓		
View Standard Bot Reports in the Winter '25 Folder		✓		
Run Flows in Bot User Context (Release Update)			✓	
Einstein Copilot				
Introducing the Agentforce Platform	✓			
Handle More Use Cases More Consistently with Copilot Topics	✓			
New and Changed Standard Copilot Topics and Actions			✓	
Find Agent Analytics In the Dashboards Tab				
Other Changes				
Explore More Anthropic, Azure, and OpenAI Models on the Einstein Platform			✓	

Experience Cloud

Upgrade existing LWR sites and CMS workspaces to enhanced sites and enjoy better performance and new features. Offer site builders an improved experience with a new navigation component, upgraded record components, and improved SEO. Capture more site events and send them to Data Cloud with the updated Data Cloud integration. Make your sites work for you with new Salesforce CDN features, additional custom domain support, and more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Aura and LWR Sites				
Fine-Tune the Look and Feel of Your LWR Site with More Design and Layout Controls		✓		
Upgrade to Enhanced LWR Sites to Access the Latest Features (Beta)		✓		
Add Enhanced CMS Content to Your Aura Site		✓		
Customize URLs for Accounts and Contacts to Improve SEO (Generally Available)		✓		
Enhance Your LWR Site Experience by Curating Data Providers on a Page (Beta)		✓		
Export and Integrate Shared Business Across Salesforce Orgs with Partner Connect			✓	
Components in Experience Builder				
Customize Navigation and More with New and Improved Components for LWR Sites		✓		
Enable or Disable a Modernized Record Experience in Aura Sites		✓		
Customize the Flow Orchestration Work Guide Component in Aura and LWR Sites		✓		
Developer Productivity				
Capture More Events with Data Cloud Integration Upgrades		✓		
Link Files from Your LWR Site to Salesforce (Beta)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Troubleshoot Custom Domain Issues Faster		✓		
Site Performance				
Use Your Enhanced Domain to Serve Your Salesforce CDN in Sandboxes		✓		
Update References to Your Force.com Site URLs		✓		
Boost LWR Site Performance with Experience Delivery (Pilot)				✓
Mobile for Experience Cloud				
Take Advantage of the Latest Features from Mobile Publisher for Experience Cloud		✓		
Security and Sharing				
Secure Record Access When Enabling Digital Experiences		✓		
Specify Trusted Domains for Clickjack Protection on Your Site		✓		
Enhance Your Experience Cloud Site with New Customer Identity Features		✓		

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 a Daily Summary of Service Appointments that Require Immediate Attention			✓	
Find Service Appointments Easily by Creating Search Filters in the Appointment List			✓	
Uncover Top Cancellation Reasons Easily (Beta)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Field Service Resource Management				
Enhanced Scheduling and Optimization				
Increase Flexibility and Efficiency When Scheduling Complex Work Chains			✓	
Gain Insights into Service Appointment Unscheduling Information			✓	
Get More Information About Scheduling and Optimization Requests with Activity Reports (Beta)			✓	
Increase Coverage with 24-Hour Availability for Capacity-Based Resources	✓			
Increase Availability by Reshuffling and Prioritizing Service Appointments			✓	
Enhance Scheduling Accuracy by Adding Travel Time Buffers per Territory		✓		
Improve Schedule Recommendations with the Appointment Insights API (Beta)		✓		
Experience Better Performance with Enhanced Live Updates (Beta)			✓	
Access Health Check in the Optimization Center Tab		✓		
Field Service Asset Management				
Field Service Asset Service Lifecycle Management Add-On				
Improve First-Time Fix Rates	✓	✓		
Improve Asset Visibility on Your Mobile App			✓	
View Asset Health Score on the Go with the Connected Assets Add-On		✓		
Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)			✓	
Field Service Operations				
Gain Instant Access to Key Operations and Insights with Field Service Home			✓	
Field Service Intelligence				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Boost and Track Team Performance			✓	
Gain Comprehensive Insights into Your Inventory and Products			✓	
Service Documents				
Grant Community Users Access to Document Builder		✓		
Personalize Service Documents with Company and Worker Details		✓		
Organize Service Documents with Page Breaks		✓		
Field Service Customer Engagement				
Schedule and Reschedule Appointments with Scheduling Dependencies in Appointment Assistant	✓			
Provide Real-Time Customer Guidance with the Visual Remote Assistant Mobile SDK Embedded in Your Branded Mobile App			✓	
Field Service Mobile				
Data Capture				
Create Dynamic Forms with Data Capture Flow (Beta)		✓		
Empower Mobile Workers with Data Capture Forms (Beta)		✓		
Accept On-Site Payments with Tap-to-Pay			✓	
Reduce Distractions and Stay Focused with Standby Mode			✓	
Search for Records Easily in the Field Service Mobile App			✓	
Launch Flows Silently Based on Geolocation	✓			
See the Status of Appointments on the Map at a Glance			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customize Tabs More Easily in the Field Service Mobile App Builder		✓		
Add Lightning Web Components with Attributes in Mobile Builder		✓		
Spotlight on Field Service Content				
Improve Your Scheduling and Optimization Proficiency with Revamped Salesforce Help Content	✓			
Switch to Lightning Data Service for the Best Mobile Experience			✓	
Start Your Journey with Einstein for Field Service			✓	

Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Get the most out of your assets by using Asset Service Lifecycle Management. Automotive Cloud optimizes vehicle loans and leases with Digital Lending for Automotive. Consumer Goods Cloud helps tour drivers sell directly from their trucks. Financial Services Cloud gets more service process templates and introduces business relationship plans. Health Cloud improves the scheduling experience for Home Health and Intelligent Appointment Management. Life Sciences Cloud helps organizations make trials more accessible with support for financial assistance programs. Salesforce for Education integrates with Data Cloud and expands its generative AI capabilities. We also have plenty of changes for Manufacturing Cloud, Loyalty Management, Industries common features, and much more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Accounting Subledger				
Reduce Processing Time for Accounting Subledger			✓	
Asset Service Lifecycle Management				
Inventory Search and Transfer				
Unify and Transform Your Inventory Data for Search			✓	
Transfer Products and Parts Across Inventory Locations			✓	
Service Parts Return				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Part Return Requests During Field Service Appointments			✓	
Create Part Return Requests from the Desktop App			✓	
Product Service Campaign				
Generate Work Orders for Campaign Items with a Single Click			✓	
Easily Track Work Orders Created for a Campaign Item			✓	
Work Order Estimation				
Schedule Appointments for Work Orders			✓	
Initiate and Update Quotes for Existing Work Orders			✓	
Improve Technician Experience with Timesheet Automation and Labor Cost Association		✓		
Automotive Cloud				
Digital Lending for Automotive (Generally Available)				
Offer Comprehensive Vehicle Lending Solutions to Financial Institutions			✓	
Capture Granular Details About Vehicle Loans and Leases			✓	
Help Customers Easily Apply for Vehicle Loans and Leases from Experience Cloud			✓	
Submit Vehicle Loan and Lease Applications on Behalf of Customers			✓	
Take Better-Informed Decisions on Vehicle Loan and Lease Applications			✓	
Optimize Proposals by Using Stipulations in the Underwriter Console			✓	
Control Dealers' Access to Sensitive Information About Applicants			✓	
Help Dealers Accept or Reject Automotive Lending Proposals from Experience Cloud			✓	
Connected Vehicle Enhancements				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Additional Entitlements for Flow-Based Orchestrations				✓
Execute Complex Actionable Event Orchestrations By Using Flows				✓
Vehicle Inventory Search and Transfer Enhancements				
Allow Dealers and Customers to Search for Vehicles			✓	
Get Notified When Vehicles Are Transferred	✓			
Easily Identify the Action Reference for Vehicle Transfer		✓		
Communications Cloud				
Enterprise Sales Management				
Optimize Resource Usage by Easily Moving Assets	✓			
Modify In-Progress Orders by Creating Quotes	✓			
Easily Apply Discounts to an Entire Cart with a Large Number of Quote Line Items	✓			
Support for New and Enhanced Industries Configure, Price, Quote (CPQ) Standard Cart-Based APIs		✓		
New Features for Communications, Media, and Energy & Utilities (CME) Managed Package		✓		
Einstein Generative AI Solutions for Enterprise Sales Management				
Create Budgetary Quotes Quickly with Einstein Conversational AI			✓	
Communications Cloud Agent Console				
Efficiently Manage Billing Disputes			✓	
Asset Service Lifecycle Management — Communications Cloud			✓	
Data Cloud Features for Communications Cloud				
Monitor User Activity and Analyze Usage Patterns			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track and Optimize Service Performance with Service Level Objectives			✓	
Consumer Goods Cloud				
Retail Execution				
Streamline Delivery with Van Sales Delivery Execution	✓			
Experience Enhanced Performance with Penny Perfect Pricing Batch V2			✓	
Boost Mobile App Productivity with Bluetooth Keyboards	✓			
Manage Tab and User Permissions for Deployed Profiles		✓		
Ensure Accurate Inventory Reconciliation		✓		
Increase the Effective Account Manager Sync Batch Performance		✓		
Generate Reports in Non-Latin or Custom Fonts in Consumer Goods Offline Mobile App			✓	
Use Consumer Goods Cloud Offline Mobile App in Hybrid Mode With Remote API Calls			✓	
Other Improvements in Retail Execution	✓			
New and Changed Objects for Retail Execution		✓		
Trade Promotion Management				
Do More with Enhanced Support for Custom Months and Quarters			✓	
Create Promotions Faster with Customized Promotion Workflows			✓	
Manage TPM Permission Sets Efficiently			✓	
Enhance Prediction Accuracy by Clustering Your Sales Data			✓	
Preview Your Processing Service			✓	
Energy and Utilities Cloud				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Drive Customer Support with Agent Console			✓	
Minimize Customer Service Calls with Self-Service Portal			✓	
Summarize Customer Calls with Einstein Work Summaries			✓	
Improve Technician Experience with Timesheet Automation and Labor Cost Association		✓		
Calculate Energy Savings and Rebates with Context Service			✓	
Monitor Connected Assets with Data Cloud Visualization			✓	
Product Catalog Management for Energy and Utilities			✓	
Efficiently Manage Mass Asset Recalls, Services, and Upgrades			✓	
Streamline Supplier Recovery Claims			✓	
Easily Estimate Field Service Work and Quote Costs to Customers			✓	
New and Updated Objects in Energy and Utilities Cloud			✓	
Financial Services Cloud				
Einstein Autofill (Pilot)				
Boost Operational Efficiency with AI-powered Einstein Autofill (Pilot)				
Business Relationship Plan				
Obtain Key Information About Your Clients			✓	
Quantify Objectives and Track Progress by Defining Measures			✓	
Get Client Relationship Insights Quickly with Prebuilt, AI-Powered Summary Templates			✓	
Complaints Management				
Resolve Complaints Faster with Einstein Generative AI for Complaints Management			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Digital Lending				
Give Guest Users Access to Your Product Catalog		✓		
Simplify Loan Estimates with the Loan Calculator		✓		
Quickly Complete Loan Approval Steps by Using Integrations		✓		
Dynamically Show Loan Offers by Using Product Configurator		✓		
Customize the Underwriter Console by Using Omnistudio		✓		
Digital Lending—India				
Simplify the Loan Application Intake Process	✓			
Offer More Loan-Related Verification and Screening Capabilities to Your Users	✓			
Service Process Automation				
Accelerate Service Process Setup with Prebuilt Templates			✓	
Wealth Management				
Identify Client Wealth Goals with a Fact-Finding Questionnaire			✓	
Analyze Client Wealth and Create Financial Plans with AI-Generated Summaries			✓	
Data Cloud for Financial Services Cloud				
Integrate Data Cloud and Financial Services Cloud for Financial Insights			✓	
Stream More Financial Services Cloud Objects			✓	
Create a Single View of Insurance Data Across Financial Services Cloud and Data Cloud			✓	
Financial Summary Rollup				
Get Meaningful Insights into Customer's Financial Information with Financial Summary Rollup				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Strengthen Your Business and Customer Relationships by Using CRM Analytics				
Watch Financial Services Cloud Videos		✓		
New and Changed Financial Services Cloud Object Fields				
New and Changed Invocable Actions in Financial Services Cloud		✓		
		Health Cloud		
Einstein for Health Cloud				
Boost the Efficiency of Healthcare Processes with Einstein			✓	
Revolutionize Healthcare Communication with Einstein's Email Generation			✓	
Home Health Enhancements				
Promote Patient-Centered Care with Self-Service Capabilities			✓	
Expedite Your Home Health Setup			✓	
Intelligent Appointment Management Enhancements				
Book Assets for Patient Appointments			✓	
Book Multiple Resources for Patient Appointments			✓	
Schedule Multiple Patient Appointments in the Same Time Slot			✓	
Boost Scheduler Efficiency with the Appointment Scheduling Home Page (not immediately available)			✓	
Search for Providers Based on Postal Code			✓	
Troubleshoot Intelligent Appointment Management Configuration			✓	
Integrated Care Management Enhancements				
Save and Resume MCG Assessments	✓			
Update Care Plans Using MCG Assessments	✓			
Expose Care Plans to Experience Site Users			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Search for MCG Assessments by Default			✓	
Participant Management Enhancements			✓	
Provider Network Management Enhancements				
Simplify Provider Roster Management with Roster File Mapping			✓	
Optimize Provider Registration with NPPES Integration			✓	
Accelerate Your Health Cloud Setup			✓	
Health Cloud Has New and Changed Objects		✓		
New and Changed Invocable Actions in Health Cloud		✓		
Insurance				
Life Sciences Cloud				
Advanced Therapy Management Enhancements				
Add Ad Hoc Tasks to a Therapy Step	✓			
Review and Update Task Assignees	✓			
Commercial Excellence Enhancements				
Increase Sales Productivity by Automating Sales Agreement and Quote Conversions			✓	
Financial Assistance Program for Life Sciences				
View the Eligible Financial Assistance Programs for a Care Program Enrollee			✓	
Apply for a Financial Assistance Program			✓	
View Financial Assistance Program Application Status			✓	
Reapply for a Financial Assistance Program			✓	
View the Details of Approved Financial Assistance Program Claims			✓	
Participant Management Enhancements				
Identify the Best Candidates for Clinical Trials by Using AI		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improve Recruitment and Enrollment Efficiency		✓		
Expedite Your Participant Management Setup		✓		
Life Sciences Cloud Has New and Changed Objects		✓		
New Invocable Actions in Life Sciences Cloud			✓	
Loyalty Management				
Create Programs Easily With Simplified Loyalty Program Setup	✓			
Promotions				
Global Promotions Management				
Simplify Promotion Targeting Through Actionable Lists	✓			
Find Members' Data Cloud Segments Faster with Data Graphs			✓	
Easily Find Eligible Promotions for Corporate Members	✓			
Maintain the Process and Rules Status During Deployment			✓	
Control Liability with Currency Subtypes	✓			
Vouchers				
Relieve Member Anxiety During Voucher Redemption	✓			
Drive Customer Engagement and Boost Sales with Time-Based Vouchers	✓			
Make Vouchers a Key Element of Your Customer Engagement Strategy		✓		
Automate Voucher Access for Customers		✓		
Make the Most of the Revamped Loyalty Program Home Page	✓			
New and Changed Objects in Loyalty Management		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Metadata Types in Loyalty Management		✓		
Changed Invocable Actions		✓		
New and Changed Connect REST APIs		✓		
Manufacturing Cloud				
Sales Agreement				
Minimize Revenue Leakage with Decimal Precision in Quantity Metrics			✓	
Choose to Specify or Autopopulate Planned Quantities for Sales Agreement Products			✓	
Make Products Easily Recognizable in the Sales Agreement Table			✓	
Easily Identify Schedules On the Sales Agreement Table			✓	
Get More Guidance for Setting Up Sales Agreements			✓	
Easily Create Part Return Requests from a Warranty Claim or Work Order			✓	
Close Deals Quickly by Automating Quote and Sales Agreement Conversion			✓	
Search For and Transfer Products and Parts Across Inventory Locations			✓	
Swiftly Generate Work Orders for Product Service Campaigns			✓	
Consider Decimal Values When Calculating Forecasts			✓	
Get Improved Mobile and Reports Support for Manufacturing Cloud Objects			✓	
New Connect APIs		✓		
Media Cloud				
Advertising Sales Management				
Boost Ad Impact With Related Media Product Bundles				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Customize the Spot Calendar's Style and Display			✓	
Net Zero Cloud				
Allowlist the Domains that You Trust for Disclosures			✓	
Collect and Manage ESG Content in Centralized Information Library for Use Across ESG Disclosures			✓	
Einstein for Disclosure and Compliance Hub				
Generate First Draft of ESG Disclosure Automatically (Beta)			✓	
Revise Disclosure Responses Accurately with Enhanced Efficiency			✓	
Revise Information Library Snippets via Einstein Generative AI			✓	
Save Disclosure Responses to Assessment Framework			✓	
Synchronize Report Content to Create Latest and Auditable Reports			✓	
Enhance Scope 3 Emissions Calculations with Einstein Generative AI (Beta)			✓	
New and Changed Objects for Net Zero Cloud	✓			
Public Sector Solutions				
Talent Recruitment Management				
Streamline How You Manage Positions, Requisitions, and Job Postings			✓	
Attract the Best Talent and Offer a Seamless Job Application Experience			✓	
Evaluate, Vet, and Hire Talent More Efficiently with the Talent Recruitment Management Console App			✓	
Accelerate Hiring Decisions with an All-In-One Hiring Experience			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Share Information with Select Hiring Team Members			✓	
Investigative Case Management				
Efficiently Manage Investigations with Casework Overview			✓	
Easily Capture Evidence for a Case by Using a Guided Flow			✓	
Get Insights into Caseworker Productivity			✓	
Share Complaints and Case Proceedings with Select Users			✓	
Speed Up Referral Authorization with Out-of-the-Box Flow			✓	
Effortlessly Build Omnistudio Components		✓		
Use Omniscripts in Multiple Languages			✓	
New and Changed Objects in Public Sector Solutions		✓		
Referral Marketing				
Easily View Configurations of a Referral Promotion	✓			
Accelerate Customer Segment Verification for Promotions			✓	
Implement Referral Marketing Without a Person Account	✓			
Enable Advocates to Manage Referrals on Experience Cloud Sites			✓	
Referral Mobile SDK				
New and Changed Connect REST APIs		✓		
Salesforce for Education				
Unify Your Learner Data with Data Cloud for Education		✓		
Build Stronger Alumni Relationships with Einstein and Data Cloud for Education: Alumni Metrics		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enroll Admitted Students into Learning Programs		✓		
Monitor Learners with Watchlist Tracking		✓		
Get Learner Feedback with Pulse Checks		✓		
Summarize Advising Cases by Using Einstein		✓		
Find Accurate Mentor Matches with Einstein Mentoring Summaries		✓		
View Academic Highlights with Learner Progress Summary		✓		
Manage Your Learning Catalog with APIs		✓		
Visualize Imported Catalog Data in Learning Program Plan Builder		✓		
Accelerate Degree Planning with Learner Pathway Templates		✓		
Clarify Prerequisites and Corequisites in Intelligent Degree Planner		✓		
Help Learners Make Informed Decisions with the Intelligent Program Comparison Engine		✓		
Strengthen Prospect Engagement With Recruitment Inquiry and Opportunity Management		✓		
Streamline the Recommendation Process with Recommender Experience		✓		
Use Fundraising Updates for Advancement		✓		
New and Changed Objects in Education Cloud		✓		
Salesforce for Nonprofits				
Nonprofit Cloud				
Provider Management Is Now Available for Nonprofit Cloud	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Fundraising				
Grantmaking			✓	
Einstein Generative AI for Nonprofit Cloud				
Salesforce for Nonprofits Managed Packages				
Elevate Retirement	✓			
foundationConnect Retirement	✓			
Industries Common Features				
Action Launcher				
Reduce the Cognitive Load of Contact Center Agents with Semantic Search	✓			
AI Accelerator				
Get Customized Prediction Insights By Using AI Accelerator		✓		
Scoring Framework (Generally Available)		✓		
Business Rules Engine				
Simplify Business Rules with Context-Aware Subexpressions	✓			
Simulate Expression Sets Comprehensively with All Available Context Mappings	✓			
Save and Manage Expression Set Versions Effortlessly	✓			
Migrate Expression Set Versions Efficiently by Using Ranks	✓			
Configure Complex Business Rules Easily by Using String Functions	✓			
Create Decision Tables More Intuitively by Using the Unified User Interface		✓		
Manage the Volume and Complexity of Your Decision Tables with the Decision Table Type Options		✓		
Expedite Efficiency by Using CSV Files to Create Decision Tables		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Narrow Your Source Conditions by Applying Source Filters in Decision Tables		✓		
Improve Decision-Making with the Newly Supported Objects in Medium Volume Decision Tables		✓		
Increase Efficiency with Faster Refresh for Decision Table Data in Flows		✓		
Support for Rule Engine Designer Role to Refresh Decision Tables		✓		
Changed Business Rules Engine Objects		✓		
Context Service				
Conveniently Activate and Deactivate Definitions, and Other Context Service Enhancements		✓		
Easily Generate Input Mapping for Blank Attributes		✓		
New Objects in Context Service			✓	
Use Data Model Objects for Mapping		✓		
New Connect REST API Resources				
CSV Data Management				
Import CSV Data by Using Various Supported Delimiters				
Perform Complex Calculations on CSV Data and Import into Salesforce Objects				
Data Processing Engine				
Simplify Transformation of Large Data by Using CSV Files (Pilot)		✓		
Write to Related Objects in Writeback Nodes in Data Cloud		✓		
Automatically Save your Recipes and Output Records		✓		
Get Notified When You Exceed Data Pipelines Usage Limits		✓		
Metadata API				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Changed Objects				
Einstein Bot Templates				
Resolve Cases Efficiently with Case Management Bot Templates	✓			
Engagement				
Changed Object		✓		
Grantmaking				
View Progress Reports for Updates on Applications	✓			
Use Flow-Based Forms in Grantmaking		✓		
Review Submitted Applications from a Single Page	✓			
New and Changed Objects in Grantmaking		✓		
Industries Configure, Price, Quote (CPQ)				
Boost Efficiency with Industries CPQ in LWC Interface			✓	
Automate Asset Management with Query Driven Asset Disconnect Scheduler			✓	
Easily Apply Discounts to an Entire Cart with Large Sets of Quote Line Items		✓		
Get a More Flexible Pricing Solution in Communications, Media, and Energy & Utilities (CME) Managed Package			✓	
Move to Salesforce Contracts in Communications, Media, and Energy & Utilities (CME) Managed Package			✓	
Reverse Cardinality of Relies On Product Instances			✓	
Relies On with Attribute Propagation			✓	
Achieve Real-Time Catalog and Pricelist Updates with Incremental Caching			✓	
Table Component Deprecated in the AccountBillingDashboard Component	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Fine-tune Permissions for vlocity_cmt__CustomObjectMap__c			✓	
Integration Solutions with MuleSoft Direct				
Industry Integration Solutions Has a New Name				
List Builder for Data Cloud Segment				
Changed Objects		✓		
Omnistudio Document Generation				
Improve Document Generation Performance with Timeout Setting		✓		
Service Process Studio				
Experience Greater Flexibility in Request Form Creation		✓		
Changed Object		✓		
Stage Management				
Migrate Stage Management Configurations with Ease		✓		

Marketing

Salesforce marketing products and features streamline and supercharge your promotional campaigns. Find out what improvements are arriving in our Winter '25 release.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Personalization				
Provide Personalized Experiences with Einstein Personalization (Generally Available)	✓			
Extend Personalized Experiences in Marketing Cloud Using Einstein Personalization	✓			
Enhance Your Websites with Personalized Experiences Using Web Personalization Manager	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Monitor Einstein Personalization Consumption in Near Real-Time with Digital Wallet	✓			
Resource Reference Digital Wallet				
Marketing Cloud Account Engagement				
General Enhancements				
Discover a New Campaign Experience with Marketing Cloud		✓		
Find and Merge Duplicate Prospect Records		✓		
Copy Forms and Emails to a Salesforce CMS Workspace			✓	
Gain Insights with Form and Landing Page Engagement Data in Data Cloud			✓	
Create More Data Cloud Segments per Business Unit			✓	
Open System Email Links in the Lightning App			✓	
Pause or Cancel Permanent Prospect Deletions	✓			
APIs and Integrations				
Account Engagement API: New and Changed Items		✓		
Marketing Cloud Engagement				
Archived Release Notes	✓			
Journeys				
Get More Accurate Journey Success Rates on the Journey History Page	✓			
Messaging				
Shorten SMS Links in MobileConnect and Journey Builder				
Marketing Cloud Growth				
Update the Required Marketing Data Kits	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create More Relevant Messages	✓			
Improve User Experiences with These Content Enhancements	✓			
Save Time with Grounded Einstein AI Tools	✓			
Calculate Campaign ROI with Opportunity Influence	✓			
Streamline Marketing Setup with These Admin Enhancements	✓			
Interface Updates in Marketing Cloud Growth		✓		
Other Changes in Marketing Cloud Growth		✓		

Mobile

Keep up with deals while on the go with the new Seller-Focused Sales Mobile Experience, which is now generally available. Improve productivity when working with records offline, customer messaging, or reports with the latest features available on the Salesforce mobile app. Create a mobile app built on Lightning Web Runtime (LWR) with Mobile Publisher for Experience Cloud LWR sites, which is now generally available. Validate the records available offline to a user with the new Total Unique Records field available in Briefcase Builder.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Mobile App				
Everything That's New in the Salesforce Mobile App				
Access Linked Resources Anytime, Anywhere in Enhanced Reports on Salesforce Mobile	✓			
Restart Offline Draft Syncs with One Tap	✓			
Messaging in the Salesforce Mobile App Is Now Generally Available		✓		
Send Messaging Components and Transfer Messaging Sessions with Messaging for Mobile		✓		
General Mobile Updates				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Boost Your Sales Productivity with a Seller-Focused Mobile App (Generally Available)			✓	
Verify Briefcase Settings by Using the Count of Total Unique Records			✓	
Mobile Publisher				
Create Lightning Web Runtime (LWR) Apps with Mobile Publisher for Experience Cloud (Generally Available)		✓		
Android Experience Cloud Apps Now Require Android 9 or Later	✓			
Conceal Sensitive Information When Your Experience Cloud App Is in the Background	✓			
Set Up Marketing Cloud Notifications on Experience Cloud Android Apps More Simply	✓			

Omnistudio

In the Winter '25 release, Omnistudio Standard offers new designers and list views for all components. It also offers customization of Omniscript elements.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Effortlessly Build Omnistudio Components By Using New Designers		✓		
Easily Browse Through Omnistudio Components with List Views		✓		
Customize Omniscript Elements for Your Business Requirements				✓
Other Improvements in Omnistudio		✓		
Omnistudio Minor Releases				✓

Revenue Cloud

Revenue Cloud brings a suite of enhancements to boost efficiency and elevate user experience. Get notified when orders are created. Product Catalog Management now supports CSV file imports, templates for qualification decision tables, and category and product qualification elements in rule procedures. Use ramp deals for dynamic pricing and other enhancements to support informed decision-making. Your customer community users can access quoting capabilities. The new Invoice Management feature automates and scales invoice generation, ensuring accuracy, compliance, and improved financial reporting. Salesforce Contracts can now compare documents, lock sections, and generate documents in real-time. Learn more about these and other enhancements in Revenue Cloud.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Revenue Lifecycle Management Is Now Revenue Cloud			✓	
Product Catalog Management				
Easily Create Qualification Decision Tables by Using Templates		✓		
Show Only Eligible and Available Categories			✓	
Improve Search Results by Indexing Your Product Catalog	✓			
Define Ramp Segment Types for Products Whose Price and Volume Can Change Over Time	✓			
Organize Bundled Products Better With Nested Groups	✓			
Product Discovery				
Guide Users to Find the Right Products			✓	
Accentuate Product Images with Tile View			✓	
Show Qualification and Pricing Information Only When Necessary			✓	
Refine Product Detail View			✓	
Boost Engagement by Granting Guest Users Access to Product Discovery			✓	
Create a Custom Product Browsing Experience			✓	
Show Only the Available and Qualified Categories in Product Discovery			✓	
Experience Enhanced Product Search			✓	
View Nested Groups for Product Bundles	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Replace the Deprecated Product Discovery Permission Sets			✓	
Connect REST APIs			✓	
New and Changed Objects For Product Catalog Management			✓	
Connect REST APIs				
New Connect REST API Resources			✓	
Changed Connect REST API Request Bodies	✓			
Changed Connect REST API Response Bodies	✓			
Salesforce Pricing				
Streamline Pricing Procedure Requirements with Procedure Plan Definitions			✓	
Ensure Pricing Transparency with Price Tracking History			✓	
Easily Update Multiple Records by Using Pricing Adjustment Batch Jobs			✓	
Salesforce Pricing Now Integrated with Commerce Cloud			✓	
Turn Off Price Waterfall for Selected Pricing Elements			✓	
Configure Proration Settings to Calculate Product Prices			✓	
Calculate the Aggregate Price of a Product Bundle			✓	
Simulate Pricing Procedures with Different Context Mappings			✓	
Derived Pricing Enhancements			✓	
Operations Console is Now Pricing Operations Console			✓	
New Objects in Salesforce Pricing			✓	
New Connect REST API Resources			✓	
Rate Management (Generally Available)				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Bill Customers Based on Consumption of a Usage Resource			✓	
Manage Discounts with Rate Adjustments			✓	
Calculate Net Unit Rates By Using Predefined Rating Elements			✓	
Make Better Rating Decisions By Using Rating Waterfall			✓	
New Objects in Rate Management			✓	
New Invocable Action in Rate Management			✓	
New Metadata Type in Rate Management			✓	
New Connect REST API Resource			✓	
Product Configurator				
Maintain Rule Integrity with Configuration Rule Validation			✓	
Easily Create Diverse Configuration Rules			✓	
Validate Products at Transaction Level			✓	
Support for Ramped Deals			✓	
Get an Enhanced View of Derived Prices			✓	
View Nested Options Group for Product Bundles			✓	
Transaction Management				
Give Your Customers More Flexibility with Usage Selling		✓		
Gain Insight into Asset Usage Rates and Tier Pricing		✓		
Use Ramp Deals for Time-Based Price and Quantity Changes	✓			
Advanced Approvals				
Design Approval Chains with Flow Builder			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Ensure Transactions Adhere to Policies			✓	
Easily See and Respond to Approval Requests	✓			
Unblock Transactions by Administering Approvals		✓		
Organize Your Transactions with Groups	✓			
Streamline the Quoting and Ordering Process for Derived Products			✓	
Effortlessly Build Quotes and Orders with Add Assets Action	✓			
Fast-Track Adding Products to Transactions	✓			
Configure Lookup Fields Efficiently in a Transaction	✓			
Renew Assets Early in Revenue Cloud	✓			
Unlock Quoting Capabilities for Customer Communities			✓	
Track Order Creation Efficiently with Timely Notifications	✓			
Summarize Quotes with Einstein			✓	
Generate Quote Emails with Einstein			✓	
Accelerate Business Growth with Enhanced Support for Large Transactions (Pilot)			✓	
New and Changed Objects in Transaction Management			✓	
Connect REST APIs				
New Connect REST API Resources			✓	
Changed Connect REST API Request Bodies				
CommerceOrders Namespace			✓	
PlaceQuote Namespace			✓	
Dynamic Revenue Orchestrator				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Interface and Performance Enhancements		✓		
Manual Task Assignment Rules				
Partially Load Fulfillment Plans		✓		
Skip a Fulfillment Branch				
Support for Decomposition by Product Classification		✓		
Define How Failed Callouts are Retried		✓		
Enhance Your Search and View in the Decomposition Viewer				
Changed Objects in Dynamic Revenue Orchestrator			✓	
Invoice Management (Generally Available)				
Define Criteria for Invoicing Products	✓			
Simplify your Billing Configuration by Using Guided Setup		✓		
Billing in Advance and Arrears	✓			
Configure Multiple Legal Entities for a Seller		✓		
Ensure Accurate Tax Calculation by Customizing Tax Addresses	✓			
Schedule Automatic Invoice Generation for Billing Schedules	✓			
Streamline Financial Reporting with Accounting Periods	✓			
Automate Conversion of Negative Invoice Lines to Credit Memo Lines			✓	
Issue Credits to Settle Balances of Invoices or Invoice Lines			✓	
Settle Invoices Faster by Auto-Applying Credit Balances			✓	
Optimize User Experience for Partner Communities	✓			
New Objects for Invoice Management		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Platform Events for Invoice Management		✓		
New Connect REST API Resources			✓	
New Metadata Types			✓	
New Invocable Actions			✓	
Salesforce Contracts				
Enhance Document Generation with Single Point Requests (SPR) and Omniscript				
Control Edit Access to Protect Essential Contract Sections		✓		
Define and Test Instructions for Better Extraction Results		✓		
Streamline Your Internal Review Processes with Automated Checkout	✓			
Identify Differences Between Contract Versions	✓			
Salesforce Billing Managed Package				
Post Invoices Seamlessly with Consecutive Batch Jobs			✓	

Sales

Boost your teams' results with new features across Sales Cloud. Nurture existing relationships and grow key accounts with Account Plans. Keep your pipeline healthy by using AI to help identify your next customer. Submit forecast numbers at a point in time. And create quota plans that incorporate stamped territory hierarchy, owner, and attribute data.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein for Sales				
Einstein Activity Capture				
Upgrade Your Service Account Connections to Org-Level OAuth 2.0 Authentication		✓		
Resync Events Renamed in User Health Status		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Copilot for Sales				
Accomplish More with Sales Copilot Topics	✓			
Revamp Your Follow-Up Game in Less Time			✓	
Log Calls with Customers with Einstein Copilot			✓	
Establish Action Items with Einstein			✓	
Organize and Quickly Find Records by Using Custom Labels with Einstein			✓	
Get Instant Access to Pricing Information			✓	
Focus on the Deals That Matter Most			✓	
Discover Key Contacts, Their Roles in Influencing Deals, and the Deals They've Impacted			✓	
Einstein Automated Contacts Is Being Retired in February 2025			✓	
Sales Summaries Beta Program Is No Longer Available			✓	
Sales Fundamentals				
Show Sales Reps Seller Home in More Places			✓	
Opportunities				
Increase Sales Team Collaboration by Assigning Opportunity Splits to Territories			✓	
Accounts				
Delivered Idea: Optimize Your Strategic Planning with Account Plans			✓	
Enhance Reporting Structure Visibility by Associating Person Accounts and Contacts with Each Other			✓	
Leads				
Review and Update Settings to Capture Leads from LinkedIn (Release Update)			✓	
Sales Cloud Go				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Simplify Discovery and Setup of Your Sales Cloud Features			✓	
Einstein Conversation Insights				
Access All Your Conversation Data with Conversation Hub	✓			
Do More with Sales Signals			✓	
Sales Engagement				
Find Your Next Customer with Prospecting Center, a new Data Cloud App			✓	
Cadence Builder Classic (1.0) is Being Retired	✓			
The Campaign Member Status Chart is Being Retired	✓			
Quickly Identify Which Builder Created Each Cadence	✓			
Change Einstein Activity Capture Permissions for Sales Engagement Basic Users (Release Update)			✓	
Revenue Intelligence				
Identify New Opportunities with Improved Einstein Account Management White Space Analysis	✓			
Email Customers Regarding Risk Factors from Within Einstein Account Management	✓			
Control Access to Data Based on Territory	✓			
Collaborative Forecasts				
Capture Forecasts at a Point in Time with Forecast Submissions			✓	
Improve Sales Forecast Accuracy with Manager Judgment Enhancements			✓	
Get a Complete Forecast Picture with Opportunity Splits by Territory Forecasts			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identify What You See in Each Forecast Chart More Easily		✓		
		Pipeline Inspection		
Close Date Predictions Is Being Retired	✓			
		Sales Programs and Partner Tracks with Enablement		
Get Timely and Contextual Feedback on Your Terms			✓	
Publish and Share Enablement Programs Quickly with Managed Packages		✓		
Personalize Your Sales Programs with Your Company's Preferred Content Experience		✓		
Track Job-Related Activity for Enablement Measures More Effectively with Additional Filter Operators		✓		
Other Changes in Sales Programs, Partner Tracks, and In-App Guidance		✓		
		Sales Performance Management		
Salesforce Maps				
Gain Customer and Market Insight with Integrated Data from Disparate Sources			✓	
Embed Maps Within Your Branded Digital Experiences			✓	
The Enhanced User Experience is now Enabled for All Users			✓	
Sales Planning				
Plan Quotas from Territory Alignments	✓			
Plan Territories with Live Data	✓			
Structure Territories that Aren't Geographic	✓			
		Email, Calendar, and Integrations		
Salesforce for Outlook				
Salesforce for Outlook Is Being Retired in December 2027		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Gmail Integration				
Increase Efficiency by Using the Gmail Integration in the Chrome Side Panel	✓			
Use Einstein Copilot with Your Gmail Integration	✓			
Partner Relationship Management				
Streamline Collaboration on Shared Deals with Trusted Partners			✓	
Sales Cloud Everywhere				
Give Copilot Instructions That Default to the Current Record in Sales Cloud Everywhere	✓			
Match Precision Improved in Contextual Insights	✓			
Speed Up Your Day with the Gmail Integration in the Chrome Side Panel	✓			
Access Einstein Copilot From Your Gmail Integration	✓			
Sales Cloud on Mobile				
Close Deals Faster with a Seller-Focused Mobile App (Generally Available)			✓	
Other Changes in the Sales Cloud				
Enable New Order Save Behavior (Release Update)			✓	

Salesforce CMS

Publish enhanced CMS content to more channels, including Aura sites. As you add these channels to your enhanced CMS workspace, remove old ones from the workspace, and delete unused channels from your org. Share and reuse content across your enhanced CMS workspaces with workspace sharing and content cloning.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Expand the Reach of Your Enhanced CMS Content		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Remove Channels from Enhanced CMS Workspaces and Delete Channels from Your Org		✓		
Scale Content Delivery for High Performance (Beta)		✓		
Broaden Content Use and Reuse Possibilities in Enhanced CMS Workspaces		✓		
Skip the Alt Text for Decorative Images		✓		

Salesforce Flow

Compose intelligent workflows with Flow Builder and Flow Orchestration. Integrate across any system with MuleSoft Composer for Salesforce.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow Builder				
Flow Builder Updates				
User Experience Updates				
Screen Flow Updates				
Get Help Creating Flow Formulas with Einstein (Beta)		✓		
Edit Your Einstein Instructions in Flow Builder (Beta)		✓		
Launch Another Active Prompt Flow as a Subflow Within a Prompt Flow		✓		
Create or Update Records Efficiently with the Create Records Element		✓		
Transform Data into More Target Resource Types		✓		
Flow Marketing Cloud				
Visualize Flow Data with On-Canvas Insights	✓			
Test and Optimize Engagement with Path Experiments			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automate Your Responses to Common Customer Actions with Out-of-the-Box Automation Event-Triggered Flows	✓			
Preserve References to Data Graph Values in Campaign Flows	✓			
Flow Actions				
Expand Your Email Reach by Using CC and BCC Options in Send Email Action	✓			
Flow Debugging				
See Scheduled Flows Limit in Debug Details		✓		
Test and Troubleshoot Your Template-Triggered Prompt Flows with the Debug Tool		✓		
Flow Runtime				
Flow and Process Run-Time Changes in API Version 62.0		✓		
Flow Extensions				
Create Personalized Recommendations Using Einstein Next Best Action in Experience Cloud Sites		✓		
Flow and Process Release Updates				
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)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
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)		✓		
Enforce Permission Requirements Defined on Built-In Apex Classes Used as Inputs (Release Update)			✓	
Sort Apex Batch Action Results by Request Order (Release Update)			✓	
Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)			✓	
Flow Orchestration				
View Orchestration Details in the Automation Lightning App		✓		
Manage Steps in an Orchestration Stage		✓		
Customize the Flow Orchestration Work Guide Component		✓		
Other Improvements		✓		
MuleSoft Composer for Salesforce			✓	

Security, Identity, and Privacy

Migrate your local connected apps to local external client apps. Monitor vital data from custom objects by creating custom metrics. Legacy My Domain URLs are no longer redirected in most non-production orgs. And Salesforce now supports TLS 1.3 for outbound HTTPS callouts from the Salesforce Platform.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Backup				
Restore Files from a Backup			✓	
Domains				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Update References to Your Previous Salesforce Domains		✓		
Disable Redirections for Legacy Hostnames		✓		
Get Help with Custom Domains Directly in Setup		✓		
Identity and Access Management				
The Multi-Factor Authentication Assistant in Setup Is No Longer Needed and Discontinued		✓		
Migrate to a Local External Client App from Your Local Connected App			✓	
Manage OAuth Usage for External Client Apps			✓	
Create an External Client App from App Manager			✓	
Assign and Package OAuth Custom Scopes for External Client Apps			✓	
Configure the Start URL for External Client Apps			✓	
Show an External Client App in App Launcher			✓	
Delivered Idea: Customize User Experience and Functionality for Authentication Providers			✓	
Customize SMS One-Time Password Delivery for Experience Cloud Sites (Generally Available)			✓	
Forced Login Is Permanently Disabled	✓			
Forgot Password Invalid Username Error Message Was Changed	✓			
Make the Most of Enhancements for the Headless Registration Flow			✓	
Get More Flexibility with Headless Identity Flows		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Be an Early Adopter of a Headless Identity Draft Standard			✓	
Revoke Individual JWT-Based Access Tokens			✓	
Migrate to a Multiple-Configuration SAML Framework (Release Update)		✓		
Manage Token Exchange Handlers with Ease		✓		
Give Users More Ways to Log In			✓	
Use REST API for Access to External Client App OAuth Consumer Credentials (Release Update)			✓	
API Error Response for Refresh Token Flow Was Changed		✓		
Verify SAML Integrations (Release Update)			✓	
Salesforce Authenticator Users Are Automatically Guided to a Workaround if Push Notifications Time Out	✓			
Privacy Center				
Avoid Accidental Data Impact by Previewing Data Management Policies	✓			
Retain Data with Privacy Center		✓		
Policy Validation Improvements in Privacy Center	✓			
Named Credentials				
Control Who Can Perform Authenticated Callouts with Ease		✓		
Salesforce Shield				
Event Monitoring				
Generate Test Events for Threat Detection (Beta)			✓	
Get Notified When a User Logs In as Someone Else with Transaction Security			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Import Real-Time Event Monitoring Event Data Into Data Cloud (Pilot)				✓
Track Network Performance Metrics		✓		
Identify Blocked Redirections for Legacy Hostnames		✓		
Get Information About Permission Changes		✓		
Query Low-Latency Event Data with Event Log Objects (Beta)			✓	
Shield Platform Encryption				
Manage Encryption Keys for Data Cloud			✓	
Set Up Shield Platform Encryption with Fewer Clicks			✓	
Encrypt Comments on New Participant Records			✓	
Security Center				
Create Custom Metrics in Security Center (Generally Available)		✓		
Monitor Additional User Permissions		✓		
View Fields That Are Encrypted Under Your Shield Platform Encryption Policy		✓		
View Pertinent Data with an Enhanced Security Center Dashboard Page				
Check the Status of Your Connected Tenants From the Dashboard Page		✓		
Other Changes				
Delivered Idea: Improve Data Transmission Speed and Security with TLS 1.3		✓		
New Hyperforce Orgs Use Salesforce Edge Network	✓			
Adopt Updated CSP Directives (Release Update)			✓	
Security Was Tightened for the retUrl Parameter for My Domain Redirects		✓		

Service

Explore the latest advancements in AI and customer service technology with Salesforce's new offerings. These include the generally available Einstein Data Library for grounding generative AI responses, the beta version of Einstein Case Management for real-time insights, and enhanced messaging capabilities across various platforms. Additionally, new tools like Employee Service streamline HR processes, while features like post-chat surveys and Einstein Copilot enhance feedback collection and supervisor efficiency. These innovations help optimize data integration and analysis, ensuring a unified view across all engagement channels.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Discover Even More Service Capabilities with My Service Journey (Beta)	✓			
Einstein for Service				
Einstein Article Recommendations				
Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations (Pilot)				✓
Einstein Conversation Mining				
Gather More Service Support Insights with Additional Channels in Einstein Conversation Mining		✓		
Einstein Knowledge Creation				
Get Quick Revisions on Knowledge Article Fields with Einstein Knowledge Edits (Beta)	✓			
Einstein Work Summaries				
Customize Your Work Summaries in Copilot (Generally Available)	✓			
Get a Quick Overview of a Case and Ongoing Developments with Case Summaries (Pilot)	✓			
Service Intelligence				
Get Faster Insights with Einstein Case Management (Beta)			✓	
Monitor Agent Performance Against Target Service Level Agreement (SLA) Times		✓		
Automate Knowledge Reviews with Salesforce Flows			✓	
Gain Deeper Insights into Knowledge Performance with Data Categories	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Channels				
Email				
Draft Personalized Service Emails with Einstein			✓	
Move Emails Easily to the Relevant Case			✓	
Use Einstein Work Summaries for Email in Five More Languages	✓			
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)			✓	
Messaging				
Help Customers in a LINE Messaging Channel			✓	
Manage Marketing and Service Interactions Together with Unified Messaging for SMS		✓		
The Messaging for In-App and Web API Is Generally Available		✓		
Messaging in the Salesforce Mobile App is Generally Available		✓		
Monitor Workflow Health and Customize Messaging for In-App and Web with Standard Client Events		✓		
Identify Top Conversation Drivers with Einstein Conversation Mining in Messaging for In-App and Web		✓		
Transfer Messaging Sessions and Send Messaging Components in Messaging for Mobile		✓		
Use Messaging for In-App and Web in Developer Edition		✓		
Send End User Information to an Auto-Response Messaging Component URL More Easily			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Show Customers a Longer Typing Indicator in Messaging for In-App and Web		✓		
Read Conversations More Easily with the Resized Chat Bubble and Avatar in Messaging for In-App and Web		✓		
Configure Routing More Easily in Enhanced Messaging	✓			
Activate, Deactivate, and Refresh Enhanced Messaging Channels		✓		
Improvements to the Send Message Action	✓			
Troubleshoot Faster with Translated Error Messages	✓			
Delete Messaging Users Without Opening a Support Case	✓			
Track Your KPIs with More Messaging Session Metrics			✓	
Send Post-Chat Surveys More Easily in Messaging for In-App and Web		✓		
Set App-Specific Consent Levels in Unified Messaging		✓		
Send Subscription Content with the Send Conversation Messages Invocable Action	✓			
Use Status-Based Capacity with Messaging (Generally Available)		✓		
Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations for Messaging (Pilot)				✓
Assist Agents and Optimize Business Processes Based on the Sentiment and Intent of Real-Time Messages (Pilot)				✓
Bring Your Own Channel				
Voice				
Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations for Voice (Pilot)				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Assist Agents and Optimize Business Processes Based on the Sentiment and Intent of Real-Time Conversations (Pilot)				✓
Expand Your Contact Center Capabilities with Integrated Voice and Messaging			✓	
Troubleshoot Errors and Retry Provisioning Contact Centers with Detailed Error Messages	✓			
Generate the Telephony Usage Report for Billing Details (Beta)				✓
Sync Phone Numbers Automatically for Disaster Recovery			✓	
Get the Latest Enhancements for Your Amazon Connect Contact Center			✓	
Customize the Partner Telephony Contact Center Setup Experience with Partner Icons		✓		
Enhance Operational Efficiency by Syncing Combined Messaging and Messaging Queues with a CCaaS Partner System		✓		
Customize How Call Information Is Organized with Sales Engagement			✓	
Pass the Conversation Intelligence Rule Name as Input to a Flow (Release Update)			✓	
Use an Apex-Defined Variable for All Intelligence Signal Types (Release Update)			✓	
Display Call Controls Only in Active Omni-Channel Sessions	✓			
Perform Enhanced Call Type Analyses Using Call Subtypes		✓		
Social Media				
Social Customer Service Starter Pack Is Being Retired		✓		
Chat				
Embedded Appointment Management Is Being Retired	✓			
Embedded Flows Is Being Retired	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Legacy Chat Is Being Retired	✓			
Channel-Object Linking				
Authenticate Messaging for Web in Channel Menu with User Verification			✓	
		Knowledge		
Integrate Knowledge and Unified Knowledge with Data Cloud			✓	
Connect Unified Knowledge to More Systems			✓	
Get More Done in the Lightning Article Editor			✓	
Turn On Lightning Article Editor and Article Personalization for Knowledge (Release Update)			✓	
Run the Lightning Knowledge Migration Tool			✓	
		Entitlements and Milestones		
Boost Service Efficiency by Automating Milestone Actions with Flows	✓			
Help Agents Prioritize Cases Effectively by Tracking Milestone Time	✓			
		Employee Service		
Simplify Information Access, Service Requests, and Case Creation with Employee Hub		✓		
Manage Employees and Inquiries Effectively, and Resolve Cases Efficiently with HR Service Workspace		✓		
New Object		✓		
		Routing		
Eligible Salesforce Orgs Automatically Upgraded to Enhanced Omni-Channel		✓		
Delivered Idea: Support Customers While on the Go with Omni-Channel for Mobile (Generally Available)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Pause Messaging Sessions with Omni-Channel Status-Based Capacity (Generally Available)		✓		
Get Informed with Proactive Monitoring				✓
Get the Latest Omni-Channel Features for Government Cloud Plus			✓	
Sync Queues for More Channel Types to Partner Systems			✓	
Delivered Idea: Add a Description for Queues		✓		
Feedback Management				
Gain Contextual Insights with Unique Post-Chat Survey Invitations	✓			

Salesforce Overall

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

IN THIS SECTION:

General Enhancements

Winter '25 gives you more reasons to love Lightning Experience.

IN THIS SECTION:

Test Restrictions on Salesforce Cookie Use

To support users that block third-party cookies, test custom functionality and code that uses a Salesforce session cookie. Enable the My Domain setting, Require first-party use of Salesforce cookies. When that setting is enabled, the new My Domain setting, Allow cross-domain use of Salesforce cookies on the preview domain, is enabled by default. That setting prevents potential issues with features that preview content, emails, products, and more while Salesforce updates those features for blocked third-party cookies.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

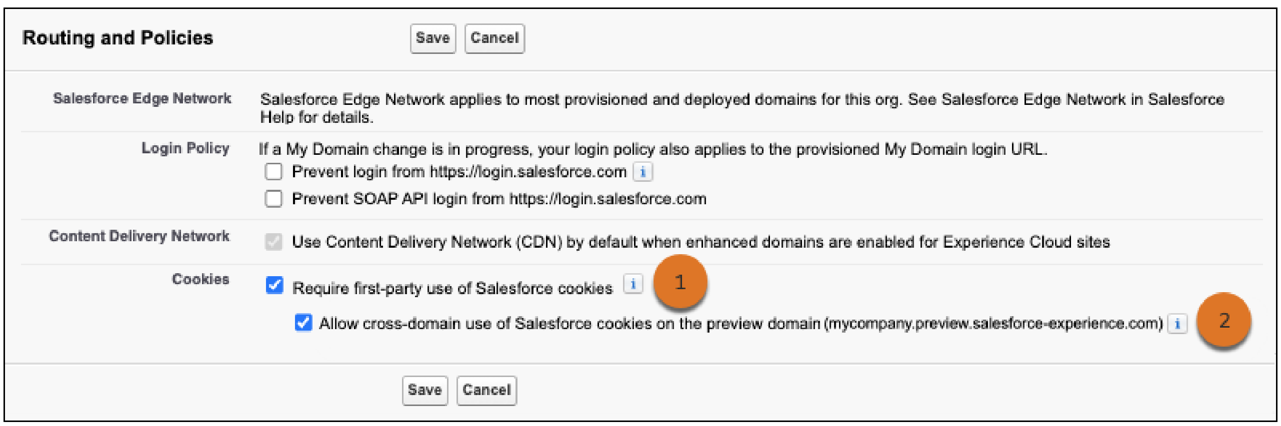
When: Both My Domain settings are enabled by default in Winter '25 in sandboxes on these instances: USA796, USA794, USA246s, USA222s, USA198s, USA196s, USA18s, USA16s, USA14s, USA12, USA10s, USA6s, and USA4s.

If your org isn't on one of those instances, the Require first-party use of Salesforce cookies setting is unchanged in Winter '25. When that setting is enabled, the Allow cross-domain use of Salesforce cookies on the preview domain setting is enabled by default.

Why: Chrome and other major web browsers block third-party cookies by default. Users can configure browsers to allow these cookies. However, that practice can introduce security risks.

Third parties can't access Salesforce cookies directly. And when your Setup pages are served on the `salesforce-setup.com` domain, Classic pages can be loaded in Setup without an additional step. However, custom code or functionality that uses a Salesforce session cookie can still be affected when browsers block third-party cookies.

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.



We recommend that the Allow cross-domain use of Salesforce cookies on the preview domain setting (2) is enabled whenever the Require first-party use of Salesforce cookies setting (1) is enabled. Otherwise, features that use Lightning to frame the preview domain no longer work.

Important: If the browser already blocks third-party cookies, both settings have no effect. Also, these settings only affect 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)

Knowledge Article: View instance information for your Salesforce Organization

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: Setup pages move to the `*.salesforce-setup.com` domain through a staggered rollout. The rollout began in Spring '24 and continues through Summer '24 and Winter '25. The change is first enabled in sandboxes and nonproduction orgs, and then in production orgs.

SEE ALSO:

Knowledge Article: New Setup Domain Rollout FAQ

Salesforce Developers Blog: Prepare for the Google Chrome Privacy Sandbox Initiative

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

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)

Release Updates

Verify Your Return Email Address for Sender Verification (Release Update)

After Spring '25, to comply with increased email security standards, you're required to verify the Email Address in My Email Settings.

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

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: A verified email address is used to send emails from your account. This update allows increased accountability and security for email deliverability.

How: To comply with increased email security standards, emails fail to send from the return email address in My Email Settings until the address is verified. Instruct all users to visit their My Email Settings. Users can manually verify their email addresses by selecting **Resend**

Verification Email and clicking the link in the email. If the resend option is unavailable, the return address is already verified. Users receive a verification email once per release until Spring '25. The email includes the verification link.

SEE ALSO:

Salesforce Help: Edit Your Email Settings (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 was first available 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`.

Get Flexible Access to Custom Apps with the Salesforce Platform Login License

The Salesforce Platform Login license allows you to assign access to custom apps built on Platform for internal users without the requirement to buy a seat-based license. With the Salesforce Platform Login license, you can pay per daily unique login for users who need infrequent or occasional access. Contact your account executive for more information on purchasing the Salesforce Platform Login license.

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

When: The Salesforce Platform Login license is available October 15, 2024.

SEE ALSO:

Salesforce Help: Standard User Licenses (can be outdated or unavailable during release preview)

Inbound Email Limit Increased

To deliver expected performance, we now limit the number of inbound emails that can be queued after you reach your daily email limit. The number of emails that you can queue is equal to your daily email rate limit. After you reach the limit, inbound emails bounce. Review your email services, and use the Requeue Message failure response option only for high-priority services.

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

Why: For example, if you have 10 Salesforce licenses, you can receive 10,000 inbound emails before you reach your daily limit. When you reach that limit, additional inbound emails are queued for processing if the failure response option on the email service is Requeue Message. After 10,000 emails are queued, all additional inbound emails for that day bounce.

SEE ALSO:

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

Review Your Integrations for a Change to Email Handling

To comply with the latest Request for Comments (RFC) standards, the local-part of contact email addresses is surrounded by quotation marks if that part contains invalid dots. The local-part of an email comes before the `@` symbol. An email address contains invalid dots when the local-part contains more than one consecutive dot or a trailing dot.

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

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

This change preserves your ability to send emails to addresses that contain invalid dots in the local-part. To accommodate this, email addresses are converted to a legal format by surrounding the local-part with quotation marks.

Here are examples of changes to email addresses.

- `consecutive..dots@example.com` is now `"consecutive..dots"@example.com`.

How: Review your integrations that use the Email field to accommodate this change.

- `trailingdot.@example.com` is now `"trailingdot."@example.com`.

SEE ALSO:

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

Knowledge Article: Email Address Validation

Sender ID Deprecated for Email Security Compliance

As part of a system-wide optimization of email security performance, Sender ID is no longer offered in Email Deliverability settings.

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

Why: If your Salesforce org is created in Winter '25 or later, you can't enable Sender ID compliance in Email Deliverability Settings. Technological enhancements and operational efficiency simplify email authentication processes and replaced Sender ID functionality. This change is a result of RFC7208 (Request for Comments), published in 2015.

How: If you're using Sender ID, you don't need to make any changes. Integrations that use Sender ID continue to work after Summer '24. Sender ID records are identified by their v=spf2.0 prefix. A record that starts with this prefix can't be used.

SEE ALSO:

Salesforce Help: Enable Email Security Compliance (can be outdated or unavailable during release preview)

External Link: Information on RFC 7208

Salesforce Scheduler

Now you get enhanced Lobby Management capabilities with QR-based check-in for a seamless end-user experience, and your service resources can declare their appointment capacity at the shift-work type level.

IN THIS SECTION:

Manage Service Resource Capacity at the Shift Level

Better manage your service resources and make sure that they have the capacity to meet customer needs by letting them define the number of appointments that they can handle at a shift level. Territory managers can now view their capacity at the Work type level for their territory and see the contribution from different service resources.

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

When: Support for capacity in scenarios involving overlapping shifts will be available starting in September 2024.

Verify Your Queue Position with QR-Code-Based Check-In

Manage drop-in traffic at business locations more efficiently with a QR-code-based check-in mechanism. Customers can also check in to a waitlist through the QR-code-based check-in mechanism. They can view where they are in the queue and use their email to track their queue position. Greeters can move customers to the front or back of the queue based on need. Customers who can't make it to their appointment can move themselves to the end of the line or cancel their appointment.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise and Unlimited editions with Salesforce Core.

How: Scan the QR-code and check yourself in to a waitlist. You can also change your waitlist position or exit the waitlist as needed.

Einstein Search

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

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IN THIS SECTION:

Search Query Limit Is Applied to Improve Performance

To ensure fair access for all users and protect against service disruptions, the number of search queries for each user is limited to 3,000 queries and 200,000 milliseconds cumulative CPU time within a 5-minute interval. When a user exceeds the limit, an error message is displayed.

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

SEE ALSO:

Salesforce Help: Search Query Limits (can be outdated or unavailable during release preview)

Salesforce Data Pipelines

Connect to secure data sources with support for virtual private connections on Snowflake. Give users read-only access to recipes in Data Manager. Allocate billing for Google BigQuery connections. Download data sync job logs in Data Manager to better diagnose issues. Improve the performance of recipes that you use to snapshot data.

IN THIS SECTION:

Improve Snapshot Data Recipe Performance with Advanced Append Output (Beta)

Free up job availability and processing time with quicker snapshot data recipe runs. The Advanced Append Output option in the Output node registers only the rows appended in a recipe run. In comparison, the Output node Dataset option re-registers the entire dataset when adding rows so that rows can be updated and inserted. When you create a version of the snapshot recipe, you add an input node for the snapshot data and any transformations to perform before appending the snapshot. Then select the Advanced Append Output option in the output node and identify the dataset to append the snapshot data to and the date configuration to use to format dates. You can also choose whether to use the disjointed schema option to make sure that the dataset updates if the snapshot data schema changes.

Other Enhancements to Data Pipelines

Learn about other important improvements to enrich your recipes in Data Pipelines.

Event Monitoring Platform Events Connector (Pilot)

Easily analyze Real-Time Event Monitoring data with the Salesforce analytics tool of your choice by importing the data into Data Cloud using the Platform Events connector pilot.

Transfer Your Snowflake Data to CRM Analytics Using VPC on AWS (Generally Available)

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 Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

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 connection for the Snowflake Private Connector.

SEE ALSO:

Salesforce Help: Snowflake VPC Connection (can be outdated or unavailable during release preview)

Salesforce Help: Secure Cross-Cloud Integrations with Private Connect (can be outdated or unavailable during release preview)

Give Users Read-Only Access to Recipes (Beta)

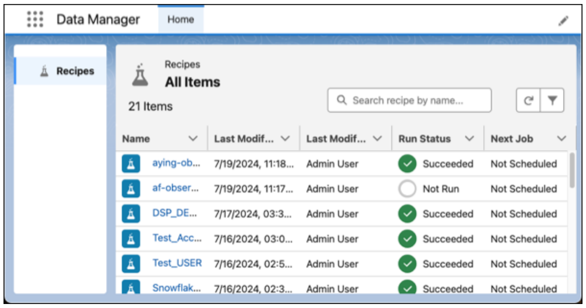
Let co-workers understand dataset content with the Recipes View Only permission. With this permission, when users visit Data Manager, they see only the Recipes option. They can then open recipes and view their content, but can't edit, run, or delete them.

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: Recipes View Only permission 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.

How: From Setup, in the Quick Find box, enter `Permission`, and select **Permission Sets**. Select or create a permission set. Click **System Permissions**, and select **Recipes View Only (BETA)**.

When users visit Data Manager and click a recipe name, they can view the recipe's details in the recipe editor.



SEE ALSO:

Salesforce Help: Learn About Data Pipelines User Permissions (can be outdated or unavailable during release preview)

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

Salesforce Help: Open and Edit a Recipe (can be outdated or unavailable during release preview)

Add Billing Information for Google BigQuery Connections

Ensure Google BigQuery costs are correctly allocated by adding a project billing ID when you create your connection. Google BigQuery and Google BigQuery Standard SQL connections now support compute and storage separation, providing for splitting CPU from storage costs so that you can allocate your internal costs to the correct department.

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.

SEE ALSO:

Salesforce Help: Google BigQuery for Legacy SQL Connection (can be outdated or unavailable during release preview)

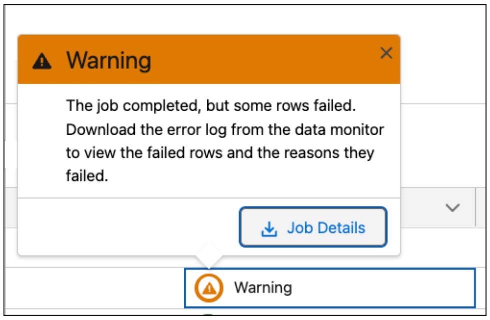
Salesforce Help: Google BigQuery Standard SQL Connection (can be outdated or unavailable during release preview)

Download Data Sync Job Logs in Data Manager

Diagnose issues with data sync jobs faster by downloading detailed job logs. Previously, logs were available only for recipes and dataflows.

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.

How: In Data Manager, open a job with warnings. In the status column, click **Warning**, and then click **Job Details** to download the log.



SEE ALSO:

Salesforce Help: Monitor a Data Sync Job (can be outdated or unavailable during release preview)

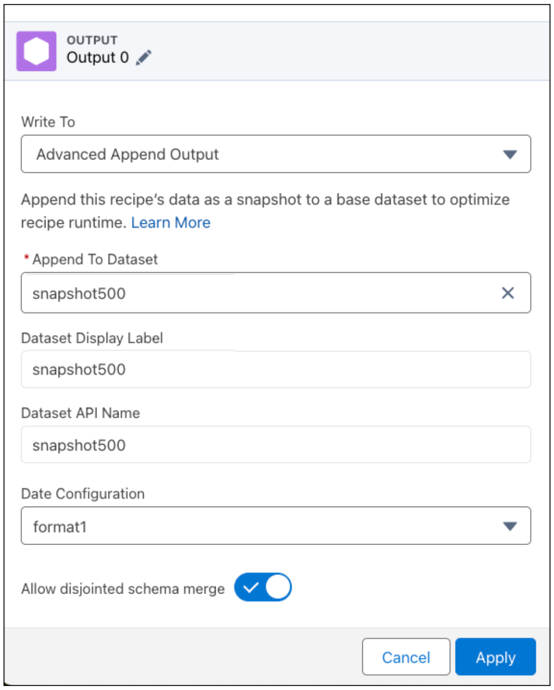
Improve Snapshot Data Recipe Performance with Advanced Append Output (Beta)

Free up job availability and processing time with quicker snapshot data recipe runs. The Advanced Append Output option in the Output node registers only the rows appended in a recipe run. In comparison, the Output node Dataset option re-registers the entire dataset when adding rows so that rows can be updated and inserted. When you create a version of the snapshot recipe, you add an input node for the snapshot data and any transformations to perform before appending the snapshot. Then select the Advanced Append Output option in the output node and identify the dataset to append the snapshot data to and the date configuration to use to format dates. You can also choose whether to use the disjointed schema option to make sure that the dataset updates if the snapshot data schema changes.

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: Advanced Append Output 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.

How: Select the Advanced Append Output option in the output node.



SEE ALSO:

Salesforce Help: Output Node: Write Recipe Results to a Dataset or External System(can be outdated or unavailable during release preview)

Other Enhancements to Data Pipelines

Learn about other important improvements to enrich your recipes in Data Pipelines.

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

Event Monitoring Platform Events Connector (Pilot)

Easily analyze Real-Time Event Monitoring data with the Salesforce analytics tool of your choice by importing the data into Data Cloud using the Platform Events connector pilot.

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 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.

Who: The event data that's available to import with this connector is only available to customers who have purchased the Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: From **Other Connectors** in Setup, click **New**. Then select **Platform Events (Pilot)** and click **Next** and fill out the name field in the window. The events that are available to import include ListViewEventStream, FileEvent, ApiEventStream, LoginEventStream, and ReportEventStream.

SEE ALSO:

Import Real-Time Event Monitoring Event Data Into Data Cloud (Pilot)

Salesforce Archive

Get to know Salesforce Archive.

IN THIS SECTION:

Optimize for speed and efficiency as your business data grows. Archive expired or unused records in an external, low-cost data store. Visualize the records in your data store directly from your Salesforce org. Automate data cleanup with recurring archive jobs. Salesforce Archive is your native solution to unchecked data bloat, a time and cost saver for your data-dominant business.

Save on Storage and Boost Performance with Salesforce Archive (Pilot)

Optimize for speed and efficiency as your business data grows. Archive expired or unused records in an external, low-cost data store. Visualize the records in your data store directly from your Salesforce org. Automate data cleanup with recurring archive jobs. Salesforce Archive is your native solution to unchecked data bloat, a time and cost saver for your data-dominant business.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. When Salesforce Archive becomes generally available, you can use it in production and sandbox environments. Currently, the product is available only in sandboxes as a pilot.

When: Salesforce Archive is currently available as a pilot program in these regions. To learn about the pilot and how to participate, contact your account executive.

- Australia
- France
- Germany
- India
- Italy
- United States

Note: Salesforce Archive 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.

Salesforce Archive will become available to production orgs on a rolling basis starting in November 2024. We'll announce production-enabled regions as they become active. For more assistance with product availability, contact your account executive.

Why: Excess data stored in your org can bog down processing times, inflate storage costs, and degrade information accuracy. But for records that you occasionally need or that you're required to maintain for regulatory compliance, hard deletion isn't the answer. That's why we built a native archive solution to enhance your Salesforce implementation.

Benefits and use cases:

- Boost Salesforce query and reporting performance.

- Improve user productivity with shorter processing times.
- Reduce storage footprint and costs.
- Avoid record redundancies and inconsistencies.
- Preserve historical data for future reference and trend analysis.
- Ensure compliance with data retention regulations.

How: When it's released for production use, Salesforce Archive is purchased as an add-on license. For pricing information, contact your account executive.

To archive Salesforce records, create and execute Archive policies. You decide when and how often Archive policies run, which objects they scan, and which records and files they act on. You can also view and manage job sessions for Archive policies. To view archived data directly from the Salesforce UI, set up your data store with Salesforce Connect.

Trust Site Enhancements

The Trust site is the single place to see the status of Salesforce services, upcoming availability impacting activities, and availability-related communications. It now has links to additional product statuses.

Where: These changes apply to `Trust.salesforce.com` and `Status.salesforce.com`.

Why: To improve the experience for our customers, the Trust site includes a link to the status site of the newly acquired Spiff. The Status site includes support for MuleSoft for Canadian Hyperforce customers and support for Tableau.

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.

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.

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 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 Winter '25.

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.

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.

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 was first made available 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.

Review and Update Settings to Capture Leads from LinkedIn (Release Update)

If you're syncing leads from LinkedIn Lead Forms to Salesforce, you must manually disconnect your LinkedIn account, reconfigure the feature by enabling a new setting, and then reconnect your account. Otherwise, LinkedIn leads will stop syncing when LinkedIn retires their legacy Ads Lead Sync APIs on December 16, 2024. This update is available starting in Winter '25.

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 and is enforced in Winter '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.

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) on page 637

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.

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.

Change Einstein Activity Capture Permissions for Sales Engagement Basic Users (Release Update)

In Spring '25, the Sales Engagement Basic User permission set no longer includes access to Einstein Activity Capture. Assign the Standard Einstein Activity Capture permission set to users who currently have access to Einstein Activity Capture through the Sales Engagement Basic User permission set or a clone.

Enable ICU Locale Formats (Release Update)

To conduct business wherever you are, adopt the International Components for Unicode (ICU) locale formats. Locales control the formats for dates, times, currencies, addresses, names, and numeric values. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. When you enable this update, the ICU locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. This update was first made available in Winter '20 and will be enforced on a rolling basis starting in Spring '24.

Enable 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 was first available in Summer '24 and will be enforced in Spring '25.

Enable Secure Redirection for Flows (Release Update)

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

Enforce 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. If your organization doesn't use roles, this update has no impact.

Migrate to a Multiple-Configuration SAML Framework (Release Update) on page 636

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. We enforced it for sandboxes in Summer '24, but we postponed the enforcement date for production instances to Spring '25.

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.

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 was first made available as of in Summer '24.

Verify Your Return Email Address for Sender Verification (Release Update)

After Spring '25, to comply with increased email security standards, you're required to verify the Email Address in My Email Settings.

Verify SAML Integrations (Release Update)

Salesforce is upgrading its SAML framework as part of regular ongoing maintenance. This maintenance update improves Salesforce's security posture, and as a result, improves your security posture. This update can impact integrations that use SAML, including single sign-on (SSO) and single logout. This update is available starting in Winter '25, and Salesforce enforces this update in Spring '25. To avoid potential service interruptions, test your SAML integrations as soon as Spring '25 sandboxes become available.

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.

Scheduled to Be Enforced in Winter '26

These updates are scheduled to be enforced in Winter '26. The list can include new, previously announced, and previously postponed release updates.

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 '26.

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, which gave all users in the org access to run any flow. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows. This update was first made available in Winter '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement date to Winter '26.

Recommended But Not Enforced

Salesforce strongly recommends enabling these updates, but won't enforce them. This list can include newly recommended updates or previously announced updates that will no longer be enforced.

Capture Prompt and Accurate Order Details with New Order Save Behavior (Release Update)

When you update an order product, the New Order Save Behavior uses custom application logic to update the parent order. Custom application logic consists of validation rules, apex triggers and classes, workflow rules, and flows. You can choose to enable or disable this feature. However, we recommend that you enable it. Starting Winter '25, this feature is enabled by default for new customer orgs. Previously, users needed additional customizations to enforce custom applications on orders and order products. Also, Salesforce didn't correctly evaluate custom application logic on the parent record.

Canceled Updates

These updates were announced in a previous release but are now canceled. They were removed from the Release Updates node and aren't enforced. The list can include previously announced and previously postponed release updates.

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

This update is canceled. Salesforce isn't enforcing the Adopt updated CSP directives setting at this time. However, to help protect your org from cross-site scripting and other code-injection attacks, we continue to encourage you to enable that setting now. To help you adopt this change, Salesforce plans to improve the reporting on restricted frames, images, and fonts in a future release. When that reporting is available, Salesforce plans to introduce a new release update to enforce the setting.

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

This update was canceled. Enforce sharing rules when an Apex class that's declared using the with sharing keyword launches an autolaunched flow that runs in the default context. To enforce the sharing rules, run the flow and Apex on API version 62.0 or later.

No Scheduled Enforcement Date

These updates have no planned enforcement date at this time. The list can include previously announced and previously postponed release updates.

Disable Ref ID and Transition to New Email Threading Behavior (Release Update) **on page 670**

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 and has no scheduled enforcement date.

Transition to the Lightning Editor for Email Composers in Email-to-Case (Generally Available) (Release Update) **on page 669**

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 and has no scheduled enforcement date.

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

Export data from a CRM Analytics lens or widget built on a Data Cloud data model object.

IN THIS SECTION:

Export from Data Cloud-connected CRM Analytics Assets (Beta)

Now you can export the results from a query on a Data Cloud data model object (DMO) to a CSV file. You can export up to 32 MB depending on the structure of the CSV table. Exporting data from a lens or widget backed by Direct Data for Data Cloud works the same as other CRM Analytics data exports, which are done from the Share or Download window.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions. The change also 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: Export from Direct Data for Data Cloud 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.

How: To get started with this beta feature, contact Salesforce Support.

SEE ALSO:

Salesforce Help: CRM Analytics Direct Data for Data Cloud Tips and Limitations (can be outdated or unavailable during release preview)

Lightning Reports and Dashboards

Build report formulas with assistance from Einstein. Create effective report types with ease in the enhanced custom report type beta.

IN THIS SECTION:

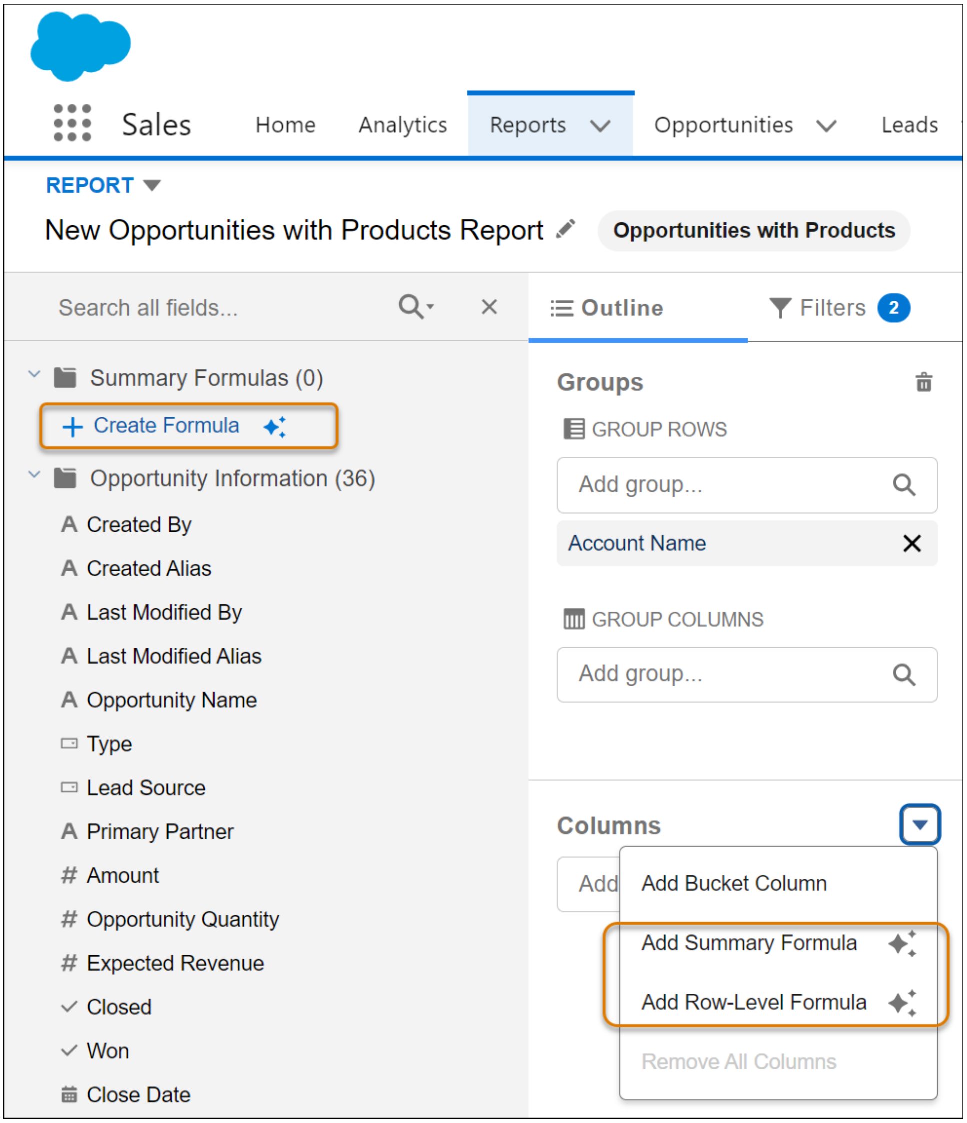
Add Calculated Fields to Your Lightning Reports with Einstein Generative AI

Customizing reports to meet your business needs is 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.

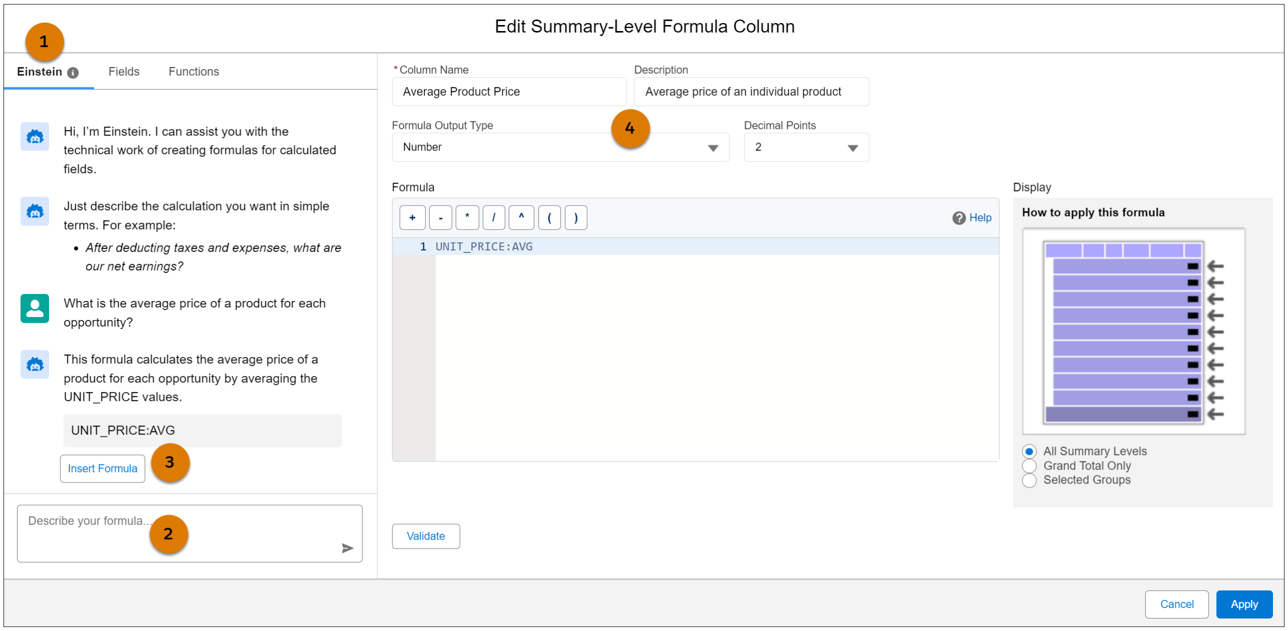
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Einstein 1 Sales Edition or Einstein 1 Service Edition and the DC Report GPT add-on. Einstein generative AI is available in Lightning Experience.

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

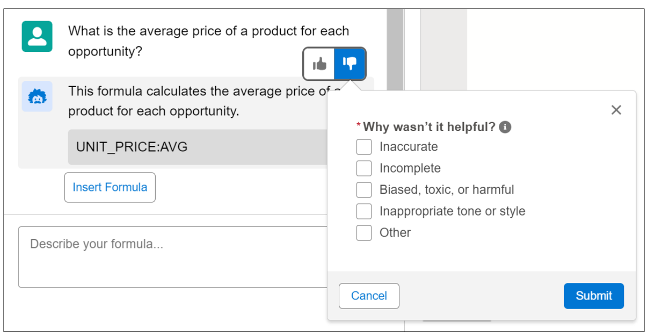
When editing a report, select **Create Formula** in the Fields panel, or select **Add Summary Formula** or **Add Row-Level Formula** in the Columns menu.



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.



Do More with Custom Report Types (Beta)

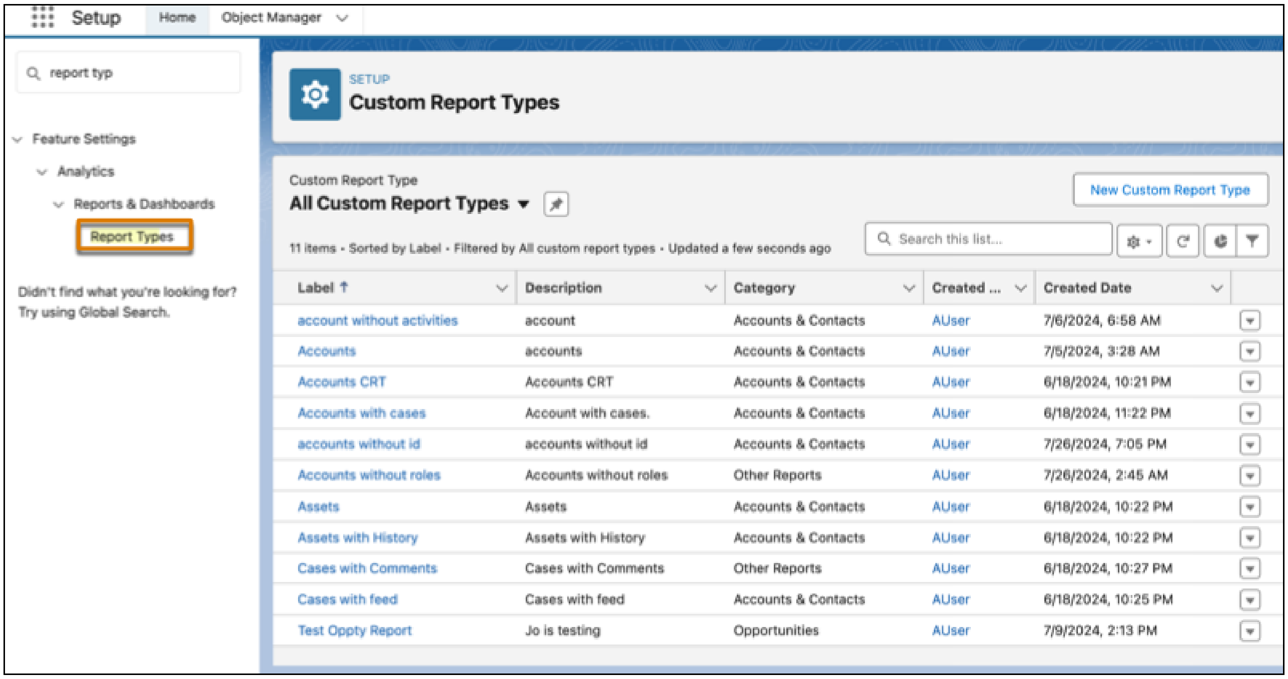
Find your report types more easily, and create personalized list views of your custom report types using the improved Custom Report page in Setup. Edit report details and modify object relationships on the summary page, which now has a more compact layout. The redesigned report type layout editor provides more flexibility when managing custom fields and sections. And you can add up to 1,000 fields in the report type layout using lookup fields.

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

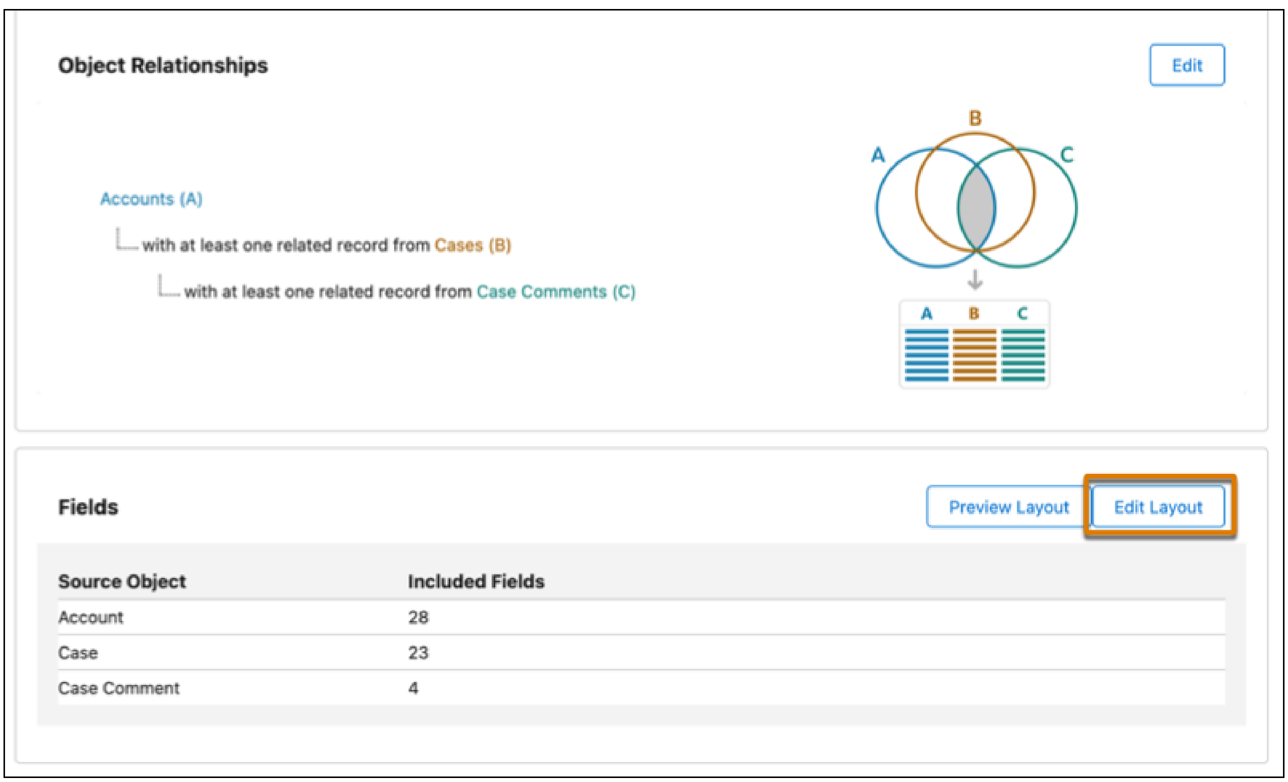
Note: Enhanced Custom Report Setup page is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

How: In Setup, in the Quick Find box, enter and select `Reports and Dashboards Settings`. Select **Enhanced Custom Report Type Setup Page (Beta)**.

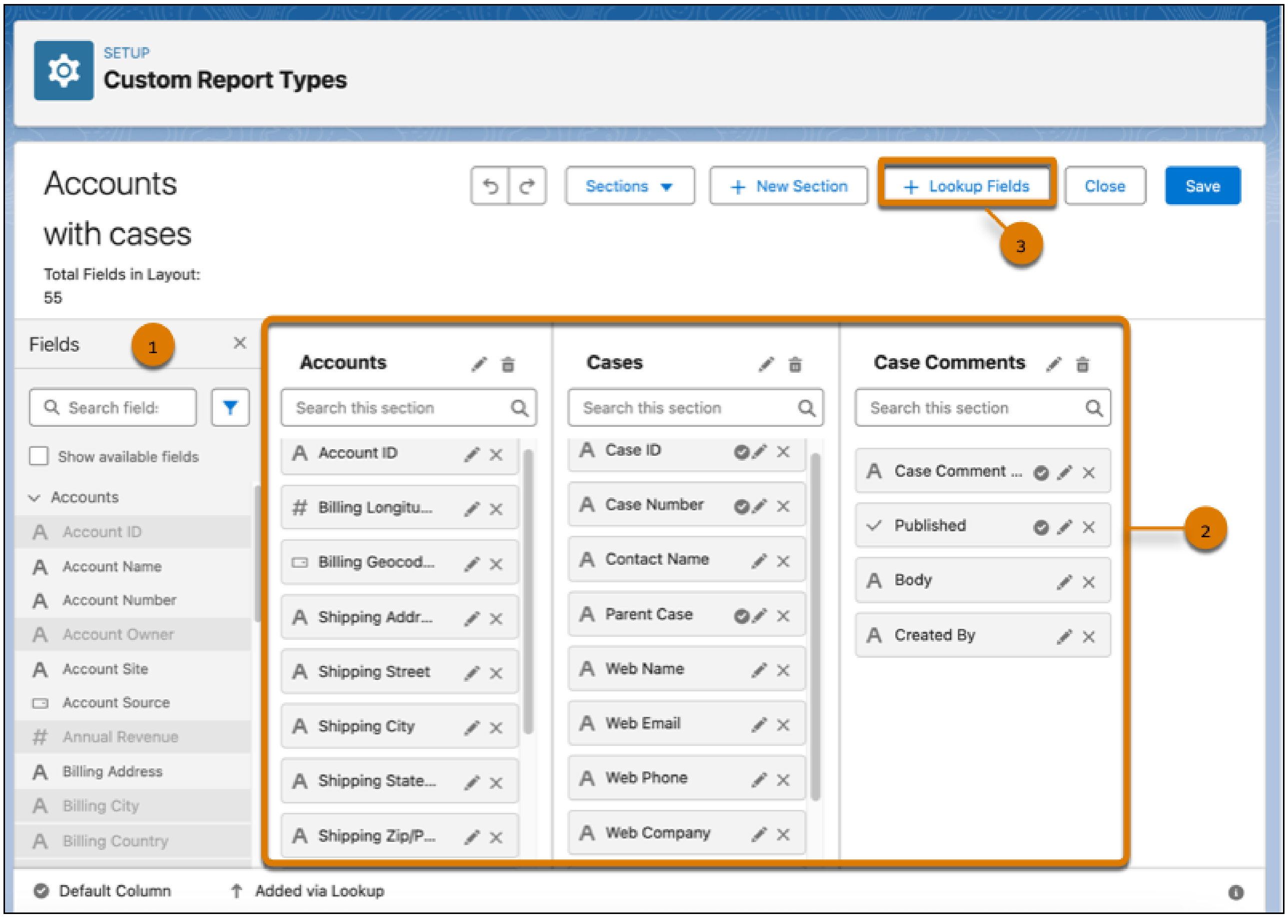
Then, in the Quick Find box, search for and select **Report Types**.



On the summary page of your custom report type, click **Edit Layout**.



From the Fields panel (1), drag fields to the appropriate section. In the report section (2), search for fields, move them, view their details, and customize their display names. Click Lookup Fields (3) to find fields and add them to the report type.



SEE ALSO:

Salesforce Help: Set Up a Custom Report Type (can be outdated or unavailable during release preview)

Data Cloud Reports and Dashboards

Create reports on calculated insights and data model objects (DMOs) faster. Control which DMO reports include smart totals. Easily review the earliest and latest values on date fields (beta).

IN THIS SECTION:

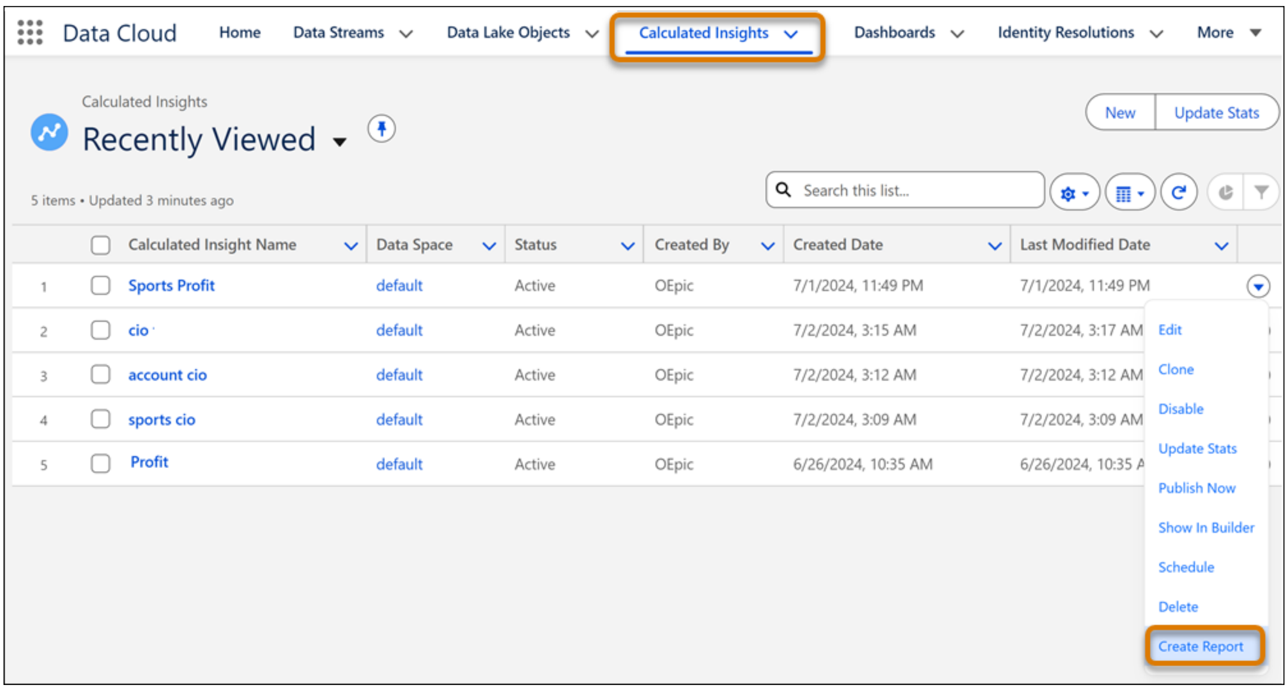
Highlight Min and Max Aggregates for Date Fields (Beta)
Surface the earliest and latest values of a date, datetime, or row-level formula field with these data types in a data model object (DMO) report. You can also review the min and max aggregates for each report grouping. For example, in a Sales Order DMO report that's grouped by fiscal quarter, include the min and max aggregates for the Created Date field to identify sales cycle trends. Or, quickly find the latest payment due date across all orders with the max value of the formula field that calculates due dates based on the Created Date field.

Create Data Cloud Reports with a Single Click

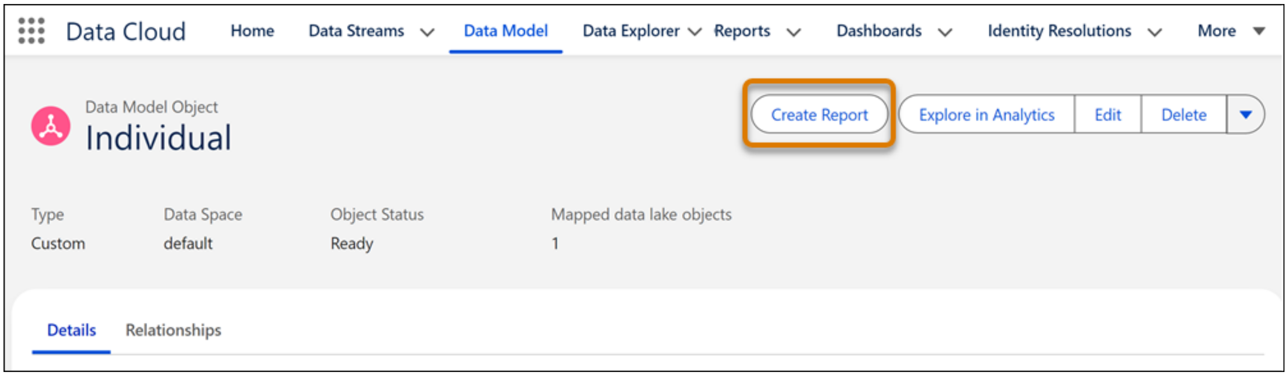
Analyze and build standard reports on calculated insights and data model objects (DMOs) directly in the flow of work. You can now create these reports from the Calculated Insights or DMO list view or the object's record page. Previously, you could create these reports only from the Reports tab.

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

How: On the Calculated Insight or Data Model tab, select **Create Report** from an object's Actions menu.



Alternatively, open the calculated insight or DMO, and click **Create Report**.



SEE ALSO:

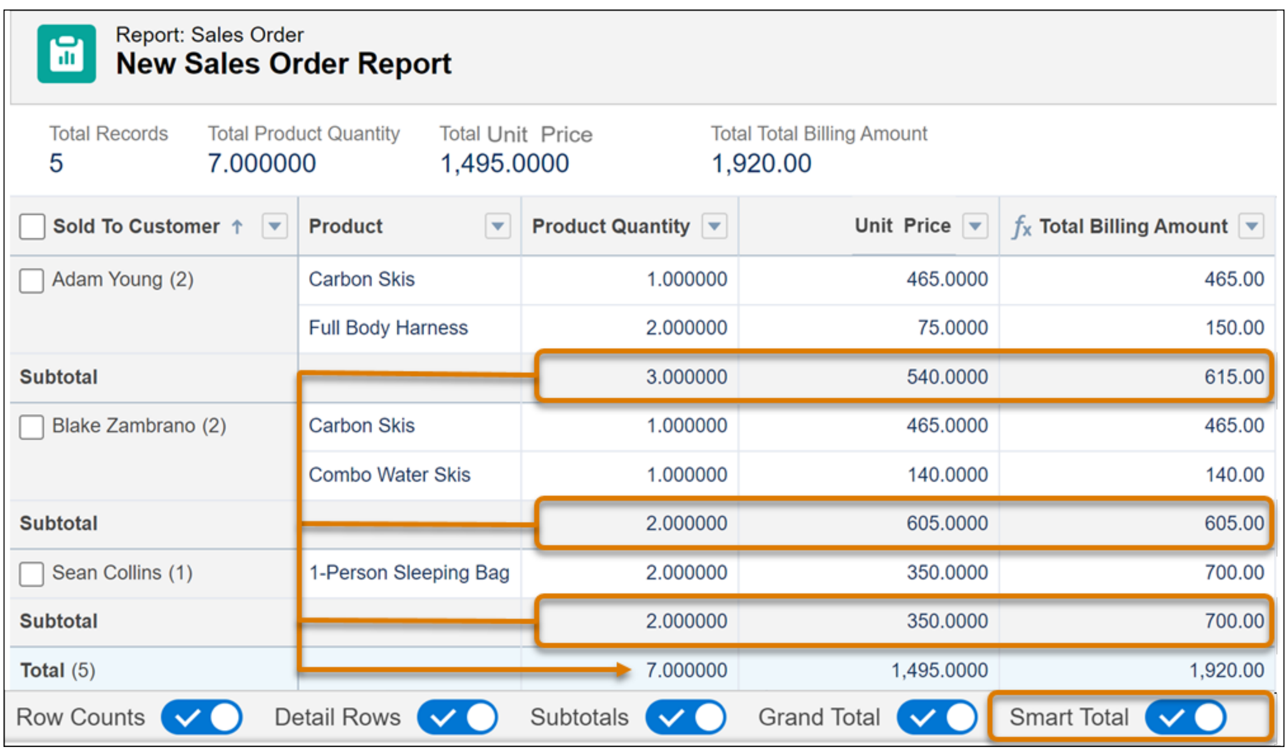
Salesforce Help: Create a Standard Report on Data Cloud Objects (can be outdated or unavailable during release preview)

Include Smart Totals Only in the Reports You Want

You can now choose to apply or turn off smart totals for reports and charts on data model objects (DMOs). For example, in a Sales Order DMO report, enable smart totals to ensure that each line item in the sales order is included in subtotals and grand totals only once. Or, turn off smart totals in a report that shows total website visit duration by individual so that the report includes all visits by an individual. Previously, smart totaling was enabled in all Data Cloud reports.

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

How: To apply or turn off smart totals, use the toggle in the report footer.



Highlight Min and Max Aggregates for Date Fields (Beta)

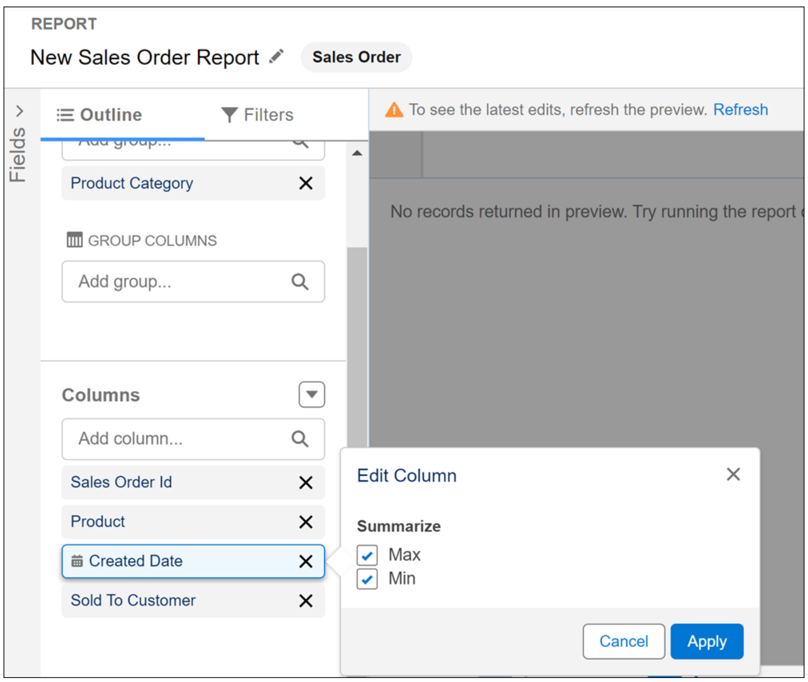
Surface the earliest and latest values of a date, datetime, or row-level formula field with these data types in a data model object (DMO) report. You can also review the min and max aggregates for each report grouping. For example, in a Sales Order DMO report that's grouped by fiscal quarter, include the min and max aggregates for the Created Date field to identify sales cycle trends. Or, quickly find the latest payment due date across all orders with the max value of the formula field that calculates due dates based on the Created Date field.

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

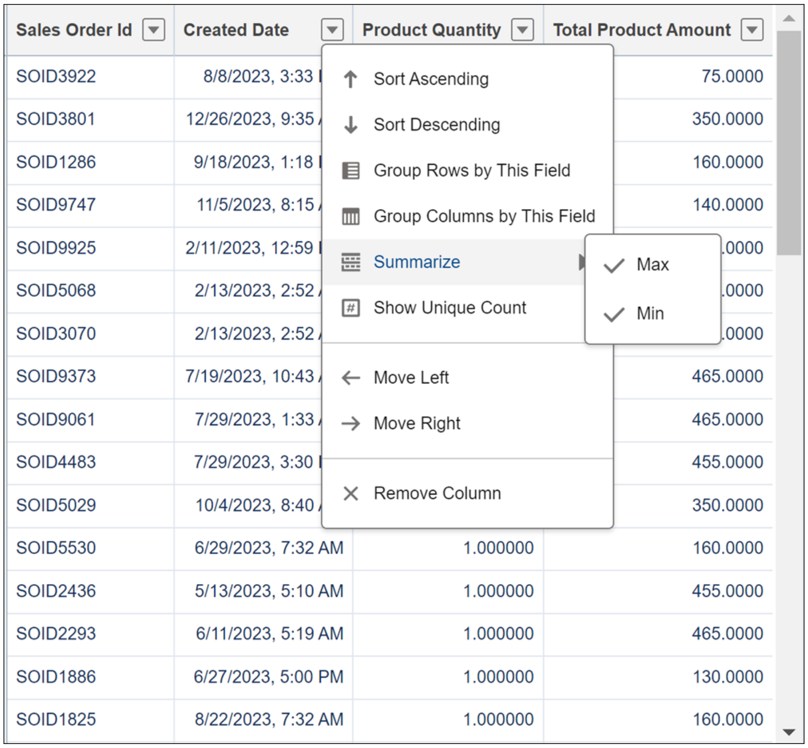
Note: Minimum and Maximum Aggregations on Date Fields in Data Cloud Reports is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

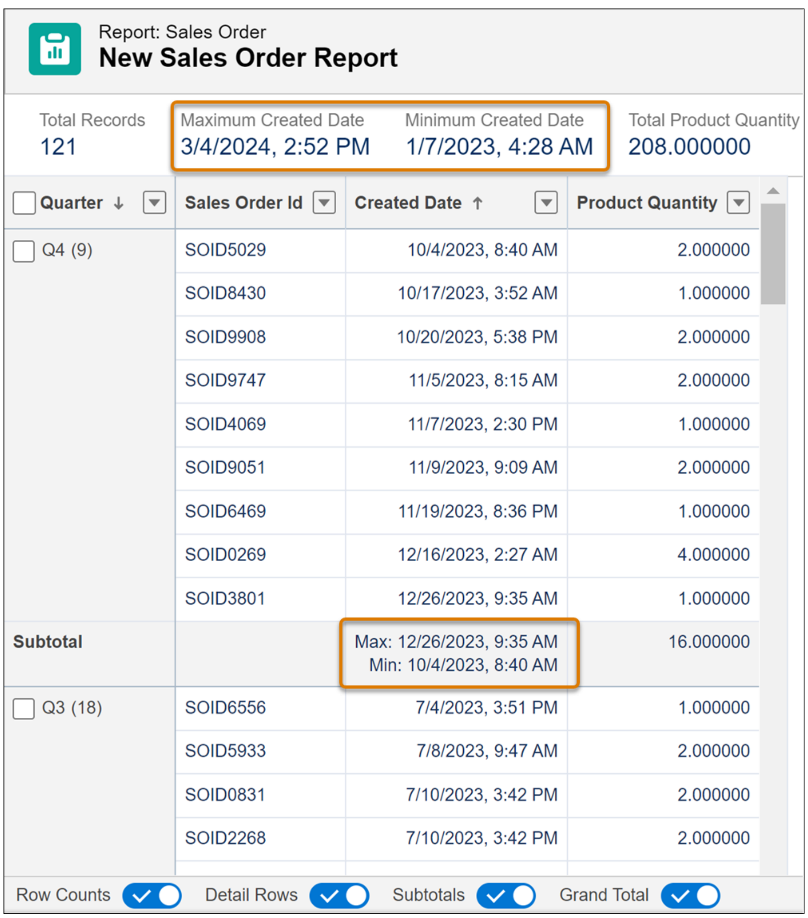
How: From Setup, in the Quick Find box, enter `Reports and Dashboard Settings`, and then select **Enable minimum and maximum aggregations on date fields in reports (Beta)**.

To add the aggregates, select the column in the Fields panel. Select the aggregates and click **Apply**.



Alternatively, in Report Builder, click next to a field name, select **Summarize**, and select the aggregates.


Sales Order Id
Created Date
Product Quantity
Total Product Amount
Sort Ascending
Sort Descending
Group Rows by This Field
Group Columns by This Field
Summarize
Show Unique Count
Move Left
Move Right
Remove Column
Max
Min
SOID3922 8/8/2023, 3:33 75.0000
SOID3801 12/26/2023, 9:35 350.0000
SOID1286 9/18/2023, 1:18 160.0000
SOID9747 11/5/2023, 8:15 140.0000
SOID9925 2/11/2023, 12:59
SOID5068 2/13/2023, 2:52
SOID3070 2/13/2023, 2:52
SOID9373 7/19/2023, 10:43 465.0000
SOID9061 7/29/2023, 1:33 465.0000
SOID4483 7/29/2023, 3:30 455.0000
SOID5029 10/4/2023, 8:40 350.0000
SOID5530 6/29/2023, 7:32 AM 1.000000 160.0000
SOID2436 5/13/2023, 5:10 AM 1.000000 455.0000
SOID2293 6/11/2023, 5:19 AM 1.000000 465.0000
SOID1886 6/27/2023, 5:00 PM 1.000000 130.0000
SOID1825 8/22/2023, 7:32 AM 1.000000 160.0000


Report: Sales Order
New Sales Order Report
Total Records 121
Maximum Created Date 3/4/2024, 2:52 PM
Minimum Created Date 1/7/2023, 4:28 AM
Total Product Quantity 208.000000
Quarter
Sales Order Id
Created Date
Product Quantity
Q4 (9)
SOID5029 10/4/2023, 8:40 AM 2.000000
SOID8430 10/17/2023, 3:52 AM 1.000000
SOID9908 10/20/2023, 5:38 PM 2.000000
SOID9747 11/5/2023, 8:15 AM 2.000000
SOID4069 11/7/2023, 2:30 PM 1.000000
SOID9051 11/9/2023, 9:09 AM 2.000000
SOID6469 11/19/2023, 8:36 PM 1.000000
SOID0269 12/16/2023, 2:27 AM 4.000000
SOID3801 12/26/2023, 9:35 AM 1.000000
Subtotal
Max: 12/26/2023, 9:35 AM
Min: 10/4/2023, 8:40 AM
16.000000
Q3 (18)
SOID6556 7/4/2023, 3:51 PM 1.000000
SOID5933 7/8/2023, 9:47 AM 2.000000
SOID0831 7/10/2023, 3:42 PM 2.000000
SOID2268 7/10/2023, 3:42 PM 2.000000
Row Counts
Detail Rows
Subtotals
Grand Total

CRM Analytics

Fine-tune dashboard appearance and usability with multiple enhancements across the dashboard builder. Connect to secure data sources with support for Virtual Private Connections on Snowflake. Inspect your Analytics assets and execute queries using the new CRM Analytics Connect API Postman collection.

IN THIS SECTION:

Analytics Experience and Visualizations

Start screen or autolaunched flows from your Analytics dashboard using flow interactions. Meet data compliance and regulatory requirements with the new confidentiality notice in image downloads and data exports. Fine-tune dashboard appearance and usability with multiple enhancements across the dashboard builder.

IN THIS SECTION:

Manage Action Menus on the Repeater Widget

You can now disable action menus on Repeater widgets to reduce dashboard maintenance and give dashboard users a simplified dashboard interaction.

Get More Table Widget Options with Header Formatting and Column Sorting

Table widget properties now include header text alignment and formatting to make your data stand out more. Also, you can sort table widgets that have query interactions.

Launch a Flow with a Dashboard Interaction (Generally Available)

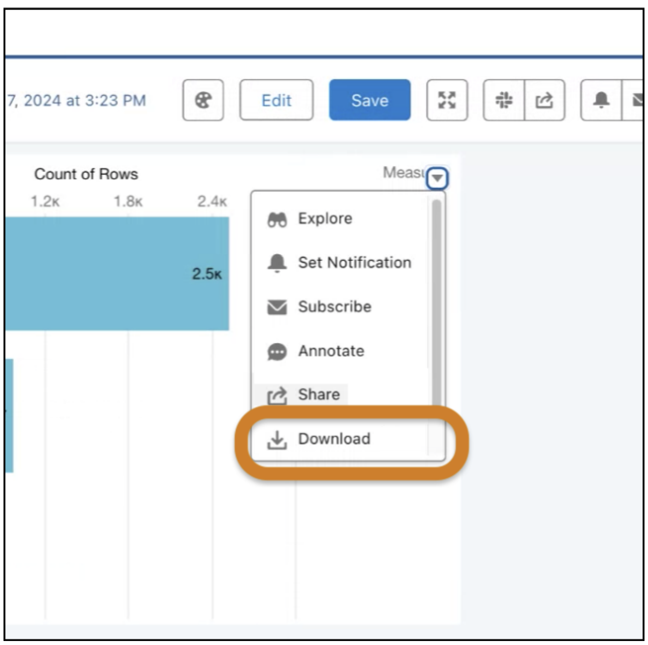
Start screen or autolaunched flows from your Analytics dashboard using flow interactions. For example, on a dashboard that tracks cases, design a text widget that launches your customer help request screen flow with a single click. The flow interaction passes dynamic values to the screen flow, so users don't have to leave your dashboard to do their work. Flow interactions are available only for the text widget.

Download Directly from Dashboard Widget Action Menus

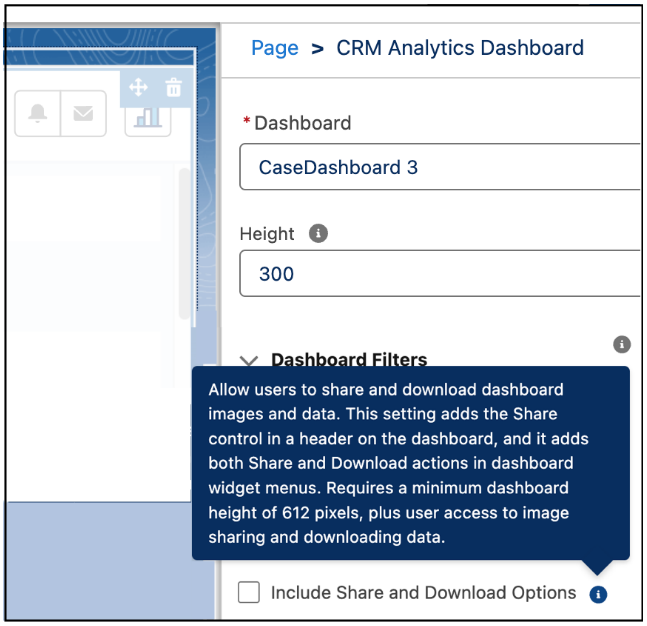
Download an image or export data directly from a widget menu without going through the Share option. The Share window still has a Download tab, but now you can take the faster path to that same Download dialog. The Download action is also available in widget menus of embedded CRM Analytics dashboards.

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

How: To access the new Download option, open the menu of a dashboard widget.



To add the Download action to embedded dashboard widgets, select **Include Share and Download Options** in the component settings panel of the Lightning App Builder.



SEE ALSO:

Salesforce Help: Download CRM Analytics Images and Export Filtered Data (can be outdated or unavailable during release preview)

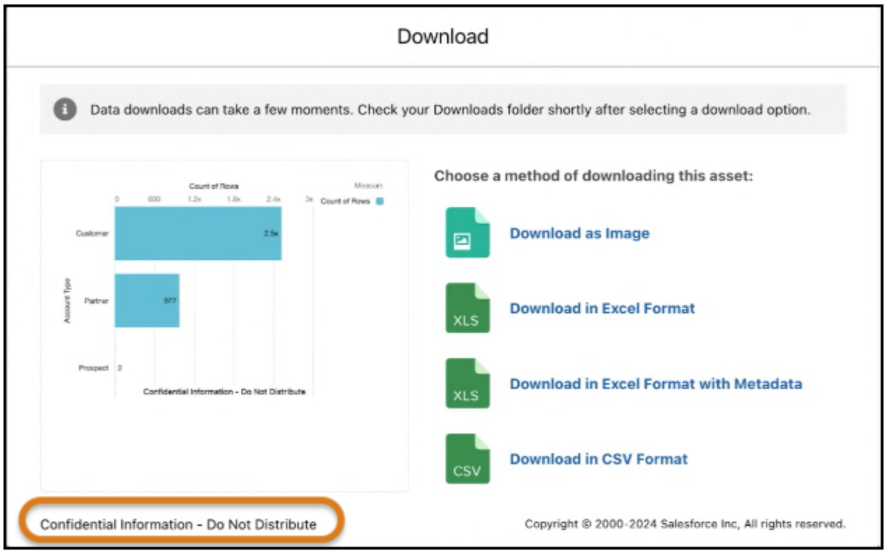
Salesforce Help: Enable Downloading Data from CRM Analytics (can be outdated or unavailable during release preview)

Mark Downloaded Images and Exported Data as Confidential

Meet data compliance and regulatory requirements with the new confidentiality notice. Remind coworkers of data confidentiality with a notice that appears in the Download window and on all downloaded images and exported data.

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

How: From Setup, in the Quick Find box, enter `Analytics`, and then select **Settings**. Enable **Include the "Confidential Information - Do Not Distribute" disclaimer message on data exports**.



SEE ALSO:

Salesforce Help: Download CRM Analytics Images and Export Filtered Data (can be outdated or unavailable during release preview)

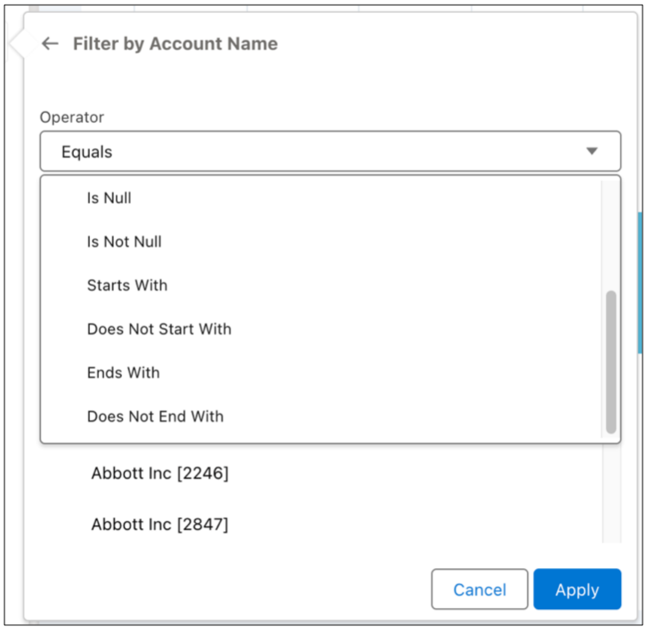
Salesforce Help: Enable Downloading Data from CRM Analytics (can be outdated or unavailable during release preview)

Add Greater Precision to Your Queries with More Filter Operators

Refine your data queries to tailor your results with expanded filter operators that include Does Not Contain, Does Not Start With, Ends With, and Does not End With. For example, use the Ends With condition to retrieve data that ends with a selected string instead of additional coding.

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: Select the Operator dropdown menu in the widget Filters panel.



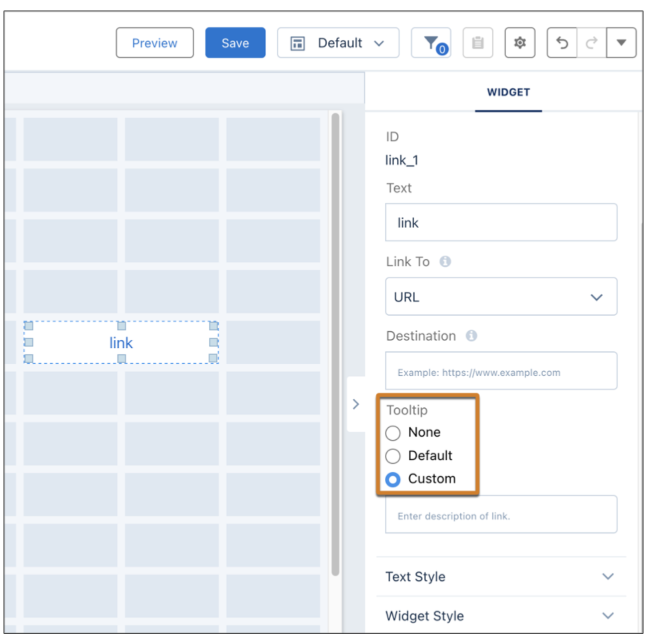
Control Tooltip Visibility on Link Widgets

You can now disable tooltips for Link widgets to reduce visual distractions and improve focus.

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

How: In the widget properties, select **URL** from the Link To menu, and go to Tooltip.

None disables the tooltip when hovering over the link widget. **Default** displays a link to an external url. **Custom** displays user-defined text. The tooltip isn't displayed if no text is added.

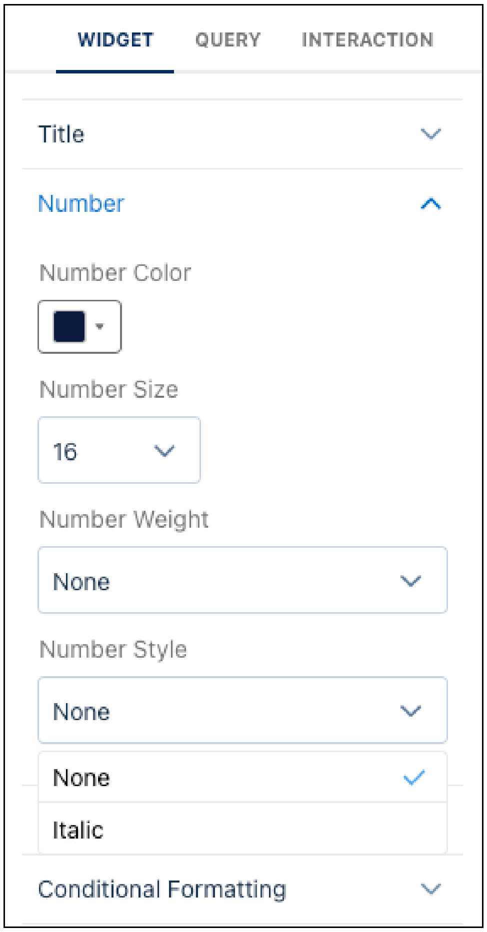


Make Dashboard Metrics Stand Out with Number Widget Enhancements

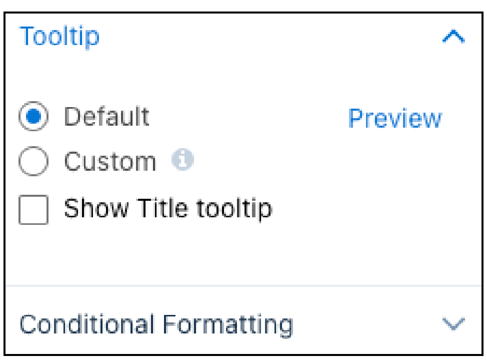
Customize the appearance of your dashboard metrics using the new formatting and tooltip visibility features. You can now add italic formatting to bring attention to important dashboard metrics, and turn off metric tooltips to limit distractions.

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

How: To apply formatting to a Number widget, go to Widget properties.



To turn off tooltips, deselect **Show Title tooltip**.

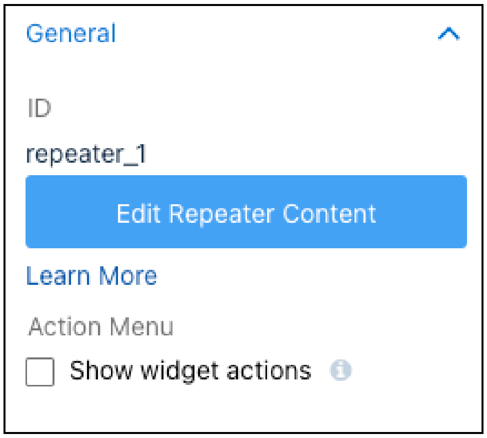


Manage Action Menus on the Repeater Widget

You can now disable action menus on Repeater widgets to reduce dashboard maintenance and give dashboard users a simplified dashboard interaction.

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

How: In Widget properties, deleselect **Show widget actions**.



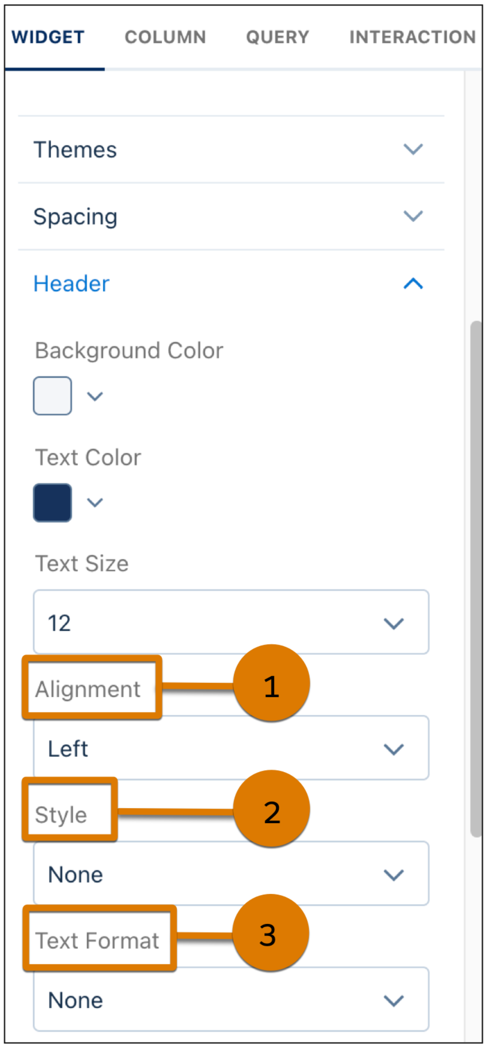
Get More Table Widget Options with Header Formatting and Column Sorting

Table widget properties now include header text alignment and formatting to make your data stand out more. Also, you can sort table widgets that have query interactions.

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

How: To format a table header, go to Widget properties and expand Header.

You can align header text left, right, or center of the column (1). Use italics (2), or add an underline (3).

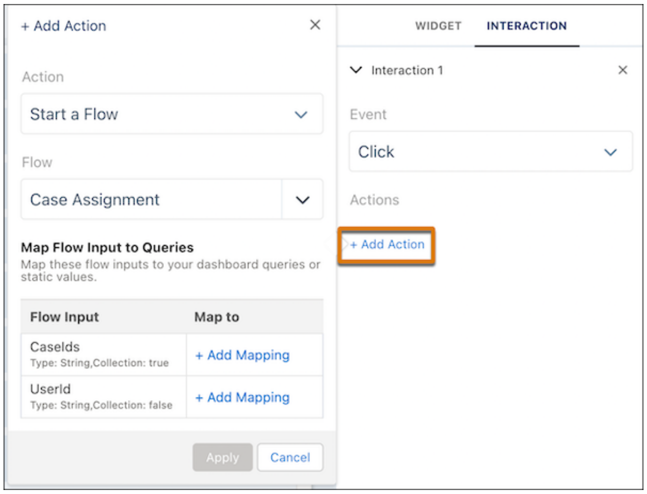


Launch a Flow with a Dashboard Interaction (Generally Available)

Start screen or autolaunched flows from your Analytics dashboard using flow interactions. For example, on a dashboard that tracks cases, design a text widget that launches your customer help request screen flow with a single click. The flow interaction passes dynamic values to the screen flow, so users don't have to leave your dashboard to do their work. Flow interactions are available only for the text widget.

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

How: In the dashboard editor, select the text widget that you want to add a flow interaction for. On the Interactions tab on the Widget Properties panel, click **Add Action** to add a Start a Flow action using your custom screen or autolaunched flow.



SEE ALSO:

Salesforce Help: Configure a Start a Flow Action (can be outdated or unavailable during release preview)

Analytics Data Integration

Connect to secure data sources with support for virtual private connections on Snowflake. Give users read-only access to recipes in Data Manager. Allocate billing for Google BigQuery connections. Download data sync job logs in Data Manager to better diagnose issues. Improve the performance of recipes that you use to snapshot data. Restrict data access using Territory Management 2.0 data in security predicates.

IN THIS SECTION:

Transfer Your Snowflake Data to CRM Analytics Using VPC on AWS (Generally Available)

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.

Give Users Read-Only Access to Recipes (Beta)

Let co-workers understand dataset content with the Recipes View Only permission. With this permission, when users visit Data Manager, they see only the Recipes option. They can then open recipes and view their content, but can't edit, run, or delete them.

Add Billing Information for Google BigQuery Connections

Ensure Google BigQuery costs are correctly allocated by adding a project billing ID when you create your connection. Google BigQuery and Google BigQuery Standard SQL connections now support compute and storage separation, providing for splitting CPU from storage costs so that you can allocate your internal costs to the correct department.

Download Data Sync Job Logs in Data Manager

Diagnose issues with data sync jobs faster by downloading detailed job logs. Previously, logs were available only for recipes and dataflows.

Improve Snapshot Data Recipe Performance with Advanced Append Output (Beta)

Free up job availability and processing time with quicker snapshot data recipe runs. The Advanced Append Output option in the Output node registers only the rows appended in a recipe run. In comparison, the Output node Dataset option re-registers the entire dataset when adding rows so that rows can be updated and inserted. When you create a version of the snapshot recipe, you add an input node for the snapshot data and any transformations to perform before appending the snapshot. Then select the Advanced Append Output option in the output node and identify the dataset to append the snapshot data to and the date configuration to use to format dates. You can also choose whether to use the disjointed schema option to make sure that the dataset updates if the snapshot data schema changes.

Control Access to Data Based on a User's Assigned Territories (Beta)

Allow users to see data in dashboards and insights only for the territories they're assigned to in Territory Management 2.0 using security predicates. You can now reference the territory hierarchy from your dataset security predicates. Previously, you could only reference user data.

Analyze Data Across Multiple Data Spaces

Get real-time analysis using multiple data spaces in Data Cloud without code or preconfigured data connections. Previously, you could access only the default data space using the CRM Analytics interface. Now you can now select among multiple data spaces and data model objects to build queries for comprehensive real-time views that optimize business processes.

Event Monitoring Platform Events Connector (Pilot)

Analyze Real-Time Event Monitoring data with the Salesforce analytics tool of your choice. Import the data into Data Cloud using the Platform Events connector pilot.

Transfer Your Snowflake Data to CRM Analytics Using VPC on AWS (Generally Available)

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. Requires a Salesforce Private Connect add-on license.

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 connection for the Snowflake Private Connector.

SEE ALSO:

Salesforce Help: Snowflake VPC Connection (can be outdated or unavailable during release preview)

Salesforce Help: Secure Cross-Cloud Integrations with Private Connect (can be outdated or unavailable during release preview)

Give Users Read-Only Access to Recipes (Beta)

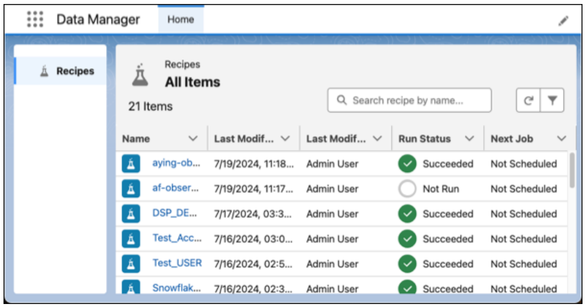
Let co-workers understand dataset content with the Recipes View Only permission. With this permission, when users visit Data Manager, they see only the Recipes option. They can then open recipes and view their content, but can't edit, run, or delete them.

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: Recipes View Only permission 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.

How: From Setup, in the Quick Find box, enter `Permission`, and select **Permission Sets**. Select or create a permission set. Click **System Permissions**, and select **Recipes View Only (BETA)**.

When users visit Data Manager and click a recipe name, they can view the recipe's details in the recipe editor.



SEE ALSO:

Salesforce Help: Learn about CRM Analytics Permission Set Licenses and User Permissions (can be outdated or unavailable during release preview)

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

Salesforce Help: Open and Edit a Recipe (can be outdated or unavailable during release preview)

Add Billing Information for Google BigQuery Connections

Ensure Google BigQuery costs are correctly allocated by adding a project billing ID when you create your connection. Google BigQuery and Google BigQuery Standard SQL connections now support compute and storage separation, providing for splitting CPU from storage costs so that you can allocate your internal costs to the correct department.

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:

Salesforce Help: Google BigQuery for Legacy SQL Connection (can be outdated or unavailable during release preview)

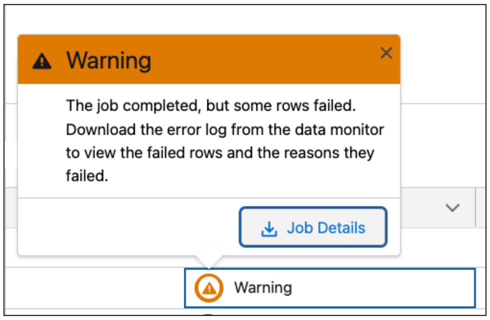
Salesforce Help: Google BigQuery Standard SQL Connection (can be outdated or unavailable during release preview)

Download Data Sync Job Logs in Data Manager

Diagnose issues with data sync jobs faster by downloading detailed job logs. Previously, logs were available only for recipes and dataflows.

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

How: In Data Manager, open a job with warnings. In the status column, click **Warning**, and then click **Job Details** to download the log.



SEE ALSO:

Salesforce Help: Monitor a Data Sync Job (can be outdated or unavailable during release preview)

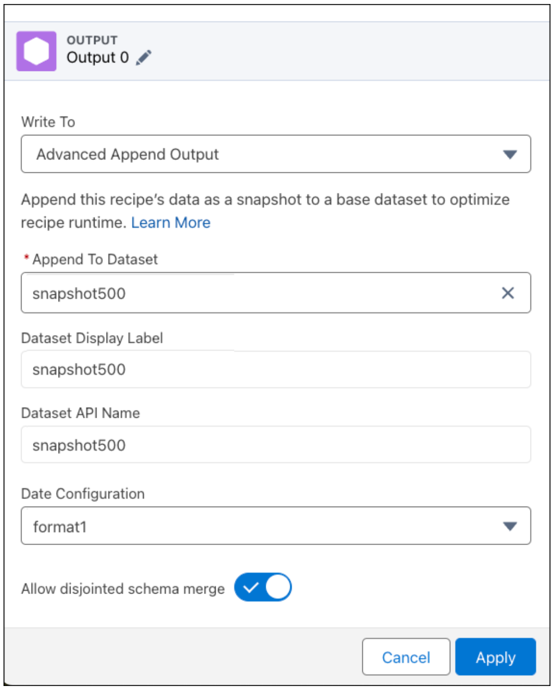
Improve Snapshot Data Recipe Performance with Advanced Append Output (Beta)

Free up job availability and processing time with quicker snapshot data recipe runs. The Advanced Append Output option in the Output node registers only the rows appended in a recipe run. In comparison, the Output node Dataset option re-registers the entire dataset when adding rows so that rows can be updated and inserted. When you create a version of the snapshot recipe, you add an input node for the snapshot data and any transformations to perform before appending the snapshot. Then select the Advanced Append Output option in the output node and identify the dataset to append the snapshot data to and the date configuration to use to format dates. You can also choose whether to use the disjointed schema option to make sure that the dataset updates if the snapshot data schema changes.

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: Advanced Append Output 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.

How: Select the Advanced Append Output option in the output node.



SEE ALSO:

Salesforce Help: Output Node: Write Recipe Results to a Dataset or External System(can be outdated or unavailable during release preview)

Control Access to Data Based on a User's Assigned Territories (Beta)

Allow users to see data in dashboards and insights only for the territories they're assigned to in Territory Management 2.0 using security predicates. You can now reference the territory hierarchy from your dataset security predicates. Previously, you could only reference user 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: Territory Hierarchy in Security Predicates 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.

How: In the recipe or dataflow defining the dataset, add a flattened territory hierarchy (multivalued dimension) for each row. For example:

Id	Name	TerritoryId2	Territory2Ids
1	Opp 1	1	1,3,4,5
2	Opp 2	2	2,3,4,5
3	Opp 3	1	1,3,4,5
4	Opp 4	3	3,4,5
5	Opp 5	3	3,4,5

Then, include this security predicate filter in the output node:

```
'Territory2.TerritoryIDs' in ["$UserTerritory2Ids"]:
```

SEE ALSO:

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

Salesforce Help: Add Row-Level Security with a Security Predicate (can be outdated or unavailable during release preview)

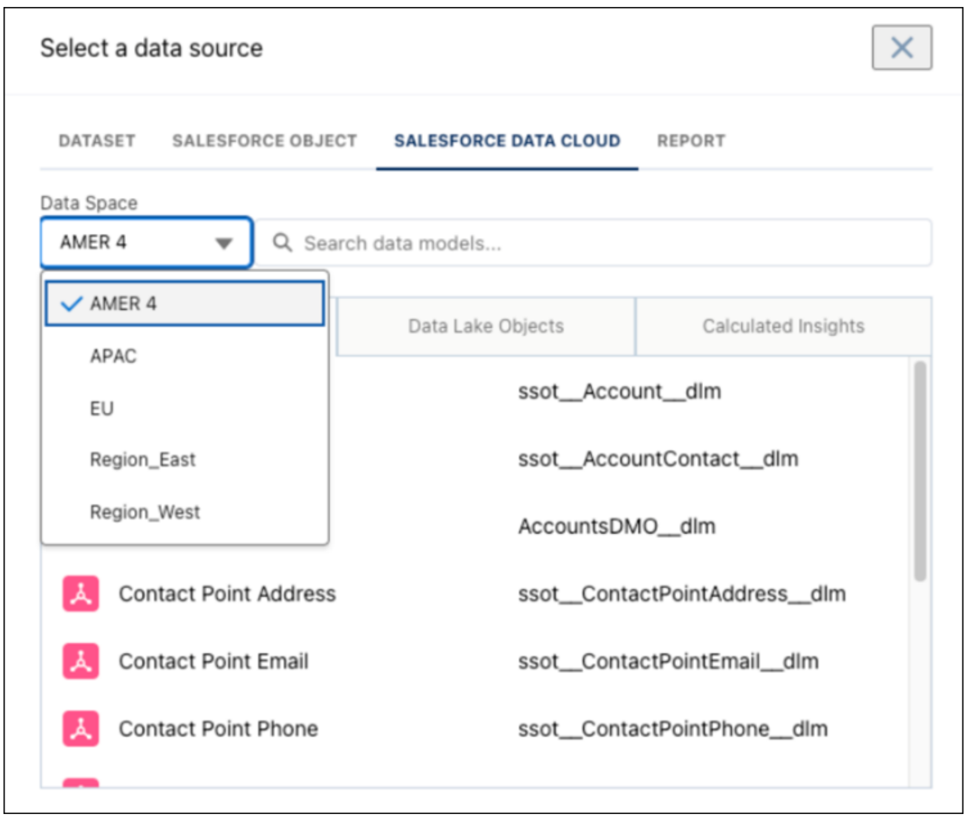
Salesforce Help: Row-Level Security Example based on Territory Hierarchy (can be outdated or unavailable during release preview)

Analyze Data Across Multiple Data Spaces

Get real-time analysis using multiple data spaces in Data Cloud without code or preconfigured data connections. Previously, you could access only the default data space using the CRM Analytics interface. Now you can now select among multiple data spaces and data model objects to build queries for comprehensive real-time views that optimize business processes.

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

How: In the dashboard designer, click **Create Query**. To select a Data Cloud data source and data space, click **Salesforce Data Cloud**.



Event Monitoring Platform Events Connector (Pilot)

Analyze Real-Time Event Monitoring data with the Salesforce analytics tool of your choice. Import the data into Data Cloud using the Platform Events connector pilot.

Note: The Platform Events Connector 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.

SEE ALSO:

Import Real-Time Event Monitoring Event Data Into Data Cloud (Pilot)

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

Test Connect API endpoints in your own development environment, and view output instantly using the new CRM Analytics collection in Postman. Use the collection to build your custom integration with CRM Analytics or to test your SAQL and SQL queries.

Test CRM Analytics Endpoints in Postman

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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

Discover new opportunities and improve sales performance with enhanced Revenue Intelligence white space analysis. Keep your operations running smoothly with the Field Service Intelligence Parts and Inventory dashboard. Set a default SLA for all Service Intelligence Omni-Channel routing queues and customize times for up to ten specific queues.

- Data Cloud for Commerce Release Notes
- Field Service Intelligence Release Notes
- Revenue Intelligence Release Notes
- Service Intelligence Release Notes

Einstein Discovery

Externally built models are retired.

IN THIS SECTION:

Externally Built Models in Einstein Discovery Are Retired

As of July 31, 2024, you can no longer use externally built machine learning models in Einstein Discovery, and your prediction definitions that use an external model will fail. Instead, use Einstein Discovery to create a model.

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

To learn more about Tableau products, go to Tableau Help.

Marketing Cloud Intelligence

Connect, harmonize, visualize, and act on your marketing data to optimize performance within campaigns, discover insights in real-time, and then act on them.

- Marketing Cloud Release Notes
- Marketing Cloud Intelligence Data Pipelines Release Notes
- Marketing Cloud Intelligence Help Map

Accessibility Enhancements in Analytics

Learn about small but important changes that make analytics more accessible.

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

How: Check out details about these changes.

Lightning Reports and Dashboards

- Keyboard navigation now reaches all cells in summary reports.
- The keyboard focus order and assistive text in the Edit Dashboard: Select Image dialog is enhanced.
- The Chart Properties dialog has improved contrast and assistive text.

- Screen readers announce various dialogs in the Lightning Report Builder.

CRM Analytics

- Contrast, keyboard navigation, and assistive text are enhanced for the Home and Browse tabs, Watchlist, Download dialog, and Notifications panel.
- Screen readers announce the status messages for actions in the Browse tab and notifications.
- The visual indicator for keyboard focus in the Notifications panel is enhanced.

Commerce

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

IN THIS SECTION:

Salesforce B2B and D2C Commerce

Get ready to take your store to new heights. You can now get contextual guidance to help you understand the purpose and requirements of tasks in the Commerce app. Work more efficiently with the updated Commerce UI, which lets you navigate the app with fewer clicks and easily switch between functions. The new Insights Workspace combines analytics, insights, and recommended actions in one convenient location, helping you reach your business goals faster. And with Salesforce Starter and Pro Suite, you can start selling online in no time. Plus, you can now turn off shipping for nonphysical products and enjoy faster loading for store images.

IN THIS SECTION:

Commerce App

Get recommended next steps for creating and managing your store based on where you are in the app. Use the streamlined navigation sidebar menu to access Commerce functionality. Easily organize products using the enhanced Category Workspace. Set up product variations with just one click. Perform basic website design tasks without leaving the Commerce app. Work more efficiently in workspaces using filters and bulk actions. Troubleshoot product visibility issues from within the Commerce app, access price settings from the Store settings page, and easily move between your store and a record page.

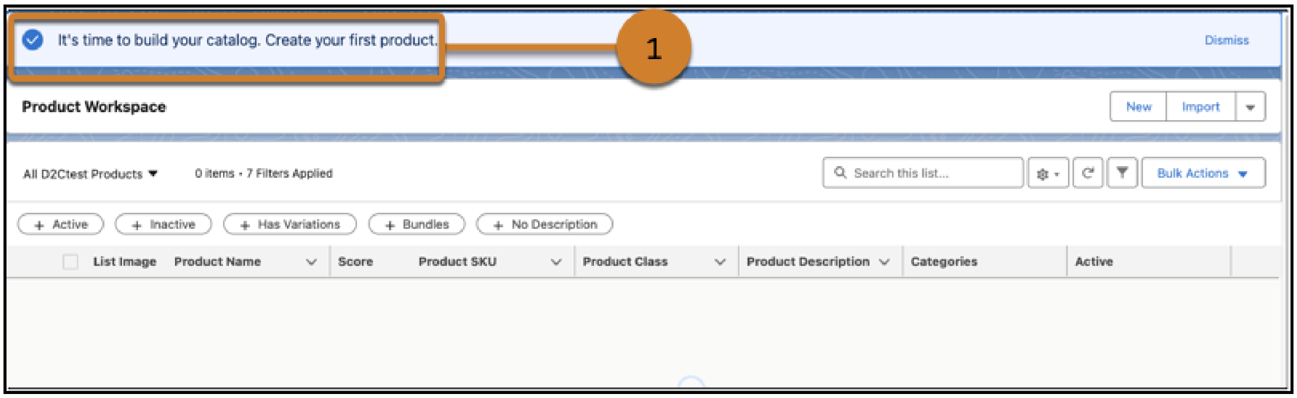
IN THIS SECTION:

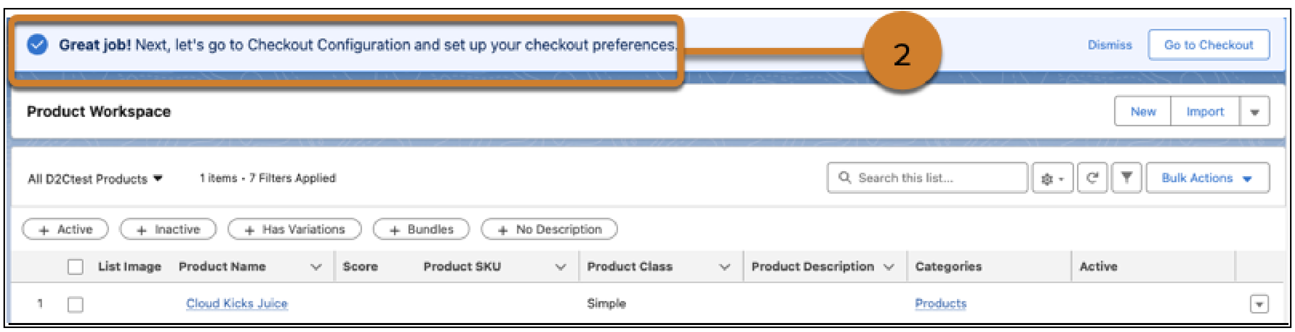
Get Contextual Guidance When Setting Up a B2B or D2C Store

Understand the purpose and requirements of the task as you set up your store by getting relevant information when you need it. As you work through the setup, contextual guidance provides the necessary information to make informed decisions and move to the next step.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Get guidance before (1) and after (2) you complete a task and as you transition to the next task.





SEE ALSO:

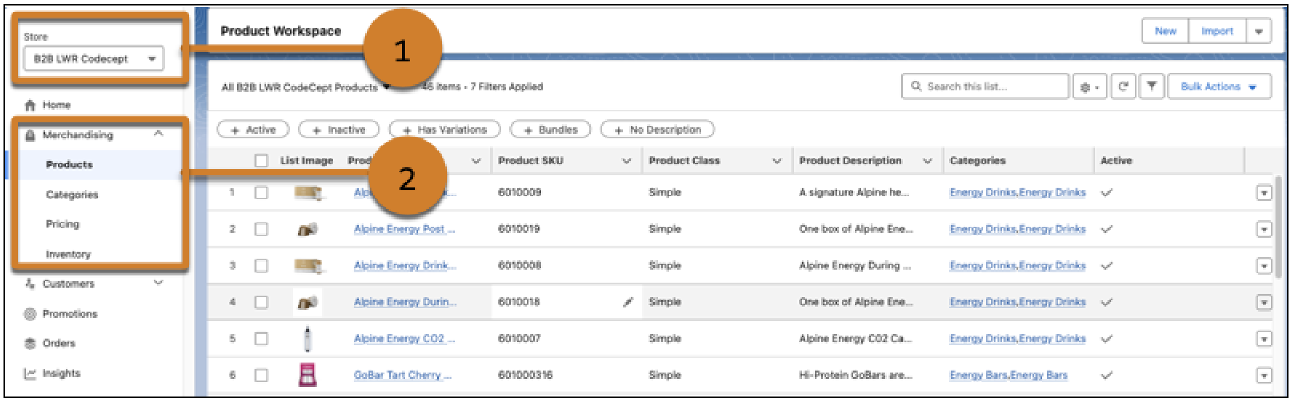
Salesforce Help: Commerce Store Setup Tasks (can be outdated or unavailable during release preview)

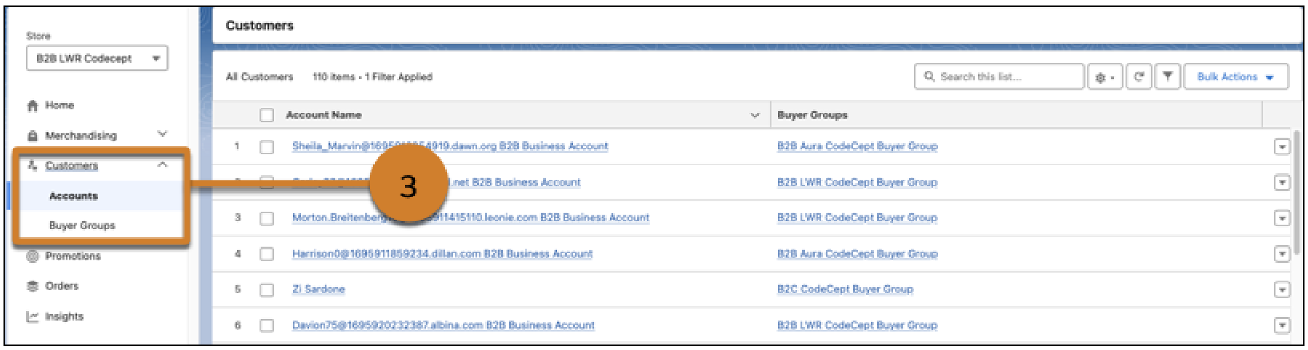
Work More Efficiently with the Updated Commerce UI

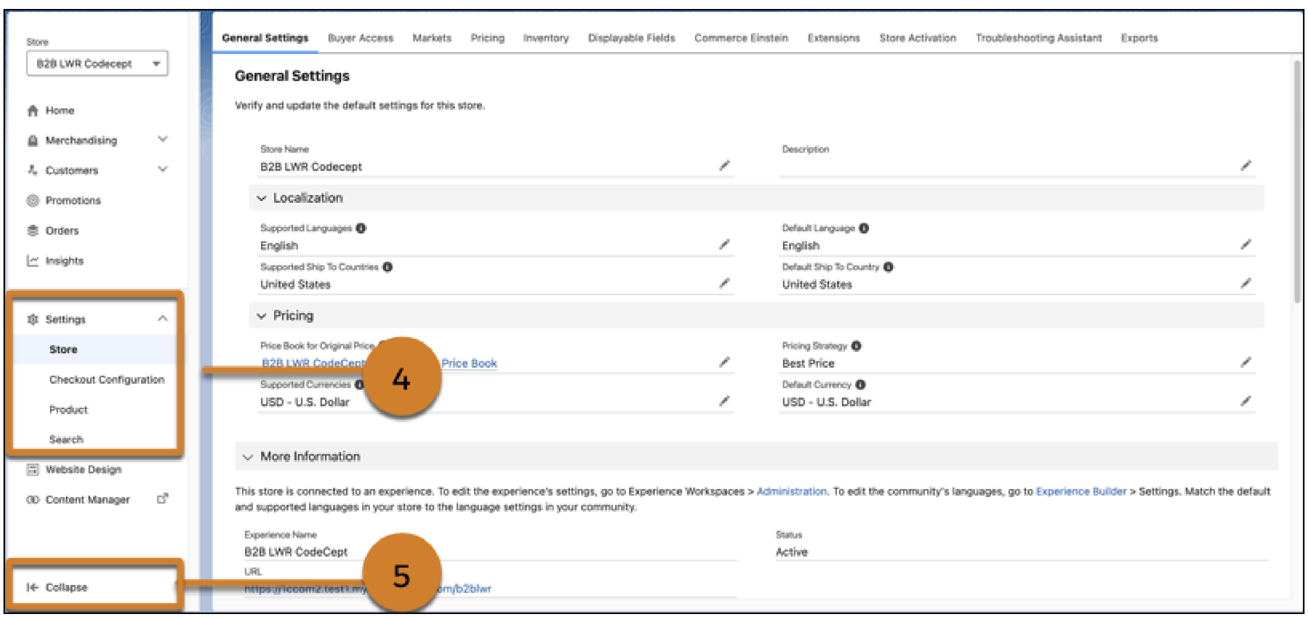
Get where you want to be in the Commerce app with fewer clicks. Easily switch between your key workspaces and settings, that are meaningfully grouped into expandable accordions. Or collapse the navigation menu to view just the icons.

Where: This change applies to B2B and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: On the Store tab (1), expand Merchandising (2) to find the Products, Categories, Pricing, and Inventory workspaces all in one place. Expand Customers (3) to find Accounts and Buyer Groups. Expand Settings (4) to find store, checkout configuration, product, and search settings all in one place. Click **Collapse** (5) to view only the icons.







SEE ALSO:

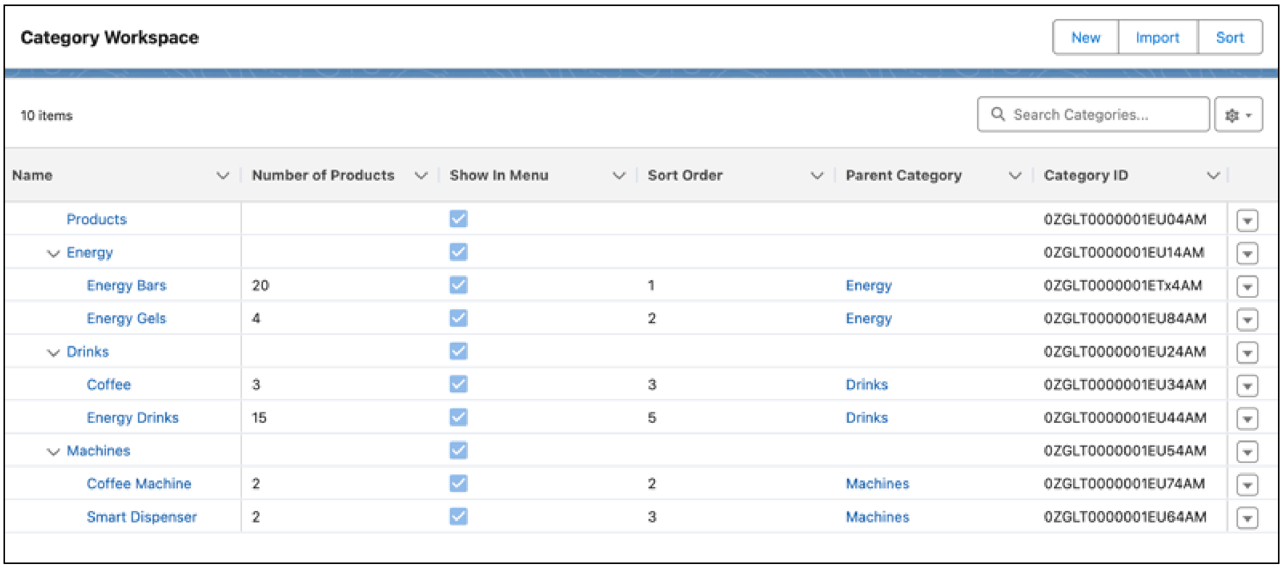
Salesforce Help: Enable the Refreshed Commerce App (can be outdated or unavailable during release preview)

Organize Products with the Enhanced Category Workspace

Streamline the creation and management of your product categories with the revamped Category Workspace. The new interface features a tree-view layout that displays categories, subcategories, and the number of products in each category. Assign multiple products to categories with fewer clicks.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Create and manage categories and subcategories in the Category Workspace. You can also search for, import, edit, or delete categories, manage the products within them, and sort or update the category list view.



Name	Number of Products	Show In Menu	Sort Order	Parent Category	Category ID
Products		☑			0ZGLT0000001EU04AM
Energy		☑			0ZGLT0000001EU14AM
Energy Bars	20	☑	1	Energy	0ZGLT0000001ETx4AM
Energy Gels	4	☑	2	Energy	0ZGLT0000001EU84AM
Drinks		☑			0ZGLT0000001EU24AM
Coffee	3	☑	3	Drinks	0ZGLT0000001EU34AM
Energy Drinks	15	☑	5	Drinks	0ZGLT0000001EU44AM
Machines		☑			0ZGLT0000001EU54AM
Coffee Machine	2	☑	2	Machines	0ZGLT0000001EU74AM
Smart Dispenser	2	☑	3	Machines	0ZGLT0000001EU64AM

SEE ALSO:

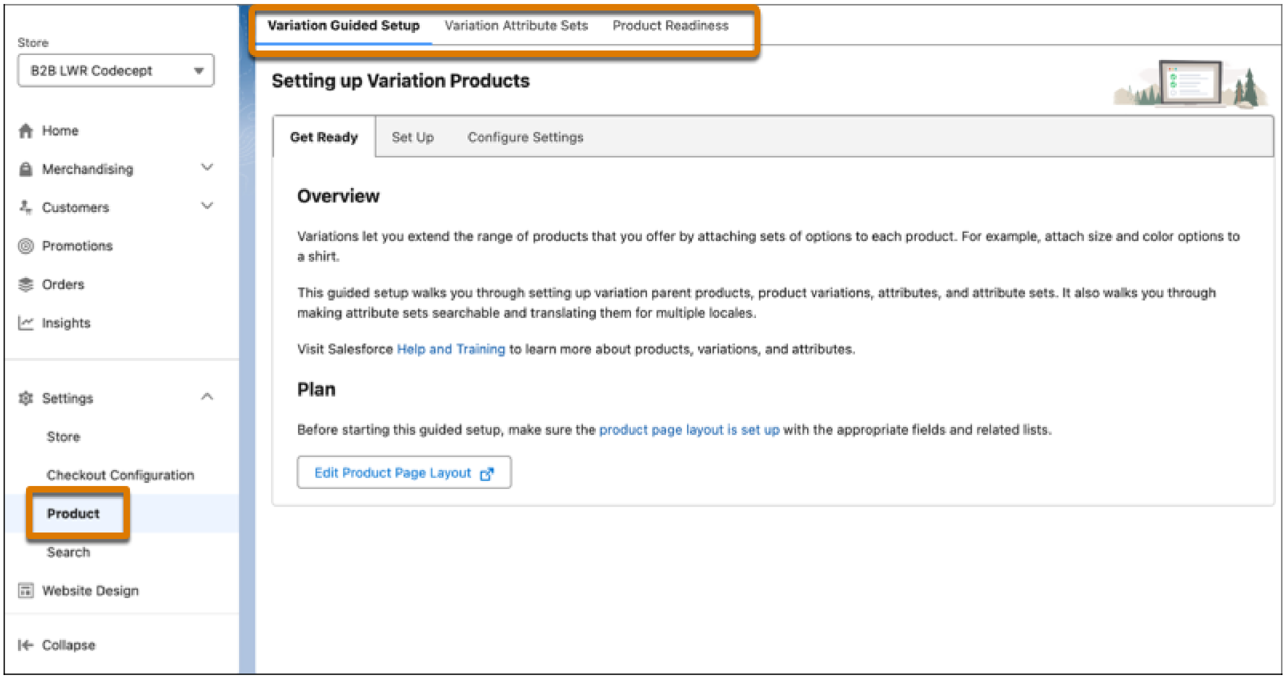
Salesforce Help: Manage Categories in Category Workspace (can be outdated or unavailable during release preview)

Access Product Variation Settings in One Click

Everything you need for managing product variations and readiness is now just a click away. Set up and manage variation products and attributes from a single page in your store's settings.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In your store's Settings, select **Product**.



SEE ALSO:

Salesforce Help: Product Variations and Attributes (can be outdated or unavailable during release preview)

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

Access Lowest Unit Price from Your Store Settings

European Union (EU) customers can now enable Lowest Unit Price directly from store settings. Enable this feature to display the lowest unit price for products and comply with EU pricing regulations.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: On the Store tab, under Settings, click **Store**. On the Pricing tab, select **Lowest Unit Price (EU Customers Only)**.

SEE ALSO:

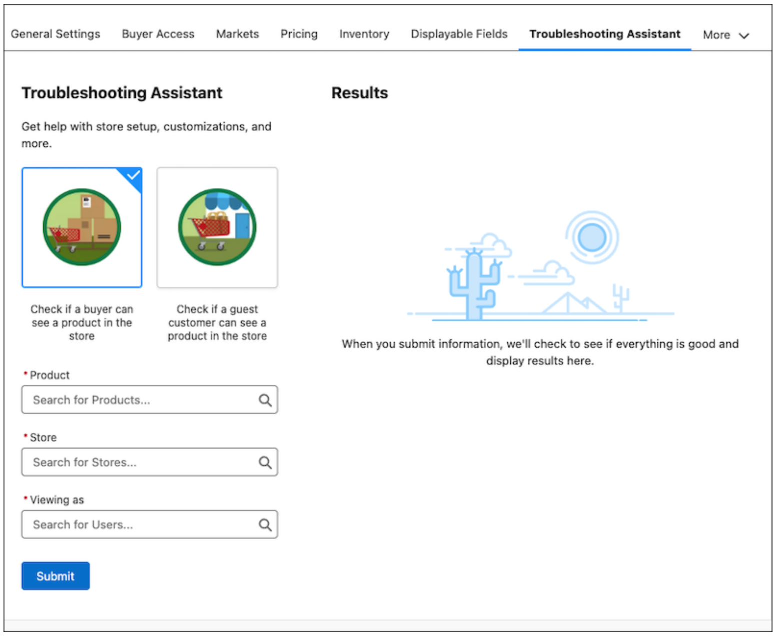
Salesforce Help: Pricing for Commerce Stores (can be outdated or unavailable during release preview)

Troubleshoot Product Visibility Issues Right from the Commerce App

With the Troubleshooting Assistant now available within the Commerce app, you can easily check if a product is visible in your store. This convenient tool helps you make sure that your products are showcased to your customers effectively.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In the navigation sidebar, select a store from the Store dropdown, and then select **Settings** > **Store** > **Troubleshooting Assistant**.



SEE ALSO:

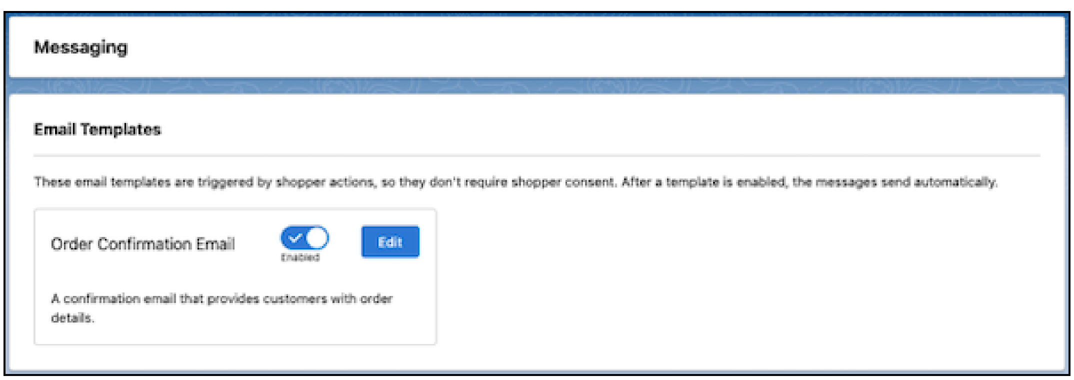
Salesforce Help: Get Help with Product Visibility Issues with the Troubleshooting Assistant (can be outdated or unavailable during release preview)

Automate Order Confirmation Emails

Streamline customer communications with automated notifications. To enable and manage automated order confirmation emails, use the new order confirmation email template in the Messaging Workspace.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In your store settings, select **Messaging**. In the Order Confirmation Email template, click **Edit** to customize it, then enable the template to automatically start the sending of messages.



SEE ALSO:

Salesforce Help: Automate Customer Communications (can be outdated or unavailable during release preview)

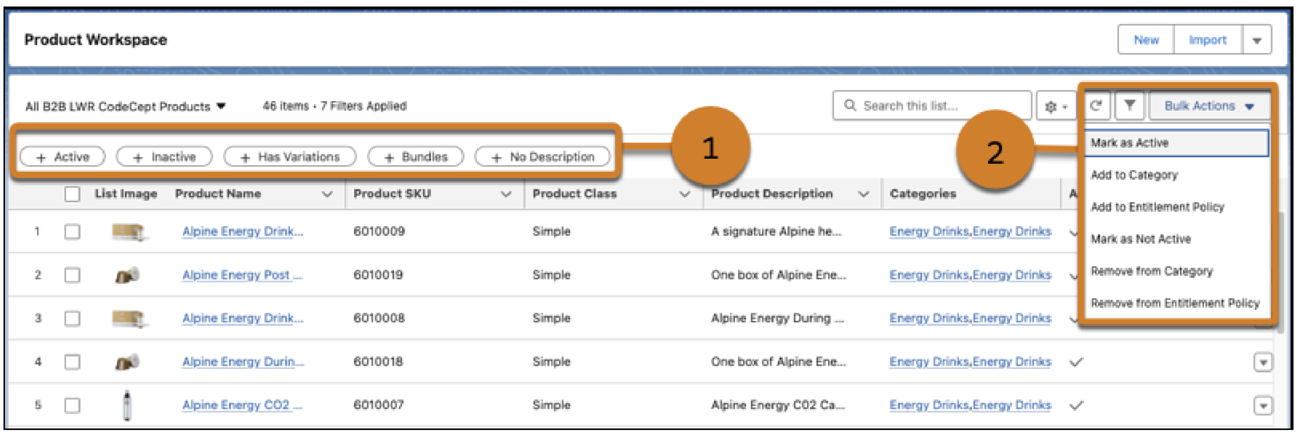
Salesforce Help: Customize an Email Template for Customer Communications (can be outdated or unavailable during release preview)

Experience Refreshed Workspaces with Quick Filters and Bulk Actions

Say goodbye to manually creating commonly-used filters for your Product Workspace. Use bulk actions to perform actions in bulk across all the workspaces. Search across all workspaces, complete tasks faster, streamline workflows, improve organization, and access a modern, enhanced, and robust UI.

Where: This change applies to B2B Commerce and D2C Commerce in Shell, Pro Suite, Enterprise, Unlimited, and Developer editions.

How: In a Product Workspace, filter products using the quick filters (1). Use the Bulk Actions (2) feature in the Product workspace to mark multiple products as active or inactive, or add multiple products to Category and Entitlement Policy.



SEE ALSO:

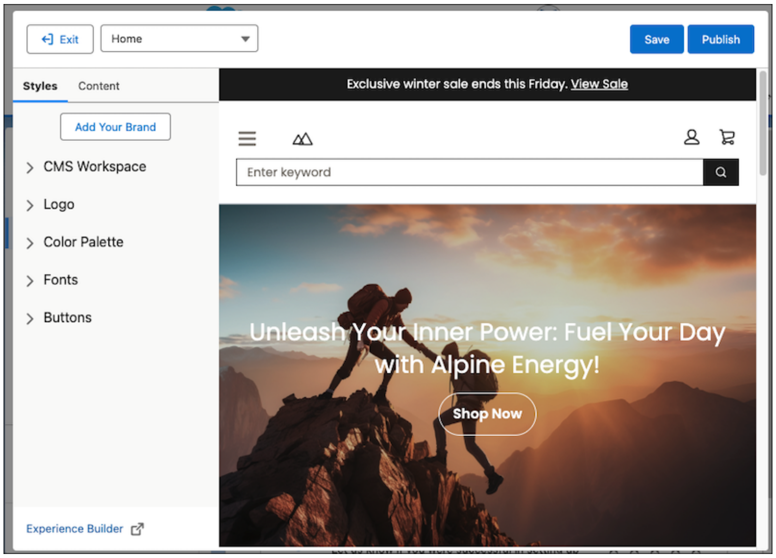
Salesforce Help: Manage Products in the Product Workspace (can be outdated or unavailable during release preview)

Add Design Elements to Your Store Without Leaving the Commerce App

Upload your logo, brand your store, and set fonts, colors, and button styles from the new Website Design Workspace. When you need to tackle more advanced design tasks, like configuring store components, changing page layouts, or setting up store navigation, you can switch to Experience Builder with a click of a button in the Website Design Workspace.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In the navigation sidebar, select a store from the Store dropdown, and then click **Website Design**.



SEE ALSO:

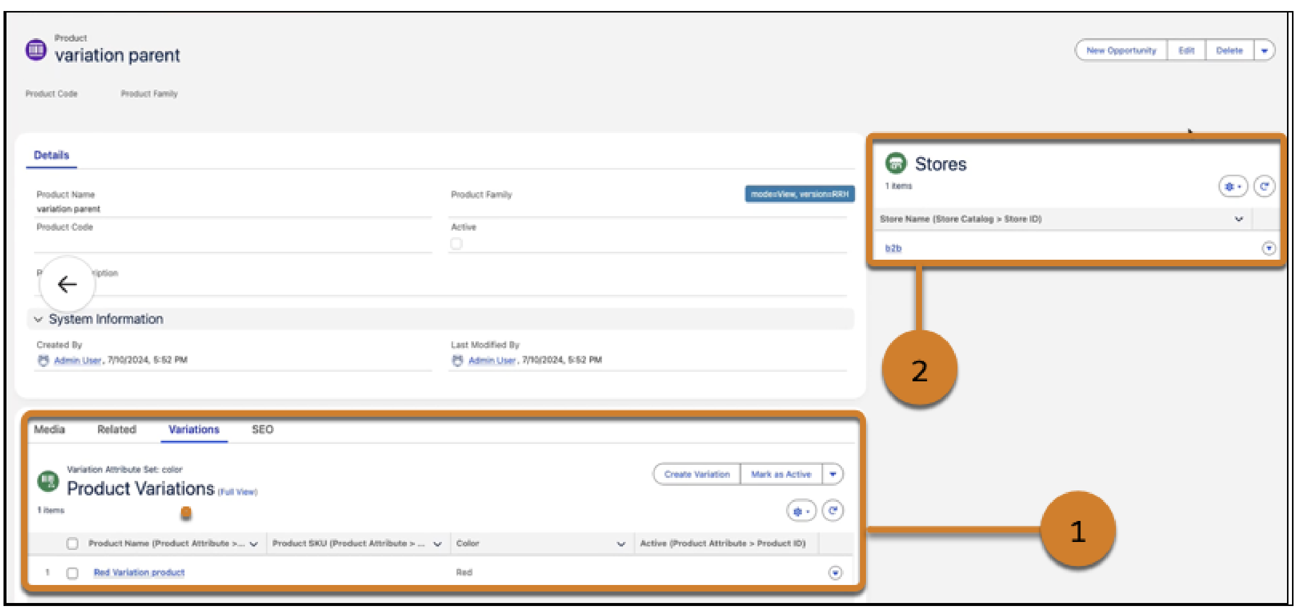
Salesforce Help: Website Design for Commerce Stores (can be outdated or unavailable during release preview)

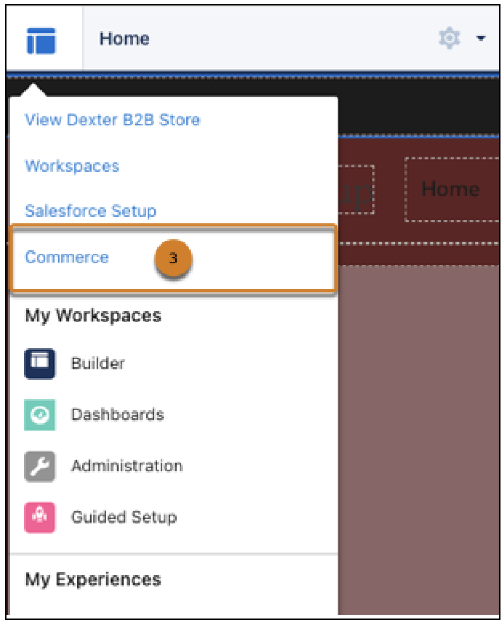
Smoothly Transition Between Your Store and a Record Page

Whether you're in Experience Builder or on a record page for a price book, buyer group, store price book, or a catalog, you can now get back to your refreshed Commerce store in one click.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the product page, view the details of the product variations (1), and then return to the store with a click (2). From the Experience Builder, return to Commerce in one click (3).





SEE ALSO:

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

Start Selling Online with Salesforce Starter and Pro Suite

Sell directly to individual shoppers and provide a personalized online shopping experience with Commerce Store for Starter and Pro Suite. Create a direct-to-consumer (D2C) online shopping experience that represents your brand, engages shoppers, and drives sales.

Where: This change applies to D2C Commerce in Starter and Pro Suite editions and in the U.S. only.

Who: To access Commerce Storefront for Starter or Pro Suite editions, you need the Commerce Admin and Commerce Starter App permissions.

How: Select the Commerce app in Starter and Pro Suite.

Data Cloud for Commerce

Get analytics dashboards, insights, and recommended actions on the new Insights Workspace. And set up Commerce Intelligence Analytics with just a few clicks.

IN THIS SECTION:

See Analytics Dashboards and Set Goal Targets in the Insights Workspace

The new Insights Workspace combines analytics, goals, and recommended actions in a single location. Use these insights to set goal targets and make important business decisions.

Set Up Intelligence Analytics with a Few Clicks

Use the updated Commerce Setup Assistant to configure Data Cloud for Commerce and activate Intelligence Analytics. This update simplifies the setup process, saving you time and effort while enhancing productivity. Access the Intelligence Analytics dashboards for products, shoppers, and inventory, enabling you to make data-driven decisions that boost revenue and efficiency.

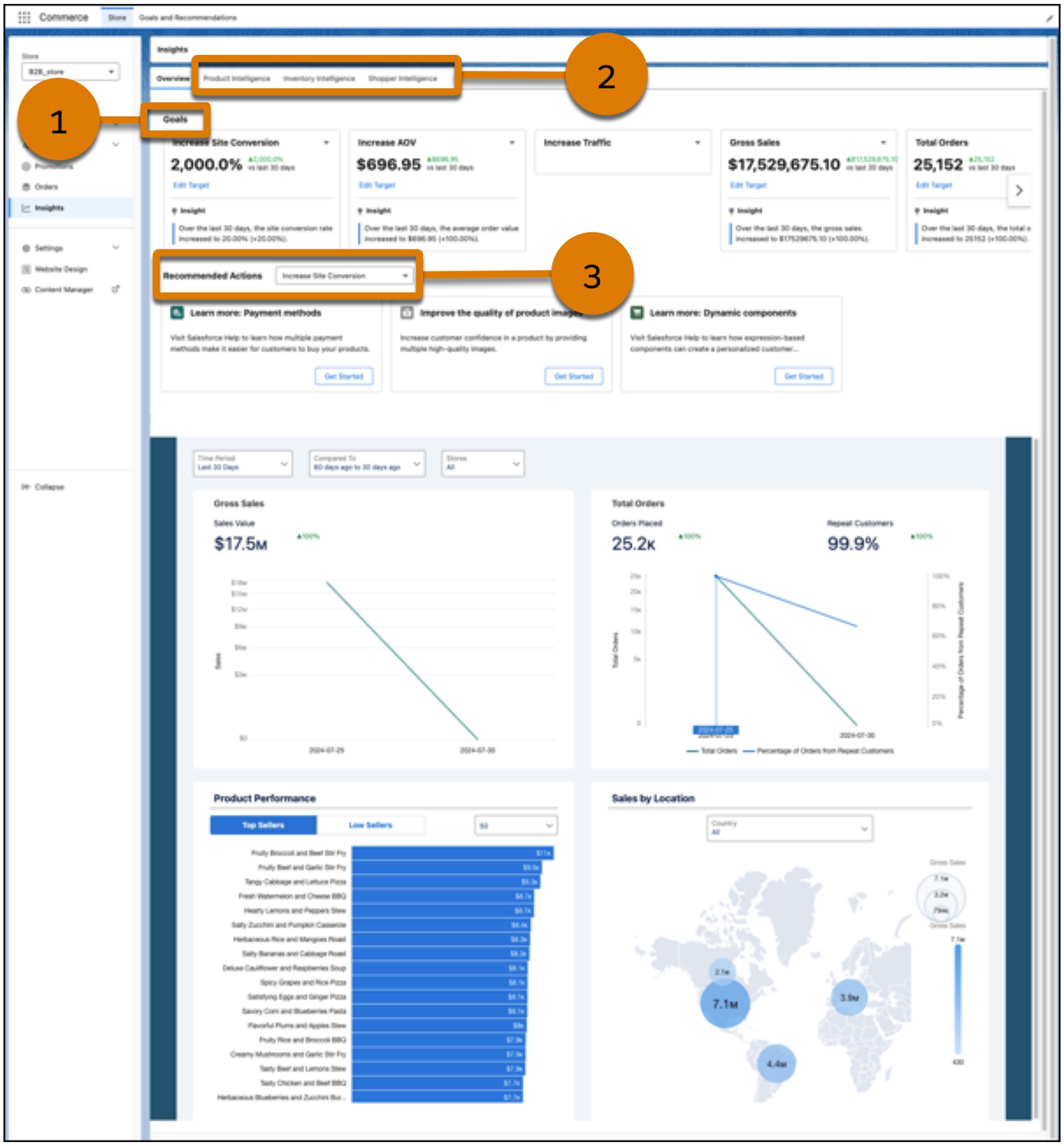
See Analytics Dashboards and Set Goal Targets in the Insights Workspace

The new Insights Workspace combines analytics, goals, and recommended actions in a single location. Use these insights to set goal targets and make important business decisions.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

Who: To see intelligence analytics dashboards, goals, and recommended actions in the Insights Workspace, you must have a Commerce Growth or Advanced license. Other licenses see the standard business analytics dashboards.

How: In the navigation sidebar, select a store, then click **Insights** to view goals (1), analytics dashboards (2), and recommended actions (3).



SEE ALSO:

Salesforce Help: Goals and Recommendations (can be outdated or unavailable during release preview)

Salesforce Help: Data Cloud for Commerce (can be outdated or unavailable during release preview)

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

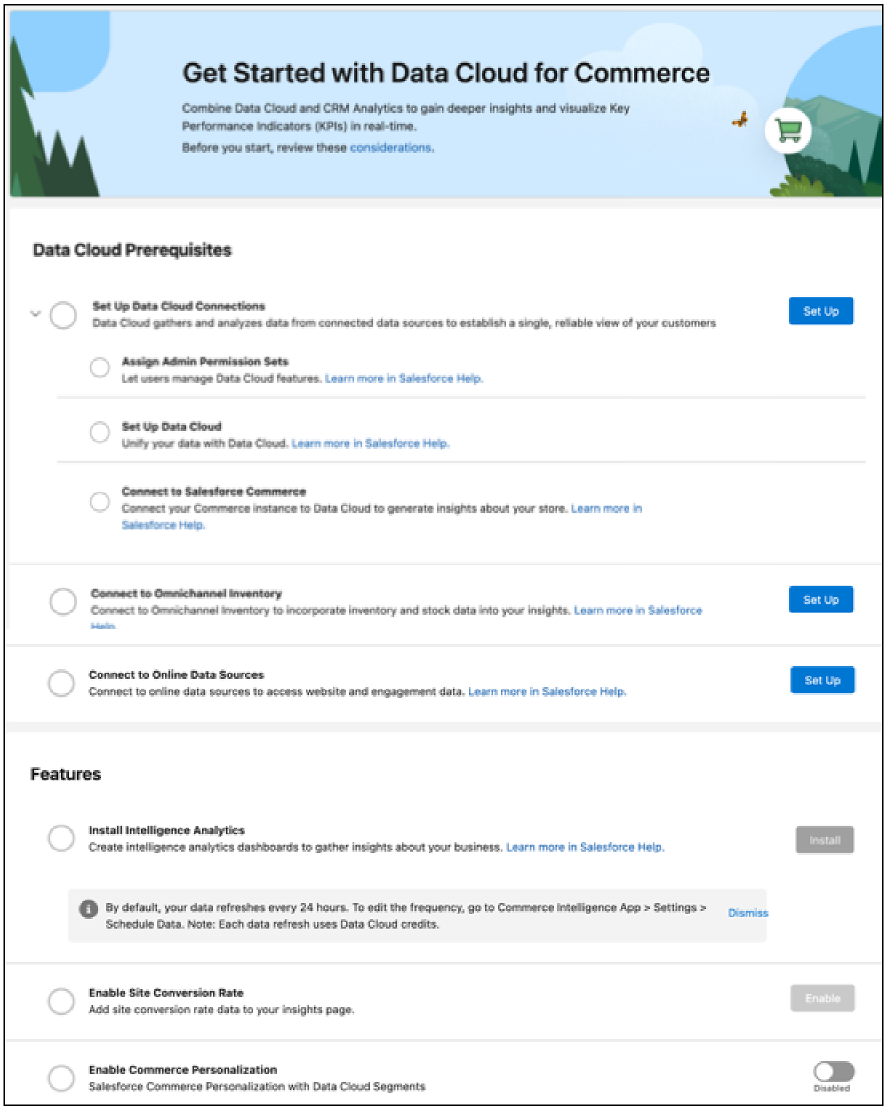
Set Up Intelligence Analytics with a Few Clicks

Use the updated Commerce Setup Assistant to configure Data Cloud for Commerce and activate Intelligence Analytics. This update simplifies the setup process, saving you time and effort while enhancing productivity. Access the Intelligence Analytics dashboards for products, shoppers, and inventory, enabling you to make data-driven decisions that boost revenue and efficiency.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

Who: To access this feature, you need a Commerce Intelligence basic or advanced license.

How: In Setup, in the Quick Find box, find and select **Commerce Setup Assistant**. Click **Get Started** for Set Up Data Cloud for Commerce. Install Intelligence Analytics.



SEE ALSO:

Salesforce Help: Set Up Data Cloud for Commerce (can be outdated or unavailable during release preview)

Commerce Cart and Checkout

Customers can now view their cart on any page with the mini cart display. Enable continuous scrolling to let customers review their carts without clicking through multiple pages. Address fields now autocomplete and suggest addresses for shoppers. Turn off shipping if you're selling only digital goods, and offer customers additional shipping options with weight-based rates. Switch between managed and custom checkout configurations at any time. Use business accounts for guest checkout in B2B stores.

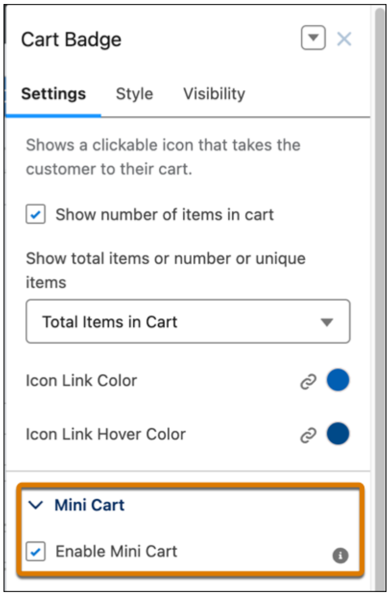
IN THIS SECTION:

Let Customers Complete Purchases on Any Page

Customers can now complete purchases and view their cart on any page with a mini cart display. When a customer adds an item to their cart or clicks the cart badge, a mini cart slides open on the right. From the mini cart, customers can review their items and go straight to the checkout page. Mini cart is enabled by default for new B2B and D2C stores.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: For an existing store, in Experience Builder, remove the existing Cart Badge component from the Commerce Header and replace it with the new component. Then customize the mini cart settings. For new stores, open the Cart Badge component and customize the mini cart settings. The My Account Page uses a different header than the site-wide, Commerce Header, so mini cart settings configured in the Commerce Header don't reflect on the My Account page.



SEE ALSO:

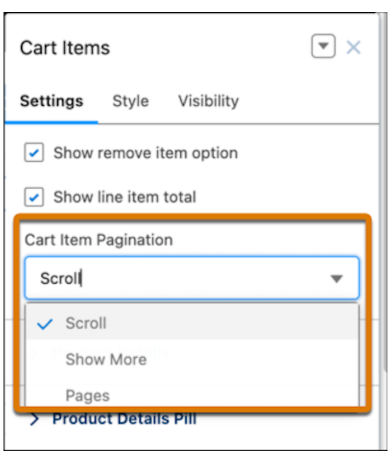
Salesforce Help: Design a Cart Page in a Commerce Store (can be outdated or unavailable during release preview)

Streamline the Shopping Experience with Continuous Scrolling

Let customers shop and review their carts conveniently with an infinite scroll option. In addition to navigating carts with the Show More button and pagination, you can now display products on one page with continuous scroll. For D2C stores, scrolling is the default experience on cart and checkout pages and in the mini cart display. For B2B stores, scrolling is the default experience on the checkout page. The cart page uses pagination.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In Experience Builder, in the Cart Items component, select a setting for Cart Item Pagination.



SEE ALSO:

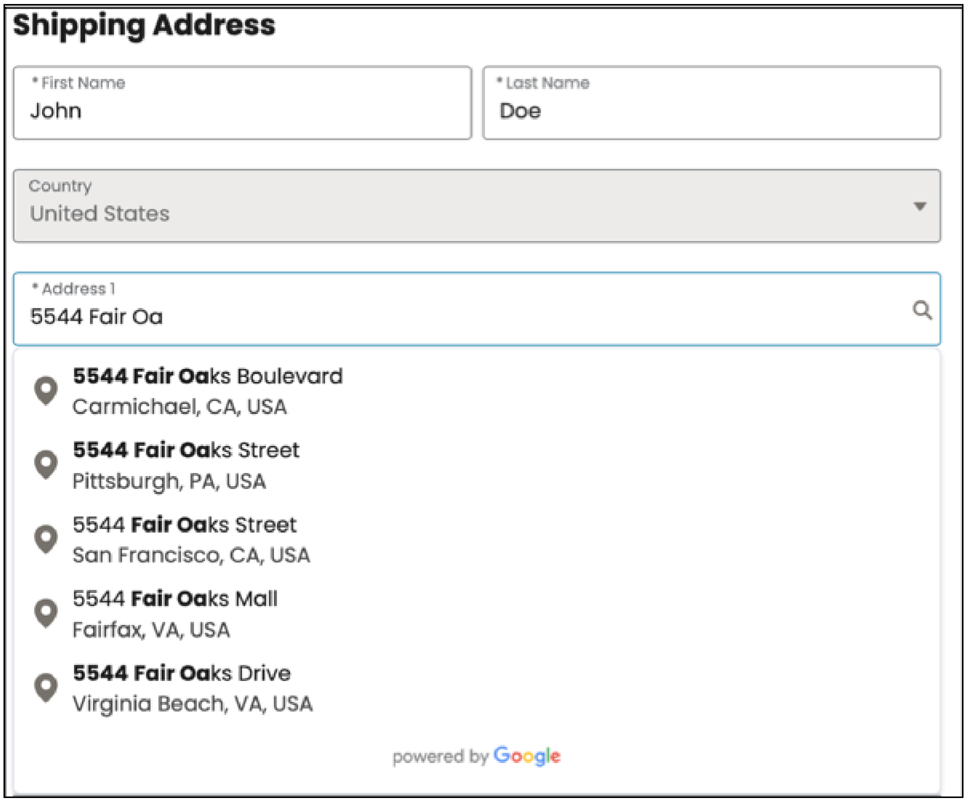
Salesforce Help: Design the Cart Page in a Commece Store (can be outdated or unavailable during release preview)

Address Fields Now Autocomplete for D2C Stores

When customers enter their information, address fields autocomplete and also suggest addresses. In addition, checkout forms now include a second address field to use as needed. Address autocomplete doesn't populate apartment and suite numbers.

Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Address autocomplete is available for D2C stores using Managed Checkout.



SEE ALSO:

Salesforce Help: Address Autocomplete Considerations for Managed Checkout in D2C Stores (can be outdated or unavailable during release preview)

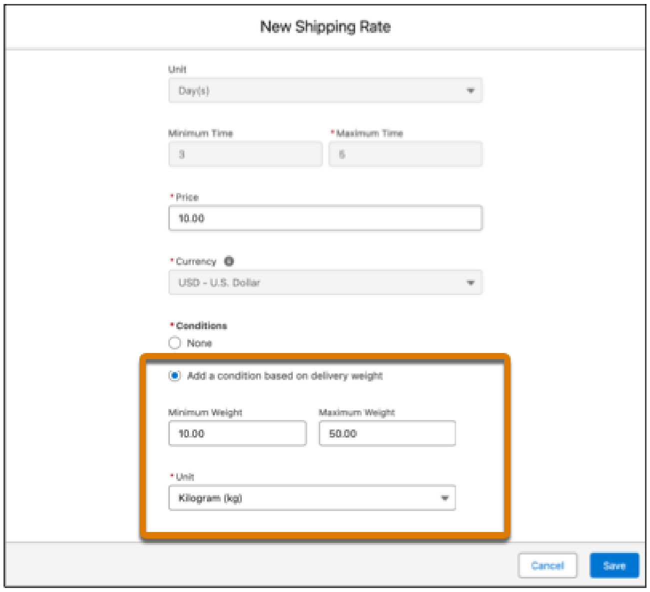
Salesforce Help: Configure Managed Checkout for a D2C Store (can be outdated or unavailable during release preview)

Offer Weight-Based Shipping Prices

Implement shipping prices based on weight to manage shipping costs more efficiently, and provide your customers transparent pricing.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In your store's Settings, select **Checkout Configuration**. On the Shipping tab, click **Manage**, and define a rate with a condition based on delivery weight.



SEE ALSO:

Salesforce Help: Set Up Salesforce Native Shipping for a Commerce Store (can be outdated or unavailable during release preview)

Turn Off Shipping for Non-Physical Products

Simplify the checkout process by turning off native shipping for stores that don't ship physical products. Use this feature for stores offering digital goods, service subscriptions, or in-store pickups. In your store's settings, go to Checkout Configuration and turn off shipping on the Shipping tab. If your store uses the Checkout Layout: Accordion component on the checkout page, change the text for the proceed button from delivery information to "Proceed to Payment."

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Set Up Salesforce Native Shipping for a Commerce Store (can be outdated or unavailable during release preview)

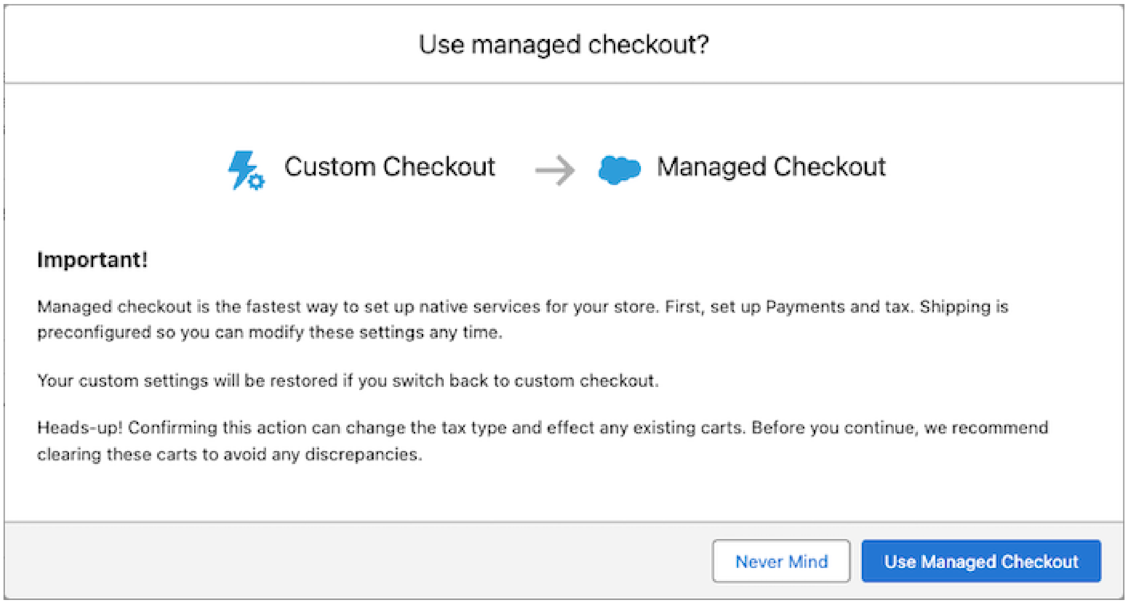
Salesforce Help: Design the Checkout Page in a Commerce Store (can be outdated or unavailable during release preview)

Switch Between Managed and Custom Checkout Without Losing Settings

Switch between managed and custom checkout as needed to deliver the best checkout experience for your customers. All your custom settings are saved from the previous checkout mode and restored when the store is published. You can make changes without disrupting your live store, keeping the shopping experience smooth for your customers. You can have only one checkout experience active per store at a time.

Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: From your store page, select **Checkout Configuration** and switch to your preferred checkout option. The Cart Calculate API must be enabled for this feature to work.



SEE ALSO:

B2B Commerce and D2C Commerce Developer Guide: Enable and Disable the Cart Calculate API for a Webstore (can be outdated or unavailable during release preview)

Salesforce Help: Configure Checkout for a Commerce Store (can be outdated or unavailable during release preview)

Use Business Accounts for B2B Store Guest Checkout

Customize the account creation process for B2B store guest checkout by choosing between creating person accounts or business accounts. Previously, only person accounts were supported.

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

How: If your store allows self-registration, you can specify which account type to create upon registration. If your store doesn't allow self-registration, you can specify which account type to create by setting the guest buyer profile's account record type defaults.

SEE ALSO:

Salesforce Help: Account Creation for Guest Checkout in B2B Stores (can be outdated or unavailable during release preview)

Salesforce Help: Allow Self-Registration and Guest Access to the Pay Now Site (can be outdated or unavailable during release preview)

Commerce Promotions

Get ready to boost your sales with shipping rate promotions in your store. Add up to 25 promotions per discount to incentivize customers to make a purchase. Quickly search for promotions, review important details, and manage promotions using row-level actions.

IN THIS SECTION:

Offer Customers Shipping Rate Promotions

Add up to 25 shipping rate discounts per promotion in your store to encourage customers to complete their purchase. For example, discount a fixed amount off the shipping or delivery cost, or offer a fixed price or percentage discount. Quantity limits and promotion rules don't apply to shipping rate promotions. Shipping rate promotions are applied automatically in B2B and D2C Commerce stores and you can use manually applied shipping rate promotions during checkout in D2C Commerce stores.

Manage Promotions with a Refreshed Promotion Workspace

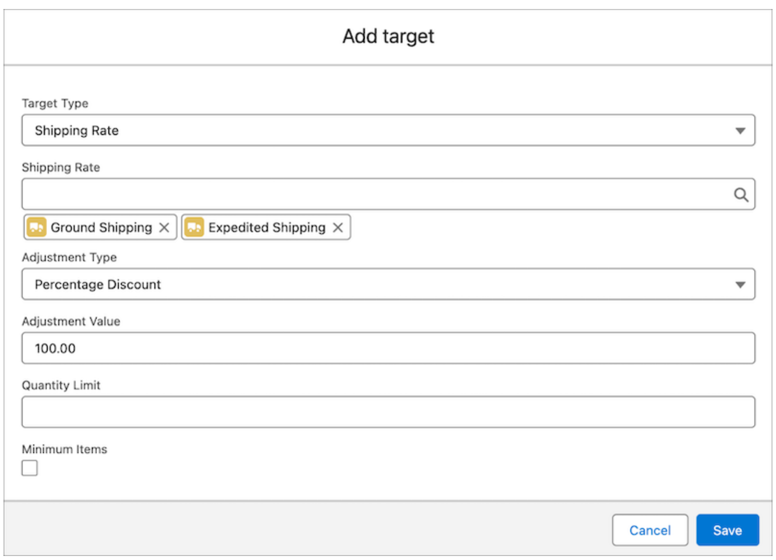
Easily search for promotions and review the most important promotion details at a glance. Clone all the promotion details or delete promotions using row-level actions. Add promotion rules directly on discount and qualifier record pages.

Offer Customers Shipping Rate Promotions

Add up to 25 shipping rate discounts per promotion in your store to encourage customers to complete their purchase. For example, discount a fixed amount off the shipping or delivery cost, or offer a fixed price or percentage discount. Quantity limits and promotion rules don't apply to shipping rate promotions. Shipping rate promotions are applied automatically in B2B and D2C Commerce stores and you can use manually applied shipping rate promotions during checkout in D2C Commerce stores.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: When drafting a discount, for Target Type, select **Shipping Rate**. For Shipping Rate, select from the shipping rates that you previously set up.



SEE ALSO:

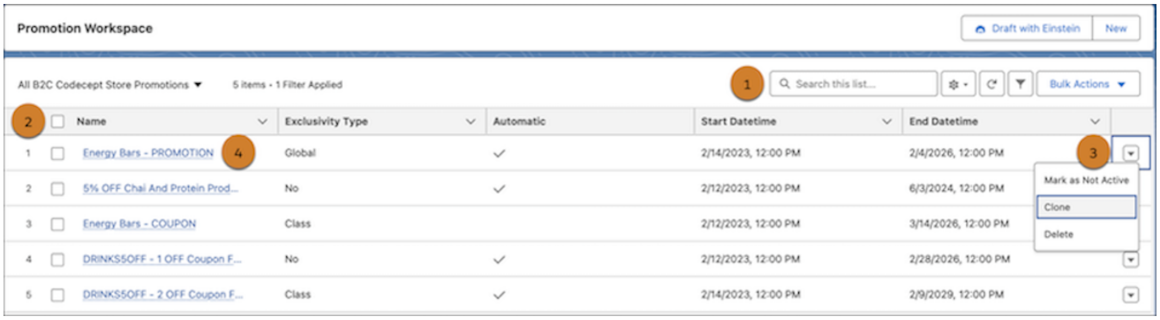
Salesforce Help: Define a Promotion Discount (can be outdated or unavailable during release preview)

Manage Promotions with a Refreshed Promotion Workspace

Easily search for promotions and review the most important promotion details at a glance. Clone all the promotion details or delete promotions using row-level actions. Add promotion rules directly on discount and qualifier record pages.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Select a store, and click **Promotions**. In the Promotion Workspace, search for promotions (1), view refreshed columns (2), use row-level actions (3), and access record pages (4).



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)

Commerce Components

Store images now load faster, which means quicker page loads, smoother layout shifts, and improved overall site performance. Guest user authentication is now simpler with the option to hide the Last Name field on the Order Details page. Customize your reorder modal with enhanced design options, and track your order status every step of the way with the new order status tracker.

IN THIS SECTION:

Display Hi-Res Images and Alternative Views with the Enhanced Product Image Gallery

Sharply showcase your product views and improve engagement with the enhanced Product Image Gallery LWR component. Shoppers can zoom in on a product image by hovering, clicking, or tapping to inspect details and textures. Images maintain clarity at maximum zoom levels whether you're shopping on a mobile device or a web store.

Faster Image Loads for Enhanced Shopping Experiences

Elevate the shopping experience for your customers across devices with more performant image loading. The image display components now include attributes to configure the aspect ratio and image size for different devices. Images are optimized for each device, resulting in quicker page loads, fewer layout shifts, and improved overall site performance.

Keep Customers Informed About Orders with Real-Time Updates

Elevate customer satisfaction with the new order status tracker on the Order Details page. Customers can track every stage of their order, from when it was created through delivery.

Control Last Name Visibility in the Order Lookup Page

Simplify guest user authentication by hiding the Last Name field on the Order Lookup page. For layout components added after the Winter '25 release, Hide Last Name is enabled by default, but you can choose to show the Last Name field at any time.

Reapply Your Customizations to the Updated Reorder Modal

We enhanced the design and customization options of the reorder modal. Because this update also resets previous custom styles applied to your reorder modal, you must update your CSS customizations to match the new layout.

Display Hi-Res Images and Alternative Views with the Enhanced Product Image Gallery

Sharply showcase your product views and improve engagement with the enhanced Product Image Gallery LWR component. Shoppers can zoom in on a product image by hovering, clicking, or tapping to inspect details and textures. Images maintain clarity at maximum zoom levels whether you're shopping on a mobile device or a web store.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In the navigation sidebar, select a store from the Store dropdown. Click **Website Design**, and select a product page.

SEE ALSO:

Salesforce Help: LWR Store Components (can be outdated or unavailable during release preview)

Faster Image Loads for Enhanced Shopping Experiences

Elevate the shopping experience for your customers across devices with more performant image loading. The image display components now include attributes to configure the aspect ratio and image size for different devices. Images are optimized for each device, resulting in quicker page loads, fewer layout shifts, and improved overall site performance.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Product Image Types (can be outdated or unavailable during release preview)

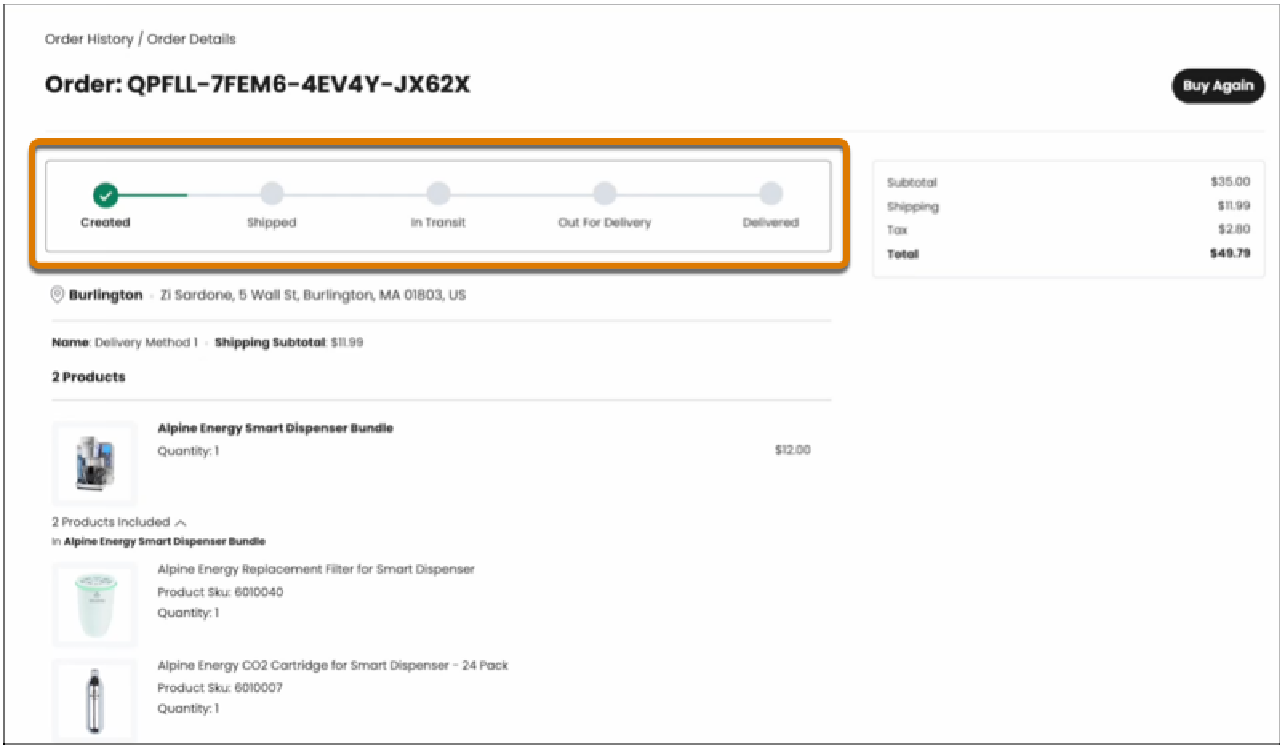
Salesforce Help: Image Optimization Best Practices (can be outdated or unavailable during release preview)

Keep Customers Informed About Orders with Real-Time Updates

Elevate customer satisfaction with the new order status tracker on the Order Details page. Customers can track every stage of their order, from when it was created through delivery.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Customers can see the order status tracker on the Order Details page.



SEE ALSO:

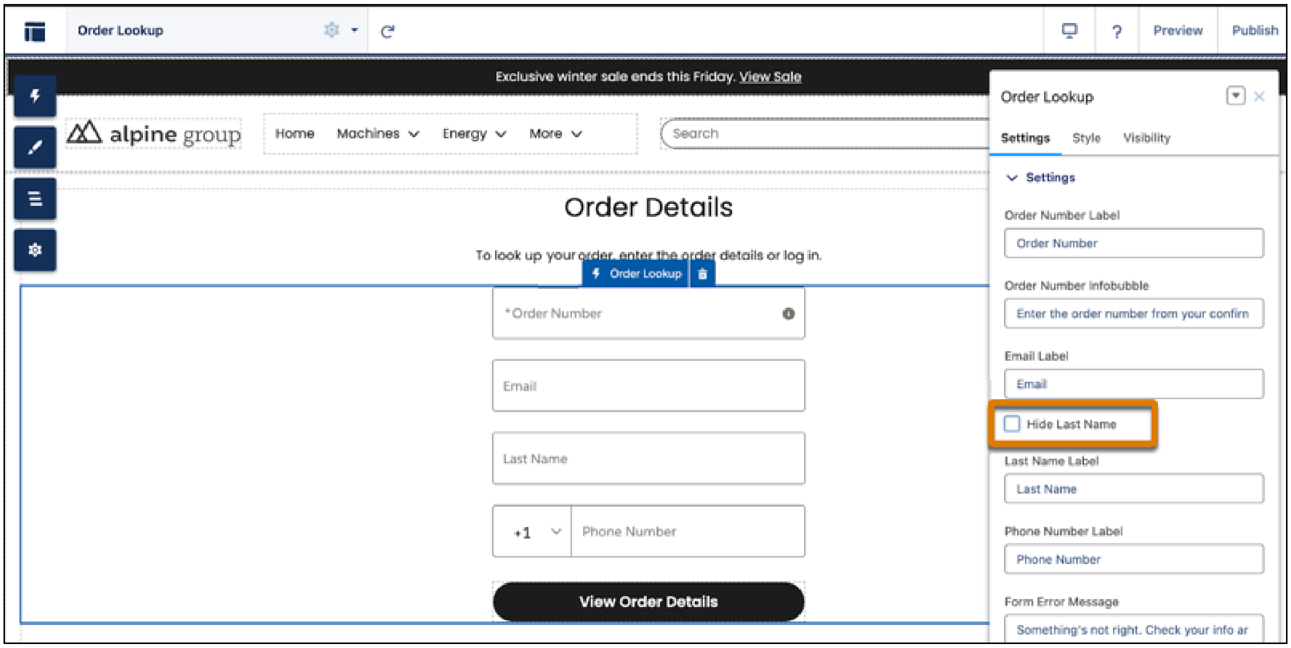
Salesforce Help: LWR Store Components (can be outdated or unavailable during release preview)

Control Last Name Visibility in the Order Lookup Page

Simplify guest user authentication by hiding the Last Name field on the Order Lookup page. For layout components added after the Winter '25 release, Hide Last Name is enabled by default, but you can choose to show the Last Name field at any time.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In Experience Builder, on the Order Lookup page, select **Hide Last Name** in the Order Lookup component.



SEE ALSO:

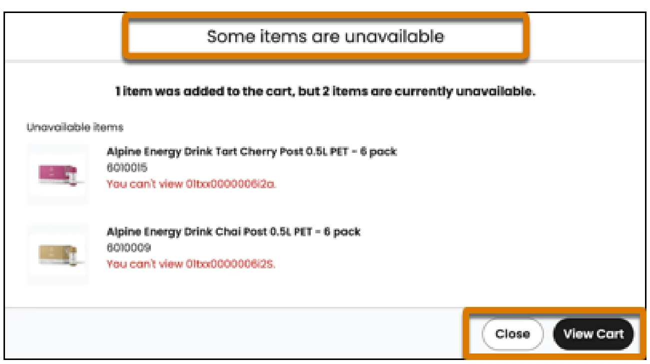
Salesforce Help: Manage Your Site's Pages and Their Properties in Experience Builder (can be outdated or unavailable during release preview)

Reapply Your Customizations to the Updated Reorder Modal

We enhanced the design and customization options of the reorder modal. Because this update also resets previous custom styles applied to your reorder modal, you must update your CSS customizations to match the new layout.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To reapply your custom styles to the modal title, use the `lightning-modal-header` selector. For the call-to-action buttons, use the `lightning-modal-footer` selector.



For example, if your current CSS is:

```
<style>
    commerce_my_account-reorder-modal-contents h1 b { color: red; }
    commerce_my_account-reorder-modal-contents button.continue-shopping { border-radius:
```

```
10px; }
</style>
```

To maintain that appearance in the new modal layout:

```
<style>
    lightning-modal-header h1 { color: red; }
    lightning-modal-footer button.primary-action-button { border-radius: 10px; }
    lightning-modal-footer button.close-button { border-radius: 10px; }
</style>
```

SEE ALSO:

Salesforce Help: Manage Your Site's Pages and Their Properties in Experience Builder (can be outdated or unavailable during release preview)

Commerce Search

The redesigned Search Index page shows product errors and index failures with the option to download a CSV file to resolve product errors. Receive instant notifications on whether the index update completed or failed. Enhance store performance with the renamed and relocated Displayable Fields toggle.

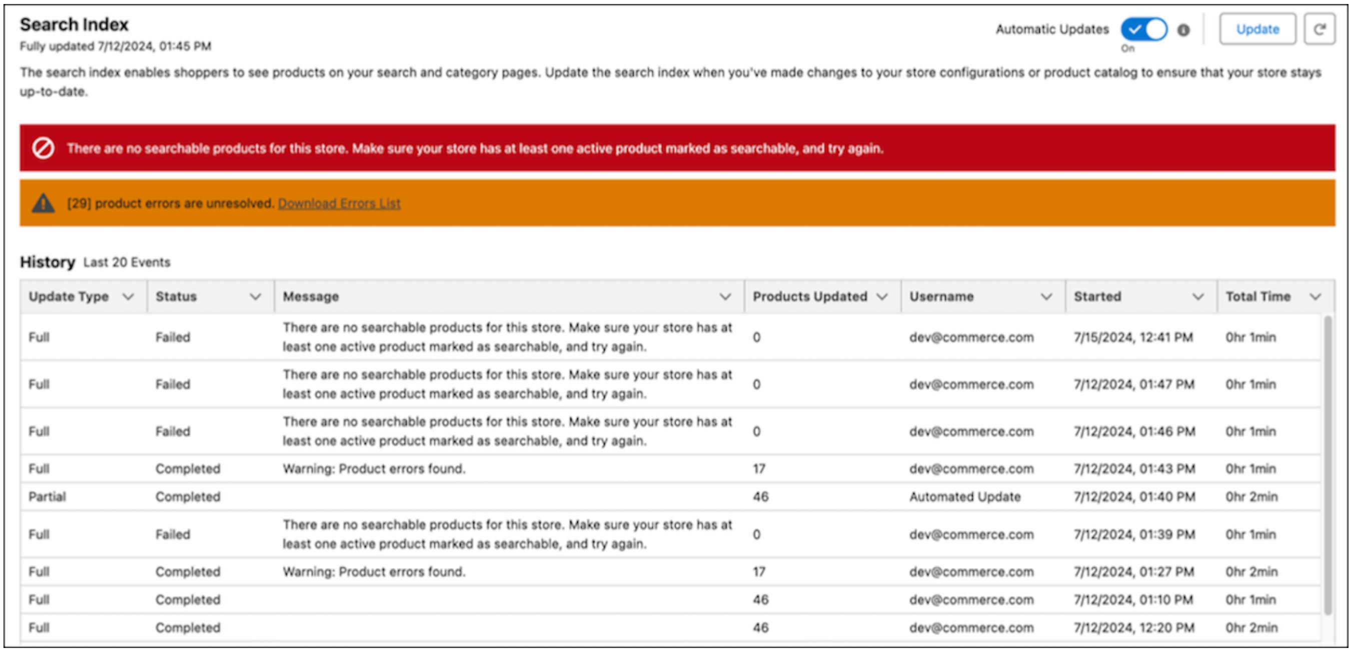
IN THIS SECTION:

Resolve Errors on the Redesigned Search Index Page

Review product errors and index failures on the redesigned Search Index page. Check whether products indexed successfully, or if there are product errors, download a CSV file to review and resolve the errors. After you update the search index, you're notified whether the search index completed or failed.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: Select a store, and click **Settings**. Select **Search**, and then select **Search Index**.



SEE ALSO:

Salesforce Help: Commerce Search Index (can be outdated or unavailable during release preview)

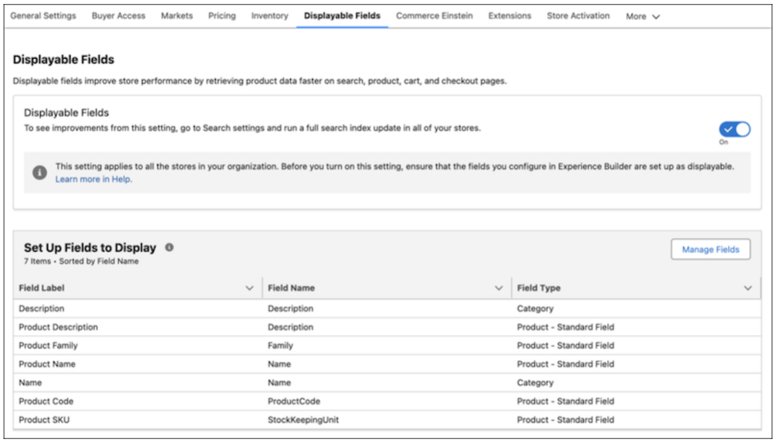
Displayable Product Fields Toggle Has a New Name and Location (Beta)

The Displayable Product Fields toggle is now called Displayable Fields and is located in Store Settings on the Displayable Fields tab. Using displayable fields can improve store performance. The name change doesn't affect the feature's functionality, and the toggle continues to be an org-wide setting that affects all the stores in your Salesforce org.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

Note: Displayable Fields 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.

How: Select a store, and click **Settings**. Select **Store**, and then select **Displayable Fields**.



SEE ALSO:

Salesforce Help: Configure Displayable Fields (Beta) (can be outdated or unavailable during release preview)

Additional Commerce Features

Say goodbye to manual tax calculations and let third-party tax providers handle the heavy lifting for global payments. Easily process tax additions and refunds with the new tax flows, and customize those flows to meet your business needs. Track your goals over time and see how completing recommended actions impacts your progress in the Goals and Recommendation Workspace. Enable the Salesforce Content Delivery Network for your organization's stores without creating a custom domain. Improve load times, performance, and security with the option to compress content and accelerate HTTP traffic.

IN THIS SECTION:

Bundle Products to Increase Average Order Value

Group items together to simplify purchasing and create cross-selling and up-selling opportunities. Bundle complementary items together to entice customers with a single product offering at a lower price. Or, group slow-selling items with more popular items to help manage inventory. You can't bundle subscriptions or use them with order servicing and fulfillment.

Set Targets to Track the Progress of Your Goals

Track the progress of your goals over time, and see how completing recommended actions impacts your progress. Set your targets in the Goals and Recommendations Workspace.

Use Salesforce Tax to Automate Tax Processes for Custom Checkout

Say goodbye to manual tax calculations and let third-party tax providers handle the heavy lifting. Streamline tax processes by calculating, collecting, and reporting tax on global payments for custom checkout by connecting a third-party tax provider to your store. Previously, automatic tax calculations were available only for managed checkout.

Simplify Tax Transactions with Flows

Promptly and accurately process tax additions and refunds using the new tax flows. The Create Tax Transaction flow records a tax transaction after an order summary is created. When an item is returned or canceled, the Record Tax Reversals flow refunds the tax amount in the external system, such as Stripe. You can also customize the flows to meet your business needs.

Use Enhanced Domains to Serve Your Salesforce CDN for LWR Commerce Stores

Enable the Salesforce Content Delivery Network (CDN) for your LWR Commerce stores without first creating a custom domain. Now you can use the system-managed `*.my.site.com` Experience Cloud URL, which uses the CDN partner Cloudflare, to serve your content with the Salesforce CDN.

Improve Performance and Security of the Content Delivery Network (CDN) for LWR Commerce Stores

You can improve the load times, performance, and security of the Salesforce CDN associated with your Commerce LWR stores. Edit CDN Settings now include the option to compress content and web resources for faster page load times. You also have the option to accelerate and secure your HTTP traffic, which improves the performance, security, and reliability of your store.

Access Product Media from Any CMS Workspace (Beta)

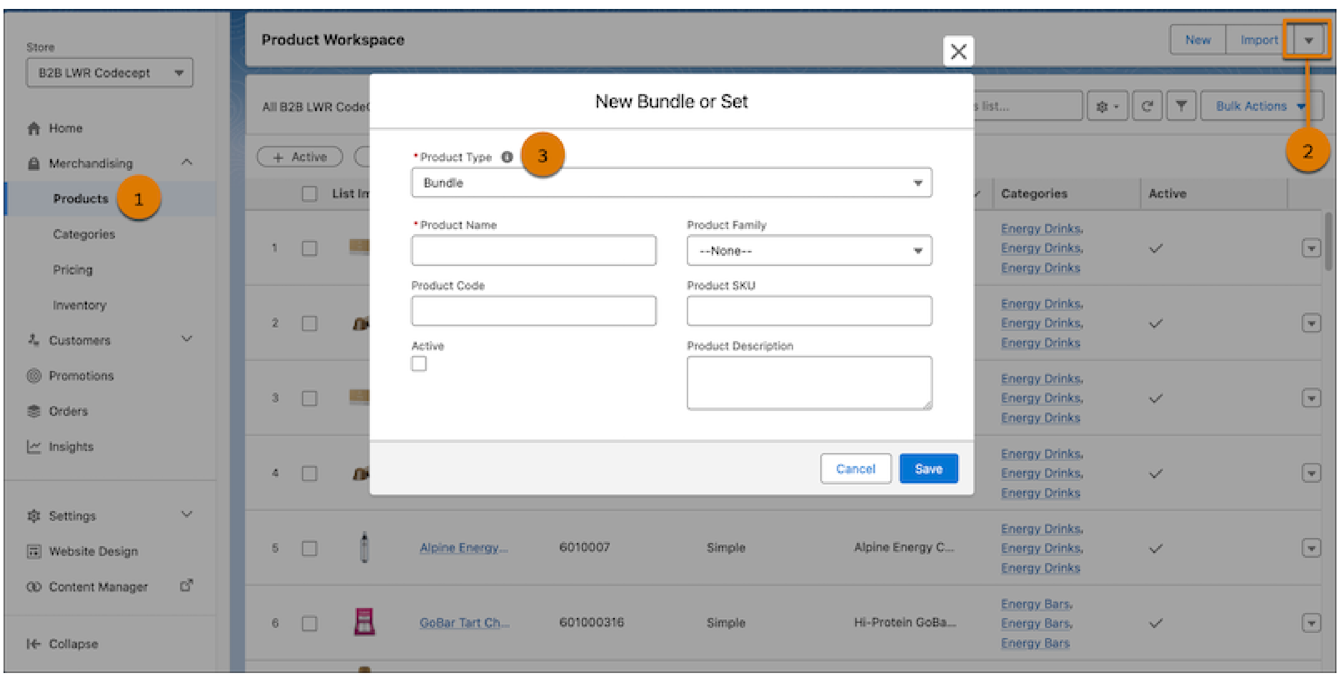
Upgrade your Commerce site to an Enhanced LWR Site and take advantage of enhanced CMS workspaces. During the upgrade, all your non-enhanced CMS workspaces are added to a new public channel and associated with your store. Use the new channel to access product media from all your workspaces.

Bundle Products to Increase Average Order Value

Group items together to simplify purchasing and create cross-selling and up-selling opportunities. Bundle complementary items together to entice customers with a single product offering at a lower price. Or, group slow-selling items with more popular items to help manage inventory. You can't bundle subscriptions or use them with order servicing and fulfillment.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From the Products Workspace (1), select **New Bundle or Set** from the workspace dropdown menu (2). For Product Type, select **Bundle** (3). Then add the products to include.



SEE ALSO:

Salesforce Help: Create and Configure a Product Bundle for a Commerce Store (can be outdated or unavailable during release preview)

Set Targets to Track the Progress of Your Goals

Track the progress of your goals over time, and see how completing recommended actions impacts your progress. Set your targets in the Goals and Recommendations Workspace.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In a goal tile, click the dropdown and select **Edit Target**. Select **Specific Target**, and enter the target value and end date.

SEE ALSO:

Salesforce Help: Goals and Recommendations (can be outdated or unavailable during release preview)

Use Salesforce Tax to Automate Tax Processes for Custom Checkout

Say goodbye to manual tax calculations and let third-party tax providers handle the heavy lifting. Streamline tax processes by calculating, collecting, and reporting tax on global payments for custom checkout by connecting a third-party tax provider to your store. Previously, automatic tax calculations were available only for managed checkout.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: From your store, go to Checkout Configuration. On the Tax tab, select a merchant account, and configure tax registrations with the third-party tax provider.

SEE ALSO:

Salesforce Help: Add a Tax Calculation Service for a Commerce Store (can be outdated or unavailable during release preview)

Simplify Tax Transactions with Flows

Promptly and accurately process tax additions and refunds using the new tax flows. The Create Tax Transaction flow records a tax transaction after an order summary is created. When an item is returned or canceled, the Record Tax Reversals flow refunds the tax amount in the external system, such as Stripe. You can also customize the flows to meet your business needs.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: To use the Record Tax Reversals flow, select **Enable Order Events** on the Order Settings page.

How: In Setup, find and select **Flows**. From the All Flows list, select the Create Tax Transaction and Record Tax Reversals flows, and then clone and activate the flows.

SEE ALSO:

Salesforce Help: Add a Tax Calculation Service for a Commerce Store (can be outdated or unavailable during release preview)

Use Enhanced Domains to Serve Your Salesforce CDN for LWR Commerce Stores

Enable the Salesforce Content Delivery Network (CDN) for your LWR Commerce stores without first creating a custom domain. Now you can use the system-managed `*.my.site.com` Experience Cloud URL, which uses the CDN partner Cloudflare, to serve your content with the Salesforce CDN.

Where: This change applies to B2B Commerce and D2C Commerce sites in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Content Delivery Networks (CDNs) and Salesforce Sites(can be outdated or unavailable during release preview)

Improve Performance and Security of the Content Delivery Network (CDN) for LWR Commerce Stores

You can improve the load times, performance, and security of the Salesforce CDN associated with your Commerce LWR stores. Edit CDN Settings now include the option to compress content and web resources for faster page load times. You also have the option to accelerate and secure your HTTP traffic, which improves the performance, security, and reliability of your store.

Where: This change applies to B2B Commerce and D2C Commerce stores in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Edit Settings for the Salesforce CDN (can be outdated or unavailable during release preview)

Access Product Media from Any CMS Workspace (Beta)

Upgrade your Commerce site to an Enhanced LWR Site and take advantage of enhanced CMS workspaces. During the upgrade, all your non-enhanced CMS workspaces are added to a new public channel and associated with your store. Use the new channel to access product media from all your workspaces.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions.

Note: Enhanced LWR Sites 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.

SEE ALSO:

Upgrade to Enhanced LWR Sites to Access the Latest Features (Beta)

Salesforce Help: What is the Enhanced Sites and Content Platform (can be outdated or unavailable during release preview)

Omnichannel Inventory

Easily add new inventory SKUs or edit existing inventory information using the Omnichannel Inventory console.

IN THIS SECTION:

Add and Edit Inventory SKUs

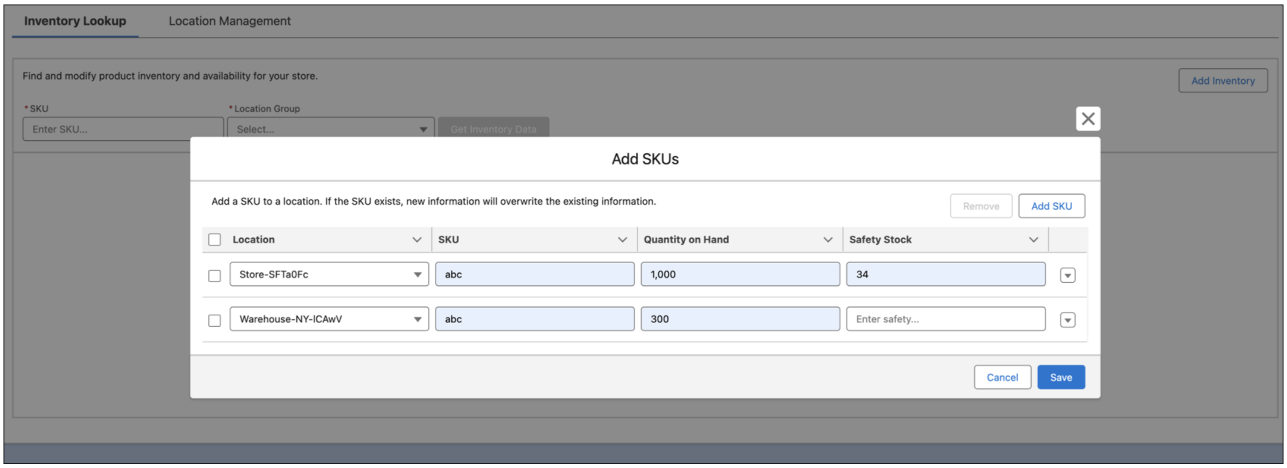
You can now add inventory SKUs or edit existing inventory information using the Omnichannel Inventory console. You can add up to 20 SKUs and edit up to 100 SKUs at a time.

Add and Edit Inventory SKUs

You can now add inventory SKUs or edit existing inventory information using the Omnichannel Inventory console. You can add up to 20 SKUs and edit up to 100 SKUs at a time.

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

How: Search for a SKU in a location, and add or edit the inventory information.



SEE ALSO:

Omnichannel Inventory App

Salesforce Order Management

Keep customers informed by displaying the estimated delivery date on the product detail page and checkout page. Improve the service flow process by customizing bulk actions.

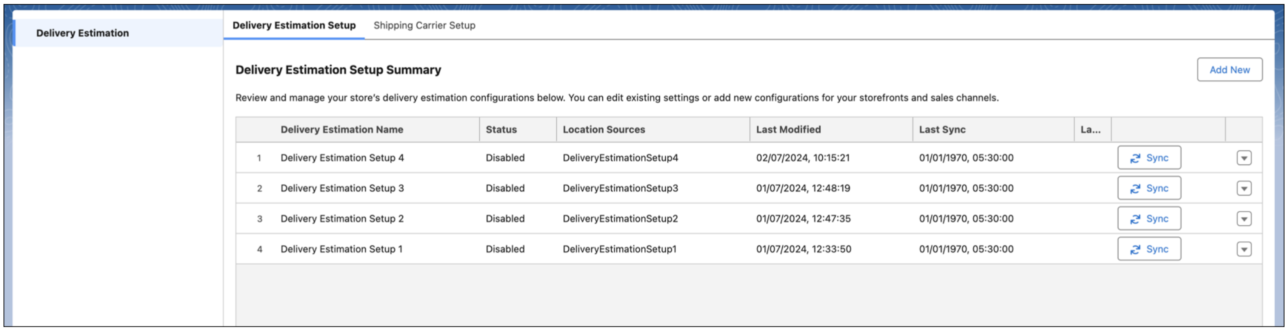
IN THIS SECTION:

Provide Customers Estimated Delivery Dates

Keep customers informed by displaying the estimated delivery date on the product detail page and checkout page. To determine the estimated delivery date, calculate the time it takes to fulfill an item using carrier cutoff times, eligible shipping days, and transit time duration. Connect the new Delivery Estimation Service to B2C Commerce, and configure your store to use delivery estimation at checkout.

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

How: Configure objects using the Order Management app. Then configure your store to use delivery estimation at checkout.



SEE ALSO:

Salesforce Help: Delivery Estimations for Order Management (can be outdated or unavailable during release preview)

Tailor Service Flow Bulk Actions to Your Store's Needs

Optimize your order service flows by controlling the threshold at which bulk actions become available. The threshold controls how many products must be in an order before a customer service representative can use bulk actions. Bulk actions are enabled by default with a value of two products.

Where: This change applies to Order Management in Unlimited, Developer, and Enterprise editions.

How: In your order service flow, set `setBulkActionDisplay` to the number of products that must be in an order for bulk actions to be available.

SEE ALSO:

Salesforce Help: Set a Threshold for Bulk Actions (can be outdated or unavailable during release preview)

Salesforce Payments

Easily switch between managed and custom checkout for your Commerce store. Get Pay Now up and running quickly using an automated guided setup, and offer customers Pay Now payment pages that are easier to use. Allow registered customers to receive one-time passcodes in an email rather than on their phone. Monitor the stages of a payment transaction from a payment record's timeline.

IN THIS SECTION:

Create Pay Now Links with an Improved Flow

It's easier to create payment links with the updated Generate Payment Link flow. For a link that includes products, the product selector shows you only the active products from the store's available price books. The filtered product list makes link creation more accurate and efficient. The designated default payment method set is preselected for new Pay Now stores. You can now use HTML in the link's Description field to format the text that a customer sees on the payment page.

Gain More Control of Payment Processing Using Manual Capture

When you configure a set of payment methods or generate a Pay Now payment link, you can enable manual capture. Manual capture lets you authorize a payment but capture that payment at a later time. Manual capture gives you more control over payment processing to check inventory, complete order fulfillment, and reduce chargebacks related to canceled or refunded orders. Manual capture also lets you carefully review and verify each transaction.

Salesforce Payments Is Now Available in Developer Edition

Salesforce Payments is now available with Developer Edition with access to the Lightning Platform and APIs, which extend Payments and integrates it with other applications. Developer Edition also provides access to many of the features available in Enterprise Edition.

Expand Customer Payment Options with Merchant-Initiated Payments

Offer your customers alternative ways to pay when they can't submit their payment information directly. Add the Merchant-Submitted Payment component to any record page to securely process payments on a customer's behalf. Add the Saved Payment Methods component to store customer payment information for future transactions. Customize the components' fields to meet your business needs.

Monitor Payment Processing to Track Your Business's Financial Health

View key events during a transaction from the Payments timeline, which is available for every payment intent record. Payment events are in chronological order, with the newest event listed first. Identify disputed and fraudulent transactions, delays in the payment process, and updates regarding customer payments.

Boost Sales by Offering More Payment Options

Offer more payment methods to customers at checkout. You can now add Amazon Pay, Link, and Affirm payment methods to your payment method set.

Let Shoppers Receive Their One-Time Passcode via Email

Give customers alternate ways to receive a passcode. Returning customers with accounts at a Commerce or Pay Now store can have a one-time passcode sent to their email to complete the login process. They don't have to receive a code on their mobile phone.

View Payment Shipping and Billing Information to Improve Operations

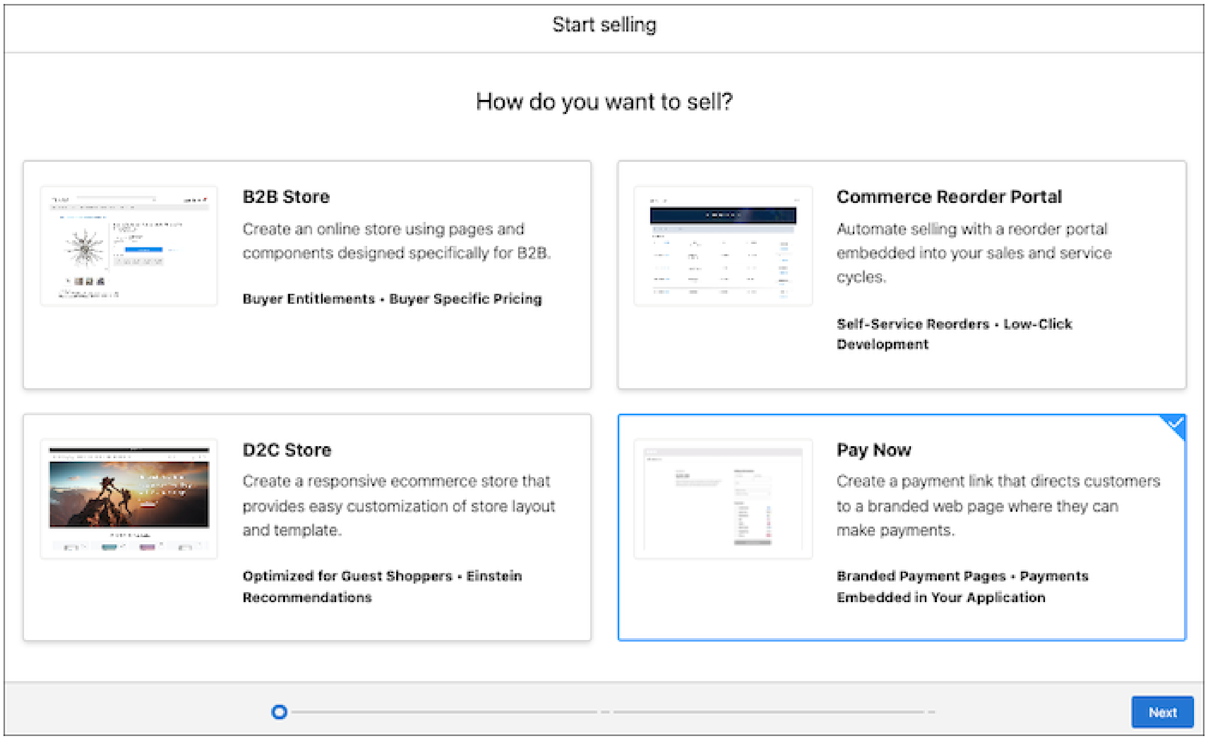
When you create a payment link, shipping and billing information is included in a payment intent record. You can use this information for order fulfillment, to audit sales, and help support agents solve customer issues.

Set Up Your Pay Now Store Quickly and Easily

Use the simplified automated setup to get your Pay Now store up and running in no time. The guided setup takes you through all the steps necessary for store configuration.

Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: From the Store page or the Commerce Setup Assistant, select the **Pay Now** tile.



SEE ALSO:

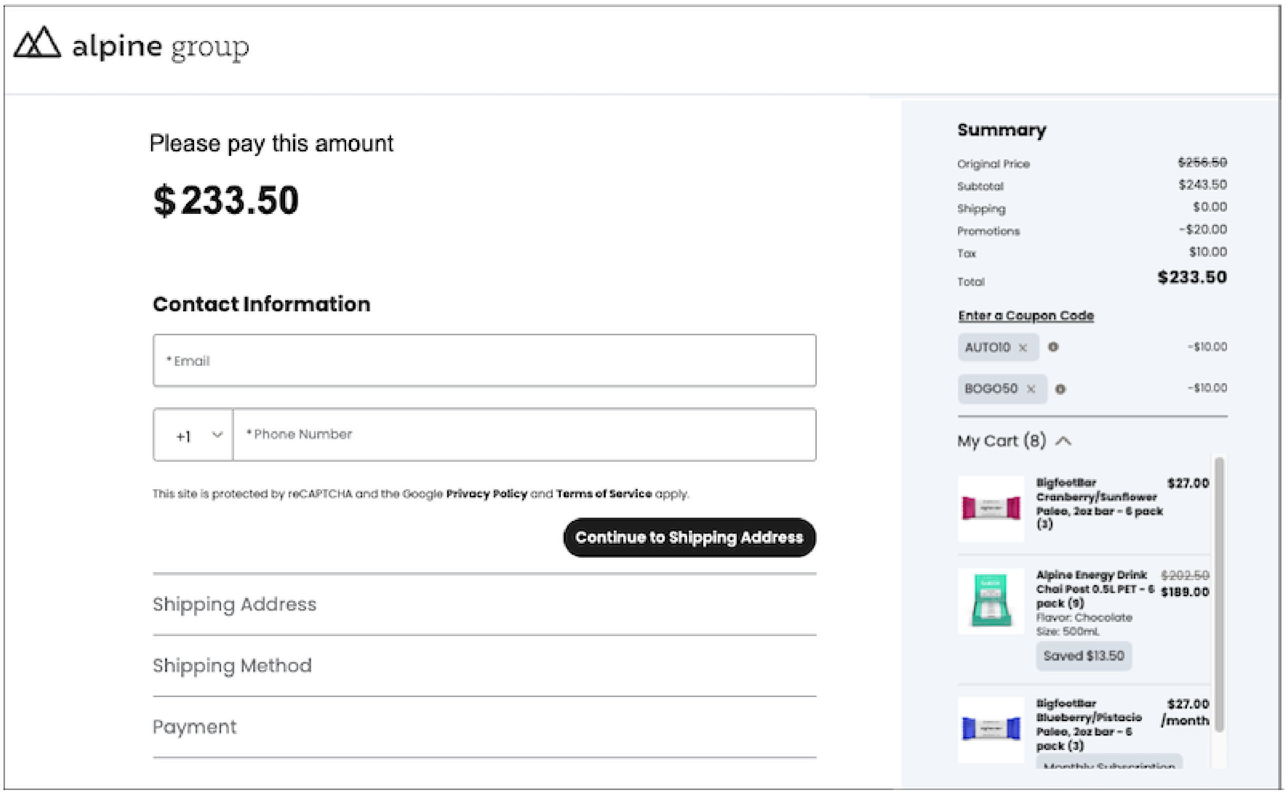
Salesforce Help: Set Up Pay Now Using the Setup Assistant(can be outdated or unavailable during release preview)

Deliver an Improved Pay Now Experience to Your Customers

Pay Now looks and operates better than before. Your payment links send your customers to a newly designed payment page to review their purchases and submit their payment information. Payment links that list products direct customers to a more robust checkout page.

Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: Follow the guided setup accessed from the Commerce Setup Assistant, and use the Generate Payment Link flow to create payment links to the updated payment pages.



SEE ALSO:

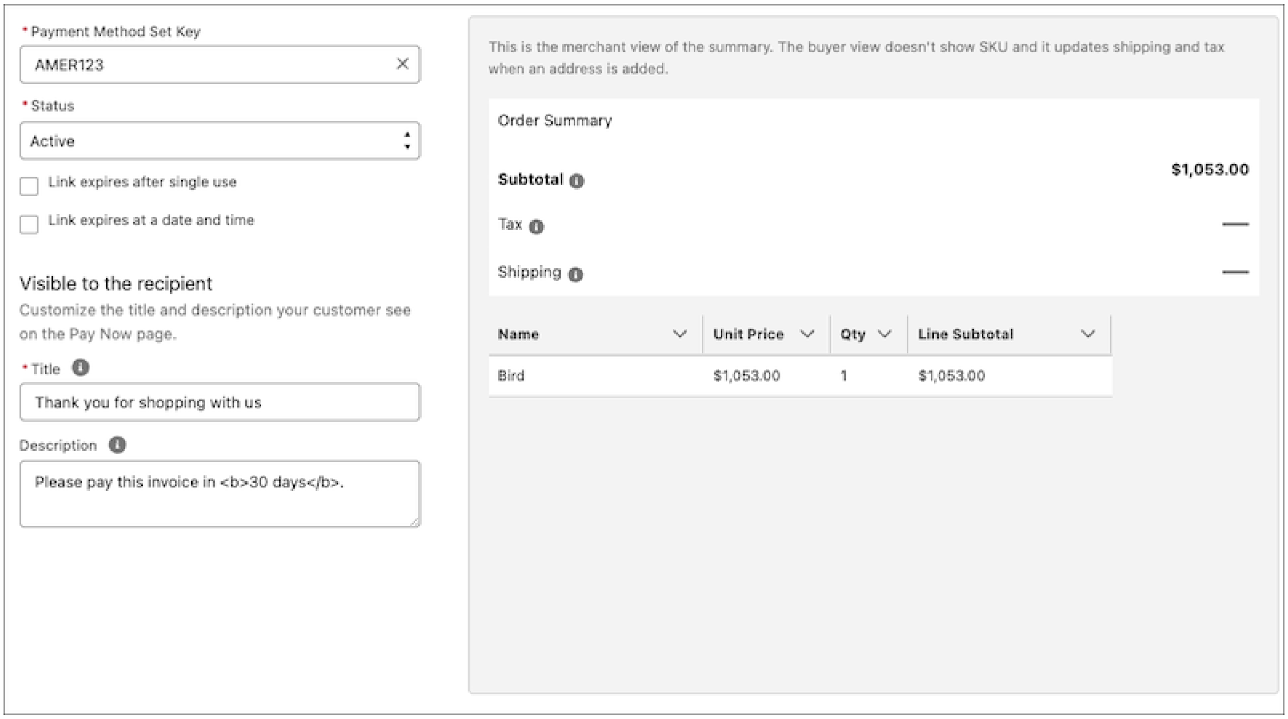
Salesforce Help: Add a Payment Link to a Salesforce Record (can be outdated or unavailable during release preview)

Create Pay Now Links with an Improved Flow

It's easier to create payment links with the updated Generate Payment Link flow. For a link that includes products, the product selector shows you only the active products from the store's available price books. The filtered product list makes link creation more accurate and efficient. The designated default payment method set is preselected for new Pay Now stores. You can now use HTML in the link's Description field to format the text that a customer sees on the payment page.

Where: Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: Run the Generate Payment Link flow, and select the payment link type that you want to create. For example, this page generates a link with products.



SEE ALSO:

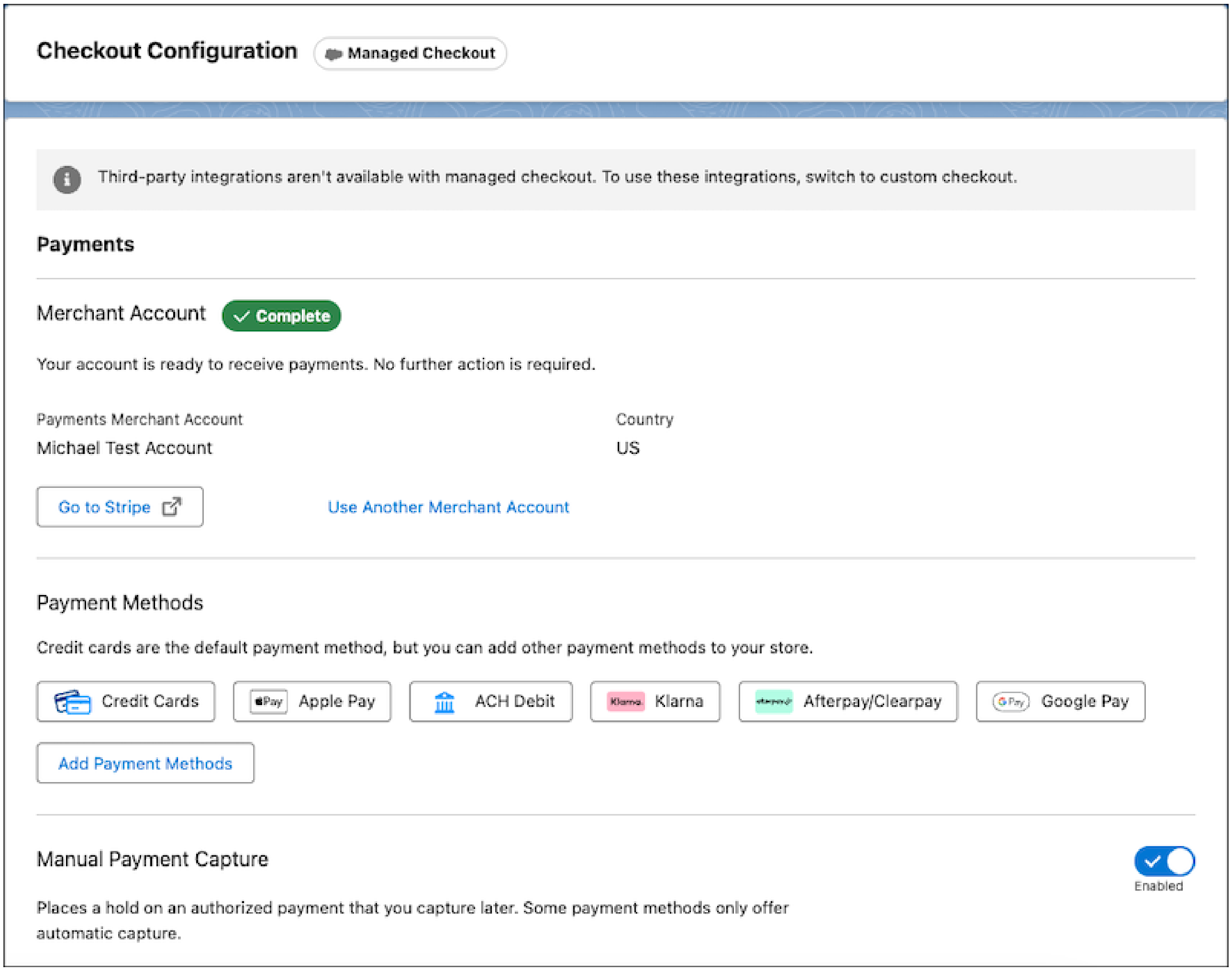
Salesforce Help: Add a Payment Link to a Salesforce Record (can be outdated or unavailable during release preview)

Gain More Control of Payment Processing Using Manual Capture

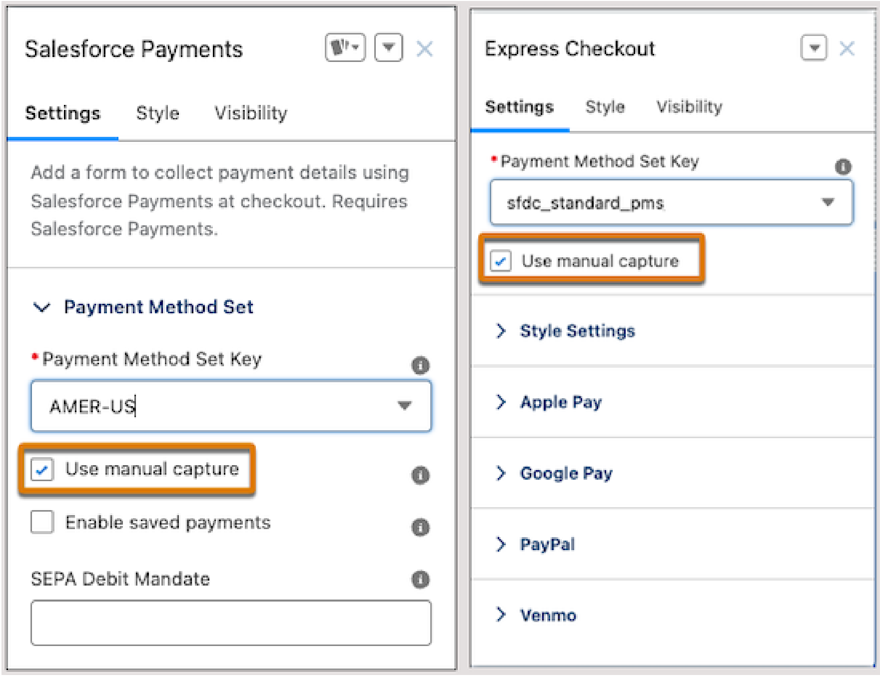
When you configure a set of payment methods or generate a Pay Now payment link, you can enable manual capture. Manual capture lets you authorize a payment but capture that payment at a later time. Manual capture gives you more control over payment processing to check inventory, complete order fulfillment, and reduce chargebacks related to canceled or refunded orders. Manual capture also lets you carefully review and verify each transaction.

Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: For a new Pay Now store or a Commerce store using managed checkout, enable manual capture in the Payments section of your store's checkout configuration, as shown in this example graphic.



For a Commerce store using custom checkout, go to Experience Builder and select the manual capture checkbox in the Salesforce Payments or Express Checkout component on the Checkout or Pay page.



SEE ALSO:

Salesforce Help: Add a Payment Method Set to a Store Checkout Page (can be outdated or unavailable during release preview)

Salesforce Payments Is Now Available in Developer Edition

Salesforce Payments is now available with Developer Edition with access to the Lightning Platform and APIs, which extend Payments and integrates it with other applications. Developer Edition also provides access to many of the features available in Enterprise Edition.

Where: This change applies to Salesforce Payments in Developer Edition.

SEE ALSO:

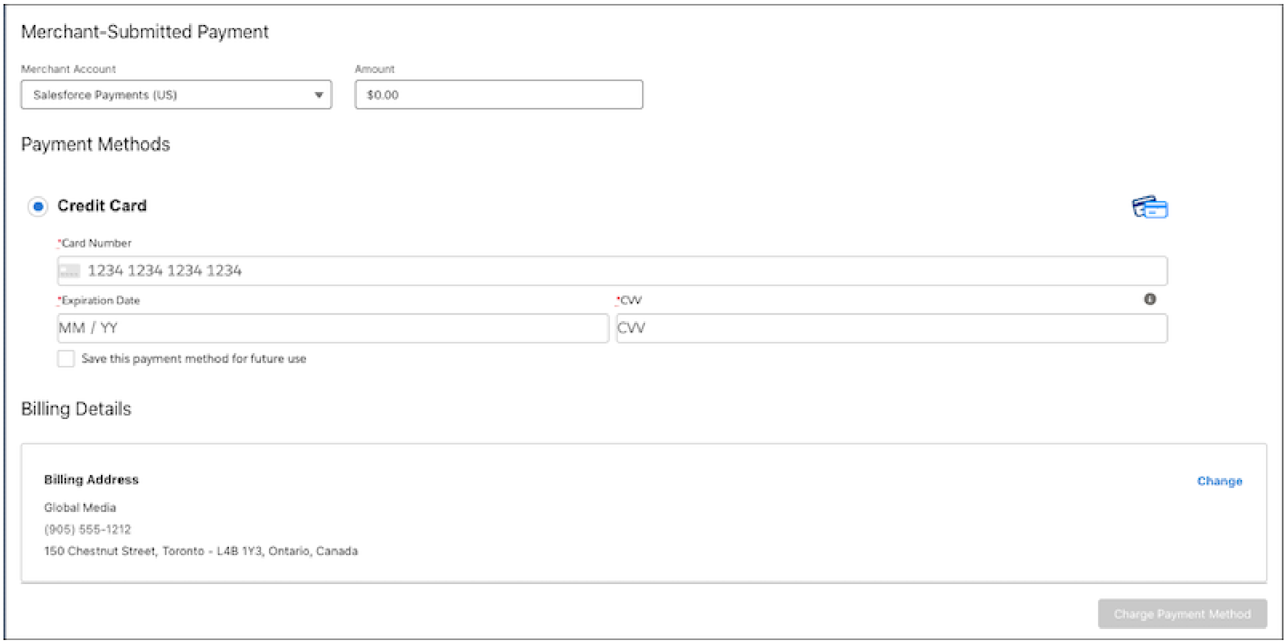
Salesforce Help: Salesforce Payments

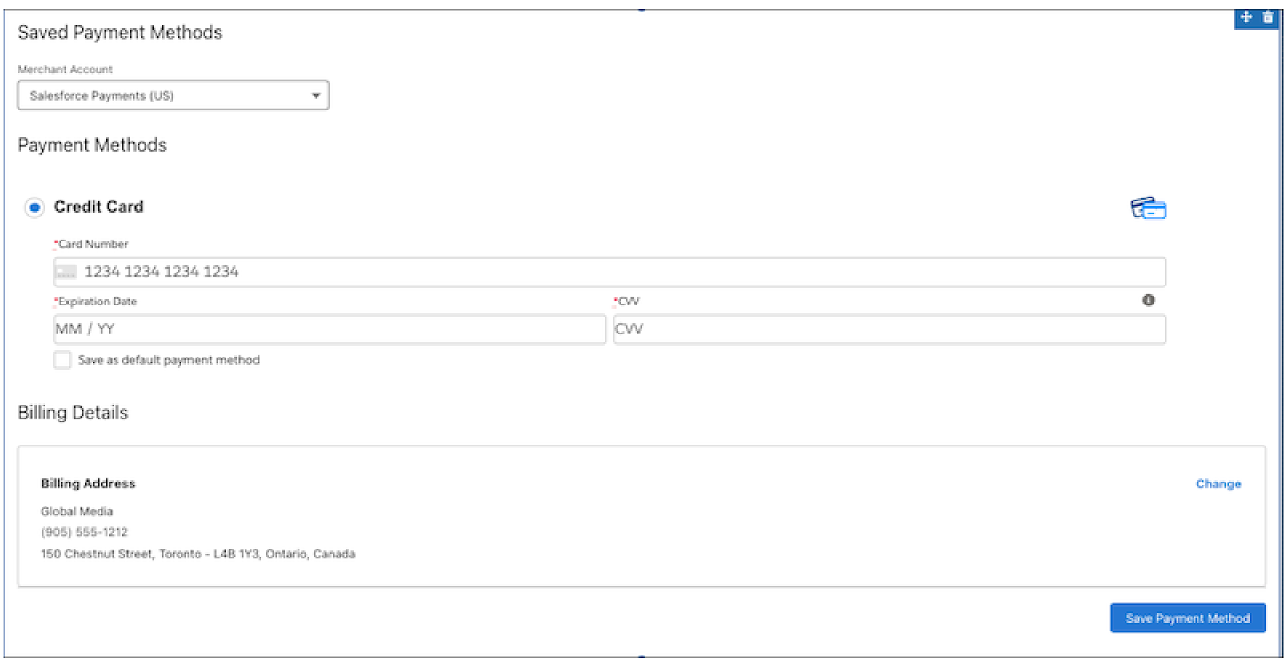
Expand Customer Payment Options with Merchant-Initiated Payments

Offer your customers alternative ways to pay when they can't submit their payment information directly. Add the Merchant-Submitted Payment component to any record page to securely process payments on a customer's behalf. Add the Saved Payment Methods component to store customer payment information for future transactions. Customize the components' fields to meet your business needs.

Where: This change applies to any record page on the Salesforce Lightning Platform.

How: Set up Payments administrator profiles and permissions for merchants. Then, in the Lightning App Builder, add the Merchant-Submitted Payment and Saved Payment Methods components to any record page.





SEE ALSO:

Salesforce Help: Create and Configure Lightning Experience Record Pages (can be outdated or unavailable during release preview)

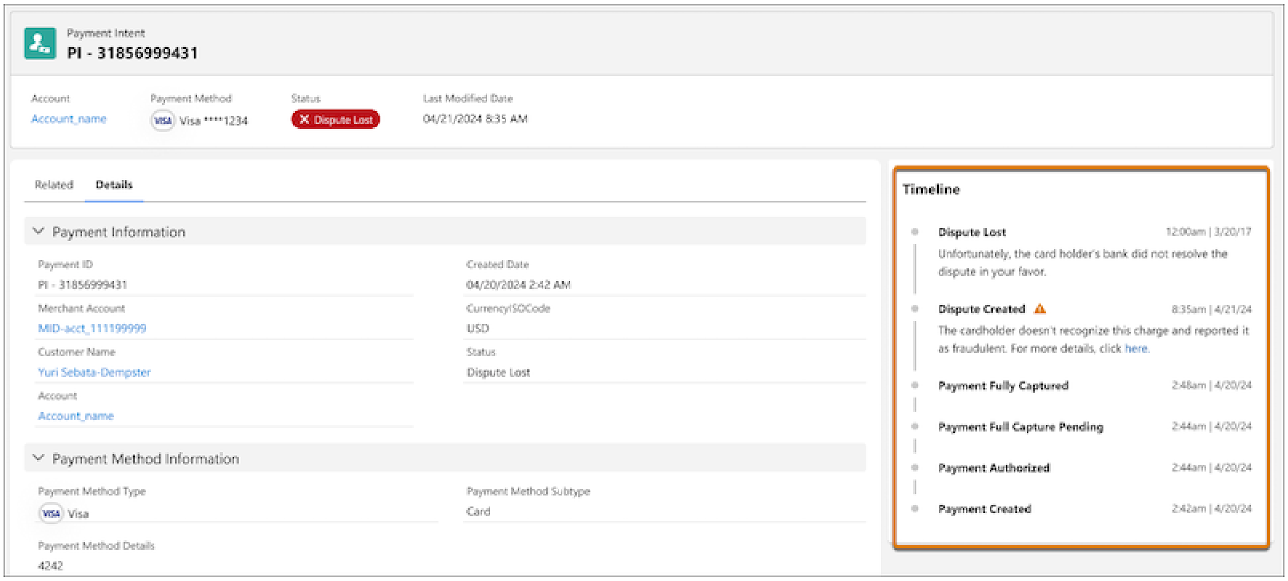
Salesforce Help: Lightning App Builder (can be outdated or unavailable during release preview)

Monitor Payment Processing to Track Your Business's Financial Health

View key events during a transaction from the Payments timeline, which is available for every payment intent record. Payment events are in chronological order, with the newest event listed first. Identify disputed and fraudulent transactions, delays in the payment process, and updates regarding customer payments.

Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: From the Payments app, go to the Payments Workspace and select a payment intent record. The timeline is on the record page.



SEE ALSO:

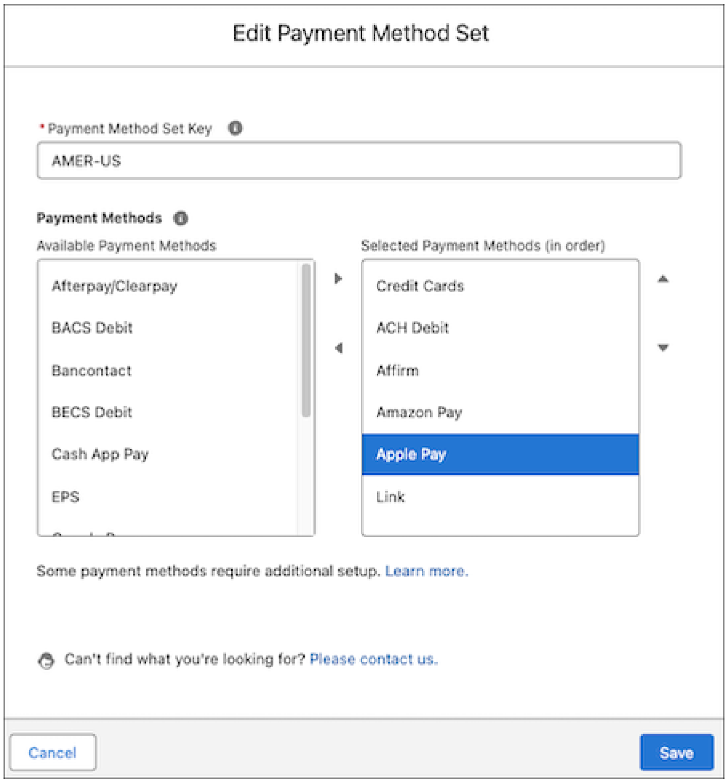
Salesforce Help: View Payment Processing from the Workspace (can be outdated or unavailable during release preview)

Boost Sales by Offering More Payment Options

Offer more payment methods to customers at checkout. You can now add Amazon Pay, Link, and Affirm payment methods to your payment method set.

Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: Create a payment method set and include any of the non-express payment methods. To use Amazon Pay and Link for express checkout, enable express checkout from the Checkout page in Experience Builder.



SEE ALSO:

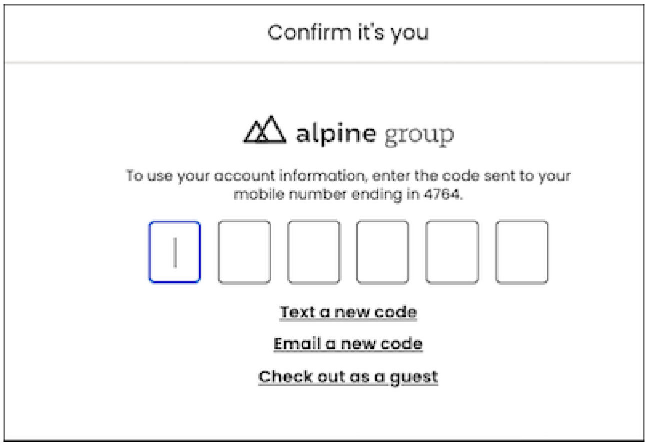
Salesforce Help: Add a Payment Method Set to a Store Checkout Page (can be outdated or unavailable during release preview)

Let Shoppers Receive Their One-Time Passcode via Email

Give customers alternate ways to receive a passcode. Returning customers with accounts at a Commerce or Pay Now store can have a one-time passcode sent to their email to complete the login process. They don't have to receive a code on their mobile phone.

Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: A registered customer enters an email address during Pay Now or Commerce store checkout. When the confirmation prompt displays, the customer can select the email link to receive a new code to complete the login process.



SEE ALSO:

Salesforce Help: Reduce Checkout Time with One-Click Checkout (can be outdated or unavailable during release preview)

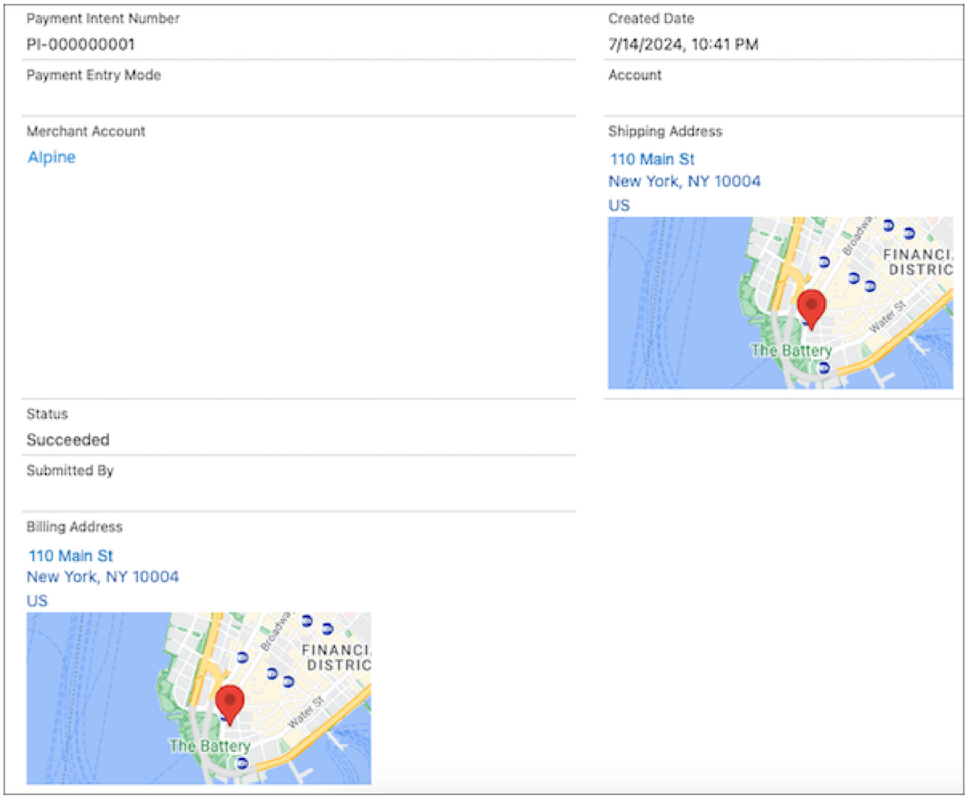
Salesforce Help: One-Click Checkout with Pay Now (can be outdated or unavailable during release preview)

View Payment Shipping and Billing Information to Improve Operations

When you create a payment link, shipping and billing information is included in a payment intent record. You can use this information for order fulfillment, to audit sales, and help support agents solve customer issues.

Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: From the Payments Workspace, open a payment intent record. View the shipping and billing information on the Details page.



SEE ALSO:

Salesforce Help: View Payment Processing from the Workspace (can be outdated or unavailable during release preview)

Customization

New and improved access summary views make managing permissions simpler. Manage list view items more easily with improved performance, usability, and other enhancements. Add impact to your Lightning records by augmenting your fields with conditional formatting.

IN THIS SECTION:

Permissions

Enhancements to the User Access Summary and a new Object Access Summary make managing permissions easier. You can also track permission changes using Event Monitoring.

List Views

List views for custom and standard objects now render faster with Lightning Web Components (LWC), and you can sort list views by multiple columns. To programmatically create, update, and delete list views rendered with LWC, use the lightning/uiListsApi module's new wire adapters. View, sort, and filter user records in a list format and directly modify new entries inline with the enhanced user list view. Block users with only the Manage Public List Views permission from seeing roles and role hierarchies when they edit public list views.

Lightning App Builder

Configure key record fields in a single responsive view with the Dynamic Highlights Panel. Customize the appearance of fields on Dynamic Forms-enabled record pages to draw attention to important information.

Sharing

Manage public group members with a faster, enhanced interface, and add descriptions for your public groups. Specify multiple picklist values in the record criteria of restriction rules and scoping rules.

Globalization

Deliver a more tailored global experience with expanded English language choices, simplified address formatting, and improved translation accuracy. Enable ICU locale formats to keep your data consistent across regions.

Salesforce Connect

Improve the security of your Snowflake integrations by using Private Connect with the Salesforce Connect SQL Adapter for Snowflake. Enhancements to the Apex Connector Framework help you access more external data types with a custom adapter for Salesforce Connect. The OData 2.0 adapter is updated to use the Apache Olingo HTTP library.

General Setup

View and edit user information more easily with enhancements to the User Access Summary page. Give your mobile users Dynamic Highlights Panel and Dynamic Forms at the same time with an updated option in Setup.

Permissions

Enhancements to the User Access Summary and a new Object Access Summary make managing permissions easier. You can also track permission changes using Event Monitoring.

IN THIS SECTION:

Delivered Idea: Get Insight into How a User's Permissions Are Granted

To simplify user management, you now have visibility into the profile, permission sets, and permission set groups that grant permissions to a specific user. This information about a user's assigned object, field, user, and custom permissions is available in the User Access Summary. Previously, troubleshooting where a user's permissions came from required multiple queries or steps. Now you can get this information with a few clicks. We delivered this feature thanks to your ideas on IdeaExchange.

Delivered Idea: See How Object Access Is Granted in Object Manager

Get a comprehensive view of the permission sets, permission set groups, and profiles that grant access to an object, and the level of access granted. Use the read-only Object Access Summary in Object Manager to quickly check object permissions when troubleshooting, completing reviews, or determining how to grant user access. We delivered this feature thanks to your ideas on IdeaExchange.

Track Permission Changes with Event Monitoring

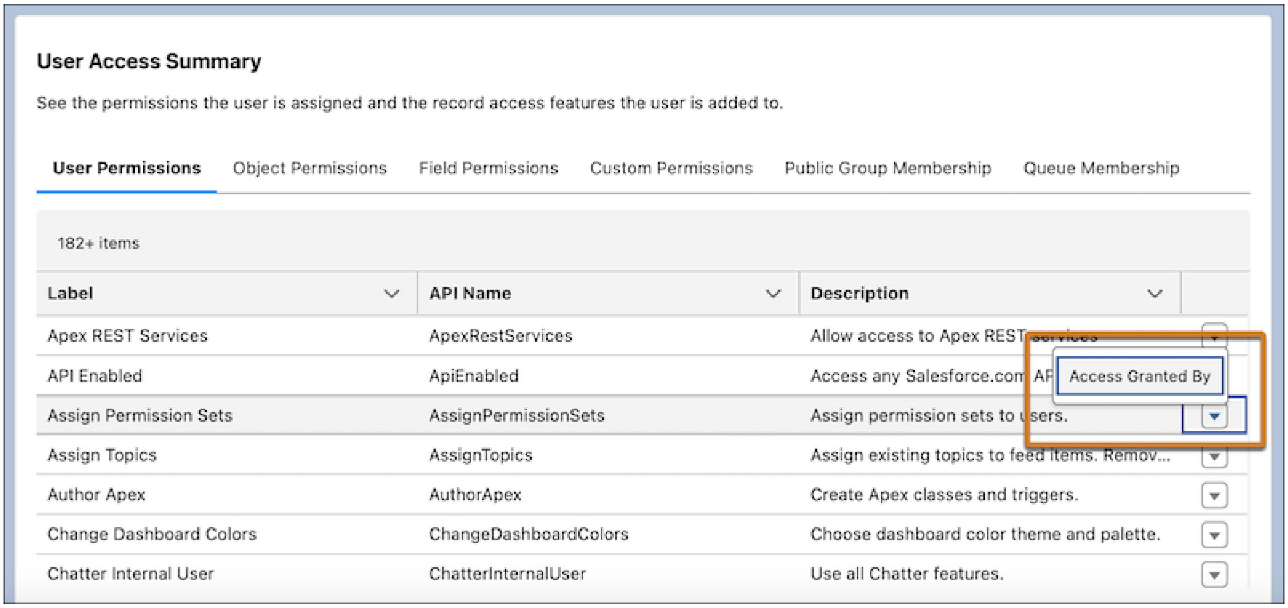
Monitor when permissions and other access settings are updated in profiles and permission sets, as well as other related changes. Use the new Permission Update event type in the EventLogFile object.

Get Insight into How a User's Permissions Are Granted

To simplify user management, you now have visibility into the profile, permission sets, and permission set groups that grant permissions to a specific user. This information about a user's assigned object, field, user, and custom permissions is available in the User Access Summary. Previously, troubleshooting where a user's permissions came from required multiple queries or steps. Now you can get this information with a few clicks. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience 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**. To see how an individual permission was granted, click the row-level action, and then click **Access Granted By**.



SEE ALSO:

IdeaExchange: Access Summary on User

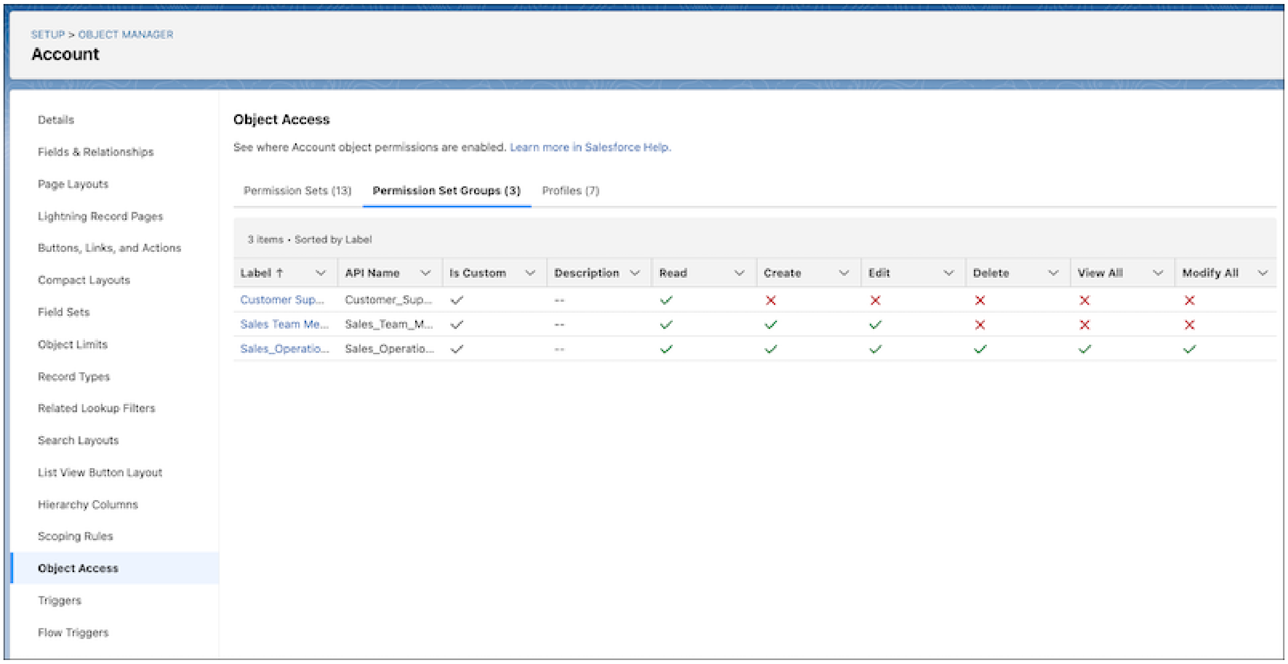
Salesforce Help: View a User's Access Summary (can be outdated or unavailable during release preview)

See How Object Access Is Granted in Object Manager

Get a comprehensive view of the permission sets, permission set groups, and profiles that grant access to an object, and the level of access granted. Use the read-only Object Access Summary in Object Manager to quickly check object permissions when troubleshooting, completing reviews, or determining how to grant user access. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: In Setup, go to Object Manager, and then select an object. In the sidebar, click **Object Access**.



SEE ALSO:

IdeaExchange: View & Manage Object CRUD Access in Object Manager

Salesforce Help: View Object Access in Object Manager (can be outdated or unavailable during release preview)

Track Permission Changes with Event Monitoring

Monitor when permissions and other access settings are updated in profiles and permission sets, as well as other related changes. Use the new Permission Update event type in the EventLogFile object.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions. This event is available in the API but not in the Event Monitoring Analytics app.

SEE ALSO:

Get Information About Permission Changes

List Views

List views for custom and standard objects now render faster with Lightning Web Components (LWC), and you can sort list views by multiple columns. To programmatically create, update, and delete list views rendered with LWC, use the lightning/uiListsApi module’s new wire adapters. View, sort, and filter user records in a list format and directly modify new entries inline with the enhanced user list view. 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:

[Delivered Idea: Make Inline Edits with the Enhanced User List View]

You can now view, sort, and filter user records in a list format and directly modify new entries inline. Quickly update and modify records and simplify this experience without navigating away from the list view. We delivered this feature thanks to your ideas on IdeaExchange.

[Get Better Performance for List Views on Custom and Standard Objects]

To improve performance and meet the latest accessibility standards, list views for custom and standard objects 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. Previously, only custom object list views rendered with LWC, and only in sandboxes.

[Sort List Views by Multiple Columns (Beta)]

To see your data in a more intuitive way and to make your list views more actionable, you can now sort list views by up to 5 columns. Select the columns to sort by and whether to sort each column in ascending or descending order. To return to sorting by a single column, click a column header that isn't included in your multiple column sort. Previously, you could sort a list view by a single column only.

[Manage List Views with New Lightning Web Component (LWC) Wire Adapters]

To programmatically create, update, and delete list views rendered with LWC, use the lightning/uiListsApi module's new wire adapters. You can get a list view's record data, and get and update a list view's preferences. You can also get the list views associated with an object or the metadata for a list view object. Previously, only the getListInfoByName and getListInfosByName wire adapters were available.

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

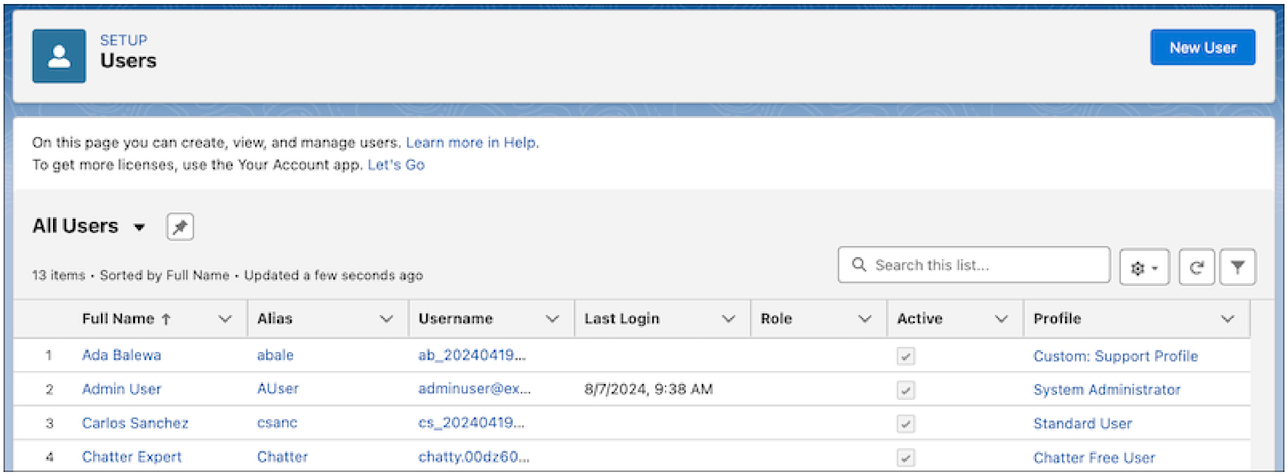
With this update, only users with the View Roles and Role Hierarchy permission can see or select from your org's list of roles when they edit public list view visibility. This update was first available in Spring '24. If you don't use roles, this update has no impact.

Make Inline Edits with the Enhanced User List View

You can now view, sort, and filter user records in a list format and directly modify new entries inline. Quickly update and modify records and simplify this experience without navigating away from the list view. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: From Setup, in the Quick Find box, enter `Users`, and then select **User Management Settings**. Enable **Enhanced User List View**. Select **Users** to view the enhanced page.



SEE ALSO:

IdeaExchange: Inline Editing for User List Views

Get Better Performance for List Views on Custom and Standard Objects

To improve performance and meet the latest accessibility standards, list views for custom and standard objects 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. Previously, only custom object list views rendered with LWC, and only in sandboxes.

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

When: This update is available on a rolling basis starting in Winter '25.

How: List view pages for standard objects include these 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 the focus at the top of the list rather than on the currently pinned list.
- Some icons and highlights have updated colors, such as the check mark next to a selected list in the List Views dropdown menu and . Additionally, the color, size, alignment, and capitalization of some windows, buttons, and dropdown menus 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. When you add or edit a filter, the Value menu closes each time that you select an option from it. Options appear below the Value menu as you select them.
- 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 you fix the issue.

- If a lead record owner inline edits the record from a list view rendered with LWC, the record is considered read. The record's Unread By Owner checkbox is unchecked. Previously, the Unread By Owner checkbox was unchecked only after the record owner viewed the full record.
- You can inline edit encrypted text fields on an object.
- Lookup fields render as hyperlinks.
- When you edit a record from on a list view, the list view's sorting doesn't automatically refresh. To include your changes in the list view's sorting, click .

Sort List Views by Multiple Columns (Beta)

To see your data in a more intuitive way and to make your list views more actionable, you can now sort list views by up to 5 columns. Select the columns to sort by and whether to sort each column in ascending or descending order. To return to sorting by a single column, click a column header that isn't included in your multiple column sort. Previously, you could sort a list view by a single column only.

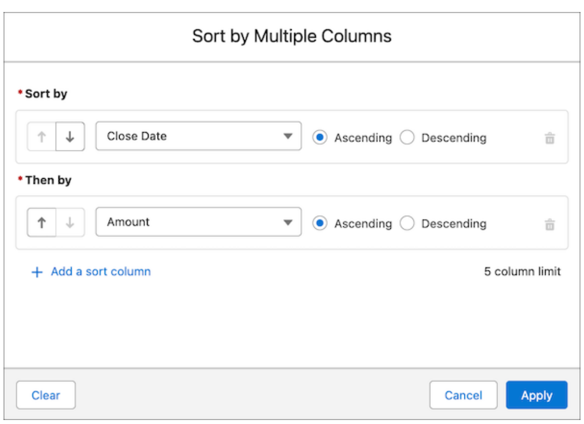
Where: This change applies to Lightning Experience in all editions except Starter.

Note: Lightning Web Runtime (LWC) sort by multiple columns 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.

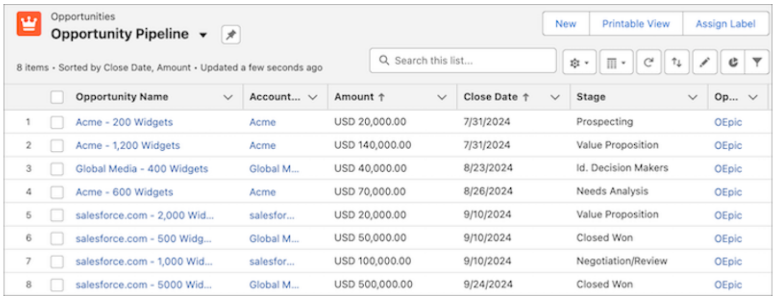
How: To join the beta, from Setup, in the Quick Find box, enter `User Interface` and select it. Then select **Enable sort by multiple columns (Beta)**. After you opt in to use this beta feature, list views for all supported custom and standard objects are rendered with Lightning Web Components (LWC) instead of with Aura.

To opt out of the beta, from Setup, in the Quick Find box, enter `User Interface` and select it. Then deselect **Enable sort by multiple columns (Beta)**. If the list views on LWC feature hasn't been rolled out to your org yet, some or all of your list views return to rendering with Aura.

To sort a list view by multiple columns, from a list view, click , and then select the columns to include in the sort.



For example, create a Cases list view that's sorted by Contact Name, then by Priority, and then by Date/Time Opened. Or you can create an Opportunities list view sorted by Close Date and then by Amount.



Your list sort configuration is saved until you modify or clear it. To return to the default sort order, click and then select **Reset Column Sorting**.

SEE ALSO:

Salesforce Help: Sort List Views (can be outdated or unavailable during release preview)

Manage List Views with New Lightning Web Component (LWC) Wire Adapters

To programmatically create, update, and delete list views rendered with LWC, use the lightning/uiListsApi module's new wire adapters. You can get a list view's record data, and get and update a list view's preferences. You can also get the list views associated with an object or the metadata for a list view object. Previously, only the getListInfoByName and getListInfosByName wire adapters were available.

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

How: The lightning/uiListsApi module includes these new wire adapters.

- `createListInfo`
- `deleteListInfo`
- `getListInfosByObjectName`
- `getListObjectInfo`
- `getListPreferences`
- `getListRecordsByName`
- `updateListInfoByName`
- `updateListPreferences`

SEE ALSO:

Lightning Web Components Developer Guide: lightning/uiListsApi (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 org's list of roles when they edit public list view visibility. This update was first available in Spring '24. If you don'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, to let users make list views visible to roles, also grant them the View Roles and Role Hierarchy permission. 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

Lightning App Builder

Configure key record fields in a single responsive view with the Dynamic Highlights Panel. Customize the appearance of fields on Dynamic Forms-enabled record pages to draw attention to important information.

IN THIS SECTION:

Configure Record Highlights in Lightning App Builder

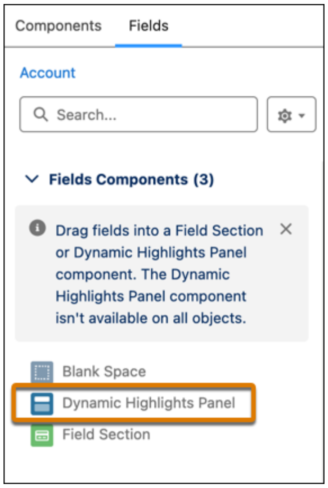
Use the new Dynamic Highlights Panel to configure your most important fields right in the Lightning App Builder. Previously, you could only configure fields in the Highlights Panel by using compact layouts in Setup. The Dynamic Highlights Panel can contain up to 12 fields. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: Drag the Dynamic Highlights Panel component onto the Lightning App Builder canvas, and then add fields to it. The Primary Field value is preselected for you, but you can change it.

The Dynamic Highlights Panel is responsive. When you change the size of your browser window, your information stays visible and wraps instead of being truncated. You can also use visibility rules to show and hide fields in the panel.

The Dynamic Highlights Panel is a container for fields just like a Field Section. You can find it on the Fields tab in the Lightning App Builder.



You can also customize the actions that appear in the panel. The Dynamic Highlights Panel uses dynamic actions by default and is supported for all LWC-enabled objects. For a list of LWC-enabled objects, see LWC Migration for Record Home Pages.

Your users can see the Dynamic Highlights Panel immediately on desktop, but for it to appear on mobile record pages, you must enable it from **Setup** > **Salesforce Mobile App** > **Dynamic Forms and Dynamic Highlights Panel on Mobile**.

SEE ALSO:

Enable Dynamic Highlights Panel and Dynamic Forms on Mobile with One Click

Salesforce Help: Dynamic Highlights Panel (can be outdated or unavailable during release preview)

Make Record Fields Stand Out with Conditional Formatting

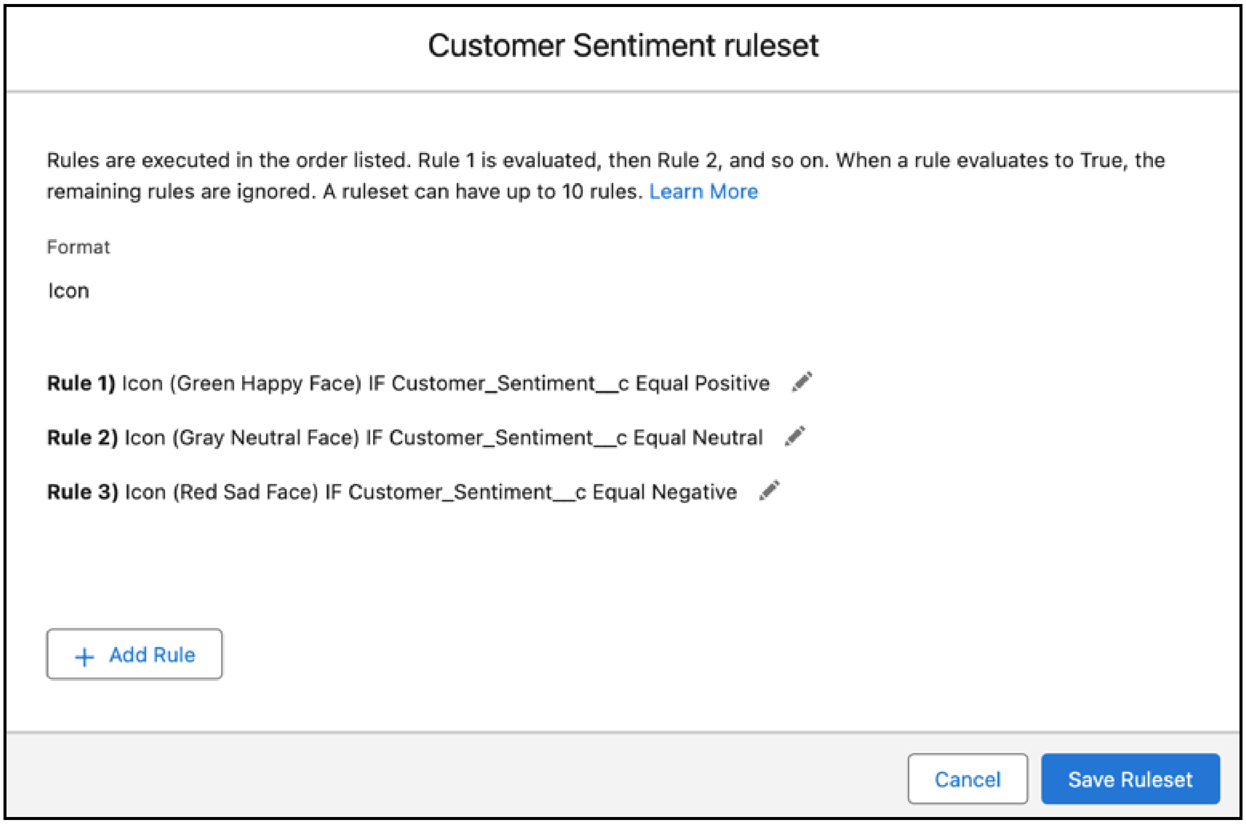
Apply formatting to fields to help users can quickly identify the most relevant information on a record page. In Lightning App Builder, give fields on Dynamic Forms-enabled pages custom icons and colors that can appear, disappear, and change color based on the criteria and rules that you define. The conditions can be based on the field's value or on the values of other fields on the page. You can view, edit, and delete rulesets for an object with the new Conditional Field Formatting node in Object Manager. 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.

When: This functionality is available on a rolling basis starting with pre-release and sandbox orgs in early September 2024.

How: Conditional formatting uses rulesets, which are collections of rules. Each rule is made up of conditions that determine how and when formatting appears on a field. To apply conditional formatting to a field, open a Dynamic Forms-enabled record page in the Lightning App Builder and click the field on the canvas. In the field's property panel, use the Conditional Formatting property to assign an existing ruleset or to create one.

Example: For example, you have a Customer Sentiment field on a page with available values of Positive, Neutral, and Negative. You can add conditional formatting to the field with rules configured to show a green happy-face icon when the field value is `Positive`, a grey neutral face when the value is `Neutral`, and a red sad-face icon when the value is `Negative`. That way, viewers can instantly see the sentiment value based on the style and color of the icon.



SEE ALSO:

Salesforce Help: Conditional Field Formatting in Lightning App Builder (can be outdated or unavailable during release preview)

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

Sharing

Manage public group members with a faster, enhanced interface, and add descriptions for your public groups. Specify multiple picklist values in the record criteria of restriction rules and scoping rules.

IN THIS SECTION:

Manage Public Group Membership More Easily

You can now use the public group's summary page to manage public group members. The updated public group member selection experience has better performance and simplifies managing the included users, roles, and nested public groups. You can search across all current or available members, add or remove up to 100 members at a time. Additionally, you can edit and delete the selected public group on its summary page.

Delivered Idea: Add a Description for Public Groups

When you create or edit a public group, you can now include a brief description of its purpose or function. We delivered this feature thanks to your ideas on IdeaExchange.

[Reference Multiple Picklist Values in Restriction and Scoping Rules]

You can now reference multiple picklist values in the record criteria of your restriction and scoping rules. This change makes it easier to configure which records and fields your users see when these rules are applied.

[Update Apex Code and Sharing Rules in Metadata Deployments that Target Roles and Subordinates]

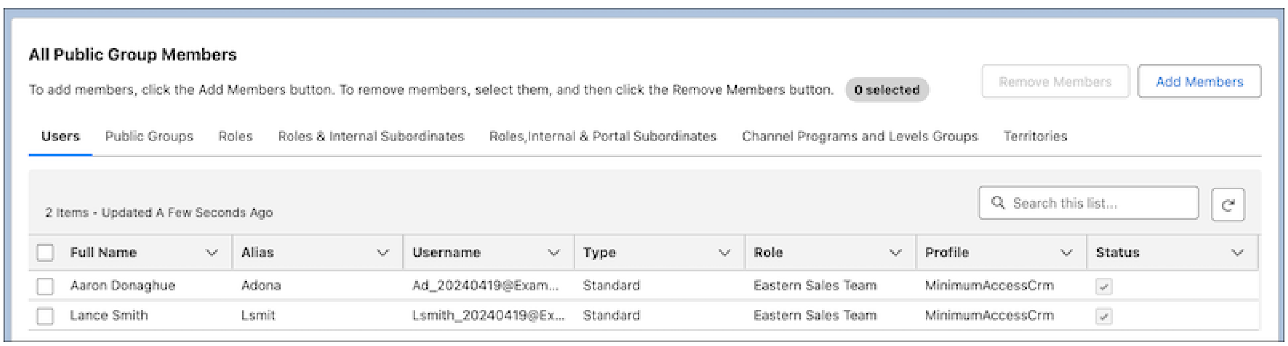
Salesforce changed the default behavior for sharing records with roles and subordinates to be more secure. As a result, the default sharing group available for roles and subordinates is now displayed as Roles and Internal Subordinates instead of Roles and Subordinates in Salesforce orgs created before February 8, 2024 that haven't enabled digital experiences. To reference this group in Apex code, use the `roleAndSubordinatesInternal` field instead of `roleAndSubordinates`. You must also update any sharing rules in metadata deployments between Summer '24 and Winter '25 orgs. No updates are needed in orgs created after February 8, 2024, or in orgs that already enabled digital experiences.

Manage Public Group Membership More Easily

You can now use the public group's summary page to manage public group members. The updated public group member selection experience has better performance and simplifies managing the included users, roles, and nested public groups. You can search across all current or available members, add or remove up to 100 members at a time. Additionally, you can edit and delete the selected public group on its summary page.

Where: This change applies to Lightning Experience in all 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**. Under All Public Group Members, add or remove members.



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When you create or edit a public group, you can now include a brief description of its purpose or function. We delivered this feature thanks to your ideas on IdeaExchange.

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

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**. Create a new public group or choose an existing one. Then edit the Description field.

SEE ALSO:

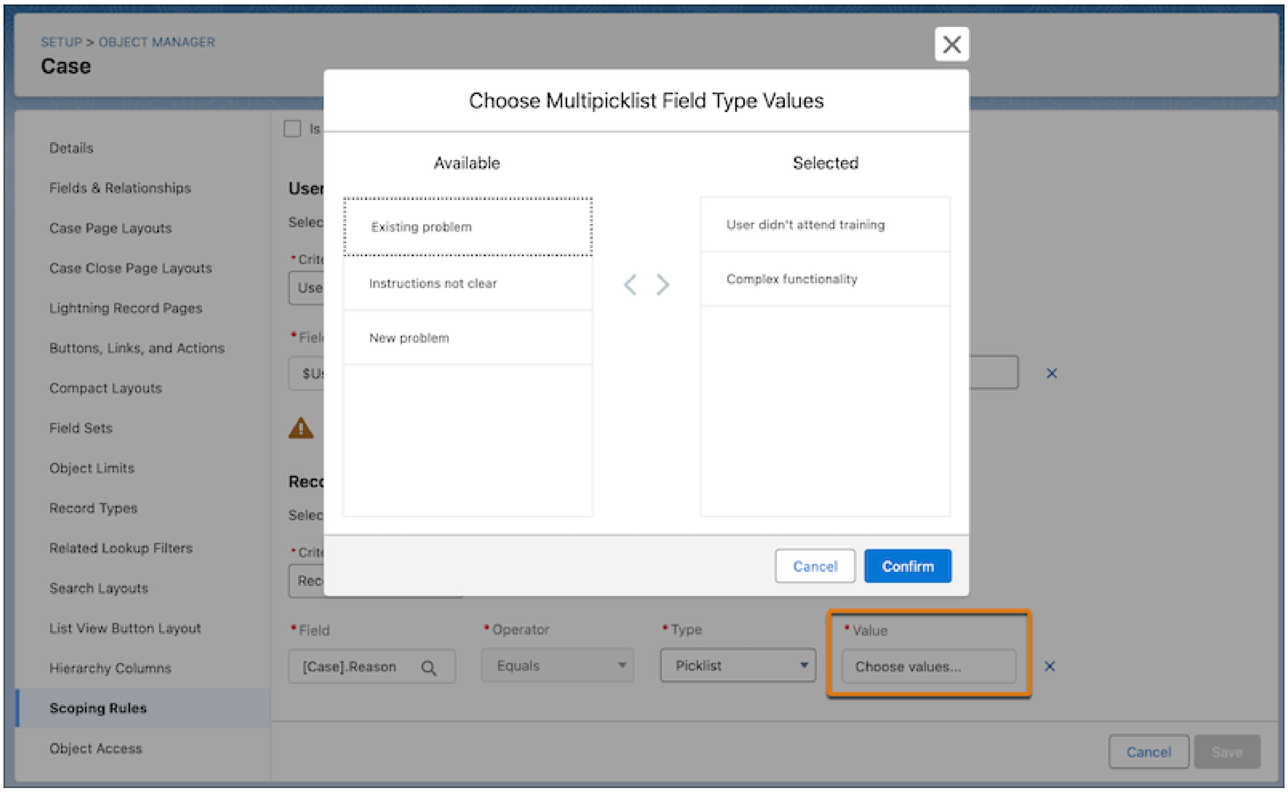
IdeaExchange: Description Field on Public Groups and Queues

Reference Multiple Picklist Values in Restriction and Scoping Rules

You can now reference multiple picklist values in the record criteria of your restriction and scoping rules. This change makes it easier to configure which records and fields your users see when these rules are applied.

Where: For restriction rules, this change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. For scoping rules, this change applies to Lightning Experience in Performance, Unlimited, and Developer editions.

How: In Object Manager, select a supported object. Click **Restriction Rules** or **Scoping Rules**, and then click **New Rule**. Under Record Criteria, after you select a picklist field, click **Choose values** to select multiple values.



SEE ALSO:

[*Salesforce Help*: Restriction Rules (can be outdated or unavailable during release preview)]

[*Salesforce Help*: Scoping Rules (can be outdated or unavailable during release preview)]

Update Apex Code and Sharing Rules in Metadata Deployments that Target Roles and Subordinates

Salesforce changed the default behavior for sharing records with roles and subordinates to be more secure. As a result, the default sharing group available for roles and subordinates is now displayed as Roles and Internal Subordinates instead of Roles and Subordinates in Salesforce orgs created before February 8, 2024 that haven't enabled digital experiences. To reference this group in Apex code, use the `roleAndSubordinatesInternal` field instead of `roleAndSubordinates`. You must also update any sharing rules in metadata deployments between Summer '24 and Winter '25 orgs. No updates are needed in orgs created after February 8, 2024, or in orgs that already enabled digital experiences.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Secure Record Access When Enabling Digital Experiences

Knowledge Article: Sharing Rule Deployment Failed with the Error "sharedTo not allowed:roleAndSubordinates" or Similar Apex Code Issues

Globalization

Deliver a more tailored global experience with expanded English language choices, simplified address formatting, and improved translation accuracy. Enable ICU locale formats to keep your data consistent across regions.

IN THIS SECTION:

Discover 11 New Regional English Variations

Eleven new English languages on our platform provide a more inclusive and personalized experience for users in different regions. This change reflects our commitment to diversity and inclusivity for our global community.

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

Why: These regional English language variations have been added.

- English (Czechia): `en_CZ`

- English (Denmark): `en_DK`
- English (France): `en_FR`
- English (Hungary): `en_HU`
- English (Norway): `en_NO`
- English (Poland): `en_PL`
- English (Romania): `en_RO`
- English (Slovakia): `en_SK`
- English (Spain): `en_ES`
- English (Sweden): `en_SE`
- English (Switzerland): `en_CH`

SEE ALSO:

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

Enjoy a Streamlined State and Country Picklist Setup Process

Enhancements to the State and Country Picklist make it easier to set up and improve usability. For example, enabling state and country picklists for address fields now takes fewer steps, which reduces the number of actions required for enablement. The Enable Picklists for Address Fields button is visible and grayed out when not active, so it's easy to check the status. Also, a new feature automatically maps standard states and countries, which saves you time and minimizes errors.

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

SEE ALSO:

Salesforce Help: Configure State and Country/Territory Picklists (can be outdated or unavailable during release preview)

Salesforce Help: Standard Countries and Territories for Address Picklists (can be outdated or unavailable during release preview)

Review Updated Label Translations

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Arabic, Bulgarian, Chinese (Simplified), Chinese (Traditional), Croatian, Czech, Danish, Dutch, Finnish, French, German, Greek, Hebrew, Hungarian, Indonesian, Italian, Japanese, Korean, Norwegian, Polish, Portuguese (Brazil), Portuguese (European), Romanian, Russian, Slovak, Slovenian, Spanish, Spanish (Mexico), Swedish, Thai, Turkish, Ukrainian, and Vietnamese.

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

How: To review the changes, see Review Winter '25 Updated Label Translations and download the attached list of changes. If you want to use a different translation for tab and field labels, you can change the name.

SEE ALSO:

Salesforce Help: Rename Object, Tab, and Field Labels (can be outdated or unavailable during release preview)

Enable ICU Locale Formats (Release Update)

To conduct business wherever you are, adopt the International Components for Unicode (ICU) locale formats. Locales control the formats for dates, times, currencies, addresses, names, and numeric values. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. When you enable this update, the ICU locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. This update was first made available in Winter '20 and 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.

Some Supported Time Zones No Longer Available

Some time zones are no longer supported on our platform. Cuba Daylight Time (America/Havana), Cuba Standard Time (America/Havana), and Korean Standard Time (Asia/Pyongyang) are no longer available.

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

SEE ALSO:

Salesforce Help: Supported Time Zones

Salesforce Connect

Improve the security of your Snowflake integrations by using Private Connect with the Salesforce Connect SQL Adapter for Snowflake. Enhancements to the Apex Connector Framework help you access more external data types with a custom adapter for Salesforce Connect. The OData 2.0 adapter is updated to use the Apache Olingo HTTP library.

IN THIS SECTION:

Use a Private Connection with the Salesforce Connect SQL Adapter for Snowflake

Securely send traffic from your Salesforce org to your AWS Virtual Private Cloud (VPC) when your users access and query Snowflake data via the Salesforce Connect SQL adapter. When your users work with Snowflake data in Salesforce, callouts to Snowflake are routed privately through the connection and don't traverse the public internet.

Enhance Your Custom Adapter for Salesforce Connect with More External Data Types

The custom adapter for Salesforce Connect now supports all external object field types so that your users can get better insights into your business. With support for additional field types, your users can work with and search across a richer set of external data directly in Salesforce.

Salesforce Connect OData 2.0 Adapter HTTP Library Is Updated

To provide you with the latest security standards, the HTTP library that supports the OData 2.0 adapter for Salesforce Connect is updated to use the Apache Olingo library. Previously, the OData 2.0 adapter used the OData4J Jersey HTTP library. We recommend that you retest your integrations to make sure that they don't rely on non-standard, implementation-specific behaviors.

Use a Private Connection with the Salesforce Connect SQL Adapter for Snowflake

Securely send traffic from your Salesforce org to your AWS Virtual Private Cloud (VPC) when your users access and query Snowflake data via the Salesforce Connect SQL adapter. When your users work with Snowflake data in Salesforce, callouts to Snowflake are routed privately through the connection and don't traverse the public internet.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

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 an external credential and a named credential. Next, define an external data source of type SQL and choose Snowflake as the provider. Connect Salesforce to access data stored in Snowflake via the private connection.

SEE ALSO:

Salesforce Help: Secure Cross-Cloud Integrations with Private Connect (can be outdated or unavailable during release preview)

Salesforce Help: Define a Named Credential for Salesforce Connect SQL Adapter for Snowflake (can be outdated or unavailable during release preview)

Enhance Your Custom Adapter for Salesforce Connect with More External Data Types

The custom adapter for Salesforce Connect now supports all external object field types so that your users can get better insights into your business. With support for additional 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 (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer 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:

- Picklist
- Picklist (Multi-Select)
- Time

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

Apex Reference Guide: DataType Enum

Salesforce Connect OData 2.0 Adapter HTTP Library Is Updated

To provide you with the latest security standards, the HTTP library that supports the OData 2.0 adapter for Salesforce Connect is updated to use the Apache Olingo library. Previously, the OData 2.0 adapter used the OData4J Jersey HTTP library. We recommend that you retest your integrations to make sure that they don't rely on non-standard, implementation-specific behaviors.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Access External Data with OData Adapters for Salesforce Connect (can be outdated or unavailable during release preview)

General Setup

View and edit user information more easily with enhancements to the User Access Summary page. Give your mobile users Dynamic Highlights Panel and Dynamic Forms at the same time with an updated option in Setup.

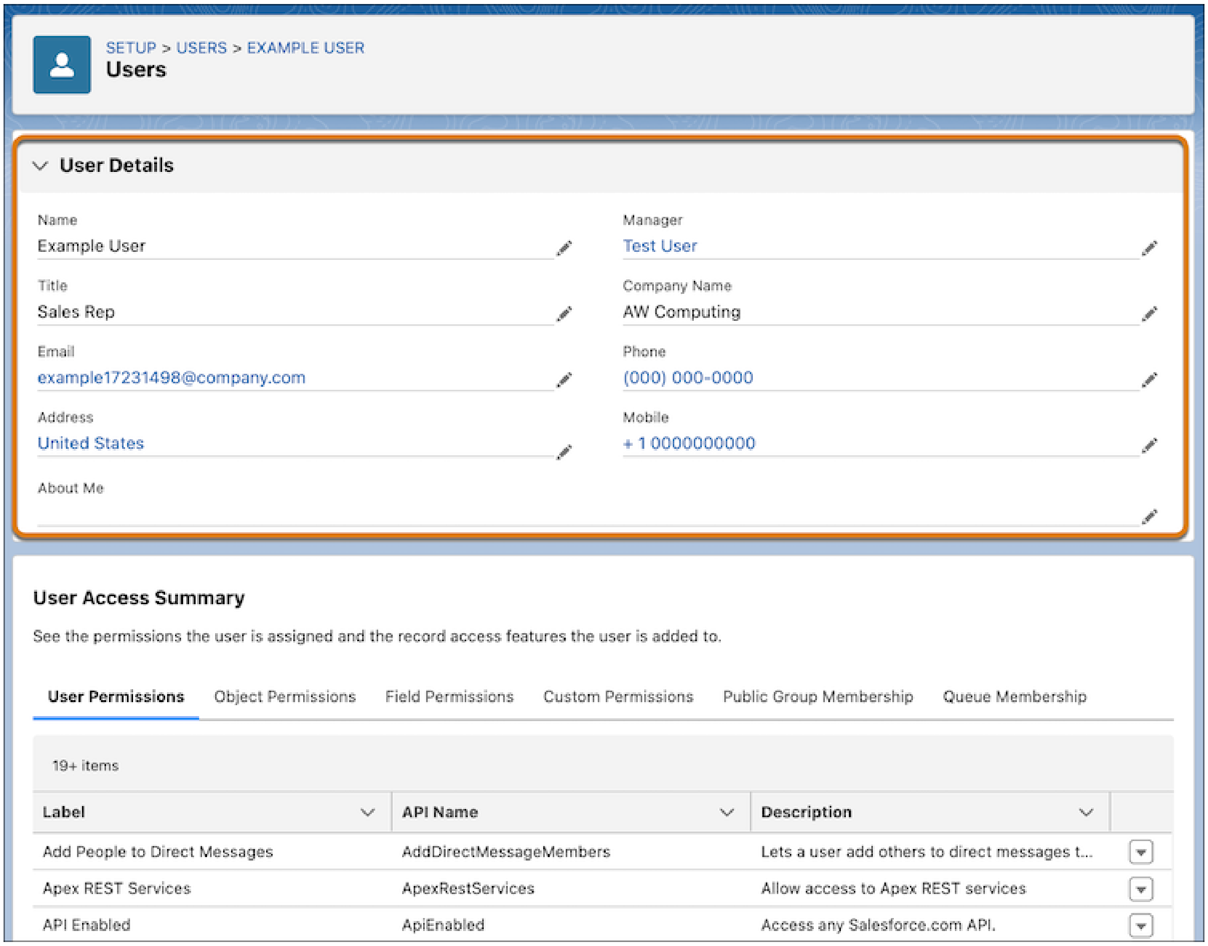
IN THIS SECTION:

Manage Details About a User in One Place

User information is now consolidated on the improved User Access Summary page, so it's easier to view and edit that information. The standard and custom user fields that appear on the summary page match the User Details section of the user's assigned user profile page layout.

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**.



SEE ALSO:

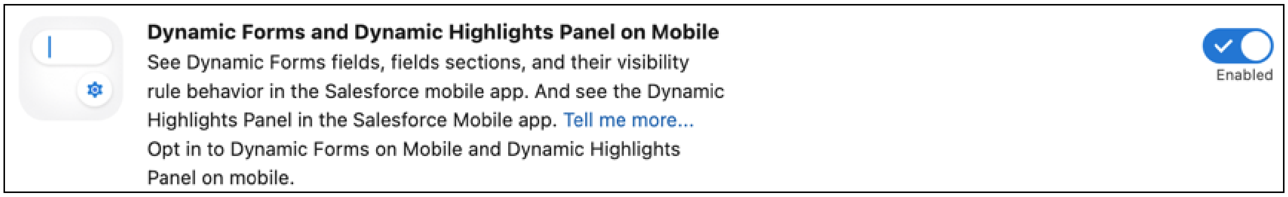
Salesforce Help: View a User's Access Summary (can be outdated or unavailable during release preview)

Enable Dynamic Highlights Panel and Dynamic Forms on Mobile with One Click

The option to enable Dynamic Forms on Mobile has been expanded to include the new Dynamic Highlights Panel on mobile devices. With one click, give your mobile users access to the same Dynamic Forms fields and Dynamic Highlights Panel that they see on desktop record pages.

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

How: You can find the updated option in Setup. In the Quick Find box, enter `Mobile`, then select **Salesforce Mobile App**.



SEE ALSO:

Delivered Idea: Configure Record Highlights in Lightning App Builder

Salesforce Help: Dynamic Highlights Panel (can be outdated or unavailable during release preview)

Restore Only the Latest Entity History Records for a Deleted Entity

Restore only the top 20,000 most recent and relevant history records for a deleted entity by enabling Field History Tracking. This restoration limit enhances database query latency and overall performance.

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

Who: This change is available to customers with Field History Tracking enabled on multiple entities.

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 Winter '25 release are generally listed under September.

Data Cloud Setup is Streamlined

We removed the need to assign the Data Cloud Admin permission set prior to accessing Data Cloud Setup, making it easier to get started. Now any Salesforce user with a system admin profile on an org with a Data Cloud license can access Data Cloud Setup. Then take advantage of the guided setup that walks you through common setup steps. Data Cloud Setup navigation has also been updated and reorganized to help you find what you're looking for.

Data Cloud Includes More Third-Party Connectors (Beta)

Check out the latest batch of connectors to make it easier for you to bring in data from your favorite sources. You can now access over 100 connectors powered natively by Data Cloud. The connectors added in this release are: Act-On, ADP, Amazon Marketplace, Apache Cassandra, Apache HBase, Apache Impala, Apache Phoenix, Azure Analysis Services, BigCommerce, CockroachDB, Facebook, Google Sheets, Instagram, LinkedIn Ads, Microsoft 365 Excel Online, Microsoft Power BI XMLA, Microsoft SQL Server Analysis Services, OData, Paylocity, SAP ASE, SAP IQ, Shopify, Splunk, Square, Stripe, Twilio, Veeva Vault, WordPress, X Ads, YouTube Analytics, and Zuora.

Include More Attributes in Your Activation to LinkedIn

Increase the likelihood of matching a Data Cloud profile to a LinkedIn user. When creating an activation to LinkedIn, map the new First Name, Last Name, Country Code, Google Ad ID, Company Title, and Job Title attributes.

Batch Data Transforms Are Updated Incrementally

Get reduced processing time and manage your costs with automatic incremental updates. Batch data transforms that meet specified criteria now process only the most recent changes to your data instead of repeatedly running on data that's been already updated. This feature is built into batch data transforms.

Lock and Protect Your Custom Metadata in a Data Kit

Maintain consistency across environments during upgrades by locking your data kit metadata in a managed package. As a package owner, you can control and protect the data kit components from unauthorized changes. Only you can change or delete the entities. After your managed packages are installed and deployed, the components are locked. Your end users can add entities, but can't modify or delete any deployed mappings or entities.

Create Dedicated Data Cloud Packages

While a managed package can't contain both Data Cloud and other metadata in a single package, you can now create separate packages with dependencies in your orgs. When creating a managed package with Data Cloud metadata, isolate the Data Cloud metadata from the other metadata by creating separate packages. You can then create a dependency between the Data Cloud package and the other packages.

Add Identity Resolution Rulesets to Data Kits

Save effort and speed up implementation of new rulesets by installing them from a data kit. When a ruleset is added to a data kit, the data lake objects and data model objects required to run the ruleset are also added.

Expand Identity Resolution With Cross-Object Matching

Cross-object matching expands and optimizes your match rules so that identity resolution can identify matching profiles from data in different objects. Cross-object matching means you can now match leads to accounts based on shared attributes such as company name. Or, make the most out of your OTT data by matching a WhatsApp username to email addresses or phone numbers stored in other objects, such as contact records.

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.

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.

Ingest Company Data into Data Cloud with ZoomInfo Connector (Generally Available)

Streamline your sales and marketing efforts by easily exporting comprehensive intelligence on companies directly into Salesforce with ZoomInfo Connector. This integration, now generally available, not only saves you from manual data entry but also significantly reduces research time, allowing you to focus on selling and marketing more effectively with up-to-date, detailed data from ZoomInfo.

Cross Cloud Updates for Data Cloud

Our latest round of cross-cloud features for Data Cloud.

Share Data in Near Real-Time Between Data Cloud and Amazon Redshift

Securely access Salesforce objects through Amazon Redshift using zero copy data shares. Create a data share and add data lake objects, data model objects, or calculated insights objects. Set up a connection to your AWS account, and link the data share.

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 Winter '25 release are generally listed under September.

Feature	Release Note
August '24	
Ingest Data	Data Cloud Setup is Streamlined
Activation	Include More Attributes in Your Activation to LinkedIn
September '24	
Build and Share	Lock and Protect Your Custom Metadata in a Data Kit
Build and Share	Create Dedicated Data Cloud Packages
Build and Share	Add Identity Resolution Rulesets to Data Kits
Unify Profiles	Expand Identity Resolution With Cross-Object Matching
Segmentation	Focus on Relevant Attributes When Creating Einstein Segments
Segmentation	Get Optimized Segment Results with Einstein Data Prism
Data Transforms	Batch Data Transforms Are Updated Incrementally
Ingest Data	Data Cloud Includes More Third-Party Connectors (Beta)
Ingest Data	Ingest Company Data into Data Cloud with ZoomInfo Connector (Generally Available)
Cross Cloud	Cross Cloud Updates for Data Cloud
Share Data	Share Data in Near Real-Time Between Data Cloud and Amazon Redshift

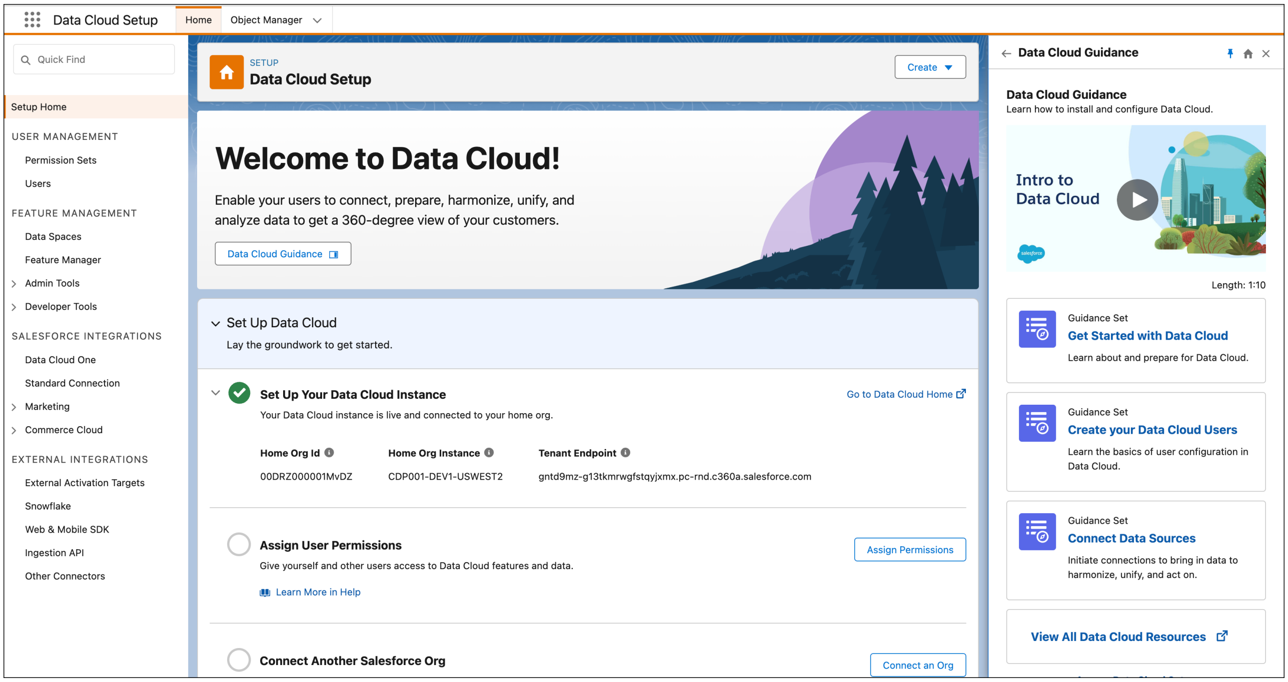
Data Cloud Setup is Streamlined

We removed the need to assign the Data Cloud Admin permission set prior to accessing Data Cloud Setup, making it easier to get started. Now any Salesforce user with a system admin profile on an org with a Data Cloud license can access Data Cloud Setup. Then take advantage of the guided setup that walks you through common setup steps. Data Cloud Setup navigation has also been updated and reorganized to help you find what you're looking for.

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

When: These changes are available in August 2024.

Why: Access new guidance sets, step through common setup tasks, and track your progress on Data Cloud Setup Home.



Data Cloud Includes More Third-Party Connectors (Beta)

Check out the latest batch of connectors to make it easier for you to bring in data from your favorite sources. You can now access over 100 connectors powered natively by Data Cloud. The connectors added in this release are: Act-On, ADP, Amazon Marketplace, Apache Cassandra, Apache HBase, Apache Impala, Apache Phoenix, Azure Analysis Services, BigCommerce, CockroachDB, Facebook, Google Sheets, Instagram, LinkedIn Ads, Microsoft 365 Excel Online, Microsoft Power BI XMLA, Microsoft SQL Server Analysis Services, OData, Paylocity, SAP ASE, SAP IQ, Shopify, Splunk, Square, Stripe, Twilio, Veeva Vault, WordPress, X Ads, YouTube Analytics, and Zuora.

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 September 2024.

How: In Data Cloud Setup, under **Other Connectors**, create a connection using the available connectors. Then in the Data Streams tab, select the connection as your source.

SEE ALSO:

Salesforce Help: Enable Data Cloud Features

Salesforce Help: Data Cloud: Connectors and Integrations

Include More Attributes in Your Activation to LinkedIn

Increase the likelihood of matching a Data Cloud profile to a LinkedIn user. When creating an activation to LinkedIn, map the new First Name, Last Name, Country Code, Google Ad ID, Company Title, and Job Title attributes.

Where: This change applies to Data Cloud in Developer, Enterprise, Performance, and Unlimited editions. Available with an Ad Audiences license.

When: This functionality is available starting in August 2024.

Batch Data Transforms Are Updated Incrementally

Get reduced processing time and manage your costs with automatic incremental updates. Batch data transforms that meet specified criteria now process only the most recent changes to your data instead of repeatedly running on data that's been already updated. This feature is built into batch data transforms.

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

When: This change is available to all customers by the end of September 2024.

SEE ALSO:

Salesforce Help: Batch Data Transform Run Types

Lock and Protect Your Custom Metadata in a Data Kit

Maintain consistency across environments during upgrades by locking your data kit metadata in a managed package. As a package owner, you can control and protect the data kit components from unauthorized changes. Only you can change or delete the entities. After your managed packages are installed and deployed, the components are locked. Your end users can add entities, but can't modify or delete any deployed mappings or entities.

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

When: This feature is available starting in September 2024.

Create Dedicated Data Cloud Packages

While a managed package can't contain both Data Cloud and other metadata in a single package, you can now create separate packages with dependencies in your orgs. When creating a managed package with Data Cloud metadata, isolate the Data Cloud metadata from the other metadata by creating separate packages. You can then create a dependency between the Data Cloud package and the other packages.

Where: This change applies to first- and second-generation managed packages.

When: This feature is available starting in September 2024.

Add Identity Resolution Rulesets to Data Kits

Save effort and speed up implementation of new rulesets by installing them from a data kit. When a ruleset is added to a data kit, the data lake objects and data model objects required to run the ruleset are also added.

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

When: These changes are available in September 2024.

Expand Identity Resolution With Cross-Object Matching

Cross-object matching expands and optimizes your match rules so that identity resolution can identify matching profiles from data in different objects. Cross-object matching means you can now match leads to accounts based on shared attributes such as company name. Or, make the most out of your OTT data by matching a WhatsApp username to email addresses or phone numbers stored in other objects, such as contact records.

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

When: These changes are available in September 2024.

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.

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.

Ingest Company Data into Data Cloud with ZoomInfo Connector (Generally Available)

Streamline your sales and marketing efforts by easily exporting comprehensive intelligence on companies directly into Salesforce with ZoomInfo Connector. This integration, now generally available, not only saves you from manual data entry but also significantly reduces research time, allowing you to focus on selling and marketing more effectively with up-to-date, detailed data from ZoomInfo.

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

When: This change is being rolled out in Winter'25.

How: In Data Cloud Setup, under Connectors, create a connection using the new ZoomInfo connector. Then in Data Streams, select the connection as your source.

Cross Cloud Updates for Data Cloud

Our latest round of cross-cloud features for Data Cloud.

New and Changed Features

- Data Cloud and Analytics:
  - CRM Analytics: Export from Data Cloud-connected CRM Analytics Assets (Beta)
  - Data Cloud Reports and Dashboards: Data Cloud Reports and Dashboards
- Data Cloud and Industries
  - Data Cloud and Communications Cloud: Data Cloud Features for Communications Cloud
  - Data Cloud and Education Cloud: Build Stronger Alumni Relationships with Einstein and Data Cloud for Education: Alumni Metrics
  - Data Cloud and Loyalty Management: Find Members' Data Cloud Segments Faster with Data Graphs

- Data Cloud and Referral Marketing: Accelerate Customer Segment Verification for Promotions

- Data Cloud and Marketing Cloud Account Engagement:
  - Gain Insights with Form and Landing Page Engagement Data in Data Cloud
  - Create More Data Cloud Segments per Business Unit
- Data Cloud and Commerce:
  - See Analytics Dashboards and Set Goal Targets in the Insights Workspace
  - Set Up Intelligence Analytics with a Few Clicks
- Data Cloud and Salesforce Shield
  - Manage Encryption Keys for Data Cloud
- Data Cloud and Service Cloud:
  - Integrate Knowledge and Unified Knowledge with Data Cloud

Share Data in Near Real-Time Between Data Cloud and Amazon Redshift

Securely access Salesforce objects through Amazon Redshift using zero copy data shares. Create a data share and add data lake objects, data model objects, or calculated insights objects. Set up a connection to your AWS account, and link the data share.

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

When: This functionality is available in Winter '25.

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:

API

The CORS allowlist you define for APIs exposed on your My Domain URL now also applies to the APIs exposed on the `api.salesforce.com` domain. The previously announced retirement of API versions 21.0 through 30.0 of the Salesforce Platform API is delayed until Summer '25.

DevOps Center

Salesforce DevOps Center provides an improved experience around change and release management that brings DevOps standard practices to your development team, regardless of where team members fall on the low-code to pro-code spectrum. All developers and builders can work together to deliver value to customers in a repeatable and scalable way.

Development Environments

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience for custom app development on Salesforce.

Heroku

Use Heroku to build, deliver, monitor, and scale innovative apps fast. Publish your Heroku apps as External Services and create actions in Salesforce.

Salesforce Functions

Salesforce Functions is retiring on January 31, 2025. Learn about the retirement plan for Salesforce Functions.

Change Data Capture

Check out the objects that are enabled for change data capture.

Platform Events

Process high volumes of platform events efficiently with parallel subscriptions. Learn about the retirement of standard-volume platform events.

Event Bus

Use event relays with filtered and enriched channels.

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

Lightning Components

LWC API version 62.0 provides HTML class binding support, access to the component's host `CSSStyleDeclaration` object using `this.style`, and access to the parent element using `this.hostElement`. Debug your components in LWS and switch certain distortions off and on to observe behavior differences. LWS automatic enablement is postponed indefinitely.

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:

LWC API Version 62.0

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, 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. Components that use LWC API version 58.0 and earlier continue to work based on LWC framework behavior in Summer '23. Update a component's API version in its `.js-meta.xml` file. LWC API version 62.0 provides several new features and bug fixes.

Create Components with Larger JavaScript File Sizes

A Lightning web component JavaScript file now has a maximum file size of 1 MB (1,000,000 bytes). Previously, the file size limit was 128 KB (131,072 bytes).

Improve Accessibility with Base Lightning Components

Use base Lightning components to help meet accessibility requirements to support your users. Over several releases, we've updated components to meet Web Content Accessibility Guidelines (WCAG). The latest components to receive accessibility updates are lightning-input and lightning-modal.

Lightning Web Security Enablement Rollout Remains 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 indefinitely. If Salesforce resumes enabling LWS in the future, we'll announce it in the release notes. 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.

Gain Insight into Component Code by Switching LWS Distortions Off and On

Debug your components in LWS and switch certain distortions off and on so that you can observe behavior differences. To temporarily disable a distortion, open a page with your component running in a browser and then enter commands to set flags in the browser developer console.

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.

Develop Lightning Web Components with TypeScript (Developer Preview)

To improve developer productivity and code quality, you can now author new Lightning web components (LWCs) with TypeScript. You can also convert existing JavaScript components to TypeScript. Previously, LWC projects only supported JavaScript components.

Quickly Develop Lightning Web Components in a Real-Time Preview (Beta)

With Local Dev (beta), you can develop your Lightning web components (LWCs) in a real-time preview of your Lightning app or Experience Cloud Lightning Web Runtime site. The preview automatically updates in your browser whenever Local Dev detects source code changes, so you can iterate faster on your LWCs without deploying code or manually refreshing the page. Migrate to the new Local Dev experience before we eventually deprecate the LWC Local Development Server, which has limited testing and previewing capabilities.

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.

SEE ALSO:

Lightning Web Components Developer Guide

Lightning Aura Components Developer Guide

LWC API Version 62.0

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, 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. Components that use LWC API version 58.0 and earlier continue to work based on LWC framework behavior in Summer '23. Update a component's API version in its `.js-meta.xml` file. LWC API version 62.0 provides several new features and bug fixes.

IN THIS SECTION:

Manage Styles with Class Object Binding

In LWC API version 62.0 and later, you can provide multiple classes on an element with a JavaScript array or object. By using class object binding, you no longer have to concatenate strings to pass in multiple classes.

Access the Parent Element on a Component

In LWC API version 62.0 and later, access the parent element using `this.hostElement` in a `renderedCallback` or in another callback.

Access the Component's Style Information

In LWC API version 62.0 and later, access the component's host `CSSStyleDeclaration` object using `this.style`. You can use `this.style` to easily change the component's style at runtime.

Stricter ESLint Rules for Imports and Exports

In LWC API version 62.0 and later, only components with valid imports and exports can be deployed to an org. If you receive an "invalid import" or "invalid export" error, check your imports and exports before deploying to an org.

SEE ALSO:

Lightning Web Components Developer Guide: API Versioning (can be outdated or unavailable during release preview)

Manage Styles with Class Object Binding

In LWC API version 62.0 and later, you can provide multiple classes on an element with a JavaScript array or object. By using class object binding, you no longer have to concatenate strings to pass in multiple classes.

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: Let's say you have a button that evaluates an object with multiple properties. Those properties determine which classes are rendered.

```
<button onclick={doSomething} class={computedClassNames}>Submit</button>
```

To work with multiple classes, pass in an array or object to the `class` attribute. For example:

```
import { LightningElement } from 'lwc';

export default class extends LightningElement {
    variant = null;
    position = "left";
    fullWidth = true;
    disabled = false;

    // Class binding with an object
    get computedClassNames() {
        return [
```

```
        "button__icon",
        this.variant && `button_${this.variant}`,
        this.position && `button_${this.position}`,
        {
            "button_full-width": this.fullWidth,
            "button_disabled": this.disabled,
        },
        ];
    }
}
```

In LWC API version 62.0 and later, the element renders like this:

```
<button class="button__icon button_left button_full-width">Submit</button>
```

In LWC API version 61.0 and earlier, the element renders differently:

```
<button class="button__icon,,button_left,[object Object]">Submit</button>
```

Consider the impact of these changes for class object binding.

- Booleans, numbers, and functions are removed instead of converted to a string.
- Arrays and objects are no longer converted to a string.

There aren't any changes if your `class` attribute renders a string, `null`, or `undefined`.

Let's look at an example.

```
<template>
  <div class={myClass}></div>
</template>
```

In LWC API version 62.0 and later, if `myClass` evaluates to `false`, `true`, or a number, the template renders like this.

```
<div class=""></div>
```

In LWC API version 61.0 and earlier, it converts the values to a string.

```
<!--LWC API version 61.0 and earlier-->
<div class="false"></div>
<div class="true"></div>
<div class="1"></div>
```

In LWC API version 62.0 and later, arrays and objects follow class object binding semantics. In previous versions, they were converted to a string. Let's say `{myClass}` evaluates an array `["highlight", "yellow"]`. The element renders `class="highlight yellow"` instead of `class="highlight,yellow"`.

Similarly, if `{myClass}` evaluates an object `{ highlight: true, yellow: false }`, the element renders `class="highlight"` instead of `class="[object Object]"`.

SEE ALSO:

LWC OSS v7.0.0: Class object binding

Lightning Web Components Developer Guide: Bind HTML Classes (can be outdated or unavailable during release preview)

Access the Parent Element on a Component

In LWC API version 62.0 and later, access the parent element using `this.hostElement` in a `renderedCallback` or in another callback.

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: By using `this.hostElement`, you can retrieve the properties on the `HTMLElement` class.

```
// c-light
import { LightningElement } from "lwc";

export default class extends LightningElement {
  static renderMode = "light"; // default is 'shadow'

  renderedCallback() {
    console.log(this.hostElement); // logs <c-light>
    console.log(this.hostElement.tagName); // logs C-LIGHT
  }
}
```

In light DOM, `this.template.host` returns undefined. In shadow DOM,`this.hostElement` is interchangeable with `this.template.host`.

Note: If you used `this.hostElement` and depended on its initial undefined value, upgrading to LWC API version 62.0 requires changes to your code. The `this.hostElement` property is now no longer undefined and is initially a truthy value. We recommend that you rename your `this.hostElement` property, for example, `this.myHostElement`. Alternatively, set `hostElement` to `undefined` before you assign a value to it.

SEE ALSO:

LWC OSS v7.0.0: New `this.hostElement` property

Access the Component's Style Information

In LWC API version 62.0 and later, access the component's host `CSSStyleDeclaration` object using `this.style`. You can use `this.style` to easily change the component's style at runtime.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components in open source.

How: Access your component's style information using `this.style`.

```
renderedCallback() {
  this.style.color = 'red';
}
```

By using `this.style`, you can also use the methods on the `CSSStyleDeclaration` class.

```
import { LightningElement } from "lwc";

export default class extends LightningElement {
  static renderMode = "light"; // default is 'shadow'

  setStyle() {
    this.style.setProperty('color', 'red');
```

```
    this.style.setProperty('border', '1px solid eee');
    console.log(this.style.color); // logs "red"
  }
}
```

In LWC API version 61.0 and earlier, `this.style` returns undefined in light DOM and you can use `this.children[0].parentElement.style` as an alternative. In shadow DOM, you can use `this.template.host.style` and `this.style` interchangeably.

Note: If you used `this.style` and depended on its initial undefined value, upgrading to LWC API version 62.0 requires changes to your code. The `this.style` property is now no longer undefined and is initially a truthy value. We recommend that you rename your `this.style` property, for example, `this.customStyle`. Alternatively, set `style` to `undefined` before you assign a value to it.

SEE ALSO:

LWC OSS v7.0.0: New `this.style` property

Stricter ESLint Rules for Imports and Exports

In LWC API version 62.0 and later, only components with valid imports and exports can be deployed to an org. If you receive an "invalid import" or "invalid export" error, check your imports and exports before deploying to an org.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app.

Why: The stricter rules better match the intention for these ESLint rules, which is to prevent developers from importing internal or private APIs from the `lwc` package. Previously, developers were able to depend on the incorrect behavior of these restrictions.

How: In LWC API version 62.0 and later, these import statements are no longer valid.

```
// Don't do this
import 'lwc';
export * as lwc from 'lwc';
export {} from 'lwc';
export { privateFunction } from 'lwc';
```

Consider these guidelines.

- Bare imports are not allowed on `lwc`. Use named imports like `import { LightningElement } from 'lwc'`.
- Exporting from `lwc` is not allowed.
- Bare exports are not allowed on `lwc`. Use named exports like `export { LightningElement } from 'lwc'` instead.

SEE ALSO:

Lightning Web Components Developer Guide: Share JavaScript Code

Lightning Web Components Developer Guide: Set up Linting

Create Components with Larger JavaScript File Sizes

A Lightning web component JavaScript file now has a maximum file size of 1 MB (1,000,000 bytes). Previously, the file size limit was 128 KB (131,072 bytes).

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app.

SEE ALSO:

Lightning Web Components Developer Guide: Component JavaScript File

Improve Accessibility with Base Lightning Components

Use base Lightning components to help meet accessibility requirements to support your users. Over several releases, we've updated components to meet Web Content Accessibility Guidelines (WCAG). The latest components to receive accessibility updates are lightning-input and lightning-modal.

Where: These changes apply to Lightning Experience and all versions of the mobile app in all editions.

How: The `lightning-input` component now displays the expected date format below the text input field for input types `date` and `datetime`. This informative text helps users who enter the date in the text field instead of selecting from the date picker. Previously, users were informed of the expected format in an error message if they entered the date incorrectly.

The `lightning-modal` component now displays the X close button with a white background. Previously, the background was transparent. The white background increases the visibility of the button.

In Spring '24 and Summer '24, many more base Lightning components received accessibility updates. See *Lightning Components: New and Changed Items* in those release notes for details.

SEE ALSO:

Lightning Design System Component Blueprints Updates

Lightning Components: New and Changed Items

Lightning Web Security Enablement Rollout Remains 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 indefinitely. If Salesforce resumes enabling LWS in the future, we'll announce it in the release notes. 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.

Gain Insight into Component Code by Switching LWS Distortions Off and On

Debug your components in LWS and switch certain distortions off and on so that you can observe behavior differences. To temporarily disable a distortion, open a page with your component running in a browser and then enter commands to set flags in the browser developer console.

Where: This change applies to Lightning Experience in all editions when debug mode is enabled.

How: Enable debug mode in your Salesforce org. With your component or application loaded and running in a browser, open the browser's developer tools console and then set a breakpoint or add a `debugger` statement directly in your code.

To list flags that you use to disable and enable distortions in the `c` default namespace, enter this command in the browser's developer console and then press Enter.

```
$LWS.namespaces.c.distortions
```

To disable one of the listed distortions, set the associated flag to `false`. For example, to disable distortions for the `XMLHttpRequest` API, type this command and then press Enter.

```
$LWS.namespaces.c.distortions.xhr = false
```

In the developer console's Sources view, use the debugger panel to observe the component running with the specified LWS distortion disabled.

To enable the distortion again in the current session, set the flag to `true`. In addition, when you reload the page, all the flags are reset to `true`.

SEE ALSO:

Lightning Web Components Developer Guide: Debug with Distortions Disabled (can be outdated or unavailable during release preview)

API Distortion Changes in Lightning Web Security

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

Where: This change applies to Lightning Experience in all editions, LWR-based Experience Cloud sites, and Lightning web components in Aura sites when LWS is enabled.

How: These APIs have new distortions documented in the LWS Distortion Viewer (can be outdated or unavailable during release preview). Corresponding ESLint rules are included in the ESLint package.

- `DataTransfer.moz*` (Firefox only APIs)
- `Document.prototype.parseHTMLUnsafe`
- `Element.prototype.setHTMLUnsafe`

Develop Lightning Web Components with TypeScript (Developer Preview)

To improve developer productivity and code quality, you can now author new Lightning web components (LWCs) with TypeScript. You can also convert existing JavaScript components to TypeScript. Previously, LWC projects only supported JavaScript components.

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

Note: TypeScript support for LWC is available as a developer preview. TypeScript support isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

How: To configure TypeScript support for an LWC project, install TypeScript v5.4.5 or later, and make sure that the project contains a tsconfig.json file. In the `compilerOptions` section of that file, set `target` to `"ESNext"`. Then, make sure that the `experimentalDecorators` compiler option is unset or set to `false`.

LWC module resolution works differently than TypeScript module resolution, so you must configure the `paths` compiler option. For every LWC module that you use in your project, there must be a record in the `paths` config that maps each module to a file. If you're working in a Salesforce DX project, the Lightning Language Server extension for VS Code automatically handles this step.

To learn how to author LWCs with TypeScript, see Lightning Web Components Developer Guide: TypeScript Support for LWC (Developer Preview). For general guidance on converting JavaScript toTypeScript, check out TypeScript: Migrating from JavaScript.

Quickly Develop Lightning Web Components in a Real-Time Preview (Beta)

With Local Dev (beta), you can develop your Lightning web components (LWCs) in a real-time preview of your Lightning app or Experience Cloud Lightning Web Runtime site. The preview automatically updates in your browser whenever Local Dev detects source code changes, so you can iterate faster on your LWCs without deploying code or manually refreshing the page. Migrate to the new Local Dev experience before we eventually deprecate the LWC Local Development Server, which has limited testing and previewing capabilities.

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

Who: Local Dev is available only for users in sandbox orgs as an open beta, and it's turned off by default.

How: To turn on Local Dev for your org, from Setup, in the Quick Find box, enter `Local Dev`, and then select **Local Dev**. Select **Enable Local Dev (Beta)** to turn it on for all org users.

For now, you can use this feature only from the command-line interface (CLI). Before you can start testing components and pages with Local Dev, install the Salesforce CLI. Then, to learn how to run a real-time preview of your org's site or app, check out Lightning Web Components Developer Guide: Test Components with Local Dev (can be outdated or unavailable during release preview).

SEE ALSO:

Salesforce Extensions for Visual Studio Code: LWC Local Development (Beta)

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, 71 components have been adapted to prepare for native shadow DOM, as we announced in the Summer '24 release notes.

In Winter '25, these additional components have been adapted to prepare for native shadow DOM.

- `lightning-checkbox-group`
- `lightning-map`
- `lightning-progress-indicator`
- `lightning-progress-step`
- `lightning-relative-date-time`
- `lightning-slider`
- `lightning-tile`
- `lightning-tree`

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*.

Lightning Design System

The Salesforce Lightning Design System (SLDS) includes the resources to create user interfaces consistent with Salesforce Lightning principles, design language, and best practices.

IN THIS SECTION:

Lightning Design System Component Blueprints Updates

Get more out of SLDS component blueprints and utilities with these enhancements and bug fixes.

Where: These changes apply to Salesforce Lightning Design System (SLDS) and Lightning Experience.

When: These changes are in Winter '25. We improve SLDS frequently. For the latest changes, see What's New in Lightning Design System documentation. That page lists the changes by the date that we completed the change. The changes are rolled up into the next major Salesforce release.

How: Improve your UI with these recent updates to SLDS component blueprints.

- Updated the datepickers blueprint with the required format for date input to display visually, improve accessibility, and meet Web Content Accessibility Guidelines (WCAG).
- Updated the datetime picker blueprint with the required format for date input to display visually, improve accessibility, and meet WCAG.
- Updated the modals blueprint to display a white background for the close button (X) to improve visibility for people with low vision.

SEE ALSO:

SLDS: Salesforce Lightning Design System
W3C: Web Content Accessibility Guidelines (WCAG)

Visualforce

Check whether you're affected when all unmanaged Visualforce pages are served on the force.com domain.

For more information on features affected by these changes, refer to the Visualforce Developer Guide.

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.

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.

Apex

Access Event Monitoring free tier usage to track unhandled exceptions in Apex code execution. See expanded coverage for exception data logged in event log files. Review SOQL error and functionality changes and understand their impact on existing code. Experience more consistent results when iterating over elements in a set.

For more information on these enhancements, see the Apex Developer Guide and the Apex Reference Guide.

IN THIS SECTION:

Track Apex Unexpected Exceptions with Free-Tier Event Monitoring

Take advantage of free-tier access to Event Monitoring, and track unhandled exceptions in Apex code execution instead of relying only on unhandled exception emails. Troubleshoot your Apex code by analyzing the information captured in the event log files for the Apex Unexpected Exception event type.

Get More Coverage for Unexpected Exceptions in Apex Code Execution

Exceptions triggered by transactions with entry points as `@AuraEnabled`, `@RestResource`, and `@InvocableAction` annotations are now captured in the Apex Unexpected Exception event type. Analyze the event log files that provide information on exceptions triggered by these transactions. A spike in exception data logged in the event log files is possible because of the expanded coverage.

Understand SOQL Error and Functionality Changes to Update Your Code

Updates in this release can impact existing Apex code that relies on old SOQL error messages and functionality, particularly code that parses error messages from dynamic SOQL queries. Review these changes and update your code as needed.

See Improved Consistency When Iterating Sets

In API version 62.0 and later, modifying elements of a set while iterating the set in a `for` or `foreach()` loop throws an exception. This behavior is versioned. In API 61.0 and earlier, modifications to sets while iterating were sometimes allowed and generated unexpected results.

Write Mock SOQL Tests for External Objects

To increase code coverage and quality, you can now write better Apex unit tests for external objects and mock SOQL query responses by using the new SOQL stub methods and a new test class. Use basic and joined SOQL queries against external objects and return mock records in a testing context.

SEE ALSO:

Apex: New and Changed Items

Track Apex Unexpected Exceptions with Free-Tier Event Monitoring

Take advantage of free-tier access to Event Monitoring, and track unhandled exceptions in Apex code execution instead of relying only on unhandled exception emails. Troubleshoot your Apex code by analyzing the information captured in the event log files for the Apex Unexpected Exception event type.

Where: This change applies to all editions.

SEE ALSO:

Object Reference: Apex Unexpected Exception Event Type

Salesforce Help: Event Log File Browser

Get More Coverage for Unexpected Exceptions in Apex Code Execution

Exceptions triggered by transactions with entry points as `@AuraEnabled`, `@RestResource`, and `@InvocableAction` annotations are now captured in the Apex Unexpected Exception event type. Analyze the event log files that provide information on exceptions triggered by these transactions. A spike in exception data logged in the event log files is possible because of the expanded coverage.

Where: This change applies to all editions.

SEE ALSO:

Object Reference: Apex Unexpected Exception Event Type

Salesforce Help: Event Log File Browser

Understand SOQL Error and Functionality Changes to Update Your Code

Updates in this release can impact existing Apex code that relies on old SOQL error messages and functionality, particularly code that parses error messages from dynamic SOQL queries. Review these changes and update your code as needed.

Where: This change applies to all editions.

How: Review the changes in functionality and updates to error messages.

- Support for negative currency values in dynamic SOQL queries in multi-currency orgs, such as `SELECT Name FROM Invoice__c WHERE Balance__c < USD-500`.
- New error messages with invalid dynamic 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'`

- New error message with quotes surrounding an unexpected token in dynamic SOQL queries.

```
SELECT annualrevenue , parentid
         FROM Account
         WHERE
            (isDeleted = false AND NumberOfEmployees != 100)
            OR (isDeleted = false AND Site = '999')
            AND ParentId = '000000000000000' LIMIT 50000
```

  Old: `unexpected token: AND`

  New: `unexpected token: 'AND'`

- New error message when using NULL literals in WHERE statements with the LIKE keyword in dynamic SOQL queries.

```
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: 'NULL'`

- New error message when using more than two nested functions in dynamic SOQL queries.

```
SELECT convertCurrency(calendar_year(convertTimezone(lastmodifieddate))) FROM
            account
```

  Old: `expecting a right parentheses, found '('`

  New: `unexpected token: '('`

- New error messages with invalid datetime literals in dynamic SOQL queries.

- ```
  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`

- New error message when there isn't a valid bind variable reference after a colon in dynamic SOQL queries.

  ```
  SELECT Id FROM Custom_User_Attribute__c WHERE User__c =:
              0050W000007Jz7jQAC
  ```

  Old: `Only variable references are allowed in dynamic SOQL/SOSL`

  New: `unexpected token: '0050'`

See Improved Consistency When Iterating Sets

In API version 62.0 and later, modifying elements of a set while iterating the set in a `for` or `foreach()` loop throws an exception. This behavior is versioned. In API 61.0 and earlier, modifications to sets while iterating were sometimes allowed and generated unexpected results.

Where: This change applies to all editions.

How: This sample code removes elements while iterating the set, which throws an exception: `System.FinalException: Cannot modify a collection while it is being iterated`.

```
Set<String> set_string = new Set<String>{'one', 'two', 'three'};
for (String str : set_string) {
  System.debug(str);
  set_string.remove(str);

  System.debug(set_string.contains(str));
}
System.debug(set_string);
```

SEE ALSO:

Apex Developer Guide: Iterating Collections

Write Mock SOQL Tests for External Objects

To increase code coverage and quality, you can now write better Apex unit tests for external objects and mock SOQL query responses by using the new SOQL stub methods and a new test class. Use basic and joined SOQL queries against external objects and return mock records in a testing context.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

How: Create mock test classes by extending the new `System.SoqlStubProvider` class and overriding the `handleSoqlQuery()` class method. Create external object records using either `Test.createStubQueryRow()` or `Test.createStubQueryRows()`. Register the mock provider in the test using `Test.createSoqlStub()` and execute the test code.

Note: Apex governor limits apply to the stubbed records.

The SOQL query must be against an external object, either directly with a FROM clause or via a subquery. These features aren't allowed within a stub implementation.

- SOQL
- SOSL
- Callouts
- Future methods
- Queueable jobs
- Batch jobs
- DML
- Platform events

SEE ALSO:

Apex Developer Guide: Mock SOQL Tests for External Objects

API

The CORS allowlist you define for APIs exposed on your My Domain URL now also applies to the APIs exposed on the `api.salesforce.com` domain. 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 before October 12, 2024. 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.

Benefit from Faster Metadata API Deployment Cancellations

Canceling a Metadata API deployment sometimes took too long if operations such as field type changes were involved, so we implemented a new framework to shorten these longer cancellation times.

Service Protection Limit on Enqueued Apex Metadata API Deployments

To preserve service function and resources for all customers on a server, we now limit the number of deployments that can be enqueued at a time from Apex Metadata API. Previously, there was no limit. We set the limit based on careful analysis to make sure that it doesn't impact your day-to-day operations. This limit applies only to enqueued Metadata API deployments that originate from Apex. It doesn't affect Metadata API deployments from Salesforce CLI, change sets, or packaging.

Enforce the CORS Allowlist on More Salesforce APIs

The CORS allowlist that you define for APIs exposed on your My Domain URL now also applies to the APIs exposed on the `api.salesforce.com` domain.

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.

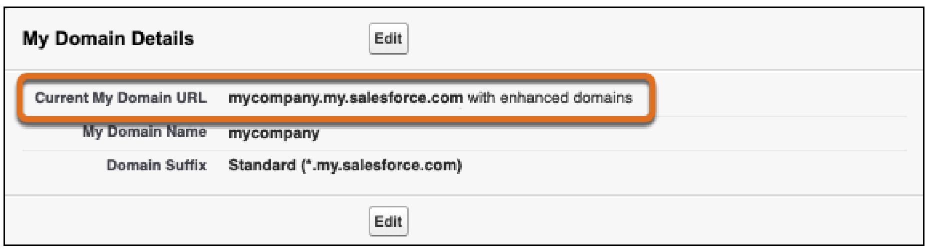
Update API Calls to Use Your My Domain Login URL

To prevent service interruptions, update instanced URLs in your API calls to your My Domain login URL before October 12, 2024. 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 instanced URL that's incorrect 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.



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

Benefit from Faster Metadata API Deployment Cancellations

Canceling a Metadata API deployment sometimes took too long if operations such as field type changes were involved, so we implemented a new framework to shorten these longer cancellation times.

Where: This change applies to all Salesforce editions.

SEE ALSO:

Salesforce Help: Notes on Changing Custom Field Types

Service Protection Limit on Enqueued Apex Metadata API Deployments

To preserve service function and resources for all customers on a server, we now limit the number of deployments that can be enqueued at a time from Apex Metadata API. Previously, there was no limit. We set the limit based on careful analysis to make sure that it doesn't impact your day-to-day operations. This limit applies only to enqueued Metadata API deployments that originate from Apex. It doesn't affect Metadata API deployments from Salesforce CLI, change sets, or packaging.

Where: This change applies to all Salesforce editions.

Enforce the CORS Allowlist on More Salesforce APIs

The CORS allowlist that you define for APIs exposed on your My Domain URL now also applies to the APIs exposed on the `api.salesforce.com` domain.

Where: This change applies to all Salesforce editions.

SEE ALSO:

Salesforce Help: My Domain

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.

DevOps Center

Salesforce DevOps Center provides an improved experience around change and release management that brings DevOps standard practices to your development team, regardless of where team members fall on the low-code to pro-code spectrum. All developers and builders can work together to deliver value to customers in a repeatable and scalable way.

Are you looking for an alternative to change sets based on modern development industry standards? We thought so.

IN THIS SECTION:

SEE ALSO:

DevOps Center roadmap: v7.5 Bug Fixes (September 2024)

Salesforce Help: Install and Configure DevOps Center

Salesforce Help: Manage and Release Changes Easily and Collaboratively with DevOps Center

DevOps Center Developer Guide

Get Started with Bitbucket Cloud (Beta)

Set up and configure Bitbucket Cloud as your source control system.

Note: DevOps Center Bitbucket Cloud support 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.

Where: This change applies to Lightning Experience in:

- Developer, Professional, Enterprise, Performance, and Unlimited Editions.
- Government Cloud Plus. Turning on DevOps Center in Government Cloud Plus orgs can send data outside the authorization boundary. Contact your Salesforce account executive for more details.

Who: Users who are assigned the required DevOps Center permission sets, including DevOps Center Release Manager.

How: If you're familiar with using DevOps Center with GitHub, some of the steps are different for setting up Bitbucket. As part of our extensibility initiatives, we're transforming our user interface, where DevOps Center functionality is moving to Lightning Experience so you have more control and flexibility in customizing the user experience. During this transition period, some Bitbucket setup and configuration tasks are performed in Lightning Experience and some are performed in the DevOps Center app. Menu options and buttons help you smoothly transition between the two.

SEE ALSO:

Salesforce Help: Install and Configure DevOps Center

Celebrate Extensibility and Performance Enhancements

The latest DevOps Center package version includes some key enhancements that augment the underlying frameworks and improve performance.

Where: This change applies to Lightning Experience in:

- Developer, Professional, Enterprise, Performance, and Unlimited Editions.
- Government Cloud Plus. Turning on DevOps Center in Government Cloud Plus orgs can send data outside the authorization boundary. Contact your Salesforce account executive for more details.

How:

- As part of our enhanced extensibility initiatives, we're transforming our user interface, where DevOps Center functionality is moving to Lightning Experience so you have more control and flexibility in customizing the user experience. During this transition period, you now have access to several record pages and list views in Lightning Experience, in support of the Bitbucket beta. Menu options and buttons help you smoothly transition between the two.
- We've created a framework that makes integrating Git-based source control systems in the future easier and more straightforward.
- If you work directly in the source control system, changes are reflected quicker and more reliably in DevOps Center. We removed the dependency on the Github Events API to detect external actions.
- When adding changes to a work item, you can include components in a folder using the Add Components Manually feature.

SEE ALSO:

DevOps Center roadmap: v7.5 Bug Fixes (September 2024)

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:

Create Your Own Libraries for Masking Data

Set up your own libraries of values outside of the defaults provided by Data Mask to replace your personally identifiable information (PII). After you install the Data Mask managed package, your custom libraries can contain any string value, including digits, special characters, and non-English alphabets. The new Custom Library feature is now shipped with the managed package and is automatically updated when the managed package is upgraded.

Set Up and Administer Data Mask Jobs More Easily

After you install the latest Data Mask managed package, it's easier to set up, start, and monitor a Data Mask job and understand the state of your sandbox's personally identifiable information (PII). The new interface changes are now shipped with the managed package and are automatically updated whenever the managed package is upgraded.

Changes to Selective Sandbox Access for Developer and Developer Pro Sandboxes

When you create or refresh a Developer or Developer Pro sandbox, you must provide access to the sandbox using a public group. This feature improves sandbox creation times, enhances the login experience, and increases sandbox security. This feature doesn't apply to Partial Copy or Full sandboxes.

Create Your Own Libraries for Masking Data

Set up your own libraries of values outside of the defaults provided by Data Mask to replace your personally identifiable information (PII). After you install the Data Mask managed package, your custom libraries can contain any string value, including digits, special characters, and non-English alphabets. The new Custom Library feature is now shipped with the managed package and is automatically updated when the managed package is upgraded.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Unlimited, and Developer editions where Data Mask is installed.

Set Up and Administer Data Mask Jobs More Easily

After you install the latest Data Mask managed package, it's easier to set up, start, and monitor a Data Mask job and understand the state of your sandbox's personally identifiable information (PII). The new interface changes are now shipped with the managed package and are automatically updated whenever the managed package is upgraded.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Unlimited, and Developer editions where Data Mask is installed.

Changes to Selective Sandbox Access for Developer and Developer Pro Sandboxes

When you create or refresh a Developer or Developer Pro sandbox, you must provide access to the sandbox using a public group. This feature improves sandbox creation times, enhances the login experience, and increases sandbox security. This feature doesn't apply to Partial Copy or Full sandboxes.

Where: This change applies to all newly created or refreshed Developer and Developer Pro sandboxes on all instances (Salesforce first-party and Hyperforce) created using the Salesforce Sandbox Setup page.

Important: Behavior change announcement: Starting in Spring '25, you must provide access via a public group for all Developer and Developer Pro sandboxes when creating or refreshing them using the Tooling API. Consequently, the ActivationUserGroupId field on the SandboxInfo object will be required. To avoid losing the ability to create or refresh Developer and Developer Pro sandboxes, use API version 60.0 or later.

When: This feature will be rolled out as a staggered release beginning in September 2024.

Who: All users in the production org with the Manage Developer Sandboxes or Manage Sandboxes user permission.

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

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

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. Read the weekly release notes to learn about recent updates.

IN THIS SECTION:

Keep Up with the Latest Salesforce CLI Enhancements

Stay up to date with recent Salesforce CLI enhancements so you can learn about better ways to work with your Salesforce DX projects.

Where: These changes apply to Salesforce CLI version 2.44.8 and later.

How: Read the Salesforce CLI weekly release notes for detailed information about all the new and changed features and bug fixes in recent releases. This topic provides just a taste of some of the features we recently delivered.

Important: Be sure you read this announcement about the upcoming removal of these commands: `force:source:*`, `force:mdapi:*`, `force:org:create`, and `force:org:delete`.

Move Complex Data More Easily with the Improved `data` Commands (Generally Available)

Import and export test data more easily with the improved `data import|export tree` commands. Key improvements include:

- You can now export up to five 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.
- When you run `data import tree` with the `--file` flag, the command uses parallel uploads, which improves performance.

Upload a Local File to Salesforce Files

Use the new `data create file` command to upload a file from your local project to an org. The upload creates a record in the ContentDocument standard object. You can attach the uploaded file to an existing record, such as an account.

This example shows how to upload the local file `astro.png` to your default org, give the file a new name, and attach the file to the record with ID `a03fakePIA3`.

```
sf data create file --file astro.png --title Astro.png --parent-id a03fakePIA3
```

Faster Salesforce CLI Installation and Updates

Installing and updating Salesforce CLI is now faster, particularly on Windows, because we significantly reduced the size of the npm packages (by 35%) and the operating system-specific installers (by 10%).

Easier Troubleshooting of Deploy or Retrieve Errors

We improved the file system structure of the output when you set the `SF_MDAPI_TEMP_DIR` environment variable and then run `project deploy start` or `project retrieve start`. For example, the output now includes a timestamp and whether the output resulted from a deploy or a retrieve. For retrieves, the output includes both metadata and source format files so you can review exactly what the CLI received from your org before the files were converted.

Permanently Delete Org Records

Permanently delete records in your org with the new `--hard-delete` flag of `data delete bulk`. With this flag, the records become immediately eligible for deletion and you no longer need to clean them manually from the Recycle Bin.

This example shows how to permanently delete account records from your default org by using the IDs listed in the specified CSV file:

```
sf data delete bulk --sobject Account --file files/delete.csv --hard-delete
```

To use this feature you must have the Bulk API Hard Delete system permission. The permission is disabled by default and can be enabled only by your Salesforce admin.

SEE ALSO:

GitHub: Salesforce CLI Release Notes

Salesforce CLI Command Reference: data Commands

Salesforce CLI Command Reference: project convert source-behavior (Beta)

Salesforce CLI Setup Guide: Debug Errors When Deploying or Retrieving Source

Salesforce Help: Salesforce Files

Salesforce Help: Activation of Bulk API Hard Delete on System Administrator Profile

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:

[Salesforce Extensions for Visual Studio Code Has a New Documentation Site](#)

The new documentation site has a UI that's more consistent with other developer guides. The new site aggregates all the documentation for Salesforce Extensions for Visual Studio Code and is easier to navigate. Requests to the old documentation site redirect to the new site.

SEE ALSO:

Salesforce Extensions for Visual Studio Code

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Where: The new documentation site is available on developer.salesforce.com.

SEE ALSO:

Code Builder Has a New Documentation Site

Einstein for Developers Has a 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:

Code Builder Has a New Documentation Site

The new documentation site has a UI that's more consistent with other developer guides. The site aggregates all the documentation for Code Builder and is easier to navigate. Requests to the old documentation site redirect to the new site.

SEE ALSO:

Code Builder Developer Guide

Code Builder Has a New Documentation Site

The new documentation site has a UI that's more consistent with other developer guides. The site aggregates all the documentation for Code Builder and is 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:

Salesforce Extensions for Visual Studio Code Has a New Documentation Site

Einstein for Developers Has a New Documentation Site

Einstein for Developers

Einstein for Developers is an AI-powered developer tool that's available as an easy-to-install Visual Studio Code extension in VS Code desktop and Code Builder. Einstein for Developers is built using CodeGen and x-Gen-Code, secure, custom AI models from Salesforce and is enabled by default in Developer, Enterprise, Partner Developer, Performance, and Unlimited editions.

Read the weekly release notes to learn about recent updates.

IN THIS SECTION:

SEE ALSO:

Einstein for Developers (Beta)

Einstein for Developers Has a New Documentation Site

The new documentation site has a UI that's more consistent with other developer guides. The site aggregates all the documentation for Einstein for Developers (beta) and is 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:

Salesforce Extensions for Visual Studio Code Has a New Documentation Site

Code Builder Has a New Documentation Site

Use Custom Generative AI to Power your Salesforce Development with Einstein for Developers (Generally Available)

Einstein for Developers is an AI-powered developer tool that's available as an easy-to-install Visual Studio Code extension built using CodeGen and x-Gen-Code, secure, custom AI models from Salesforce. Einstein for Developers is enabled in all Salesforce orgs by default.

Where: This change applies to Lightning Experience:

- **Available In**: Developer, Enterprise, Partner Developer, Performance, and Unlimited Editions.

- **Not Available in**: EU Operating Zone. EU Operating Zone is a special paid offering that provides an enhanced level of data residency commitment. Einstein for Developers is supported in orgs in the EU that aren't part of EU OZ, per standard product terms and conditions.

Who: Einstein for Developers is available to all customers and is enabled by default.

Why: With Einstein for Developers, we give you a modern development environment that uses custom generative AI that has been trained on anonymized code patterns.

How: Einstein for Developers is a part of the Salesforce Extension Pack (Expanded) and is enabled by default in all Salesforce orgs. It's available for users in VS Code desktop and Code Builder. With Einstein for Developers you can:

- Chat with Dev Assistant. The Dev Assistant suggests code based on what you say and the file you're working on in your Visual Studio Code editor.
- Use AI-based autocomplete to generate suggestions for code as you write it right inside your editor. Inline autocompletions can currently be triggered in Apex and LWC (Javascript, CSS, and HTML) files.
- Quickly generate unit tests for your Apex classes.

To learn more about Einstein for Developers, go to Einstein for Developers documentation.

Scalability

Optimize and test your implementations. Troubleshoot errors, identify issues with application performance, and improve how you scale.

IN THIS SECTION:

Scale Test

Book a slot on your sandbox instance calendar and test at production peak load. We added inputs for business metrics, use cases, flows, and a ramp plan to the booking process. Use Trial Accuracy Checker to create a sandbox trial run by using the same code from production. The Test Execution page now includes a link to Scale Center on the Compare Tests tab.

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

Who: Scale Test is available for customers with a full sandbox in all Hyperforce regions, except 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**.

Scale Center

We've added a Report Insights feature that shows you which reports were slow over the last week and recommendations to improve performance. We also added fully decrypted URLs in the Callout summary of the Integrations analysis. Signature Customers see Scale Center deep linking in the Technical Health Score (THS) on the CSS Portal.

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 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**.

ApexGuru

We've expanded our antipattern detection features that optimize Apex code and improve performance. View SOQL queries in loops, identify inefficient query filters and operations, and get recommendations for reducing expensive string operations and debug statements.

Where: These updates apply to Salesforce environments with ApexGuru enabled in Full Sandbox and Production environments.

Who: ApexGuru is generally available at no additional cost for all Unlimited Edition Full Sandbox, Signature, and Scale Test customers.

How: From Setup, in the Quick Find box, enter `Scale Insights`, and then click **ApexGuru Insights**.

Heroku

Use Heroku to build, deliver, monitor, and scale innovative apps fast. Publish your Heroku apps as External Services and create actions in Salesforce.

To learn more about Heroku, see the Heroku Dev Center.

IN THIS SECTION:

Explore Your Heroku Apps in Salesforce Setup (Pilot)

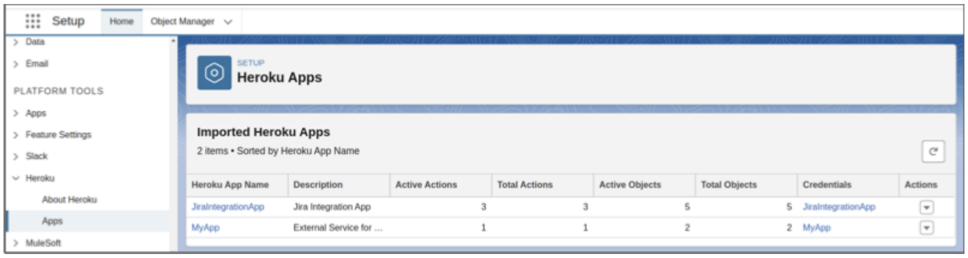
Publish your Heroku apps as External Services by using the Heroku Integration add-on. After connecting to Salesforce and publishing your app, your app's API operations become actions in External Services. You can explore these APIs in Salesforce Setup and use these actions in Flow Builder, Apex, and Data Cloud. Your Heroku app can connect, query, and write back to Salesforce and Data Cloud.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Unlimited, and Developer editions.

Note: Heroku Apps in Salesforce Setup 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.

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

How: From Setup, in the Quick Find box, enter `Heroku`, and then select **Apps**.



SEE ALSO:

Metadata API

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.

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.

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 Salesforce Functions Retirement on the Heroku Dev Center for the end-of-life timeline and more information on migrating your functions.

SEE ALSO:

Developer Doc: Salesforce Functions Release Notes

Change Data Capture

Check out the objects that are enabled for change data capture.

IN THIS SECTION:

Receive Change Event Notifications for More Objects

Many more objects are now enabled for Change Data Capture. With these enabled objects, you can receive real-time notifications of new and changed records.

Receive Change Event Notifications for More Objects

Many more objects are now enabled for Change Data Capture. With these enabled objects, you can receive real-time notifications of new and changed records.

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

How: Select the objects that you want to get notifications for on the Change Data Capture page in Setup, or create a custom channel.

Salesforce Overall

- AccountCleanInfo
- AssetRelationship
- AssociatedLocation
- AuthorizationFormDataUse
- BusinessBrand
- CalendarView
- CollaborationGroupRecord
- CollabTemplateMetric
- ConferenceNumber
- ContactCleanInfo
- ContentFolder
- Coupon
- ExternalEvent
- FieldServiceMobileSettings
- FlowRecord
- FlowRecordElement
- FlowRecordVersion
- ForecastingOwnerAdjustment
- LinkedArticle
- ManagedContent
- MerchantAccount
- ObjectDataImport
- ProcessException
- ProfileSkillEndorsement
- QuickTextUsage
- SurveyInvitation
- SurveySubject
- TenantEntitlementTransaction
- TenantUsageTypeMultiplier
- Territory2Model
- TodayGoal
- UserAppInfo

- UserEmailPreferredPerson
- WaveAutoInstallRequest
- WorkAccess
- WorkBadge
- WorkBadgeDefinition
- WorkCapacityLimit
- WorkThanks

Commerce

- LocationGroup
- LocationGroupAssignment
- FulfillmentOrder
- FulfillmentOrderLineItem
- FulfillmentOrderItemTax
- OrderAdjustmentGroupSummary
- OrderDeliveryGroupSummary
- OrderDeliveryMethod
- OrderItemSummary
- OrderItemSummaryChange
- OrderItemTaxLineItemSummary
- OrderPaymentSummary
- OrderSummary
- SalesChannel

Data Cloud

- MarketSegmentActivation

Einstein

- Conversation Reason objects: ConversationContextEntry, ConversationReason, ConversationReasonExcerpt, and ConversationReasonGroup. See Einstein Conversation Insights in *Salesforce Help*.

Field Service

- ProductWarrantyTerm
- ReturnOrderItemAdjustment
- ReturnOrderItemTax

Industries

Automotive Cloud objects:

- AssetAccountParticipant

- Vehicle
- VehicleDefinition

Consumer Goods Cloud objects:

- Promotion
- RetailStore

Financial Services Cloud objects:

- PersonLifeEvent

Health Cloud objects:

- ActivityTiming
- CareMetricTarget
- CarePgmProvHealthcareProvider
- CareProgramCampaign
- CareProgramGoal
- CareRequestExtension
- CareRequestReviewer
- ClinicalEncounterDiagnosis
- DataUseLegalBasis
- HealthScore
- LiveAgentSession
- MedicationReconciliation
- MedicationStatementDetail
- MedicinalIngredient
- MedReconRecommendation
- MedReconStmtRecommendation
- PatientMedicalProcedureDetail

Loyalty Management objects:

- BenefitType
- JournalSubType
- JournalType
- LoyaltyMemberCurrency
- LoyaltyMemberTier
- LoyaltyPartnerProduct
- LoyaltyPgmEngmtAttribute
- LoyaltyPgmEngmtAttrProm
- LoyaltyPgmGroupMbrRlnsp
- LoyaltyPgmMbrAttributeVal
- LoyaltyPgmPartnerPromotion
- LoyaltyProgram
- LoyaltyProgramBadge

- LoyaltyProgramCurrency
- LoyaltyProgramMemberBadge
- LoyaltyProgramMemberCase
- LoyaltyProgramPartner
- LoyaltyTier
- LoyaltyTierBenefit
- LoyaltyTierGroup
- MemberBenefit
- PromotionLoyaltyPtnrProdt
- PromotionMarketSegment
- VoucherDefinition

Manufacturing Cloud objects:

- AccountForecast
- AcctMgrTarget
- AcctMgrTargetDstr
- LeadLineItem
- LeadPreferredSeller
- OpportunityPreferredSeller
- SalesAgreement
- SalesAgreementProduct

Nonprofit Cloud objects:

- GiftCommitment
- GiftCommitmentSchedule
- GiftSoftCredit
- GiftTransaction
- OutreachSourceCode
- GiftRefund
- GiftTransactionDesignation

Salesforce Flow

- FlowOrchestrationVersion

Security and Identity

- AuthorizationFormDataUse
- CommSubscriptionTiming
- DataUseLegalBasis
- DataUsePurpose

Service

- LiveChatTranscriptEvent
- LiveChatVisitor
- MessagingEndUser
- MessagingSession
- PendingServiceRouting
- UserServicePresence

Platform Events

Process high volumes of platform events efficiently with parallel subscriptions. Learn about the retirement of standard-volume platform events.

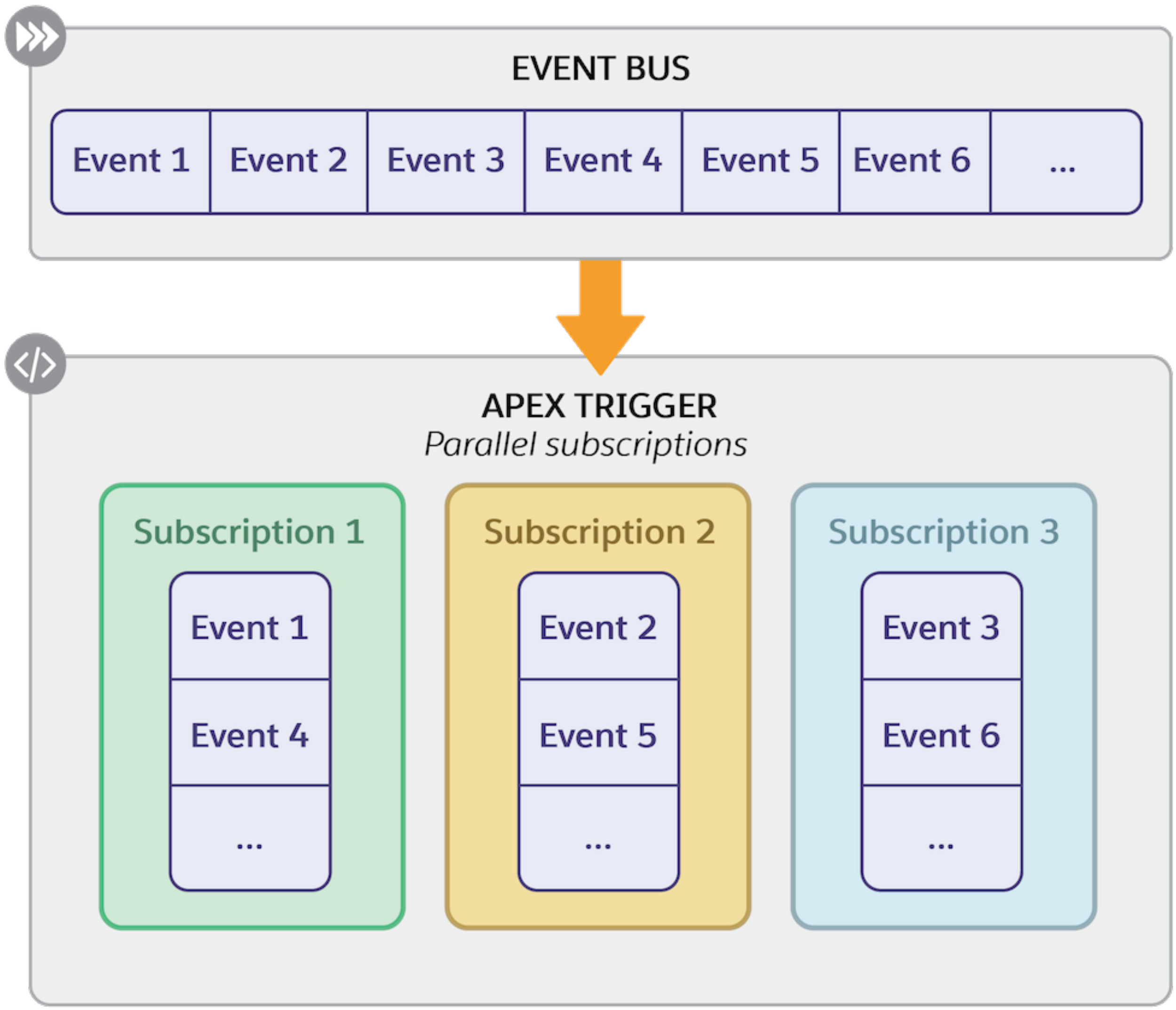
IN THIS SECTION:

Process Platform Events at Scale with Parallel Subscriptions for Apex Triggers (Generally Available)

To speed up platform event processing in an Apex trigger, use parallel subscriptions to process events simultaneously instead of in a single stream. With parallel subscriptions, you can scale your Apex platform event triggers to handle high volumes of events. Parallel subscriptions are available for custom high-volume platform events but not standard events or change events.

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

How: How the system distributes events to parallel subscriptions depends on the partition key that you specify—the standard `EventUuid` field or a platform event custom field. You can specify up to 10 parallel subscriptions, also referred to as partitions.



To configure parallel subscriptions for an Apex trigger, use Tooling API or Metadata API to specify the event field used for partitioning (`PartitionKey`) and the number of partitions (`NumPartitions`) in PlatformEventSubscriberConfig. This example shows a PlatformEventSubscriberConfig Tooling API request body for a custom partition key field and three partitions.

```
{
  "DeveloperName":"MyOrderEventTriggerConfig",
  "MasterLabel":"MyOrderEventTriggerConfig",
  "PlatformEventConsumerId": "<Apex_Trigger_Id>",
  "PartitionKey": "Order_Event__e.Order_Number__c",
  "NumPartitions": "3"
}
```

For a custom field, the partition key includes the event name as a prefix in this format: ***`EventName__e.FieldName__c`***. For the standard `EventUuid` field, the partition key format is the field name without the event name: `EventUuid`.

To monitor your parallel subscriptions, from Setup, in the Quick Find box, enter *`Platform Events`*, select **Platform Events**, and then click your platform event. The parallel subscriptions are displayed on the platform event detail page, in the Parallel Subscriptions related list.

Parallel Subscriptions

Action	Subscriber	Last Processed Id	State	Partition Key	Number of Partitions
Manage	MyOrderEventTrigger	1255	Running	Order_Number__c	3

SEE ALSO:

Platform Events Developer Guide: Platform Event Processing at Scale with Parallel Subscriptions for Apex Triggers

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, replace them with high-volume platform events. After retirement, you can no longer publish or subscribe to standard-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 Now Retired

If your client references any of the retired API versions, the system routes the request to the latest API version. Even though the system uses a newer API version, we recommend that you update your client to use the latest API version to make your code more accurate.

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

Use event relays with filtered and enriched channels.

IN THIS SECTION:

Use a Filtered Channel to Relay Events to Amazon EventBridge

Add a filter to a custom channel and send only platform events and change events that match the filter criteria to Amazon EventBridge. By using a filtered channel, you reduce the volume of events relayed to Amazon EventBridge, process events efficiently, and decrease the consumption of the event delivery allocation. Stream filtering is available for custom channels that reference custom platform events and change events but not for real-time event monitoring events. We delivered this feature thanks to your ideas on IdeaExchange.

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

SEE ALSO:

Salesforce Help: Event Channels

Platform Events Developer Guide: Filter Your Stream of Platform Events with Custom Channels

Send Enriched Change Events to Amazon EventBridge

Make sure that relayed change events always contain fields whether changed or not, and use channels that are configured with change event enrichment with event relays. Previously, you couldn't use enriched channels with event relays. We delivered this feature thanks to your ideas on IdeaExchange.

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

SEE ALSO:

Salesforce Help: Event Channels

Change Data Capture Developer Guide: Enrich Change Events with Extra Fields

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.

IN THIS SECTION:

New and Changed Lightning Web Components

Build UI easily with these new and changed components.

Changed Lightning Web Components

The following components have changed.

lightning-datatable

This behavior has changed.

- During inline editing, validation errors appear on the cell itself rather than on the whole datatable.

This attribute has changed.

- `wrap-table-header`—This attribute is now a string instead of a boolean. In addition to clipping or wrapping all table headers, you can now wrap or clip table headers based on the wrap and clip settings for each individual column. Accepted values are `all`, `none`, and `by-column`. The default setting is `by-column`.

lightning-helptext

This accessibility behavior is new.

- Users can now use either mouse clicks or keyboard interactions to launch the tooltip.

lightning-input

This behavior is new for `type="number"`.

- A `badNumericInput` validity error is emitted when the input isn't a number. The default error message is, "Enter a valid numeric value." You can use the `message-when-bad-input` attribute to override the default message.

This accessibility behavior is new for `type="date"`.

- Formatted text now appears inline beneath the input field that shows the required date format. The date format shown is based on the `date-style` attribute.

This accessibility behavior has changed for `type="date"` and date fields in `type="datetime"`.

- The error message for the `valueMissing` now includes the expected date format. The listed date format in the message corresponds to the user's locale and the `date-style` attribute.
- All custom error messages now include additional text after the custom message with the expected date format in parentheses. The listed date format in the appended text corresponds to the user's locale and the `date-style` attribute.

lightning-record-form

This behavior has changed.

- You can now request Salesforce `Event` objects, but `Event.IsRecurrence`, `Event.IsRecurrence2`, and `Event.IsReminderSet` aren't rendered.

lightning-record-edit-form

This behavior has changed.

- You can now request Salesforce `Event` objects, but `Event.IsRecurrence`, `Event.IsRecurrence2`, and `Event.IsReminderSet` aren't rendered.

lightning-modal

This accessibility behavior has changed.

- The close icon now has a white background fill to comply with non-text contrast ratio requirements in Web Content Accessibility Guidelines (WCAG 2.1).

lightning-record-view-form

This behavior has changed.

- You can now request Salesforce `Event` objects, but `Event.IsRecurrence`, `Event.IsRecurrence2`, and `Event.IsReminderSet` aren't rendered.

SEE ALSO:

Component Library

New and Changed Modules for Lightning Web Components

Do more with Lightning web components by using modules.

New Modules

These modules are now available.

lightning/uiLayoutApi

This module includes this new function.

- `getLayout`—Gets layout information, metadata, and data to build UI for one or more records.

lightning/uiLearningPlatformApi

This module includes this new wire adapter.

- `evaluateLearningItem`—Checks whether the criteria for completing a custom exercise in an Enablement program are satisfied.

Changed Modules

These modules have new, changed, or deprecated wire adapters and JavaScript functions.

lightning/uiGraphQLApi

The GraphQL wire adapter is now supported in Experience Cloud sites.

lightning/uiListsApi

This module includes these new wire adapters.

- `createListInfo`—Create a list view associated with an object.
- `deleteListInfo`—Delete a list view.
- `getListInfosByObjectName`—Get the list views associated with an object.
- `getListObjectInfo`—Get the metadata for a list view object.
- `getListPreferences`—Get the preferences for a list view.
- `getListRecordsByName`—Get record data for a list view.
- `updateListInfoByName`—Update a list view's metadata.
- `updateListPreferences`—Update the preferences for a list view.

For more information, see Manage List Views with New Lightning Web Component (LWC) Wire Adapters.

experience/cmsDeliveryApi

This module includes this new wire adapter.

- `getContents`—Retrieves a list of published content from an enhanced CMS workspace for an enhanced LWR site in Experience Cloud.

SEE ALSO:

Component Library

New and Changed Targets for Lightning Web Components

Use Lightning web components in builders such as Lightning App Builder, Experience Builder, Flow Builder, and more.

New Targets

These targets are now available.

lightning__ECSFSApp

Enables a component to be used in Field Service Mobile App Builder.

lightning__EnablementProgram

Enables a component to be used in Program Builder as a custom exercise type for an Enablement program.

SEE ALSO:

Lightning Web Components Developer Guide: XML Configuration File Elements

New and Changed Aura Components

Build UI easily with these new and changed components.

Changed Aura Components

These components have changed.

lightning:recordEditForm

This behavior has changed.

- You can now request Salesforce `Event` objects, but `Event.IsRecurrence`, `Event.IsRecurrence2`, and `Event.IsReminderSet` aren't rendered.

lightning:recordForm

This behavior has changed.

- You can now request Salesforce `Event` objects, but `Event.IsRecurrence`, `Event.IsRecurrence2`, and `Event.IsReminderSet` aren't rendered.

lightning:recordViewForm

This behavior has changed.

- You can now request Salesforce `Event` objects, but `Event.IsRecurrence`, `Event.IsRecurrence2`, and `Event.IsReminderSet` aren't rendered.

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.

DataSource Namespace

The DataSource namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

CommerceOrders Namespace

The CommerceOrders namespace has this new enum.

PlaceQuote Namespace
The PlaceQuote namespace has this new enum.

SEE ALSO:

Apex: New Features

Auth Namespace

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Return user IDs or custom error messages when using a headless user discovery handler to find users
Use the `(userIds, customErrorMessage)` constructor in the new `Auth.HeadlessUserDiscoveryResponse` class.

New Enums

Specify the method for sending a one-time password (OTP) to a user during headless passwordless login
Use the new `Auth.VerificationAction` enum.

Specify success and exception responses from a custom OTP delivery handler
Use the new `Auth.CustomOneTimePasswordDeliveryResult` enum.

Changed Enums

Specify that you want to revoke a JSON Web Token (JWT)-based access token
Use the new `ORG_JWT` value for the `Auth.OauthTokenType` enum.

New Interfaces

Use a custom OTP provider for Experience Cloud use cases (generally available)
Use the new `Auth.CustomOneTimePasswordDeliveryHandler` interface.

Find users based on an identifier of your choice during headless passwordless login
Use the new `Auth.HeadlessUserDiscoveryHandler` interface.

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.

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 `multipicklist(name, picklistValues, isPicklistAlphabeticallySorted, isPicklistRestricted)`, `multipicklist(name, picklistValues)`, `picklist(name, picklistValues, isPicklistAlphabeticallySorted, isPicklistRestricted)`, `picklist(name, picklistValues)`, and `time(name)` methods in the `Column` class to create new columns on a `DataSource.Table`.

Get more information about Salesforce external object fields

Use the new `get(name, label, description, isSortable, isFilterable, type, length, decimalPlaces, referenceTo, referenceTargetField, picklistValuesObj, isPicklistAlphabeticallySorted, isPicklistRestricted)` method in the `Column` class.

Retrieve information about picklist and multi-select picklist columns on data tables

Use the new `isPicklistAlphabeticallySorted`, `isPicklistRestricted`, and `picklistValues` properties in the `Column` class.

Changed Enums

Specify the new data types supported by the Apex Connector Framework

Use the new `PICKLIST_MULTISELECT_TYPE`, `PICKLIST_TYPE`, and `TIME_TYPE` values in the `DataType` enum.

Specify whether an external system supports picklist and multi-select picklist fields on data tables

Use the new `MULTI_PICKLIST` and `PICKLIST` values in the `Capability` enum.

CommerceOrders Namespace

The CommerceOrders namespace has this new enum.

New Enum

Specify whether the rate card entries defined in the catalog must be fetched for order items

Use the new `CatalogRatesPreferenceEnum` enum in the `PlaceOrderExecutor` class method.

PlaceQuote Namespace

The PlaceQuote namespace has this new enum.

New Enum

Specify whether the rate card entries defined in the catalog must be fetched for quote line items

Use the new `CatalogRatesPreferenceEnum` enum in the `PlaceQuoteRLMApexProcessor` class method.

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:

SEE ALSO:

Connect REST API

Apex Reference Guide: ConnectApi Namespace

Connect REST API Developer Guide

ConnectApi Rate Limit Changes

To avoid potentially restrictive per user, per namespace, per hour ConnectApi rate limits, we're migrating orgs to the per org, per 24-hour Salesforce Platform API rate limit. Orgs created in Summer '24 and later are already using the Salesforce Platform API rate limit. For migrated and 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.

When: Org migrations to the Salesforce Platform API rate limit occur on a rolling basis starting with Winter '25. Migrations occur in the background without notification.

SEE ALSO:

Salesforce Developer Limits and Allocations Quick Reference : API Request Limits and Allocations

New and Changed Connect in Apex Classes

These classes are new or changed.

Commerce

This new method is in the `ConnectApi.CommerceCart` class.

Perform a cart calculation

- `calculateCart(webstoreId, activeCartOrId, effectiveAccountId)`

New output class: `ConnectApi.CalculateCartResult`

New output class: `ConnectApi.CommerceResultRepresentationBase`

This new method is in the `ConnectApi.CommerceCatalogManagement` class.

Create a variation product

- `compositeCommerceVariationCreate(webstoreId, compositeCommerceVariationInputRepresentation)`

New input class: `ConnectApi.CompositeCommerceVariationInputRepresentation`

New output class: `ConnectApi.CompositeCommerceVariationOutputRepresentation`

Named Credentials

These new methods are in the `ConnectApi.NamedCredentials` class.

Get, create, update, or delete an external auth identity provider

- `createExternalAuthIdentityProvider(requestBody)`
- `deleteExternalAuthIdentityProvider(fullName)`
- `getExternalAuthIdentityProvider(fullName)`
- `updateExternalAuthIdentityProvider(fullName, requestBody)`

New input class: `ConnectApi.ExternalAuthIdentityProviderInput`

New output class: `ConnectApi.ExternalAuthIdentityProvider`

Get a list of external auth identity providers in the org

- `getExternalAuthIdentityProviders()`

New output class: `ConnectApi.ExternalAuthIdentityProviderList`

Get, create, or update external auth identity provider credentials

- `createExternalAuthIdentityProviderCredentials(fullName, requestBody)`
- `getExternalAuthIdentityProviderCredentials(fullName)`
- `updateExternalAuthIdentityProviderCredentials(fullName, requestBody)`

New input class: `ConnectApi.ExternalAuthIdentityProviderCredentialsInput`

New output class: `ConnectApi.ExternalAuthIdentityProviderCredentials`

Salesforce CMS

This changed method is in the `ConnectApi.ManagedContent` class.

Get managed content delivery channels

- `getAllDeliveryChannels(pageParam, pageSize)`

This method is no longer available. Use `getChannels(pageParam, pageSize)` in the `ConnectApi.ManagedContentDelivery` class instead.

These new methods are in the new `ConnectApi.ManagedContentChannels` class.

Get managed content channels

- `getManagedContentChannels(pageParam, pageSize, showDetails)`

New output class: `ConnectApi.ManagedContentChannelsRepresentation`

Create a managed content channel

- `postManagedContentChannel(ManagedContentCreateInputParam)`

New input class: `ConnectApi.ManagedContentChannelCreateRepresentation`

Get a managed content channel

- `getManagedContentChannel(channelId)`

Update a managed content channel

- `patchManagedContentChannel(channelId, ManagedContentChannelInput)`

  New input class: `ConnectApi.ManagedContentChannelUpdateRepresentation`

Delete a managed content channel

- `deleteManagedContentChannel(channelId)`

These new and changed methods are in the `ConnectApi.ManagedContentDelivery` class.

Get managed content delivery channels

- `getChannels(pageParam, pageSize)`

  New output class: `ConnectApi.ManagedContentDeliveryChannelsRepresentation`

Get a managed content delivery channel

- `getManagedContentChannel(channelId)`

  This method is no longer available. Use `getChannel(channelId)` instead.

Get a managed content delivery channel

- `getChannel(channelId)`

  New output class: `ConnectApi.ManagedContentDeliveryChannelRepresentation`

These new methods are in the new `ConnectApi.ManagedContentSpaces` class.

Get channels for a managed content space

- `getManagedContentSpaceChannels(contentSpaceId, pageParam, pageSize)`

  New output class: `ConnectApi.ManagedContentSpaceChannelsRepresentation`

Add or remove channels from a managed content space

- `patchManagedContentSpaceChannels(contentSpaceId, spaceChannels)`

  New input class: `ConnectApi.ManagedContentSpaceChannelsInputRepresentation`

  New output class: `ConnectApi.ManagedContentSpaceChannelsRepresentation`

Changed Connect in Apex Output Classes

These output classes have changes.

Commerce

`ConnectApi.AbstractCartItem`

This output class has these new properties.

- `childProductCount`—Number of child products in the cart that are associated with the item. A cart item can have child products if the `productClass` of the item is `Bundle`. For nested bundles, which include a child product that's also a bundle, `childProductCount` includes all child products.
- `parentCartItemId`—ID of the item's parent cart item. The value is empty if the item is a top-level cart item.

`ConnectApi.CartItem`

This output class has this new property.

- `productClass`—Class of the product.

`ConnectApi.OCIInventoryRecordOutputRepresentation`

This output class has this new property.

- `exists`—Indicates if the SKU exists in the inventory.

`ConnectApi.ProductChild`

This output class has this new property.

- `isEntitled`—Specifies whether the child product can be viewed on the product detail page (`true`) or not (`false`).

Experience Cloud Sites

`ConnectApi.Community`

This output class has this new property.

- `contentSpaceId`—ID of the managed content space associated with the enhanced site.

Flow Orchestration

Orchestration Work Item

This response body has this new property.

- `flowType`—Flow type of the orchestration that created the orchestration work item.

Salesforce CMS

`ConnectApi.ManagedContentChannel`

This output class has these changed and new properties.

- `channelId`—This property is no longer returned.
- `channelName`—This property is no longer returned.
- `channelType`—This property is no longer returned.
- `domain`—This property is no longer returned.
- `domainName`—This property is no longer returned.
- `id`—ID of the managed content channel.
- `isChannelSearchable`—This property is no longer returned.
- `isDomainLocked`—This property is no longer returned.
- `isSearchable`—Specifies whether the text contents of the channel are searchable.
- `managedContentChannelDomain`—Domain associated with the channel.
- `name`—Name of the managed content channel.
- `targetId`—ID of the target associated with the managed content channel.
- `type`—Type of managed content channel.

`ConnectApi.ManagedContentChannelSummary`

This output class has these changed and new properties.

- `domainUrl`—This property is no longer returned.
- `id`—ID of the managed content channel.
- `resourceUrl`—This property is no longer returned.
- `target`—This property is no longer returned.

- `type`—Type of managed content channel.
- `url`—URL to the channel resource.

`ConnectApi.ManagedContentCollectionItems`

This output class has these changed and new properties.

- `channelInfo`—This property is no longer returned. Use `channelSummary` instead.
- `channelSummary`—Summary information for the managed content delivery channel.

`ConnectApi.ManagedContentDeliveryDocument`

This output class has these changed and new properties.

- `channelInfo`—This property is no longer returned. Use `channelSummary` instead.
- `channelSummary`—Summary information for the managed content delivery channel.

`ConnectApi.ManagedContentDeliveryDocumentCollection`

This output class has these changed and new properties.

- `channelInfo`—This property is no longer returned. Use `channelSummary` instead.
- `channelSummary`—Summary information for the managed content delivery channel.

Changed Connect in Apex Enums

These enums have changes.

For information about these enums, see ConnectApi Enums in the *Apex Reference Guide*.

`ConnectApi.ProductClass`

This enum has these new values.

- `Bundle`—The product has a class of bundle.
- `Set`—The product has a class of set.

API: New and Changed Items

Access more data objects and metadata types in API version 62.0.

IN THIS SECTION:

Invocable Actions

An invocable action represents an action that you can perform on Salesforce with APIs. Invocable actions are available through REST API.

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

Related lists for records support child relationships, and User Interface API supports more objects.

New and Changed Objects

Access more data through these new and changed standard objects.

Salesforce Overall

Associate person accounts and contacts to other person accounts or contacts that they report to

Use the new `PersonReportsToId` field on the existing Account object.

Commerce

Set the coupon that causes the adjustment

Use the new `AdjustmentBasisReferenceId` field on the existing CartDeliveryGroupMethodAdj object. By default, field-level security hides these fields.

Get the reference number associated with a tax calculation

Use the new `CalculationReferenceNumber` field on the existing OrderItemTaxLineItemSummary object.

Get the reference number associated with a tax transaction commit request

Use the new `TransactionReferenceNumber` field on the existing OrderItemTaxLineItemSummary object.

Revert taxes when an order is canceled or returned

Use the new `ReferenceNumber` field on the existing OrderItemTaxLineItemSummary object.

Create a delivery estimation setup configuration

Use the new DeliveryEstimationSetup object.

Assign a shipping carrier method to a location group

Use the new LocationShippingCarrierMethod object.

Add a condition based on delivery weight that affects the shipping rate

Use the new `OrderWeightFactor` value on the existing `ConditionFactor` field on the StandardShippingRate object.

Indicate weight information for cart items

Use these new fields.

- New `WeightUnit` field on the existing StandardShippingRate object
- New `PerUnitWeight`, `TotalWeight`, and `WeightUnit` fields on the existing CartItem object

Include the billing and shipping addresses for each payment intent

Use the new `BillingAddress`, `ShippingAddress`, and their related address fields on the PaymentIntent object.

Check the amount, fee, and status of disputed payments

Use the new `DisputeEvidenceDueDate`, `DisputeFee`, `DisputeStatus`, and `DisputedAmount` fields on the PaymentIntent object.

Indicate the type of bank account holder for saved payment methods

Use the new `BankAccountHolderType` field on the SavedPaymentMethod object.

Include the billing address for saved payment methods

Use the new `BillingAddress`, and its related address fields on the SavedPaymentMethod object.

Indicate if a merchant initiated a payment on behalf of a customer

Use the new `EntryMode` and `SubmittedById` fields on the PaymentIntent object, and the `IsMerchantCreated` on the SavedPaymentMethod object.

Indicate the status of an orphaned payment

Use the new `IncurrenceStatus` field on the PaymentIntent object.

Specify the code for how an ACH payment is made and authenticated

Use the new `StandardEntryClassCode` field on the SavedPaymentMethod and AlternativePaymentMethod objects.

BEHAVIOR CHANGE: Create a product that can be sold as part of a bundle

The ProductRelatedComponent object now supports creating bundles for Commerce. Use the new `DoesBundlePriceIncludeChild`, `QuantityScaleMethod`, `ParentProductRole`, `ChildProductRole`, and `ProductRelationshipTypeId` fields on the existing ProductRelatedComponent object.

Indicate the class of a cart item

Use the new `ProductClass` field on the CartItem object.

Indicate parent and child product information for a cart item

Use the new `ChildProductCount`, `ParentCartItemId`, `ProductRelatedComponentId`, and `ProductValidationKey` fields on the CartItem object.

Check stock levels of a product

Use the new `StockCheckMethod` field on the Product2 object.

Indicate the stock levels of a cart item

Use the new `StockCheckMethod` field on the CartItem object.

Customization

Add a description for public groups and queues

Use the new `Description` field on the existing Group object.

Development

Determine whether a platform event Apex trigger uses parallel subscriptions

Query the new `IsPartitioned` field on the existing EventBusSubscriber object.

Event Monitoring

Identify blocked redirections for legacy hostnames

Use the new `Redirection was blocked because redirections for the legacy SOURCE_HOSTNAME are no longer supported.` value in the `REDIRECT_REASON` field of the Hostname Redirects event type.

Monitor permission changes in profiles, permission sets, and permission set groups

Use the new Permission Update event type.

Experience Cloud

Add an API Name when you create new content in an enhanced CMS workspace

Use the new `ApiName` field on the existing ManagedContent object.

Define the content type of an item of CMS content or a content variant

Use the new `ContentTypeFullyQualifiedName` field on the existing ManagedContent or ManagedContentVariant objects.

Field Service

Show mobile workers a brief of their upcoming work order

Use the new `Pre-Work Brief Prompt Template ID` field on the Work Order object.

Summarize a completed work order

Use the new `Post-Work Summary` field on the Work Order object.

Set up geolocation-based actions based on platform alerts

Use the new `Platform Alert` value of the `Action Type` field on the Geolocation-Based Action object.

Revenue

Track your invoice batch run processing totals

Use the new `TotalDraftInvoiceAmount`, `TotalDraftInvoices`, `TotalPostedInvoices`, and `TotBillSchdUpdtDurDrftToPost` fields on the existing InvoiceBatchRun object.

Sales

Capture forecasts at a point in time

Use the new ForecastingSubmission and ForecastingSubmissionItem objects.

Roll up manager judgment values for all forecast managers

Use the new ForecastingCustomCategory object.

Create custom exercise types for Enablement programs

Use these new objects, fields, and values.

- New EnblProgramTaskSubCategory and LearningItemType objects
- New `CustomEnblPgmTaskSubCategoryId` field on the existing EnblProgramTaskDefinition object
- New `CustomExercise` value in the existing `TaskSubCategory` field on the EnblProgramTaskDefinition object
- New `CustomLearningItemTypeId` field on the existing LearningItem object
- New `CustomContent` value in the existing `Type` field on the LearningItem object

Move Enablement programs and their dependencies between orgs with second-generation managed packages

Use the new `NamespacePrefix` field on the existing EnablementMeasureDefinition, EnablementProgramDefinition, and EnblMeasureObjectDefinition objects.

BEHAVIOR CHANGE: The `Body` field on the PromptVersion object allows a maximum of 4,000 characters for all prompt types

Previously, this field allowed only a maximum of 240 characters for floating prompts and docked prompts. This enhancement was introduced in API version 60.0.

Track external record share exports between partner and vendor orgs using Partner Connect

Use these new objects, fields, and picklist values.

- ExtlRecShrCnct

- ExtlRecShrCnctAccnt
- ExtlRecShrField
- ExtlRecShrFieldMap
- ExtlRecShrLead
- ExtlRecShrObject
- ExtlRecShrOpportunity
- ExtlRecShrPcklstOptn
- ExtlRecShrRecordMap
- ExtlRecShrPicklistMap
- `External Record Import` value in the existing `Type` field on the ObjectDataImport object
- `ExportStatus` field on the Lead object
- `ExportStatus` field on the Opportunity object

Create and manage account plans to win new business and grow key accounts

Use the new AccountPlan, AccountPlanObjective, and AccountPlanObjectiveMeasure objects.

Track Territory Assignments on Opportunity Splits and Opportunity Product Splits

Use the new `ArchivedTerritoryName` and `Territory2Id` fields on the OpportunitySplit and OpportunityLineItemSplit objects. These fields are available in API version 62.0 and later.

Salesforce Flow

View the details of an orchestration definition

Use the new FlowOrchestration object. This object is available in API version 62.0 and later.

View the version of an orchestration

Use the new FlowOrchestrationVersion object. This object is available in API version 62.0 and later.

View the API name of the stage that was running when an orchestration instance was paused or failed because of an error in an action called by a step

Use the new `CurrentStage` field on the existing FlowOrchestrationInstance object.

View the duration in seconds from the time that an orchestration instance started until it was completed, canceled, or failed

Use the new `Duration` field on the existing FlowOrchestrationInstance object.

View the ID of the record that triggered an orchestration instance

Use the new `TriggeringRecordId` field on the existing FlowOrchestrationInstance object.

View analytics for each element in a flow

Use the new FlowRecordElementOccurence object.

View the category that determines the usage limits of the flow

Use the new `CapacityCategory` field on the existing FlowDefinitionView, FlowRecord, FlowRecordVersion, and FlowVersionView objects.

Identify an automation event as the flow trigger

Use these new values:

- New `AutomationEvent` value in the existing `TriggerType` field on the FlowDefinitionView object
- New `AutomationEventTrig` value in the existing `FlowType` field on the FlowRecord object
- New `AutomationEventTrig` value in the existing `FlowType` field on the FlowRecordVersion object

Security and Identity

Configure a custom one-time password (OTP) provider delivery handler for external user identity verification (generally available)

Use the new `CustomOtpDeliveryHandlerId` field on the existing NetworkAuthApiSettings object.

Require reCAPTCHA for headless username-password login flows that use the OAuth 2.0 authorization challenge endpoint

Use the new `DoesPasswordLoginRequireAuth` field on the existing NetworkAuthApiSettings object.

Enable headless username-password login, passwordless login, and registration using the OAuth 2.0 authorization challenge endpoint

Use the new `isFirstPartyAppsAllowed` field on the existing NetworkAuthApiSettings object.

Configure a headless user discovery Apex handler to look up users during passwordless login

Use the new `HeadlessDiscoveryHandlerId` field on the existing NetworkAuthApiSettings object.

Set an execution user to run a headless user discovery Apex handler

Use the new `HeadlessDiscoveryExecutionUserId` field on the existing NetworkAuthApiSettings object.

Control authentication provider functionality by dynamically adding URL parameters to client configuration URLs

Use the new AuthProvParamFwdAllowlist object.

Store TenantSecurityCustomMetricStat drill down details.

Use the new TenantSecurityCustomMetricDetail object.

Store the configuration for a custom metric within Security Center

Use the TenantSecurityCustomMetricSetup object.

Store custom metric data within Security Center

Use the TenantSecurityCustomMetricStat object.

Surface event data stored in standard objects

Use the new event log objects (beta): ContentTransferEventLog, MetadataApiOpEventLog, PackageInstallEventLog, SandboxStatusEventLog, and SiteEventLog .

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

Track agent and end user response time in enhanced messaging sessions

Use the new MessagingSessionMetrics object.

Link a unified Messaging channel to multiple applications

Use the new MessagingChannel field on the existing MessagingChannelUsage object.

Set a required consent level in Messaging channels

Use the new ConsentType picklist field on the existing MessagingChannelUsage object.

Specify which messaging component to send to messaging end users

Use the new MessageDefinition field on the existing ConvMessageSendRequest object.

Choose a messaging component to automatically send to messaging users

Use the new MessageDefinition field on the existing ConvMessageSendRequest object.

Specify routing details for a voicemail configuration and relate a Bring Your Own Channel for CCaaS Messaging channel to a contact center

Use the ContactCenterChannel object. Introduced in API version 56.0, this object has been added to the Object Reference Guide with newly available fields.

Identify your custom Messaging channel integration with a logo

Use the `CustomIconId` field on the existing ConversationChannelDefinition object to identify a Bring Your Own Channel or Bring Your Own Channel for CCaaS messaging channel integration. Introduced in API version 61.0, this field has been added to the Object Reference Guide.

Identify your custom Messaging channel integration with a logo

Use the `CapabilitiesSupportsCustomChannelParameters` field on the existing ConversationChannelDefinition object. Introduced in API version 61.0, this field has been added to the Object Reference Guide.

Specify the connected app owner for Bring Your Own Channel

Use the new `ConnectedAppType` field on the existing ConversationChannelDefinition object with Bring Your Own Channel or Bring Your Own Channel for CCaaS.

Note the OAuth link for a connected app created by a customer for Bring Your Own Channel

Use the new `CustomerConnectedAppOauthLink` field on the existing ConversationChannelDefinition object with Bring Your Own Channel or Bring Your Own Channel for CCaaS.

Identify your custom Contact Center as a Service (CCaaS) or partner telephony integration with a logo

Use the new `CustomIconId` field on the existing ConversationVendorInfo object to identify a contact center integration.

Perform enhanced call type analyses

Use the new `callSubtype` field and the existing `CallerContactInfo` and `RecipientContactInfo` fields on the existing VoiceCall object. The `ToPhoneNumber` field was renamed to `CallerContactInfo` and the `FromPhoneNumber` field was renamed to `RecipientContactInfo`.

New and Changed Data Model Objects

Access more data groupings through these new and changed data model objects (DMOs).

Salesforce Flow

View an instance of a recurring flow that runs on a schedule

Use the new Flow Version Occurrence 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.

Sales

Track external record share exports between partner and vendor orgs using Partner Connect

Use the new ExtlRecShrEvent and ExtlRecShrResultEvent platform events.

Bulk API

These calls are new, changed, or deprecated in API version 62.0

Get information about Bulk API requests with Bulk API Event log type

A new event log type, `Bulk API Request Event`, indicates when Bulk API requests are received. This includes receiving requests for create job, update job, create batch, update batch, and when a job completes. Previously, only the `Bulk API Event` event log type captured one event for each time a batch was processed. Use either or both to monitor your Bulk API jobs.

SEE ALSO:

Object Reference for the Salesforce Platform: Bulk API Request Event Type

Bulk API 2.0

These calls are new, changed, or deprecated in API version 62.0.

Download Bulk API 2.0 query results in parallel

Use the new `resultPages` resource to retrieve multiple pages of results in parallel for a query job. Previously, you could use only the `results` resource in serial to retrieve results. Supports up to 5 parallel HTTPS downloads at one time.

SEE ALSO:

Bulk API 2.0 and Bulk API Developer Guide: Get Paged Results for a Query Job

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

To avoid potentially restrictive per user, per application, per hour Connect REST API rate limits, we're migrating orgs to the per org, per 24-hour Salesforce Platform API rate limit. Orgs created in Summer '24 and later are already using the Salesforce Platform API rate limit. For migrated and 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

To avoid potentially restrictive per user, per application, per hour Connect REST API rate limits, we're migrating orgs to the per org, per 24-hour Salesforce Platform API rate limit. Orgs created in Summer '24 and later are already using the Salesforce Platform API rate limit. For migrated and 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.

When: Org migrations to the Salesforce Platform API rate limit occur on a rolling basis starting with Winter '25. Migrations occur in the background without notification.

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.

Perform a cart calculation

Make a POST request to the new `/commerce/webstores/`***`webstoreId`***`/carts/`***`activeCartOrId`***`/actions/calculate` resource.

New response body: Cart Summary Result

Create a variation product

Make a POST request to the new `/commerce/management/webstores/`***`webstoreId`***`/composite-variations` resource.

New request body: Composite Commerce Variation Input

New response body: Composite Product Variation

Retrieve a list of KPIs along with the insights each KPI supports

Make a GET request to the new `/commerce/intelligence/kpis` resource.

Retrieve information about a specified Key Performance Indicator

Make a GET request to the new `/commerce/intelligence/kpis/`***`{kpiName}`*** resource.

Create a new promotion

Make a POST request to the new `/commerce/promotions/composite-promotions` resource.

New request body: Composite Promotion Input

New response body: Composite Promotion

Retrieve information about a specified promotion

Make a GET request to the new `/commerce/promotions/composite-promotions` resource.

New request parameters: `promotionId`, `templateId`. and `webstoreId`

New response body: Composite Promotion

Batch update inventory records to Omnichannel Inventory

Make a POST request to the new `/commerce/oci/availability-records/actions/batch-update` resource.

New request body: OCI Batch Update Input

New response body: OCI Batch Update

Named Credentials

Create an external auth identity provider

Make a POST request to the new `/named-credentials/external-auth-identity-providers` resource.

New request body: External Auth Identity Provider Input

New response body: External Auth Identity Provider

Get a list of external auth identity providers in the org

Make a GET request to the new `/named-credentials/external-auth-identity-providers` resource.

New response body: External Auth Identity Provider List

Get information about an external auth identity provider

Make a GET request to the new `/named-credentials/external-auth-identity-providers/`***`fullName`*** resource.

New response body: External Auth Identity Provider

Update an external auth identity provider

Make a PUT request to the new `/named-credentials/external-auth-identity-providers/`***`fullName`*** resource.

New request body: External Auth Identity Provider Input

New response body: External Auth Identity Provider

Delete an external auth identity provider

Make a DELETE request to the new `/named-credentials/external-auth-identity-providers/`***`fullName`*** resource.

Get information about external auth identity provider credentials

Make a GET request to the new `/named-credentials/external-auth-identity-provider-credentials/`***`fullName`*** resource.

New response body: External Auth Identity Provider Credentials

Create external auth identity provider credentials

Make a POST request to the new `/named-credentials/external-auth-identity-provider-credentials/`***`fullName`*** resource.

New request body: External Auth Identity Provider Credentials Input

New response body: External Auth Identity Provider Credentials

Update external auth identity provider credentials

Make a PUT request to the new `/named-credentials/external-auth-identity-provider-credentials/`***`fullName`*** resource.

New request body: External Auth Identity Provider Credentials Input

New response body: External Auth Identity Provider Credentials

Platform

Get a list of custom URLs for a custom domain

Make a GET request to the new `/connect/custom-domain/domains/`***`domainId`***`/custom-urls` resource.

New response body: Custom Domain Custom URL Collection

Get information about a specified custom URL

Make a GET request to the new `/connect/custom-domain/domains/`***`domainId`***`/custom-urls/`***`customUrlId`*** resource.

New response body: Custom URL Detail

Salesforce CMS

Get managed content channels

Make a GET request to the new `/connect/cms/channels` resource.

New response body: Managed Content Channels

Create a managed content channel

Make a POST request to the new `/connect/cms/channels` resource.

New request body: Managed Content Create

Get a managed content channel

Make a GET request to the new `/connect/cms/channels/`***`channelId`*** resource.

Update a managed content channel

Make a PATCH request to the new `/connect/cms/channels/`***`channelId`*** resource.

New request body: Managed Content Update

Delete a managed content channel

Make a delete request to the new `/connect/cms/channels/`***`channelId`*** resource.

Get a managed content delivery channel

Make a GET request to the existing `/connect/cms/delivery/channels/`***`channelId`*** resource.

New response body: Managed Content Delivery Channel

Previously, this resource returned a Managed Content Channel Detail response body.

Get managed content delivery channels

Make a GET request to the existing `/connect/cms/delivery/channels` resource.

New response body: Managed Content Delivery Channels

Previously, this resource returned a Managed Content Channel Collection response body.

Get channels for a managed content space

Make a GET request to the new `/connect/cms/spaces/`***`contentSpaceId`***`/channels` resource.

New response body: Managed Content Space Channels

Add or remove channels from a managed content space

Make a PATCH request to the new `/connect/cms/spaces/`***`contentSpaceId`***`/channels` resource.

New request body: Managed Content Space Channels Input

New response body: Managed Content Space Channels

Salesforce Files

Get a file upload config

Make a GET request to the new `/connect/file/upload/config` resource.

New response body: File Upload Config

Guest users can upload a file

Make a POST request to the existing `/connect/files/users/me` resource.

Changed Connect REST API Request Bodies

These request bodies have changes.

Commerce

Checkout Start Input

This request body has this new property.

- `customFields`—Array of sObjects and their custom fields. Currently, only the WebCart and CartDeliveryGroup sObjects are supported.

Composite Product Input

This request body has this new property.

- `attributeSetInfo`—Attribute set information for a variation parent product.

Payment Method Tokenization Input

This request body has these new properties.

- `savedByMerchant`—Specifies whether the customer payment information is saved by the merchant for future purchases.

Sale Input

This request body has these new properties.

- `legalEntityId`—ID of the legal entity record.
- `submittedByMerchant`—Specifies whether the customers payment sale information is submitted to the payment sale service by the merchant.

Salesforce Files

File Input

This request body has these new properties.

- `contentBodyId`—ID of the content body.
- `fieldName`—Name of a custom field on the ContentVersion object.
- `fieldValue`—Value to store for the custom field specified in `fieldName` for the uploaded file.
- `firstPublishLocationId`—ID of the location where the file was first published.
- `networkId`—ID of the Experience Cloud site where the file originated.
- `pathOnClient`—Complete path of the file.

Changed Connect REST API Response Bodies

These response bodies have changes.

Commerce

Application Context

This response body has this new property.

- `orderStatuses`—Order statuses that are available in the `Status` picklist of the Order Summary object.

Cart Item

This response body has these new properties.

- `childProductCount`—Number of child products in the cart that are associated with the item. A cart item can have child products if the `productClass` of the item is `Bundle`. For nested bundles, which include a child product that's also a bundle, `childProductCount` includes all child products.
- `parentCartItemId`—ID of the item's parent cart item. The value is empty if the item is a top-level cart item.
- `productClass`—Class of product.

Checkout

This response body has this new property.

- `customFields`—Array of sObjects and their custom fields. Currently, only the WebCart and CartDeliveryGroup sObjects are supported.

Checkout Settings

This response body has this new property.

- `shippingMethodsEnabled`—Indicates if the shipping method calculation is enabled for a web store.

OCI Update Reservation Output

This response body has this new property.

- `exists`—Indicates if the SKU exists in the inventory.

Order Item Summary Lookup Output

This response body has these new properties.

- `associatedLineItems`—Child product line items associated with the order item summary.
- `itemClass`—Determine whether a product is sold individually or can have variations.

Order Summary

This response body has this new property.

- `orderProductTopLevelLineCount`—Count of top-level order product line summaries.

Order to Cart Failed Product

This response body has this new property.

- `media`—Media associated with the product.

Product Child Collection

This response body has this new property.

- `productClass`—Class of product.

Timeline Output

This response body has these new properties.

- `activityCode`—Code of the payment event.
- `providerGateway`—Payment service provider.

Experience Cloud Sites

Community

This response body has this new property.

- `contentSpaceId`—ID of the managed content space associated with the enhanced site.

Flow Orchestration

Orchestration Work Item

This response body has this new property.

- `flowType`—Flow type of the orchestration that created the orchestration work item.

Platform

Custom Domain Detail

This response body has this new property.

- `customUrls`—List of custom URLs for this domain.

Salesforce CMS

Managed Content Channel

This response body has these changed and new properties.

- `channelId`—This property is no longer returned.
- `channelName`—This property is no longer returned.
- `channelType`—This property is no longer returned.
- `domain`—This property is no longer returned.
- `domainName`—This property is no longer returned.
- `id`—ID of the managed content channel.
- `isChannelSearchable`—This property is no longer returned.
- `isDomainLocked`—This property is no longer returned.
- `isSearchable`—Specifies whether the text contents of the channel are searchable.
- `managedContentChannelDomain`—Domain associated with the channel.
- `name`—Name of the managed content channel.
- `targetId`—ID of the target associated with the managed content channel.
- `type`—Type of managed content channel.

Managed Content Channel Summary

This response body has these changed and new properties.

- `domainUrl`—This property is no longer returned.
- `id`—ID of the managed content channel.
- `resourceUrl`—This property is no longer returned.
- `target`—This property is no longer returned.
- `type`—Type of managed content channel.
- `url`—URL to the channel resource.

Managed Content Collection Items

This response body has these changed and new properties.

- `channelInfo`—This property is no longer returned. Use `channelSummary` instead.
- `channelSummary`—Summary information for the managed content delivery channel.

Managed Content Delivery Document

This response body has these changed and new properties.

- `channelInfo`—This property is no longer returned. Use `channelSummary` instead.
- `channelSummary`—Summary information for the managed content delivery channel.

Managed Content Delivery Document Collection

This response body has these changed and new properties.

- `channelInfo`—This property is no longer returned. Use `channelSummary` instead.
- `channelSummary`—Summary information for the managed content delivery channel.

Salesforce Files

File Detail

This response body has this new property.

- `contentVersionId`—ID of the content version.

File Summary

This response body has this new property.

- `contentVersionId`—ID of the content version.

Invocable Actions

An invocable action represents an action that you can perform on Salesforce with APIs. Invocable actions are available through REST API.

Commerce

These invocable actions are available with Salesforce Commerce.

Record tax transactions from an order summary to an external system.

Use the new recordTaxTransaction action.

Reverse the recorded tax transactions in an external system after an order is returned or canceled.

Use the new recordTaxReversal action.

For more information on invocable actions, see the Actions Developer's Guide.

Metadata API

Access more metadata through these new and changed metadata types.

Salesforce Overall

Allow users to associate person accounts and contacts to other person accounts or contacts that they report to

Use the new `enableReportsToOnPersonAccount` field on the existing AccountSettings metadata type.

Customization

Access Lightning Experience transition tools through the External Application Settings page in Setup

Use the new `canUseAdoptionApps` field on the existing UserEngagementSettings metadata type.

REMOVED: The `canGovCloudUseAdoptionApps` field on the UserEngagementSettings metadata type is removed

Instead, use the new `canUseAdoptionApps` field on the UserEngagementSettings metadata type.

Add a description for public groups and queues

Use the new `Description` field on the existing Group metadata type.

Development

Set up parallel subscriptions for a platform event Apex trigger

Use the `numPartitions` field. Set the `partitionKey` field to specify the platform event field used to generate the hash value for the subscription partitions.

Generate actions from External Services with Heroku apps (pilot)

Use the new `Heroku` value, which is in the existing `ExternalServiceRegistrationProviderType` field on the existing ExternalServiceRegistration metadata type.

Note: Heroku Apps in Salesforce Setup 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.

Marketing Cloud Growth

Retrieve and deploy landing pages and emails

Use the existing DigitalExperienceBundle type to retrieve and deploy landing pages and emails in marketing workspaces.

Move landing pages, forms, and emails between orgs with change sets and second-generation managed packages

Use the existing DigitalExperienceBundle type to package landing pages, forms, and emails in marketing workspaces.

Sales

Send email notifications when a lead owner is updated through Apex in Lightning Experience

Use the new `shouldSendNotificationEmailWhenLeadOwnerUpdatesViaApexInLEX` field on the existing LeadConfigSettings metadata type. Introduced in API version 53.0, this field has been added to the *Metadata API Developer Guide*.

Capture forecasts at a point in time with Forecast Submissions

Use the new `forecastSubmissionSettings` field on the existing ForecastingType metadata type.

Move custom exercise types in Enablement programs between orgs with change sets and second-generation managed packages

Use these new metadata types, fields, and values:

- New EnablementProgramTaskCustomContent, EnblProgramTaskSubCategory, and LearningItemType metadata types
- New `CustomExercise` value in the existing `taskSubCategory` field on the EnablementProgramTask metadata type
- New `customContent` field on the existing EnablementProgramTaskExercise metadata type

BEHAVIOR CHANGE: The `contentKey` field on the existing EnablementProgramTaskCmsContent metadata type is no longer used

Instead, use the `apiName` field on the EnablementProgramTaskCmsContent metadata type.

BEHAVIOR CHANGE: The `body` field on the Prompt metadata type allows a maximum of 4,000 characters for all prompt types

Previously, this field allowed only a maximum of 240 characters for floating prompts and docked prompts. This enhancement was introduced in API version 60.0.

Salesforce Flow

BEHAVIOR CHANGE: The assignee field is no longer a required field of FlowStageStepAssignee metadata type

The assignee field that shows the names of the user, group, or queue assigned to an interactive step is optional. Updated in API version 61.0, this change has been made to the *Metadata API Developer Guide*.

Specify that the type of the assignee associated with the interactive step is not valid

Use the new `invalid` value in the existing `assigneeType` field on FlowStageStepAssignee metadata type. Introduced in API version 61.0, this value has been added to the *Metadata API Developer Guide*.

Specify a template for a screen component (beta)

Use the new `sourceTemplateApiName` and `sourceTemplateProviderType` fields on the existing FlowScreenField subtype, which is on the FlowScreen subtype of the Flow metadata type.

Update existing records using the Create Records element

Use the new `doesUpsert`, `upsertExternalIdField`, `upsertStandardIdField`, and `doesUpsertAllOrNone` fields on the existing FlowRecordCreate subtype of the Flow metadata type.

Define input parameters for the flow Start element

Use the new `inputs` field on the existing FlowStart subtype of the Flow metadata type.

Specify that a flow is triggered by an automation event

Use the new `AutomationEvent` value on the existing triggerType field, which is on the FlowStart subtype of the Flow metadata type.

Set a timeout to pause a flow until an action is completed

Use the new `isWaitUntilCompleted` value, which is in the existing FlowCallAction field on the existing Flow metadata type.

Set a maximum amount of time to pause a flow while it waits for an action to be completed

Use the new `offset` value, which is in the existing FlowCallAction field on the existing Flow metadata type.

Set the time unit used to wait when the asynchronous action is executing

Use the new `offsetUnit` value, which is in the existing FlowCallAction field on the existing Flow metadata type.

Set which node to execute if an asynchronous action execution is timed out

Use the new `timeoutConnector` value, which is in the existing FlowCallAction field on the existing Flow metadata type.

DEPRECATED: The `nameSegment` value is deprecated in API version 62.0 and later.

Instead, use the new `versionString` field on the FlowCallAction metadata type.

DEPRECATED: The `versionSegment` value is deprecated in API version 62.0 and later.

Instead, use the new `versionString` field on the FlowCallAction metadata type.

Get record data and field metadata to prioritize records

Use the new `getRecPrioData` value, which is in the existing actionType field on the Flow metadata type.

Security and Identity

Access OAuth Client Credentials through the credentials REST API

Use the new `enableClientSecretInRestApiAccess` field on the existing ExternalClientAppSettings metadata type.

Package External Client Apps on More Types of Orgs
Use the new `enablePackageEcaOauthFromDevOrg` field on the existing ExternalClientAppSettings metadata type.

Enable an external client app for headless identity flows that use the OAuth 2.0 authorization challenge endpoint
Use the new `isFirstPartyAppEnabled` field on the existing ExtlClntAppOauthSettings metadata type.

Upload a certificate to sign a client attestation JWT for headless identity flows that use the OAuth 2.0 authorization challenge endpoint
Use the new `clientAssertionCertificate` field on the existing ExtlClntAppOauthSettings metadata type.

Enable headless username-password login, passwordless login, and registration using the OAuth 2.0 authorization challenge endpoint
Use the new `isFirstPartyAppsAllowed` field on the existing NetworkAuthApiSettings subtype of the Network metadata type.

Require reCAPTCHA for headless username-password login configured with the OAuth 2.0 authorization challenge endpoint
Use the new `doesPasswordLoginRequireAuth` field on the existing NetworkAuthApiSettings subtype of the Network metadata type.

Configure a headless user discovery Apex handler to look up users during passwordless login
Use the new `headlessDiscoveryHandler` field on the existing NetworkAuthApiSettings subtype of the Network metadata type.

Set an execution user to run a headless user discovery Apex handler
Use the new `headlessDiscoveryExecutionUser` field on the existing NetworkAuthApiSettings subtype of the Network metadata type.

Control authentication provider functionality by dynamically adding URL parameters to client configuration URLs
Use the new AuthProvParamFwdAllowlist subtype of the AuthProvider metadata type.

Simplify the configuration process for authentication providers used by named credentials
Use the new ExternalAuthIdentityProvider metadata type and the new `externalAuthIdentityProvider` field on the existing ExternalCredentialParameter metadata type, which is a subtype of the existing ExternalCredential metadata type.

Use a static username and password to authenticate into external systems
Use the `Basic` value in the existing `authenticationProtocol` field on the existing ExternalCredential metadata type. Introduced in API version 60.0, this value is now added to the *Metadata API Developer Guide*.

Allow cross-domain cookies on the Experience Builder preview domain
Use the new `enableCrossDomainPreviewCookies` field on the existing MyDomainSettings type.

Redirect legacy hostnames
Use the new `enableLegacyRedirections` field on the existing MyDomainSettings type. If Salesforce stopped legacy hostname redirections for your org, this field has no effect.

Service

Access client settings for an Embedded Messaging channel
Use the new `EmbeddedConfig` metadata subtype of the existing MessagingChannel metadata type.

Configure different authorization methods supported by the Embedded Messaging channel
Use the new MessagingAuthorization metadata subtype of the new EmbeddedConfig metadata type, which is a subtype of the existing MessagingChannel metadata type.

Create or update the settings of an Embedded Service deployment whose deploymentFeature is EmbeddedMessaging
Use the new `EmbeddedServiceMessagingChannel` metadata subtype of the existing EmbeddedServiceConfig metadata type.

Create or edit the pre-chat form for an Embedded Service deployment whose `deploymentFeature` is `EmbeddedMessaging`

Use the new `EmbeddedServiceForm` metadata subtype of the EmbeddedServiceConfig metadata type.

Create or edit an individual field in a pre-chat form for an Embedded Service deployment whose deploymentFeature is EmbeddedMessaging

Use the new `EmbeddedServiceFormField` metadata subtype of the new `EmbeddedServiceForm` metadata type, which is a subtype of the existing EmbeddedServiceConfig metadata type.

Create or edit a dropdown field for your pre-chat form in an Embedded Messaging deployment

Use the new `ChoiceList` metadata type.

Set or edit the dropdown field options for your pre-chat form in an Embedded Messaging deployment

Use the new `ChoiceListValue` metadata subtype of the ChoiceList metadata type.

Set up a text response or an auto-response messaging definition used in an Embedded Messaging channel

Use the new `MessagingAutoResponse` metadata subtype on the existing MessagingChannel metadata type.

Set up the keyword for a text response in an Embedded Messaging channel

Use the new `MessagingKeyword` metadata subtype on the existing MessagingChannel metadata type.

Validate the end user's provided JWT token with a JSON Web Key in User Verification for Embedded Messaging

Use the new `PublicKeyCertificate` metadata type.

Access a public certificate or set of JSON web keys in User Verification for Messaging for Embedded Messaging

Use the new `PublicKeyCertificateSet` type.

Map the public certificate key to the public certificate keyset in User Verification for Embedded Messaging

Use the new `PublicKeyCertificateSetKey` metadata subtype of the PublicCertificateSet metadata type.

Identify your custom Messaging channel integration with a logo

Use the `customIcon` field on the existing ConversationChannelDefinition type to identify a Bring Your Own Channel or Bring Your Own Channel for CCaaS messaging channel integration. Introduced in API version 61.0, this field has been added to the *Metadata API Developer Guide*.

Specify whether admins can configure custom parameters and parameter mappings for Messaging channels

Use the `supportsCustomChannelParameters` field on the existing ConversationChannelDefinition type. Introduced in API version 61.0, this field has been added to the *Metadata API Developer Guide*.

Specify the connected app owner for Bring Your Own Channel

Use the new `connectedAppType` field on the existing ConversationChannelDefinition type with Bring Your Own Channel or Bring Your Own Channel for CCaaS.

Note the OAuth link for a connected app created by a customer for Bring Your Own Channel

Use the new `customerConnectedAppOauthLink` field on the existing ConversationChannelDefinition type with Bring Your Own Channel or Bring Your Own Channel for CCaaS.

Relate a Messaging channel to a contact center and specify routing details for a voicemail configuration

Use the `ContactCenterChannel` subtype of the existing CallCenter type with Bring Your Own Channel for CCaaS. Introduced in API version 56.0, this subtype has been added to the *Metadata API Developer Guide*.

Connect a partner vendor system to Service Cloud

Use the ConversationVendorInfo type. Introduced in API version 52.0, this type has been added to the *Metadata API Developer Guide*.

SOQL

The updates to SOQL errors and functionality in this release could affect existing code that relies on old errors and functionality.

Changed Error Messages

Using `WITH SECURITY ENFORCED` without a proper Apex context setup results in the error message SECURITY_ENFORCED not allowed in this context. This error message was changed in Summer '24 to a different message. That change is reverted in Winter '25.

Tooling API New and Changed Objects

Access more metadata through these new and changed Tooling API objects.

Customization

Add a description for public groups and queues

Use the new `Description` field on the existing Group object.

Development

Set up parallel subscriptions for a platform event Apex trigger

Use the `NumPartitions` field to specify the number of parallel subscriptions. Set the `PartitionKey` field to specify the platform event field used to generate the hash value for the subscription partitions.

Generate actions from External Services with Heroku apps (pilot)

Use the new `Heroku` value, which is in the existing `ExternalServiceRegistrationProviderType` field on the existing ExternalServiceRegistration object.

Note: Heroku Apps in Salesforce Setup 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.

Increase sandbox security by indicating a public group when creating or refreshing a Developer or Developer Pro sandbox

Behavior change announcement: Starting in Spring '25, the `ActivationUserGroupId` field on the SandboxInfo object will be required when creating or refreshing a Developer or Developer Pro sandbox. To avoid losing the ability to create or refresh Developer and Developer Pro sandboxes, use API version 60.0 or later.

Security and Identity

Simplify the configuration process for authentication providers used by named credentials

Use the new ExternalAuthIdentityProvider object and the new `ExtlAuthIdentityProvider` field on the existing ExternalCredentialParameter object.

Use a static username and password to authenticate into external systems

Use the `Basic` value in the existing `AuthenticationProtocol` field on the existing ExternalCredential object. Introduced in API version 60.0, this value is now added to the *Tooling API Developer Guide*.

Service

Identify your custom Messaging channel integration with a logo

Use the `customIconId` field on the existing ConversationChannelDefinition object to identify a Bring Your Own Channel or Bring Your Own Channel for CCaaS messaging channel integration. Introduced in API version 61.0, this field has been added to the *Tooling API Developer Guide*.

Specify whether admins can configure custom parameters and parameter mappings for Messaging channels

Use the `CapabilitiesSupportsCustomChannelParameters` field on the existing ConversationChannelDefinition object. Introduced in API version 61.0, this field has been added to the *Tooling API Developer Guide*.

Specify the connected app owner for Bring Your Own Channel

Use the new `ConnectedAppType` field on the existing ConversationChannelDefinition object with Bring Your Own Channel or Bring Your Own Channel for CCaaS.

Note the OAuth link for a connected app created by a customer for Bring Your Own Channel

Use the new `CustomerConnectedAppOauthLink` field on the existing ConversationChannelDefinition object with Bring Your Own Channel or Bring Your Own Channel for CCaaS.

Relate a Messaging channel to a contact center and specify routing details for a voicemail configuration

Use the ContactCenterChannel object with a Bring Your Own Channel for Contact Center as a Service (CCaaS) messaging channel. Introduced in API version 56.0, this object has been added to the *Tooling API Developer Guide*.

Connect a partner vendor system to Service Cloud

Use the ConversationVendorInfo object. Introduced in API version 52.0, this object has been added to the *Tooling API Developer Guide*.

User Interface API

Related lists for records support child relationships, and User Interface API supports more objects.

IN THIS SECTION:

SEE ALSO:

User Interface API Developer Guide

New and Changed User Interface API Resources

These resources are new or have changes.

Lists

Get related list records

Make a GET or PATCH request to the existing `/ui-api/related-list-records/${parentRecordId}/${relatedListId}` resource.

The `relatedListId` query parameter now supports the API name of a child relationship.

Changed User Interface API Response Bodies

These response bodies have changes.

Lists

List Info

This response body has this new property.

- `hasMassActions`—Indicates whether the list has mass actions.

Supported Objects

All new standard objects are auto-enabled for use with User Interface API.

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.

- CampaignInfluence
- Event (available in late October 2024)
- Profile
- Task (available in late October 2024)

These standard objects are already supported in User Interface API, and they're newly supported for list views and most recently used list views.

- DelegatedAccount
- MaintenanceWorkRule
- ResourceAbsence
- User
- WorkCapacityLimit
- WorkCapacityUsage

These standard objects are already supported in User Interface API and for list views, and they're newly supported for most recently used list views.

- PaymentTerm
- PaymentTermItem

SEE ALSO:

User Interface API Developer Guide: Supported Objects

Einstein

Supercharge your workforce efficiency with predictive and generative AI.

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 September monthly release generally become available when Winter '25 rolls out to your org.

Cloud	Features	Release Note
	September '24	
Analytics	Lightning Report Formula Generation	Add Calculated Fields to Your Lightning Reports with Einstein Generative AI on page 99
Communications	Einstein Quick Quote	Create Budgetary Quotes Quickly With Einstein Conversational AI
Education	Data Cloud for Education Cloud: Alumni Metrics	Build Stronger Alumni Relationships with Einstein and Data Cloud for Education: Alumni Metrics on page 422
Education	Einstein Advising Summary for Advisors	Summarize Advising Cases by Using Einstein on page 424
Education	Einstein Mentoring Summaries	Find Accurate Mentor Matches with Einstein Mentoring Summaries on page 424
Field Service	Einstein Copilot: Summarize Scheduling Issues for Field Service	Get a Daily Summary of Service Appointments that Require Immediate Attention on page 287
Field Service	Einstein Copilot: Create Appointment List Filter for Field Service	Find Service Appointments Easily by Creating Search Filters in the Appointment List on page 288
Field Service	Einstein Copilot: Summarize Service Appointment Notes	Uncover Top Cancellation Reasons Easily (Beta) on page 289
Financial Services	Einstein Summaries for Business Relationship Plan	Get Client Relationship Insights Quickly with Prebuilt, AI-Powered Summary Templates on page 349
Health	Einstein Embedded AI: Summarization and Email Generation for Healthcare	Einstein for Health Cloud
Industries: Net Zero	Generate First Draft of ESG Disclosure Automatically, Revise Disclosure Responses, Revise Information Library Snippets	Einstein for Disclosure and Compliance Hub on page 405
Industries: Net Zero	Enhance Scope 3 Emissions Calculations	Enhance Scope 3 Emissions Calculations with Einstein Generative AI (Beta) on page 408
Marketing	Einstein Copilot: Create Briefs and Campaigns	Save Time with Grounded Einstein AI Tools on page 470
Nonprofit	Einstein Program Benefits Summary (beta), Einstein Notes Summary (beta), Einstein Board	Einstein Generative AI for Nonprofit Cloud on page 434

Cloud	Features	Release Note
	Version of Grant Application (beta), Einstein Fundraising Award Summary (beta), Einstein Major Donor Engagement Summary (beta), Einstein Major Gift Proposal (beta)	
Sales	Einstein Coach	Get Timely and Contextual Feedback on Your Terms on page 563
Sales	Einstein Activity Capture, Einstein Automated Contacts, Sales Summaries (beta)	Einstein for Sales on page 537
Sales	Einstein Copilot: Add Record to Cadence, Create a Label, Create a To-Do, Find Contact Interactions, Get Product Pricing, Identify Contact Role, Identify Key Contacts, Label a Record, and Log a Call	Einstein Copilot for Sales on page 540
Sales	Einstein Copilot: Prioritize Opportunities	Focus on the Deals That Matter Most on page 544
Service	Einstein Article Recommendations, Einstein Conversation Mining, Einstein Knowledge Creation, Einstein Work Summaries	Einstein for Service on page 655

SEE ALSO:

Salesforce Help: Einstein Generative AI Features

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.

Features	Release Note
September '24	
Einstein Bots	Connect Enhanced Bots to LINE Messaging Channels (Generally Available)
	Get to Know Customers Faster with Improved Intent Recognition (Generally Available)

Features	Release Note
	Reach More Customers with Multi-Language Support for Messaging Components (Generally Available)
	Save Time with New Messaging Components for Enhanced Bots (Generally Available)
	Translate Dialogs Easily to Different Languages (Generally Available)
	Understand Customers More Accurately with Strict Recognition (Generally Available)
Einstein Copilot	Introducing the Agentforce Platform on page 265
	Handle More Use Cases More Consistently with Copilot Topics on page 265
	Find Agent Analytics In the Dashboards Tab on page 268
Other Changes	Explore More Anthropic, Azure, and OpenAI Models on the Einstein Platform on page 269

Einstein Bots

Keep bot conversations more focused with a strict recognition threshold, connect with more customers by quickly translating bot dialogs to different languages, use enhanced bots on a LINE messaging channel, and more.

IN THIS SECTION:

Understand Customers More Accurately with Strict Recognition (Generally Available)

Set a strict recognition threshold to reduce the time your bot spends on unclear messages and keep bot conversations more focused. When you enable strict recognition, the bot recognizes and directs customer messages that contain gibberish, profanity, or irrelevant content to the Confused dialog.

Translate Dialogs Easily to Different Languages (Generally Available)

Connect with more customers by quickly translating your bot's dialogs to different languages. Multi-language bots can now translate a dialog to another language in seconds. Previously, you manually added translations for each secondary language.

Save Time with New Messaging Components for Enhanced Bots (Generally Available)

Empower customers and save service agents' time with the authentication, custom, form, and payment messaging components. Enhanced bots can now handle more complex use cases on enhanced Apple Messages for Business channels. The form component is also available for Messaging for In-App and Web.

Get to Know Customers Faster with Improved Intent Recognition (Generally Available)

Enhanced bots now recognize the intent of the first message a customer sends. Previously, only standard bots supported intent recognition for the first customer message.

Reach More Customers with Multi-Language Support for Messaging Components (Generally Available)

Enhanced bots with messaging components now have full multi-language support.

Connect Enhanced Bots to LINE Messaging Channels (Generally Available)

Reach more customers with an enhanced Messaging channel that's connected to the LINE messaging app, widely used in Japan. With a LINE channel, your support team can now address LINE messages directly from the Service Console.

View Standard Bot Reports in the Winter '25 Folder

Each release, Einstein Bots adds a folder that contains the latest versions of all standard bot reports. In Winter '25, no changes affect standard bot metric types or individual reports from Summer '24, but you can access fresh versions of all reports in the Einstein Bot Reports Winter '25 folder.

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 and is enforced in Winter '25.

Understand Customers More Accurately with Strict Recognition (Generally Available)

Set a strict recognition threshold to reduce the time your bot spends on unclear messages and keep bot conversations more focused. When you enable strict recognition, the bot recognizes and directs customer messages that contain gibberish, profanity, or irrelevant content to the Confused dialog.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: In the Bot Builder, go to the Bot Overview page for your bot. In the Intent Enhancements section of Settings, make sure that your bot is using the cross-lingual intent model. Then select **Use Strict Recognition with this bot**. Set a strict recognition threshold and save your changes.

Translate Dialogs Easily to Different Languages (Generally Available)

Connect with more customers by quickly translating your bot's dialogs to different languages. Multi-language bots can now translate a dialog to another language in seconds. Previously, you manually added translations for each secondary language.

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

How: In the Bot Builder, go to the dialog that you want to translate. Then, on the Dialog Translations tab, select a secondary language from the dropdown. In the Translations section, select the dialog steps that you want to translate, and then click **Translate Selected**.

SEE ALSO:

Salesforce Help: Define Languages for Your Einstein Bot (can be outdated or unavailable during release preview)

Save Time with New Messaging Components for Enhanced Bots (Generally Available)

Empower customers and save service agents' time with the authentication, custom, form, and payment messaging components. Enhanced bots can now handle more complex use cases on enhanced Apple Messages for Business channels. The form component is also available for Messaging for In-App and Web.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Why: The new messaging components support powerful bot interactions with customers.

- Authentication: Verify a customer's identity.
- Custom: Embed an external app in a bot conversation.
- Form: Send a form to easily and securely gather information from a customer.
- Payment: Process a payment with Apple Pay.

The authentication, form, and payment components are a new class of asynchronous messaging components. Unlike with other messaging components, when the bot sends an asynchronous component, the customer can respond to the component later.

To ensure a natural conversational experience, you can tell the bot to wait for customer input or move on to the next dialog step depending on the scenario. You can also control how the bot responds to errors by customizing error handling for asynchronous components.

How: Create and manage components on the Messaging Components page in Setup. To add a messaging component to your enhanced bot, on the Dialogs page of the Bot Builder, add the associated dialog step to a dialog.

SEE ALSO:

Salesforce Help: Asynchronous Messaging Components (can be outdated or unavailable during release preview)

Get to Know Customers Faster with Improved Intent Recognition (Generally Available)

Enhanced bots now recognize the intent of the first message a customer sends. Previously, only standard bots supported intent recognition for the first customer message.

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.

Reach More Customers with Multi-Language Support for Messaging Components (Generally Available)

Enhanced bots with messaging components now have full multi-language support.

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: Define Languages for Your Einstein Bot (can be outdated or unavailable during release preview)

Connect Enhanced Bots to LINE Messaging Channels (Generally Available)

Reach more customers with an enhanced Messaging channel that's connected to the LINE messaging app, widely used in Japan. With a LINE channel, your support team can now address LINE messages directly from the Service Console.

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

How: Create a LINE Official Account. Add yourself as a provider and create a channel in the LINE Developers Console. Then, in Salesforce, create a LINE channel. To route LINE conversations to and from an enhanced bot, add the Route Work flow action to an Omni-Channel flow.

SEE ALSO:

Help Customers in a LINE Messaging Channel

View Standard Bot Reports in the Winter '25 Folder

Each release, Einstein Bots adds a folder that contains the latest versions of all standard bot reports. In Winter '25, no changes affect standard bot metric types or individual reports from Summer '24, but you can access fresh versions of all reports in the Einstein Bot Reports Winter '25 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)

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 and is enforced in Winter '25.

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 an org with Developer Edition. Test that the flows initiated from your bot can perform all flow operations. If a flow fails, identify the missing permissions and add them to the user profile or permission sets associated with your bot.

SEE ALSO:

Release Updates

Einstein 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 Winter '25. In the meantime, we're continuing to add features to Summer '24 through August 2024.

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.

New and Changed Standard Copilot Topics and Actions

Quickly add powerful functionality to a copilot with new and changed copilot standard topics and actions.

Find Agent Analytics In the Dashboards Tab

Finding the Agent Analytics dashboard and reports is about to get easier. No longer a page in Setup, the dashboard with the linked reports is moving to the Copilot for Salesforce Apps folder in the Dashboard tab.

Introducing the Agentforce Platform

Einstein Copilot Studio is now Agent Studio, as the platform grows to make way for AI agents. Like a copilot, an agent helps increase productivity and reduce your teams' workload by automating routine tasks and assisting with complex ones. But agents are more autonomous, so they can independently identify opportunities for action, anticipate next steps, and initiate tasks within the use cases and guardrails you specify. Plus, some agents can be deployed to channels outside of Salesforce, so agents can help your customers as well as your employees.

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 is available starting the week of September 2, 2024.

Why: We're currently working to grow our team of Agentforce agents for Sales and Service use cases and beyond. In the meantime, you'll see changes throughout Setup.

- A copilot, including Einstein Copilot for Salesforce, is now a type of agent. We've updated page, field, and column names and other text to reflect this change. However, there's no change to your copilot's functionality, so you can count on it to continue assisting, collaborating with, and supporting your users throughout Salesforce.
- Einstein Copilot Studio Setup pages have been renamed to Agent Studio. Start your Quick Find searches with `Agent` instead of `Copilot`.
- The Copilot Builder is now the Agent Builder, where you'll be able to easily create, customize, and activate your agents with minimal setup required.
- Copilot topics and actions are now agent topics and actions.

We're also working to reflect these changes in our Salesforce Help content and Trailhead modules. Stay tuned!

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.
- Einstein Copilot now uses OpenAI GPT-4o for all planner service calls, so you can expect to see improvements in the speed and accuracy of your copilot's decision-making. Previously, Einstein Copilot used OpenAI GPT-4.
- With this change, data masking through the Einstein Trust Layer is disabled to improve the performance and accuracy of Einstein Copilot. All data, including PII, that is accessed by Copilot is still protected in transit as part of our Trust Layer and is not stored or used for training purposes by external LLM providers, maintaining our strict zero-data retention policy.

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

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.

September '24

New and changed copilot topics and actions included in the September monthly release typically become available when Winter '25 rolls out to your org.

New Topic: General CRM on page 265

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 265

The new Record Summary topic generates a summary for a single Salesforce record.

New Topic: Close Deals on page 541

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 on page 541

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 on page 541

Answer user's questions about a voice or video call based on the contents of the call transcript.

New Topic: Field Service Dispatcher Actions

The Field Service Dispatcher Actions topic helps users find appointments that require immediate attention and shows them in the appointment list for subsequent follow-up actions.

- New Action: Create Appointment List Filters on page 288: Creates a filter for the service appointment list in the dispatcher console. If a user triggers QueryRecords to retrieve service appointments with certain criteria and then asks to see the service appointments in the appointment list, the action creates a filter in the Appointment List containing the service appointments returned by Copilot.
- New Action: Summarize Scheduling Issues on page 287: Creates a summary of the total number of appointments that require immediate attention. The summary is divided according to exception categories. The copilot action creates a filter for each category in the appointment list. This action is one of the actions provided by the Einstein Copilot: Field Service Actions feature. The categories used by the reports are customizable.

New Topic: Forecast Sales Revenue on page 541

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 on page 541

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.

New Action: Add Record to Cadence on page 541

Sales users now have the convenience of the Add Record to Cadence copilot action, allowing the seamless association of contacts and leads with cadences from Einstein Copilot.

New Action: Create a Label on page 542
Sales users can use the Create a Label action to create custom labels that can be used to organize and retrieve records easily.

New Action: Create a To-Do on page 542
Sales users can now use the Create a To-Do action in Einstein Copilot to create tasks for pending actions and follow-ups.

New Action: Find Contact Interactions on page 544
Sales users can identify the list of opportunities or an account that a specific contact has influenced.

New Action: Get Product Pricing on page 543
Sales users can use the new Get Product Pricing copilot action to get pricing information for a product, including relevant historical data from previous deals involving the same product.

New Action: Identify Contact Role on page 544
Sales users now have the convenience of the Add Record to Cadence copilot action, allowing the seamless association of contacts and leads with cadences from Einstein Copilot.

New Action: Identify Key Contacts on page 544
Sales users can identify the role, significance, or impact of a contact in influencing the opportunity or account status.

New Action: Label a Record on page 542
Sales users can assign personalized labels to records.

New Action: Log a Call on page 541
Sales users can use the new Log a Call copilot action to effortlessly log calls and save time by using Einstein Copilot. You can also add details about the call, such as the date, time, and purpose.

New Action: Prioritize Opportunities on page 544

Sales reps can use the new Prioritize Opportunities action to generate a list of top deals and identify the opportunities to focus on. This action is available with the Einstein for Sales add-on.

Find Agent Analytics In the Dashboards Tab

Finding the Agent Analytics dashboard and reports is about to get easier. No longer a page in Setup, the dashboard with the linked reports is moving to the Copilot for Salesforce Apps folder in the Dashboard 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: This change is effective in October 2024.

Other Changes

Enjoy expanded Einstein generative AI support for locales, models, and more.

IN THIS SECTION:

Explore More Anthropic, Azure, and OpenAI Models on the Einstein Platform
We added support for Azure OpenAI GPT-4o, OpenAI GPT-4o mini, and Anthropic Claude 3.5 Sonnet on the Einstein Platform. OpenAI GPT-4o mini is available in Prompt Builder and Model Builder. Azure OpenAI GPT-4o is available in Prompt Builder and Model Builder, and supports geo-aware routing and BYOLLM use cases. Anthropic Claude 3.5 Sonnet is available in Model Builder for BYOLLM use cases only. Use Prompt Builder and Model Builder to build and test prompts with all our supported models.

Explore More Anthropic, Azure, and OpenAI Models on the Einstein Platform

We added support for Azure OpenAI GPT-4o, OpenAI GPT-4o mini, and Anthropic Claude 3.5 Sonnet on the Einstein Platform. OpenAI GPT-4o mini is available in Prompt Builder and Model Builder. Azure OpenAI GPT-4o is available in Prompt Builder and Model Builder, and supports geo-aware routing and BYOLLM use cases. Anthropic Claude 3.5 Sonnet is available in Model Builder for BYOLLM use cases only. 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.

When: Anthropic Claude 3.5 Sonnet is available starting on August 8, 2024, Azure OpenAI GPT-4o (including the geo-aware model) is available starting on August 14, 2024, and OpenAI GPT-4o mini is available starting on August 28, 2024 on the Einstein Platform.

SEE ALSO:

Salesforce Help: Large Language Model Support

Salesforce Help: Geo-Aware LLM Request Routing

Experience Cloud

Upgrade existing LWR sites and CMS workspaces to enhanced sites and enjoy better performance and new features. Offer site builders an improved experience with a new navigation component, upgraded record components, and improved SEO. Capture more site events and send them to Data Cloud with the updated Data Cloud integration. Make your sites work for you with new Salesforce CDN features, additional custom domain support, and more.

Security and Sharing

Make records that are shared with the Roles and Internal Subordinates group more secure by limiting sharing to internal users. To provide proper redirects, clean up old force.com URLs. Specify the third-party domains that you trust in your enhanced LWR sites. Enjoy a bundle of new customer identity features to improve your sites.

Aura and LWR Sites

Refine your LWR site design with new features in Experience Builder. Upgrade existing LWR sites to enhanced LWR, and drive more traffic to your enhanced LWR site with SEO-friendly URLs. On Aura sites, show enhanced CMS content, such as news, images, and custom content, and use Partner Connect for smooth collaboration with your trusted partners.

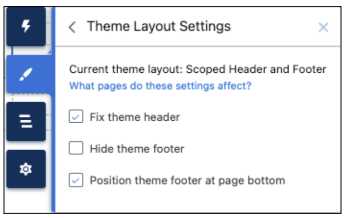
IN THIS SECTION:

Fine-Tune the Look and Feel of Your LWR Site with More Design and Layout Controls

New features in Experience Builder offer abundant options for refining your site design. Use new properties in the Theme panel to specify the style for more elements, such as buttons and headings. Anchor the header region of your site to the top of the page so that it stays visible even when visitors scroll down. Customize the color palette for an individual Columns component. Previously, you could customize only a full section or an entire site.

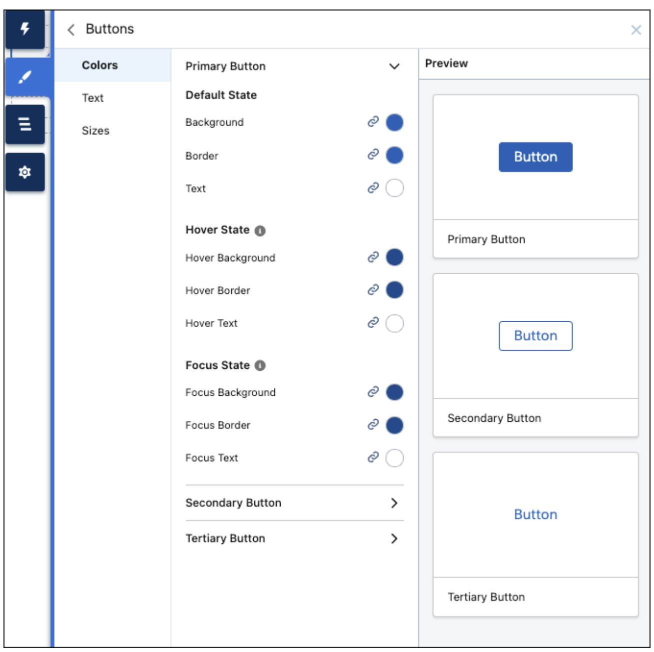
Where: These changes apply to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Not all features are available in all LWR templates.

How: For LWR sites created with the Build Your Own template, pages with a Scoped Header and Footer theme layout component offer access to the new Theme Layout Settings panel. Go to **Theme** > **Theme Layout Settings** for options to anchor your site's header and footer regions and to hide the footer. Select **Fix theme header** and the entire header region and its components always remain visible at the top of the page. Select **Position theme footer at page bottom** and the footer region sits at the bottom of the page, regardless of the page's content length.



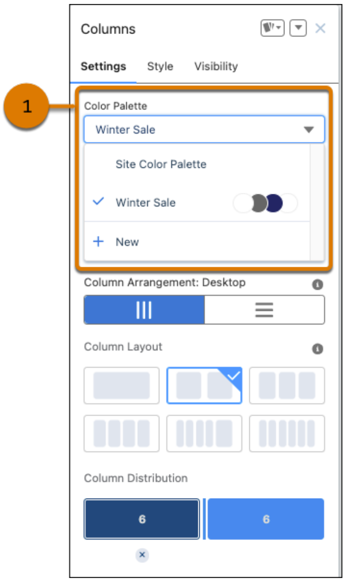
These choices are also available in Settings | Theme, in the property settings for Scoped Header and Footer.

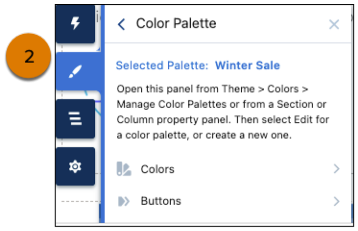
On all LWR sites, you have more options for customizing the colors of buttons and columns. In the revamped Theme | Buttons panel, specify colors not only for primary buttons, but also for secondary and tertiary buttons. You can designate the colors for background, borders, and text for each button in all three states—default, hover, and focus state.



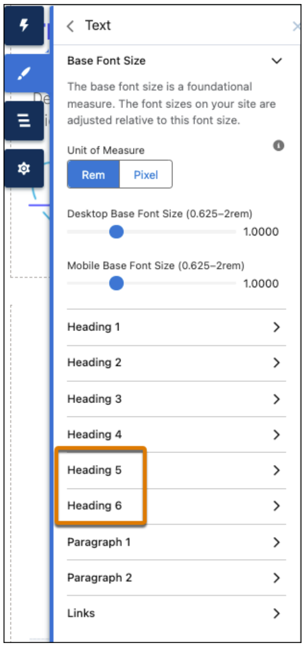
With the redesigned Theme | Buttons panel, the property for Button Active color is no longer available. However, you can still use the `--dxp-s-button-color-active` styling hook within your CSS to set the color of an active button.

Also on all LWR sites, apply a color palette to any Columns component. In the component property panel, select a choice from the Color Palette menu (1), or click **New** to create a palette for that component. When you create or edit a color palette for a column or section, a new Color Palette panel (2) becomes available in the Theme panel.





In the Theme | Text panel for all LWR sites, you can customize the look and feel of Headings 5 and 6. As with all other text elements, specify the font family, font size, character spacing, and more. Headings 5 and 6 are also now available on the Text Style menu in the Text Block component.



SEE ALSO:

LWR Developer Guide: How --dxp Styling Hooks Map to Theme Panel Properties (can be outdated or unavailable during release preview)

Knowledge Article: Button Active color theme property removed fro LWR sites in Winter '25 (can be outdated or unavailable during release preview)

Knowledge Article: Unable to deploy Summer '24 (version 61.0) LWR site metadata that's retrieved from a Winter '25 (version 62.0) environment back to a Summer '24 (can be outdated or unavailable during release preview)

Upgrade to Enhanced LWR Sites to Access the Latest Features (Beta)

The enhanced sites and content platform is a flexible system that brings together Salesforce CMS and LWR sites. Since Winter '23, enhanced LWR sites and enhanced CMS workspaces that you create are hosted together on this redesigned platform, which offers partial deployment, improved content management, expression-based visibility, and more. Now, as part of the move to the enhanced platform, you can upgrade your existing LWR sites to enhanced LWR sites to take advantage of the platform's newest features and capabilities.

Where: These changes apply to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Note: Site upgrade 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.

Why: Over the past several releases, we added many features that are available only with enhanced LWR sites, including:

- Expression-based visibility and variations: Create several versions of the same component, and then use visibility rules to determine who sees what.
- Component-specific Style tab: Apply custom CSS from a component's Style tab for more granular control over the look of each component.
- Site content search: Use the Search Bar and Results Layout components to add search functionality that includes content results from enhanced CMS workspaces.

- Data Cloud integration: Connect enhanced LWR sites to Data Cloud for a complete understanding of who's visiting your site and how you can best engage with them.
- Enhanced CMS workspaces: Avail of role-based workflows and approvals, content variations, collections, and the latest workspace sharing and channel removal features.

How: You can only upgrade LWR sites created in Winter '23 or later. These sites are authenticated by default and don't include `/s` in the URL. Authenticated sites, which include /s in the URL, and unauthenticated sites created before Winter '23 are unsupported.

To upgrade your LWR site, in Experience Builder, click **Settings** > **Updates**. Select **Opt in to try this beta feature**, and click **Upgrade**.

After you upgrade your site to an enhanced LWR site, the site's metadata changes. Unlike non-enhanced LWR sites, which use the ExperienceBundle metadata type, enhanced LWR sites use the DigitalExperienceBundle and the DigitalExperienceConfig types.

SEE ALSO:

Salesforce Help: What Is the Enhanced Sites and Content Platform? (can be outdated or unavailable during release preview)

Add Enhanced CMS Content to Your Aura Site

Show content from enhanced CMS workspaces on your Aura site, including News, Image, Document, and custom content types. Create manual and dynamic collections for Aura sites, now with enhanced CMS content. Previously, you could add only content from non-enhanced CMS workspaces to your Aura site.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

How: Add your Aura site as a channel to your enhanced CMS workspace. To show an individual piece of enhanced content, use the CMS Single Item or CMS Single Item (Detail) component. To create a collection of enhanced CMS content for an Aura site, go to the Content Management tile of your Aura site's workspace. Then add the collection to the site by using the CMS Collection component.

SEE ALSO:

Expand the Reach of Your Enhanced CMS Content

Salesforce Help: Display Salesforce CMS Content in Your Aura Site (can be outdated or unavailable during release preview)

Salesforce Help: Salesforce CMS Collections for Aura Sites (can be outdated or unavailable during release preview)

Customize URLs for Accounts and Contacts to Improve SEO (Generally Available)

Boost organic traffic to your enhanced LWR sites 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.

How: To start using SEO-friendly URLs, go to your site preferences and enable **Use SEO-Friendly URL Slugs**. From Object Manager, you can bulk-import slugs for your pages from a CSV file. You can add the SEO tab to Lightning record pages, and then slugs can be added and edited at the record level. Use the ObjectRelatedUrl object to upload SEO-friendly URL slugs in the Salesforce Platform APIs that you typically use.

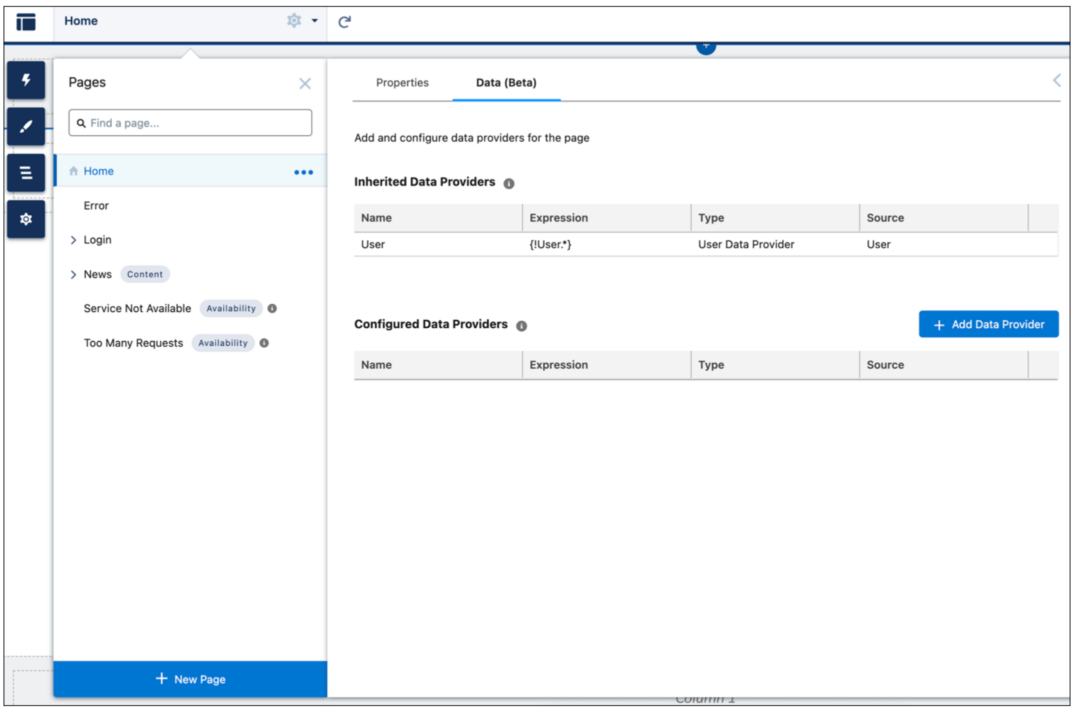
Enhance Your LWR Site Experience by Curating Data Providers on a Page (Beta)

Add and configure data providers on an LWR site page in Experience Builder and get access to data from different sources. You can use data from Apex or Record data providers in your site page and its components.

Where: This change applies to LWR sites accessed through Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions. You must have at least one active community license in your org to use this feature.

Note: Data Provider Configuration 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.

How: To configure data providers on an LWR Site page in Experience Builder, from the Pages menu, click ••• to access the Page Action menu and select **Page Settings**. Then click the **Data (Beta)** tab.



Export and Integrate Shared Business Across Salesforce Orgs with Partner Connect

Streamline collaboration on the business that you share with trusted partners. Partner Connect securely connects two Salesforce orgs, allowing a partner to export selected records from a vendor's Experience Cloud site to the partner's own org. A connection is maintained across exported records, providing vendors and partner users with a read-only glimpse of how the records progress independently for each company.

Where: This change applies to Aura sites accessed through Lightning Experience in Enterprise and Unlimited editions with Sales Cloud or Service Cloud. Vendors must have a PRM add-on license for the partner admin user and each partner user who you want to export records.

SEE ALSO:

Streamline Collaboration on Shared Deals with Trusted Partners

Components in Experience Builder

Create navigation menus for the desktop and mobile versions of your LWR site with the new Navigation Menu component. Design headers for specific pages on your LWR site with the Site Header component (beta). Use upgraded record components in your Aura sites, and see stylistic changes to those components that previously were visible only in sandbox environments.

IN THIS SECTION:

Customize Navigation and More with New and Improved Components for LWR Sites

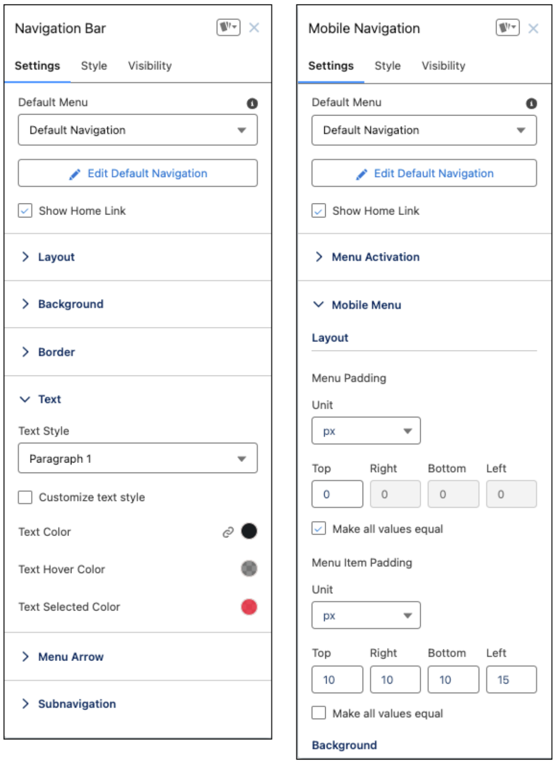
With the highly customizable Navigation Menu component, you can craft a navigation experience for your desktop and mobile site visitors without code. Try the Site Header component (beta) and create page headers that incorporate your company's logo and style. In the Grid component, standardize the height of the cells for a tidier visual presentation. The Site Logo component is now visible in the component palette on all site pages. Previously, it was visible only in the palette on the site's login pages.

Where: These changes apply to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Not all features are available in all LWR templates. You must have at least one active community license in your org to use these components.

Note: Site Header 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.

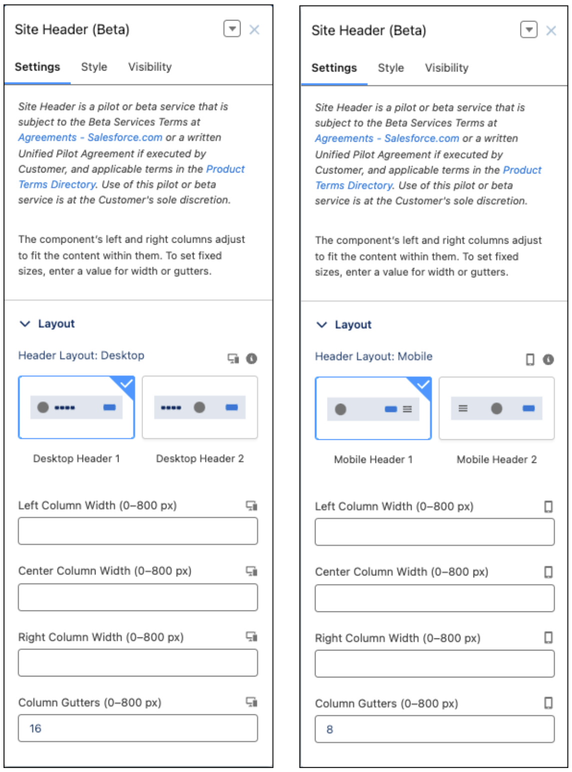
How: For LWR sites created with the Build Your Own or Microsite template, design separate navigation menus and site headers for desktop and mobile screen sizes. In Experience Builder, alternate between desktop and mobile view modes to customize these components.

In the Navigation Menu component, customize the Navigation Bar for desktop screens and Mobile Navigation for mobile screens. Adjust colors, borders, spacing, text styles, accent lines, and more for both screen sizes. A tablet held in landscape view shows the desktop navigation, whereas portrait view shows mobile navigation. You can add these types of menu items: External URL, Menu Label, Salesforce Object, Site Page. We recommend against using custom CSS with this component, because the CSS can fail.

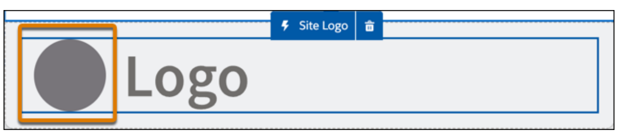


The new Site Header component (beta) comes with fields for your company's logo, a navigation menu, and a button. Add or delete components to the header based on your site's needs. On this component, responsive properties work only in enhanced LWR sites.

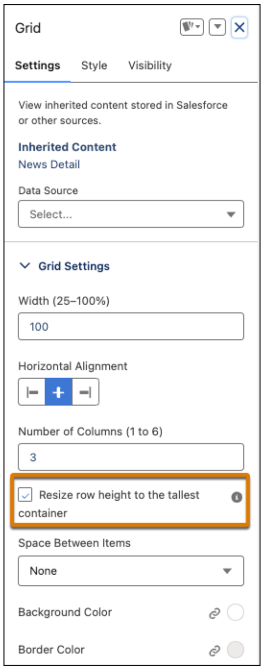
To use Site Header with the Microsite template, go to **Settings** > **Theme** and create a theme layout using the Simple Theme Layout option. Assign the new layout to the pages where you want the site header to appear, delete the default header from those pages, and replace it with Site Header.



In another update for LWR sites created with the Build Your Own or Microsite template, the Site Logo component now includes a placeholder graphic for the logo, making this field easier to see and customize.



And for all LWR sites, the Grid component includes a new option to resize the height of all cells in the grid to match the tallest container. Now you can ensure that the cells in the grid are neatly aligned vertically.



For enhanced LWR sites, button size is now responsive. On the Button component, you can specify a different button size for the desktop and mobile versions of your site.

SEE ALSO:

Salesforce Help: Configure Microsite Layout and Create Navigation (can be outdated or unavailable during release preview)

Knowledge Article: Navigation Menu within the Site Header (Beta) component disappears when you change tablet form factors (can be outdated or unavailable during release preview)

Enable or Disable a Modernized Record Experience in Aura Sites

Use upgraded record components, running on Lightning web component technology, and see stylistic changes to these components in your Aura sites. Previously, changes were available only in sandbox environments. Now changes are available in Create Record Form, Record Banner, and Record Detail components in production environments.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: When the **Use Lightning web components on your record pages in Aura sites** setting is enabled, the Create Record Form, Record Banner, and Record Detail components show minor style changes. Some of the primary changes include: .

- Buttons are center-aligned. Previously, they were right-aligned.
- Text in the record window is indented compared to the title. Previously, the text and title were aligned with one another.
- If a form includes required fields, there's now an explanation that an asterisk indicates 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 message telling them to complete the field.
- Error messages are displayed at the bottom of the record form. Previously, errors were displayed at the top.
- Field focus is highlighted with a yellow background.
- Page headers scroll with the page rather than remaining frozen at the top.

- Success messages are now more descriptive.
- New icons appear next to various fields.

How: In **Setup** > **Digital Experiences**, enable or disable **Use Lightning web components on your record pages in Aura sites**.

SEE ALSO:

Lightning Design System: Getting Started (can be outdated or unavailable during release preview)

Customize the Flow Orchestration Work Guide Component in Aura and LWR Sites

Control how the Flow Orchestration Work Guide component appears to Experience Cloud site visitors with assigned work. You can configure the component to work differently on each record page that you add it to. The changes that you make don't affect how the component looks in Experience Builder. Provide your title for the component and set a default sort order for orchestration work items. You can set the visibility of the orchestration run name, stage name, and step name for all work items displayed in the component. You can also hide the component for assigned site visitors who have no work items.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least one active community license in your org to use this feature.

Developer Productivity

Capture events and track more site data with automatic upgrades to your Data Cloud integration. Use the File Upload Lightning web component for LWR sites (beta) to send files from your enhanced LWR sites to your Salesforce org. Access custom domain troubleshooting help directly from Setup.

IN THIS SECTION:

Capture More Events with Data Cloud Integration Upgrades

You can now capture new checkout, order, and cart events in your enhanced LWR sites. After connecting your sites to Data Cloud, your integration does the behind-the-scenes work of connecting your LWR sites to Data Cloud.

Link Files from Your LWR Site to Salesforce (Beta)

Now you can use the File Upload Lightning web component for LWR sites (beta) to upload files from an enhanced LWR site to your Salesforce org. Previously, the File Upload component was available only for Aura sites.

Troubleshoot Custom Domain Issues Faster

A custom domain provides your users a branded experience by serving your Experience Cloud sites on a domain that you own, such as https://www.example.com. Now you can access answers to common questions and setup guidance about this highly recommended feature directly in Setup.

Capture More Events with Data Cloud Integration Upgrades

You can now capture new checkout, order, and cart events in your enhanced LWR sites. After connecting your sites to Data Cloud, your integration does the behind-the-scenes work of connecting your LWR sites to Data Cloud.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: The latest upgrade is version 1.3 and captures these new interaction events. Your integration version is listed on the Data Cloud integration card in Experience Builder.

- Begin checkout

- Enter contact info during checkout
- Register during checkout
- Enter shipping address during checkout
- Enter billing address during checkout
- Choose shipping options during checkout
- Make payment during checkout
- Apply coupon during checkout
- Review order during checkout
- Submit cart during checkout
- Order accepted and ready for fulfillment
- View cart
- Click category
- View search results, View category products
- Update user profile

How: To enable your Data Cloud integration, in Experience Builder, go to **Settings** > **Integrations**. On the Data Cloud card, click **Add to Site** and then click **Share site data with Data Cloud**. If Data Cloud is enabled, the integration version is listed on the integration card. To start sending user engagement data to Data Cloud after your version upgrade, publish your site.

Link Files from Your LWR Site to Salesforce (Beta)

Now you can use the File Upload Lightning web component for LWR sites (beta) to upload files from an enhanced LWR site to your Salesforce org. Previously, the File Upload component was available only for Aura sites.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

> Note: File Upload Lightning web component for Lightning Web Runtime 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.

How: From Setup, in the Quick Find box, enter `Salesforce Files`, and then select **General Settings**. Select **Allow site guest users to upload files** and select **Use the File Upload Lightning web component for LWR sites (Beta)**.

SEE ALSO:

Aura Component Reference: File Upload (can be outdated or unavailable during release preview)

Lightning Web Component Reference: File Upload (can be outdated or unavailable during release preview)

Troubleshoot Custom Domain Issues Faster

A custom domain provides your users a branded experience by serving your Experience Cloud sites on a domain that you own, such as https://www.example.com. Now you can access answers to common questions and setup guidance about this highly recommended feature directly in Setup.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, and Unlimited editions. Also available in Professional Edition with Marketing Cloud Account Engagement (Pardot).

SEE ALSO:

Get Help with Custom Domains Directly in Setup

Site Performance

Give your LWR sites a scalability and performance boost with Experience Delivery (pilot) and enjoy improvements to your Salesforce CDN. Use enhanced domains to serve your CDN in sandbox environments.

IN THIS SECTION:

Use Your Enhanced Domain to Serve Your Salesforce CDN in Sandboxes

Use the system-managed `*.sandbox.my.site.com` Experience Cloud URL, when enabling the Salesforce Content Delivery Network (CDN) for Commerce LWR sites and sites hosted on Experience Delivery.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Serve Your Experience Cloud Site with the Salesforce Content Delivery Network (CDN) (can be outdated or unavailable during release preview)

Update References to Your Force.com Site URLs

To ensure continued access to your sites, update references to your old `*.force.com` site URLs, which are no longer redirected in most non-production orgs. Look for references to those domains in Salesforce, such as in knowledge articles, 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 (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Update References to Your Previous Salesforce Domains

Boost LWR Site Performance with Experience Delivery (Pilot)

Improve the scalability and performance of your LWR sites by 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. 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: Experience Delivery 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.

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.

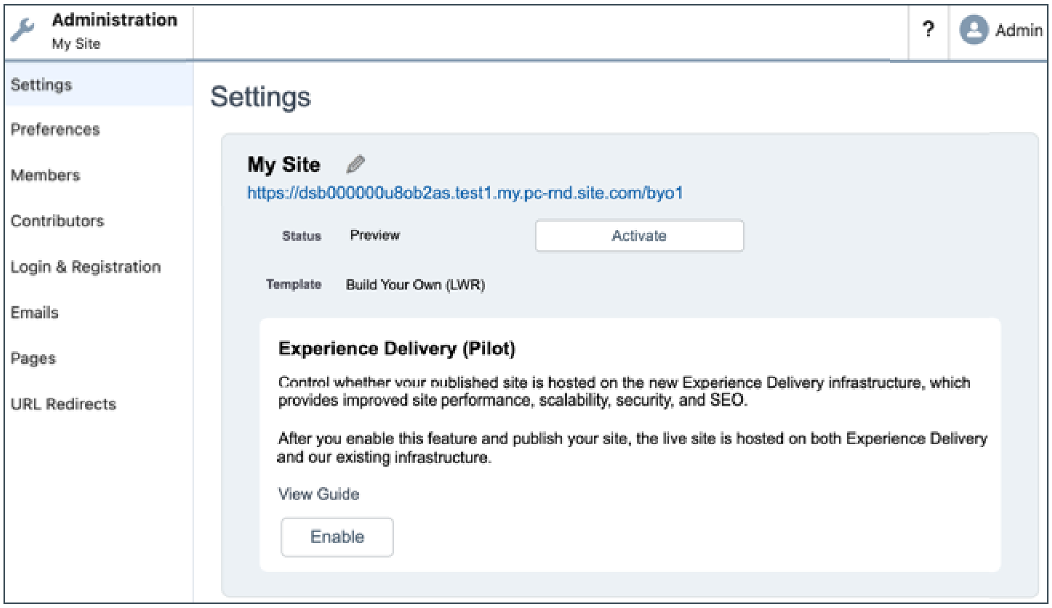
Since the previous release, we:

- Improved load-time performance
- Added support for Salesforce projects in the SSR Playground
- Added SSR support for several components, such as `lightning-formatted-rich-text`
- Implemented various bug fixes

How: To participate in this pilot, contact your Salesforce account executive. This pilot is for developers who are familiar with:

- 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.



Mobile for Experience Cloud

Mobile Publisher is generally available for LWR sites. Protect your mobile app information with snapshot prevention. Learn about new requirements for your Android app.

IN THIS SECTION:

Take Advantage of the Latest Features from Mobile Publisher for Experience Cloud

Mobile Publisher is now generally available for Experience Cloud Lightning Web Runtime (LWR) sites. Protect your app's information by enabling snapshot prevention, which conceals the snapshot of your app while the app is in the background of a device. To install a Mobile Publisher for Experience Cloud Android app in version 12.6 or later, user devices must be updated to an operating system minimum of Android 9. And you can now use consolidated Google Firebase fields in Setup for Mobile Publisher to configure Marketing Cloud notifications for an Android app.

Where: These changes apply to apps created with Mobile Publisher for Aura and LWR sites in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Mobile Publisher Winter '25 Release Notes

Security and Sharing

Make records that are shared with the Roles and Internal Subordinates group more secure by limiting sharing to internal users. To provide proper redirects, clean up old force.com URLs. Specify the third-party domains that you trust in your enhanced LWR sites. Enjoy a bundle of new customer identity features to improve your sites.

IN THIS SECTION:

Secure Record Access When Enabling Digital Experiences

After you enable digital experiences in any org, accessibility to records that are shared with the Roles and Internal Subordinates group through sharing rules or other features is limited to those internal users. Previously, this secure behavior was available only for orgs created after February 8, 2024. For orgs that enabled digital experiences before February 8, 2024, records shared with internal users were made available automatically to external site users. To secure access, use the Convert External User Access wizard.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Use the Convert External User Access Wizard (can be outdated or unavailable during release preview)

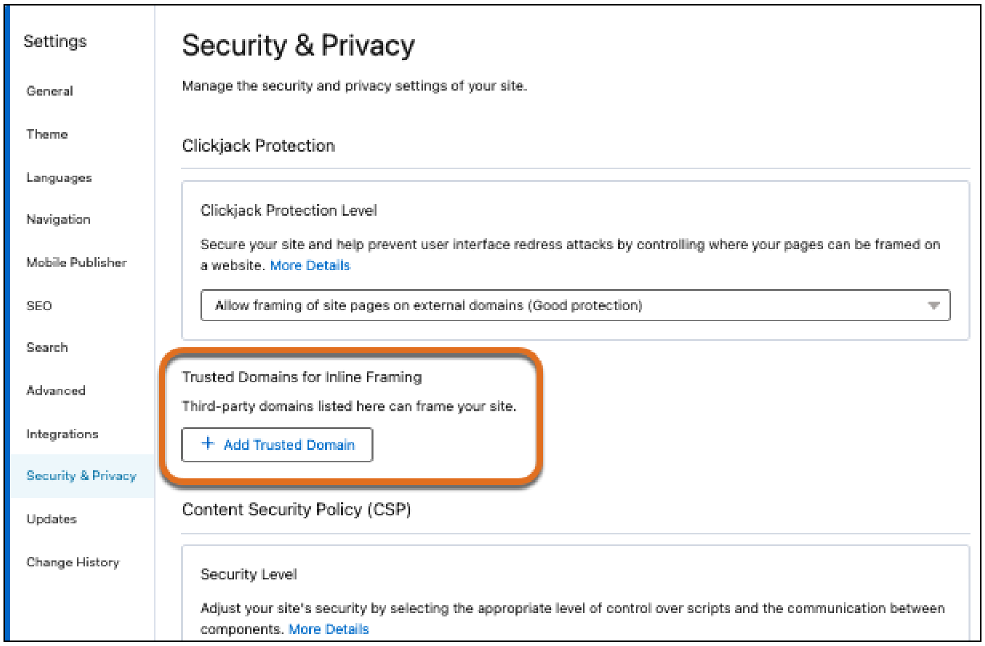
Update Apex Code and Sharing Rules in Metadata Deployments that Target Roles and Subordinates

Specify Trusted Domains for Clickjack Protection on Your Site

Now you can specify the third-party domains that you trust to frame your enhanced LWR site. Previously, this feature was available only for Aura sites, Visualforce sites, and non-enhanced LWR sites.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

How: In Experience Builder, select **Settings** > **Security & Privacy**. Under Clickjack Protection Level, select **Allow framing of site pages on external domains (good protection)**. To allow a third-party domain to frame your site, click **Add Trusted Domain** and add the domain.



SEE ALSO:

Salesforce Help: Enable Clickjack Protection in Experience Cloud Sites (can be outdated or unavailable during release preview)

Enhance Your Experience Cloud Site with New Customer Identity Features

For more control over identity verification, send one-time passwords (OTP) via a messaging provider of your choice. Customize your social sign-on user experience and functionality by allowlisting URL forwarding parameters for authentication providers. Elevate your headless identity setup with more ways for users to log in, headless registration improvements, and a new standards-based OAuth endpoint. An error message for the Forgot Password page is now easier for users to understand.

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.

- Customize SMS One-Time Password Delivery for Experience Cloud Sites (Generally Available)
- Customize User Experience and Functionality for Authentication Providers
- Give Users More Ways to Log In
- Make the Most of Enhancements for the Headless Registration Flow
- Be an Early Adopter of a Headless Identity Draft Standard
- Forgot Password Invalid Username Error Message Was Changed

Field Service

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.

IN THIS SECTION:

Get a Daily Summary of Service Appointments that Require Immediate Attention

Elevate dispatcher productivity by using Einstein Copilot Field Service actions. Get a daily overview to highlight service appointments that require immediate attention, such as appointments with rule violations, overlaps, SLA risks, or emergencies. Each category in the summary is converted into a filter in the appointment list, so it's easy for dispatchers to resolve these issues immediately. Customize the summary to include additional categories.

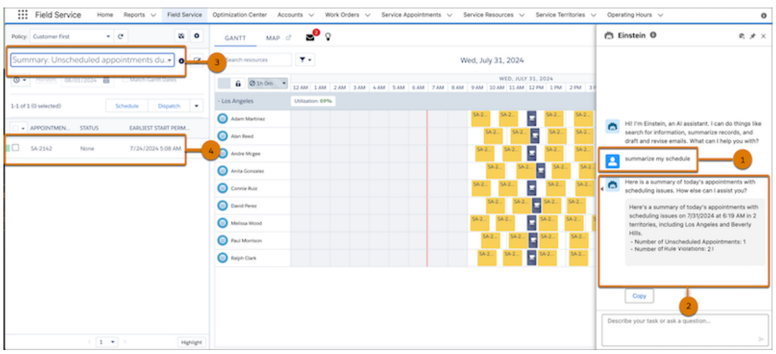
Where: This change applies to Lightning Experience in the Einstein 1 Field Service Edition with the Field Service Managed Package installed. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein 1 Field Service Edition, contact your Salesforce account executive.

Who: Einstein Copilot is available to users with the Use Einstein Copilot for Salesforce user permission. Field Service copilot actions are available to users with the Access Field Service Copilot Actions user permission.

To use Einstein Copilot actions that execute prompt templates, users must have the Execute Prompt Templates user permission.

How: The Summarize Scheduling Issues standard copilot action is included in the Field Service Dispatcher Actions topic. When a dispatcher asks Copilot to create a schedule summary (1), the Summarize Scheduling Issues action uses a Summarize Scheduling Issues prompt template to generate the summary. Copilot shows the summary (2), creates filters (3), and displays the appointments in the appointment list (4).



SEE ALSO:

Salesforce Help: Using Einstein Copilot in the Dispatcher Console (can be outdated or unavailable during release preview)

Salesforce Help: Creating Custom Summary Reports for Copilot Field Service Actions (can be outdated or unavailable during release preview)

Salesforce Help: Working in the Field Service Dispatcher Console Appointment List (can be outdated or unavailable during release preview)

Salesforce Help: Einstein for Field Service (can be outdated or unavailable during release preview)

Salesforce Help: Copilot Action: Summarize Scheduling Issues (can be outdated or unavailable during release preview)

Einstein Features

Find Service Appointments Easily by Creating Search Filters in the Appointment List

Boost dispatcher efficiency by using Einstein Copilot Field Service Actions. Dispatchers can quickly find service appointments and take immediate action, whether planning schedules or addressing schedule changes. With the Create Appointment List Filter action, dispatchers can benefit from generative AI to search for appointments by using natural language. Einstein Copilot then converts these searches into filters in the appointment list.

Where: This change applies to Lightning Experience in the Einstein 1 Field Service Edition with the Field Service Managed Package installed. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein 1 Field Service Edition, contact your Salesforce account executive.

Who: Einstein Copilot is available to users with the Use Einstein Copilot for Salesforce user permission. Field Service copilot actions are available to users with the Access Field Service Copilot Actions user permission.

To use Einstein Copilot actions that execute prompt templates, users must have the Execute Prompt Templates user permission.

How: The Create Appointment List Filter standard copilot action is included in the Field Service Dispatcher Actions topic. In the dispatcher console, ask Einstein Copilot to find service appointments by using specific criteria, for example, "Show me unscheduled appointments that are due today" (1). Then, instruct Copilot to create filters in the Appointment List that correspond to your searches (2). Copilot saves your search as a filter (3) and displays the appointments in the appointment list (4).

SEE ALSO:

Salesforce Help: Using Einstein Copilot in the Dispatcher Console (can be outdated or unavailable during release preview)

Salesforce Help: Working in the Field Service Dispatcher Console Appointment List (can be outdated or unavailable during release preview)

Salesforce Help: Einstein for Field Service (can be outdated or unavailable during release preview)

Salesforce Help: Copilot Action: Create Appointment List Filter (can be outdated or unavailable during release preview)

Einstein Features

Uncover Top Cancellation Reasons Easily (Beta)

Use Summarize Service Appointment Notes to identify and address the main causes of appointment cancellations. Einstein Copilot gathers and organizes service notes from all corresponding appointments, highlights common patterns, and offers a succinct summary. Better insights into cancellation trends help you implement effective solutions that increase appointment retention rates and improve resource allocation.

Where: This change applies to Lightning Experience in the Einstein 1 Field Service Edition. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein 1 Field Service Edition, contact your Salesforce account executive.

Note: This Einstein Copilot action is in beta and has limited functionality, as further described in the Documentation. Including it in a copilot is part of the Services and will consume Einstein Requests if enabled and used.

Who: Einstein Copilot is available to users with the Use Einstein Copilot for Salesforce user permission. Field Service copilot actions are available to users with the Access Field Service Copilot Actions 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 Service Appointment Notes standard copilot action. When a dispatcher asks Copilot to summarize appointment notes, the Summarize Service Appointment Notes action uses a Summarize Service

Appointment Notes prompt template to generate the summary. Copilot collects and categorizes service notes from all matching appointments, ranks common themes and reasons, and provides a concise summary.

SEE ALSO:

Salesforce Help: Create Service Appointments for Field Service (can be outdated or unavailable during release preview)

Salesforce Help: Einstein for Field Service (can be outdated or unavailable during release preview)

Salesforce Help: Copilot Action: Summarize Service Appointment Notes (can be outdated or unavailable during release preview)

Einstein Features

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.

Experience Better Performance with Enhanced Live Updates (Beta)

Get real-time updates quickly when working with the dispatcher console Gantt by enabling the new Enhanced Live Updates setting. This setting's enhanced capabilities let you handle large datasets efficiently, experience a stable environment, and effectively manage time-sensitive and critical tasks. With this new setting, Experience Cloud site users can also benefit from live Gantt updates. Previously, live updates weren't available to Experience Cloud site users.

Access Health Check in the Optimization Center Tab

Get the information you need to resolve issues quickly by testing your Field Service settings and configuration data in Health Check, now conveniently located in the Optimization Center tab. This tab includes all features related to monitoring Field Service activities and troubleshooting issues. Previously, Health Check was available in the Field Service Settings tab of the Field Service Admin app.

Enhanced Scheduling and Optimization

Benefit from advanced features and better schedule quality with Enhanced Scheduling and Optimization.

IN THIS SECTION:

Increase Flexibility and Efficiency When Scheduling Complex Work Chains

Improve resource utilization on the Gantt for Appointment Booking and Schedule operations with additional service appointment sliding capabilities. The Enhanced Scheduling and Optimization engine can now slide multiple appointments in a complex work chain with a start-after-finish dependency between service resources to a later time within the resources' availability. Previously, the engine could move appointments with this type of dependency only up to the start time of the next appointment in the chain.

Gain Insights into Service Appointment Unscheduling Information

Discover why service appointments were unscheduled during optimization in the Optimization Hub and the JSON response file of the optimization request. Then, use this information to adjust your scheduling data or fine-tune your scheduling policy's rules and business objectives to improve your scheduling results.

Get More Information About Scheduling and Optimization Requests with Activity Reports (Beta)

See near real-time data on your scheduling and optimization requests that are in progress when you generate an activity report. Get information about more request types, such as Bundling: Manual Requests, and access more information in the report output, such as Secondary Operations, to help you easily identify and resolve issues.

Increase Coverage with 24-Hour Availability for Capacity-Based Resources

Assign capacity-based resources to appointments that occur at any time, day or night. This round-the-clock availability ensures continuous coverage to meet SLAs, optimizes the use of contractors, and minimizes manual scheduling efforts by leveraging Scheduling and Optimization services.

Increase Availability by Reshuffling and Prioritizing Service Appointments

Efficiently book or schedule a service appointment by automatically moving appointments across shifts or between resources. Make room for scheduling high-priority service appointments, even when the Gantt is full, by dropping low-priority appointments when required. Make sure that critical appointments remain scheduled when you reshuffle by defining "keep scheduled" criteria.

Enhance Scheduling Accuracy by Adding Travel Time Buffers per Territory

Adjust your estimated travel time for each territory to account for additional arrival time considerations, such as finding parking. These changes keep your schedule accurate and realistic and increase customer satisfaction by providing customers with more accurate arrival information.

Improve Schedule Recommendations with the Appointment Insights API (Beta)

Understand why a service appointment can't be scheduled and which work rules are preventing its scheduling with the Appointment Insights API. The new `getAppointmentInsights` Apex method, under the `ScheduleService` Apex class, returns data about why a specific service appointment can't be scheduled on the Gantt, helping you fine-tune your scheduling policy.

Increase Flexibility and Efficiency When Scheduling Complex Work Chains

Improve resource utilization on the Gantt for Appointment Booking and Schedule operations with additional service appointment sliding capabilities. The Enhanced Scheduling and Optimization engine can now slide multiple appointments in a complex work chain with a start-after-finish dependency between service resources to a later time within the resources' availability. Previously, the engine could move appointments with this type of dependency only up to the start time of the next appointment in the chain.

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 enable service appointment sliding under General Logic.

SEE ALSO:

Salesforce Help: Complex Work in Field Service (can be outdated or unavailable during release preview)

Salesforce Help: Enable Service Appointment Sliding (can be outdated or unavailable during release preview)

Gain Insights into Service Appointment Unscheduling Information

Discover why service appointments were unscheduled during optimization in the Optimization Hub and the JSON response file of the optimization request. Then, use this information to adjust your scheduling data or fine-tune your scheduling policy's rules and business objectives to improve your scheduling results.

Where: This feature is available in Lightning Experience 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 optimization requests, use Lightning App Builder to add the Optimization Hub Lightning web component to the optimization request record page. In the Field Service Admin app, click the **Field Service Settings** tab and select **Scheduling**. Then enable optimization request files under General Logic.

SEE ALSO:

Salesforce Help: Explore Metrics in Field Service Optimization Hub (can be outdated or unavailable during release preview)

Salesforce Help: Access Optimization Request Files (Beta) (can be outdated or unavailable during release preview)

Get More Information About Scheduling and Optimization Requests with Activity Reports (Beta)

See near real-time data on your scheduling and optimization requests that are in progress when you generate an activity report. Get information about more request types, such as Bundling: Manual Requests, and access more information in the report output, such as Secondary Operations, to help you easily identify and resolve issues.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

Note: Activity Reports 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.

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**.

SEE ALSO:

Salesforce Help: Review the History of Scheduling and Optimization Requests with Activity Reports (Beta) (can be outdated or unavailable during release preview)

Increase Coverage with 24-Hour Availability for Capacity-Based Resources

Assign capacity-based resources to appointments that occur at any time, day or night. This round-the-clock availability ensures continuous coverage to meet SLAs, optimizes the use of contractors, and minimizes manual scheduling efforts by leveraging Scheduling and Optimization services.

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, click the **Operating Hours** tab, and create an operating hours record. Then, click the **Related** tab, create a time slot, and define the start time as 12:00 AM and the end time as 23.59. Alternatively, from the App Launcher, find and select **Shifts**, and create a shift as usual.

SEE ALSO:

Salesforce Help: Create Operating Hours for Field Service (can be outdated or unavailable during release preview)

Increase Availability by Reshuffling and Prioritizing Service Appointments

Efficiently book or schedule a service appointment by automatically moving appointments across shifts or between resources. Make room for scheduling high-priority service appointments, even when the Gantt is full, by dropping low-priority appointments when required. Make sure that critical appointments remain scheduled when you reshuffle by defining "keep scheduled" criteria.

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, click the **Field Service Settings** tab and select **Scheduling**. Then enable reshuffling and sliding under General Logic.

SEE ALSO:

Salesforce Help: Set Up Service Appointment Reshuffling and Sliding (can be outdated or unavailable during release preview)

Salesforce Help: Book and Schedule Appointments Using Priorities (can be outdated or unavailable during release preview)

Salesforce Help: Schedule Appointments from the Dispatcher Console (can be outdated or unavailable during release preview)

Salesforce Help: Schedule Appointments from the Record Feed (can be outdated or unavailable during release preview)

Enhance Scheduling Accuracy by Adding Travel Time Buffers per Territory

Adjust your estimated travel time for each territory to account for additional arrival time considerations, such as finding parking. These changes keep your schedule accurate and realistic and increase customer satisfaction by providing customers with more accurate arrival information.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. In the Field Service Admin app, select the **Service Territories** tab and create a service territory. Then, in the Travel Time Buffer field, define the value to add to the estimated travel time.

SEE ALSO:

Salesforce Help: Create Service Territories for Field Service (can be outdated or unavailable during release preview)

Improve Schedule Recommendations with the Appointment Insights API (Beta)

Understand why a service appointment can't be scheduled and which work rules are preventing its scheduling with the Appointment Insights API. The new `getAppointmentInsights` Apex method, under the `ScheduleService` Apex class, returns data about why a specific service appointment can't be scheduled on the Gantt, helping you fine-tune your scheduling policy.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Note: Appointment Insights API 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.

SEE ALSO:

https://developer.salesforce.com/docs/atlas.en-us.field_service_dev.meta/field_service_dev/apex_class_FSL_ScheduleService.htm#apex_FSL_ScheduleService_getAppointmentInsights

Experience Better Performance with Enhanced Live Updates (Beta)

Get real-time updates quickly when working with the dispatcher console Gantt by enabling the new Enhanced Live Updates setting. This setting's enhanced capabilities let you handle large datasets efficiently, experience a stable environment, and effectively manage time-sensitive and critical tasks. With this new setting, Experience Cloud site users can also benefit from live Gantt updates. Previously, live updates weren't available to Experience Cloud site users.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

Note: Enhanced Live Updates 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.

How: In the Field Service Admin app, click the Field Service Settings tab and select **Dispatcher Console UI**. Then turn on Enhanced Live Updates under Updating the Gantt.

SEE ALSO:

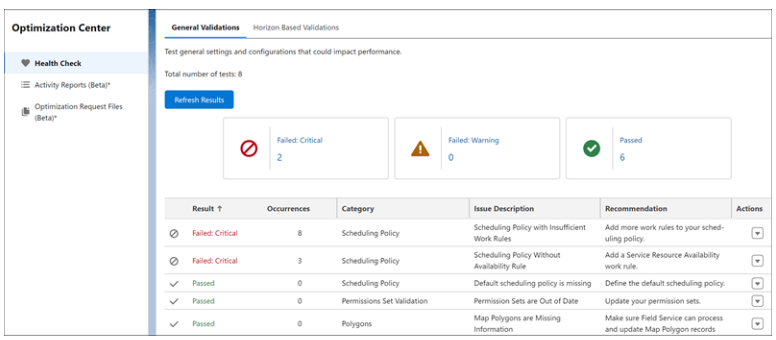
Salesforce Help: Turn On Field Service Gantt Live Updates (can be outdated or unavailable during release preview)

Access Health Check in the Optimization Center Tab

Get the information you need to resolve issues quickly by testing your Field Service settings and configuration data in Health Check, now conveniently located in the Optimization Center tab. This tab includes all features related to monitoring Field Service activities and troubleshooting issues. Previously, Health Check was available in the Field Service Settings tab of the Field Service Admin app.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: From the App Launcher, find and select **Optimization Center**. Then click **Health Check**.



SEE ALSO:

Salesforce Help: Get Information on Optimization with Field Service Optimization Center (can be outdated or unavailable during release preview)

Salesforce Help: Test Your Field Service Configuration with Health Check (can be outdated or unavailable during release preview)

Field Service Asset Management

Discover what's new to take asset management to the next level.

IN THIS SECTION:

Field Service Asset Service Lifecycle Management Add-On

Discover new features that drive innovation through seamless collaboration and resource optimization.

View Asset Health Score on the Go with the Connected Assets Add-On

Mobile workers can now triage issues and prioritize inspection work. For example, an on-site mobile worker can pull up a list view of customer assets and see which ones have low health scores. The worker can then prioritize inspections for these assets.

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 '26.

Field Service Asset Service Lifecycle Management Add-On

Discover new features that drive innovation through seamless collaboration and resource optimization.

IN THIS SECTION:

Improve First-Time Fix Rates

Let asset managers complete administrative tasks efficiently and resolve large-scale issues by interacting with the asset's hierarchical view. Asset managers can now see a large asset and its child assets in the asset hierarchical view. They can then easily search for an asset and track the real-time status and lifecycle by location and install base. Previously, asset managers could only view the asset hierarchy.

Improve Asset Visibility on Your Mobile App

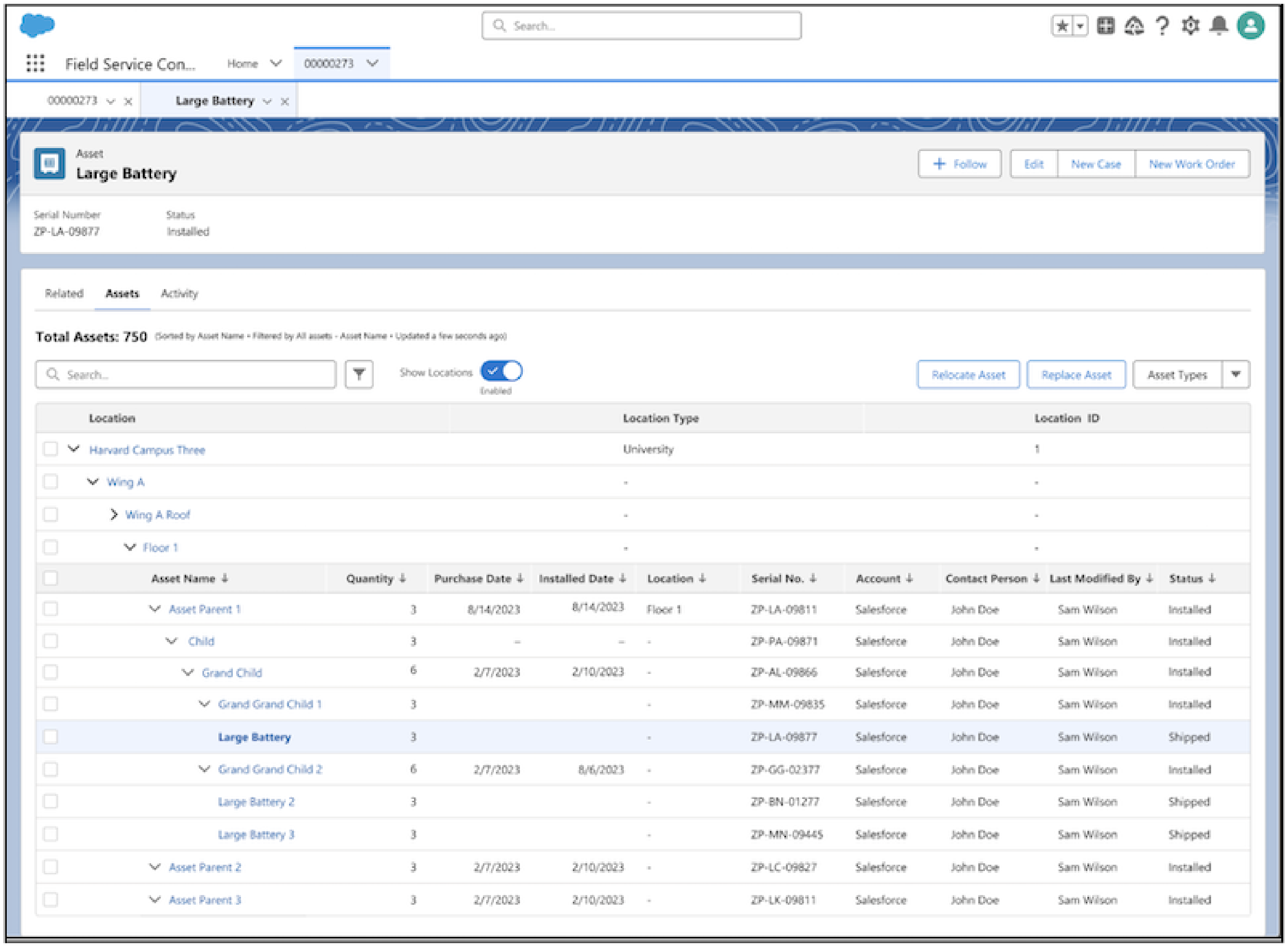
Let mobile workers quickly diagnose problems and efficiently get the job done in the Asset Hierarchy view. This view reduces the number of apps mobile workers need to use to understand all the asset details at a specific location or at several locations. Mobile workers can now see a large asset and its child assets in the asset's hierarchical view and then easily search for an asset or asset location. Previously, asset hierarchy wasn't available on the mobile app.

Improve First-Time Fix Rates

Let asset managers complete administrative tasks efficiently and resolve large-scale issues by interacting with the asset's hierarchical view. Asset managers can now see a large asset and its child assets in the asset hierarchical view. They can then easily search for an asset and track the real-time status and lifecycle by location and install base. Previously, asset managers could only view the asset hierarchy.

Where: This change applies to Lightning Experience in Asset Service Lifecycle Management with Field Service installed. The feature is available in the Field Service mobile app for iOS and Android. To purchase the Asset Service Lifecycle Management add-on license, contact your Salesforce account executive.

How: Navigate to the asset hierarchy from the asset page to view a grid of the asset, its location, and its child assets. You can also check the location of each child asset.



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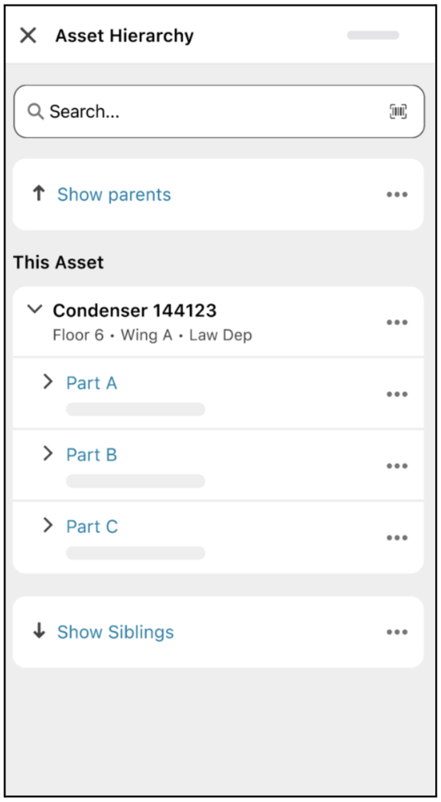
Let mobile workers quickly diagnose problems and efficiently get the job done in the Asset Hierarchy view. This view reduces the number of apps mobile workers need to use to understand all the asset details at a specific location or at several locations. Mobile workers can now see a large asset and its child assets in the asset's hierarchical view and then easily search for an asset or asset location. Previously, asset hierarchy wasn't available on the mobile app.

Where: This change applies to Lightning Experience in Asset Service Lifecycle Management with Field Service installed. The feature is available in the Field Service mobile app for iOS and Android.

To purchase the Asset Service Lifecycle Management add-on license, contact your Salesforce account executive.

How: When you go to the asset hierarchy from the asset page or work order, you see the list of all assets in a hierarchical view.



SEE ALSO:

Salesforce Help: Interactive Asset Hierarchy (can be outdated or unavailable during release preview)

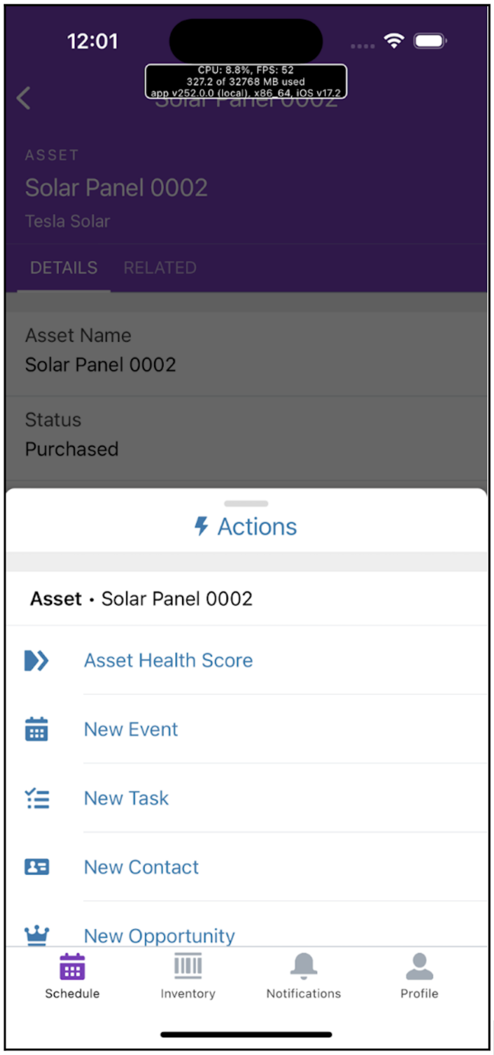
View Asset Health Score on the Go with the Connected Assets Add-On

Mobile workers can now triage issues and prioritize inspection work. For example, an on-site mobile worker can pull up a list view of customer assets and see which ones have low health scores. The worker can then prioritize inspections for these assets.

Where: This change applies to Lightning Experience in Connected Assets with Field Service installed. The feature is available in the Field Service mobile app for iOS and Android.

To purchase the Connected Assets add-on license, contact your Salesforce account executive.

How: When you open the asset view, you see a list of all the assets with low asset health scores. Mobile workers can open the asset health score dashboard through the asset record's action menu.



SEE ALSO:

Salesforce Help: Asset Health Score Dashboard (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 '26.

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 '26. 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 '26, 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 Operations

Streamline, extend, and customize your Field Service operations with these additions.

IN THIS SECTION:

Gain Instant Access to Key Operations and Insights with Field Service Home

Access your apps with one click and get personalized insights that spotlight the most crucial data for your field operations, from performance metrics to service trends. The Operations Home provides a comprehensive solution for managing Field Service operations and eliminates the need to search for apps and metrics.

Field Service Intelligence

Boost operations with Field Service Intelligence data-driven solutions.

Service Documents

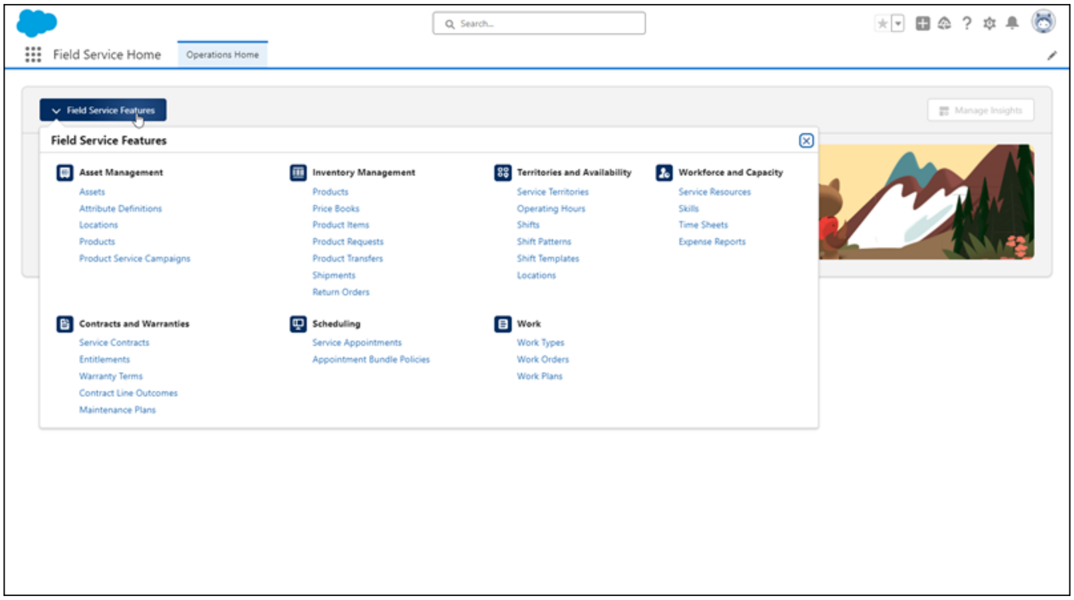
Discover what's new for service documents.

Gain Instant Access to Key Operations and Insights with Field Service Home

Access your apps with one click and get personalized insights that spotlight the most crucial data for your field operations, from performance metrics to service trends. The Operations Home provides a comprehensive solution for managing Field Service operations and eliminates the need to search for apps and metrics.

Where: This feature is available in Lightning Experience in the Einstein 1 Field Service Edition.

How: From the App Launcher, find and select **Field Service Home**. To access the Field Service Apps, click **Field Service Features**.



SEE ALSO:

Salesforce Help: Field Service Home (can be outdated or unavailable during release preview)

Field Service Intelligence

Boost operations with Field Service Intelligence data-driven solutions.

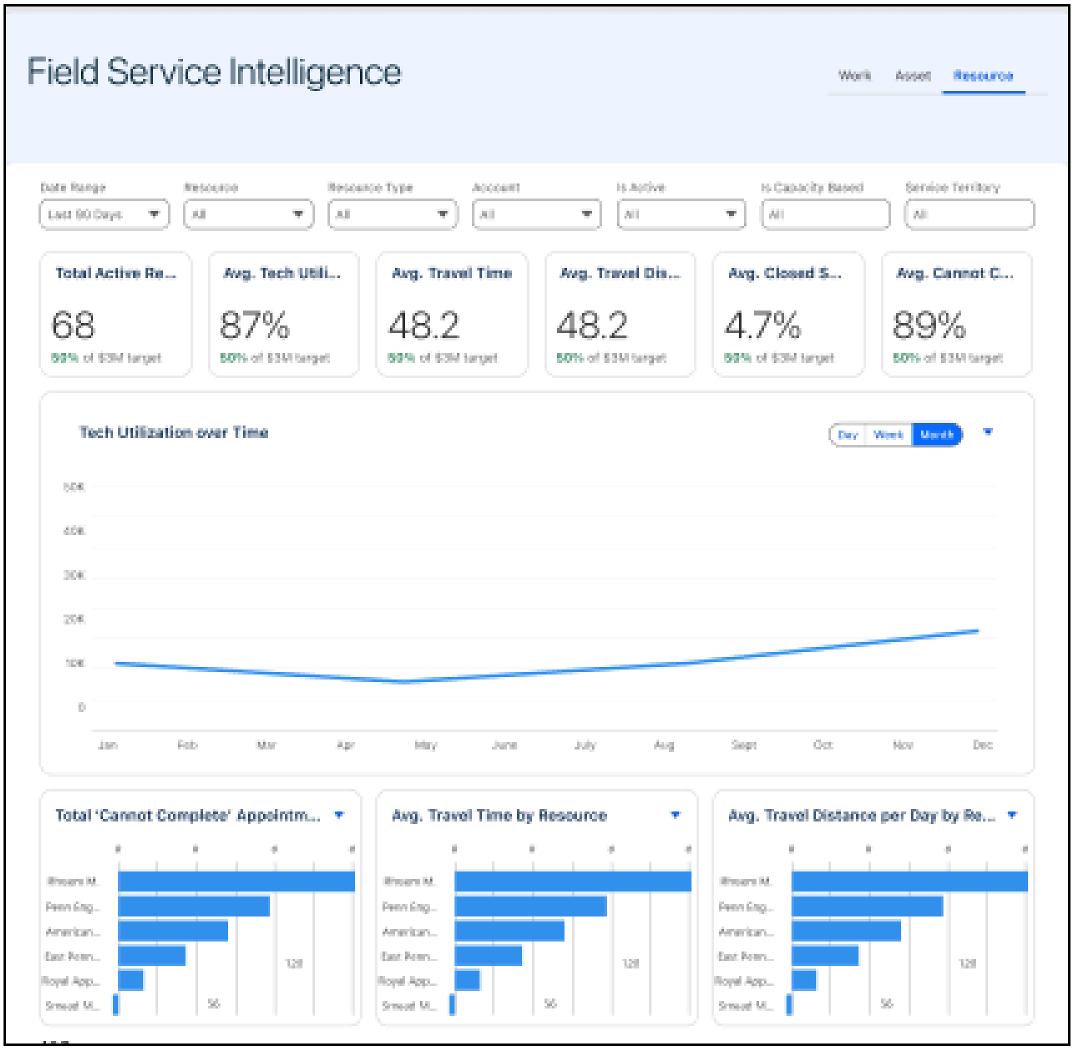
IN THIS SECTION:

Boost and Track Team Performance

Effortlessly monitor resource utilization, performance efficiency, and burnout risk with the Resource Management dashboard. Analyze individual metrics against team and company benchmarks that help you identify opportunities for improvement and ensure that your team thrives.

Where: This feature is available in Lightning Experience in the Einstein 1 Field Service Edition.

How: From the App Launcher, find and select **Field Service Intelligence**. And then click **Resources**.



SEE ALSO:

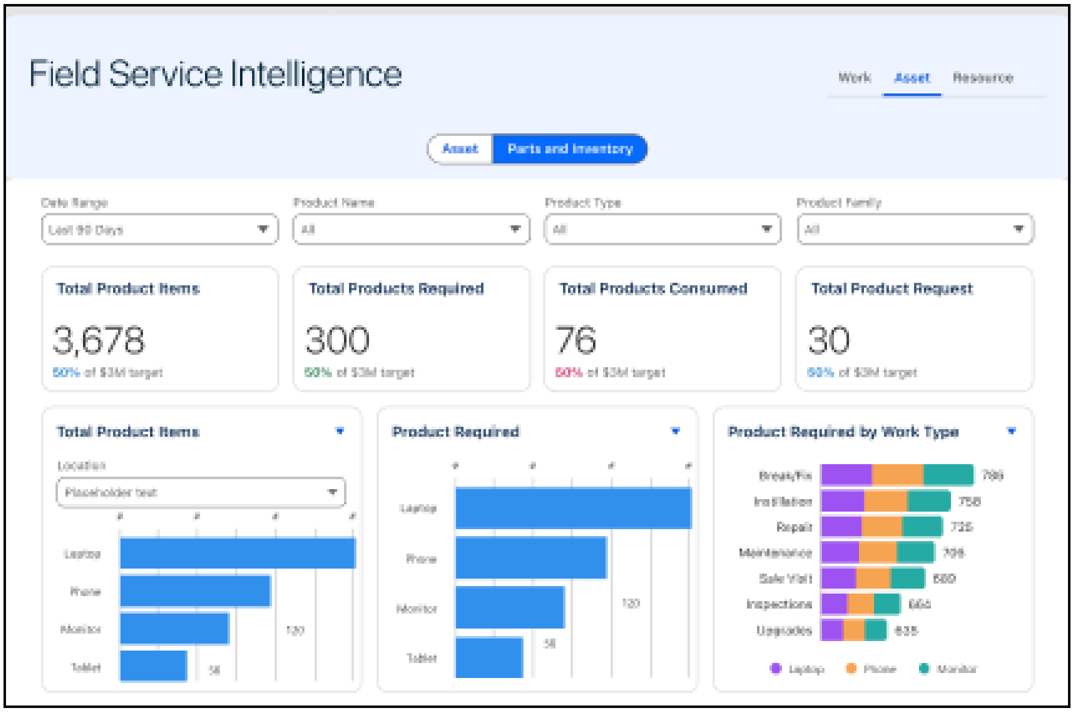
Salesforce Help: Field Service Intelligence Dashboards (can be outdated or unavailable during release preview)

Gain Comprehensive Insights into Your Inventory and Products

Keep your operations running smoothly with the Parts and Inventory dashboard. Track stock levels, consumption rates, demand trends, and request statuses so you're always informed.

Where: This feature is available in Lightning Experience in the Einstein 1 Field Service Edition.

How: From the App Launcher, find and select **Field Service Intelligence**. Click **Assets** and then click **Parts and Inventory**.



SEE ALSO:

Salesforce Help: Field Service Intelligence Dashboards (can be outdated or unavailable during release preview)

Service Documents

Discover what's new for service documents.

IN THIS SECTION:

Grant Community Users Access to Document Builder

Document Builder is now available to users with community licenses, including mobile workers who are using Contractor and Contractor Plus Login-Based licenses.

Personalize Service Documents with Company and Worker Details

Provide customers with details about your company and who completed the job by including information, such as your company address and phone, name, and specialty of the mobile worker, in your service documents. Embed fields from User and Organization objects into your service documents with Document Builder.

Organize Service Documents with Page Breaks

Control the pagination of your service document content with the Page Break component for Document Builder. Previously, you couldn't control what was shown on each page. Drag the Page Break component onto the document template in Document Builder's canvas to create more readable, compliant, personalized service documents.

Grant Community Users Access to Document Builder

Document Builder is now available to users with community licenses, including mobile workers who are using Contractor and Contractor Plus Login-Based licenses.

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

SEE ALSO:

Salesforce Help: About Document Builder (can be outdated or unavailable during release preview)

Personalize Service Documents with Company and Worker Details

Provide customers with details about your company and who completed the job by including information, such as your company address and phone, name, and specialty of the mobile worker, in your service documents. Embed fields from User and Organization objects into your service documents with Document Builder.

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

How: In Document Builder, drag User and Organization fields onto the canvas. Save the template, and then test it in the document preview.

SEE ALSO:

Salesforce Help: About Document Builder (can be outdated or unavailable during release preview)

https://developer.salesforce.com/docs/atlas.en-us.object_reference.meta/object_reference/sforce_api_objects_organization.htm

https://developer.salesforce.com/docs/atlas.en-us.object_reference.meta/object_reference/sforce_api_objects_user.htm

Organize Service Documents with Page Breaks

Control the pagination of your service document content with the Page Break component for Document Builder. Previously, you couldn't control what was shown on each page. Drag the Page Break component onto the document template in Document Builder's canvas to create more readable, compliant, personalized service documents.

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

SEE ALSO:

Salesforce Help: About Document Builder (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:

Schedule and Reschedule Appointments with Scheduling Dependencies in Appointment Assistant

If you're using Enhanced Scheduling and Optimization, your customers can schedule and reschedule complex work in Appointment Assistant Self-Service Scheduling. Previously, if an appointment had scheduling dependencies, customers couldn't schedule or reschedule it.

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: Enable Complex Work for New Appointments with Self-Service Scheduling

Salesforce Help: Enable Complex Work for Existing Appointments with Self-Service Scheduling

Provide Real-Time Customer Guidance with the Visual Remote Assistant Mobile SDK Embedded in Your Branded Mobile App

Improve customer experience with live on-screen guidance from your mobile app tailored to your unique brand identity. Agents can view a customer's mobile screen remotely to provide personalized support and resolve issues more efficiently. Previously, you could use only the generic Visual Remote Assistant mobile app.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Develop and integrate the Visual Remote Assistant mobile SDK into your branded mobile app.

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:

Data Capture

Discover what's new for Data Capture. This Salesforce Field Service solution for dynamic, responsive forms is a beta feature.

IN THIS SECTION:

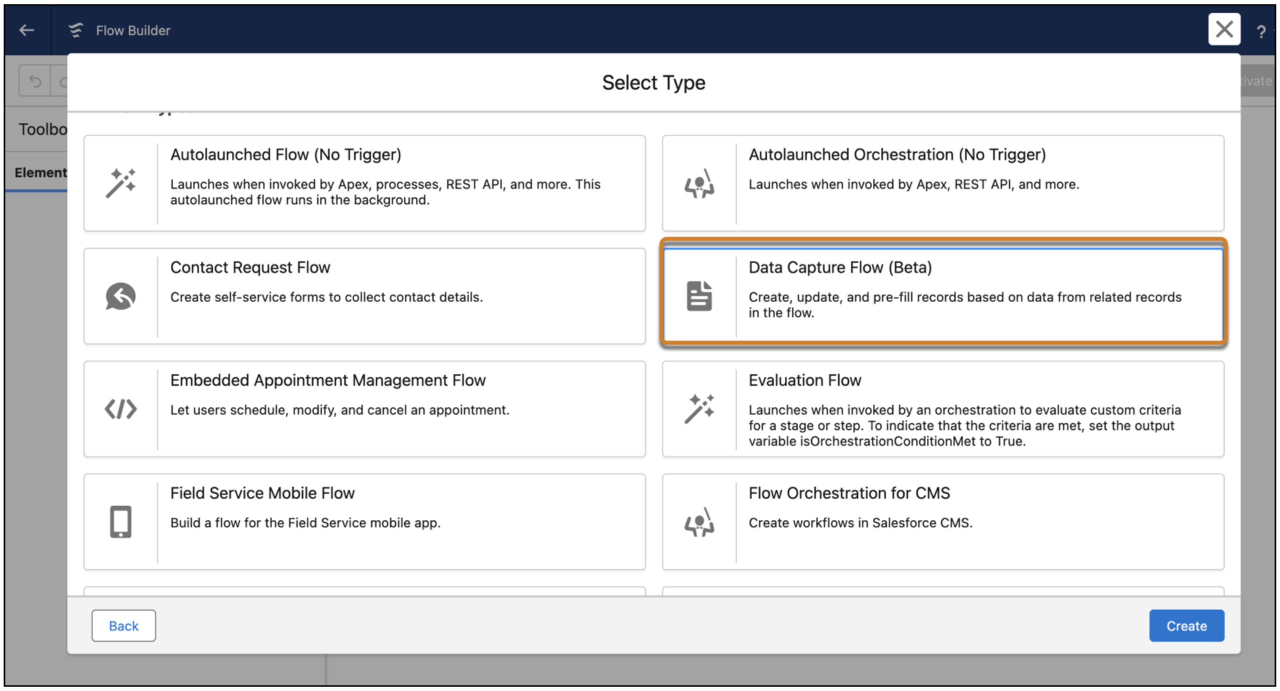
Create Dynamic Forms with Data Capture Flow (Beta)

Wield the magic of the new Data Capture flow type to create dynamic, responsive forms in Flow Builder. Build forms that use conditional logic to simplify the mobile experience. Data Capture forms respond to mobile users' input, deliver focused questions, and reduce task completion time. Previously, you had to integrate external apps to create forms that launch from the mobile app. With the Data Capture flow, forms are integrated with the Salesforce platform and are tailored to the task.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Note: Data Capture 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.

How: Select the Data Capture (Beta) flow type in Flow Builder.



SEE ALSO:

Salesforce Help: Flow Builder Tour (can be outdated or unavailable during release preview)

Salesforce Help: About Data Capture Flow (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Flow Builder Tour (can be outdated or unavailable during release preview)

Salesforce Help: About Data Capture Flow (Beta) (can be outdated or unavailable during release preview)

Empower Mobile Workers with Data Capture Forms (Beta)

Get the job done faster, online or offline, with smart, dynamic Data Capture forms. Launch Data Capture forms from the new Forms tab on Work Order Overview or directly from a service appointment or work order line item via the related list. Pause, resume, and progress backwards and forwards through Data Capture forms without missing a beat. From collecting data on assets that need maintenance to conducting environmental assessments, the conditional logic of Data Capture gives mobile workers only the questions that they need for the task at hand.

Where: This feature is available in the Field Service mobile app for Android and iOS.

Note: Data Capture 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.

Accept On-Site Payments with Tap-to-Pay

Create a Lightning web component (LWC) that lets your customers use the Tap-to-Pay capability of the Payments plug-in to pay mobile workers directly. The Field Service mobile app then integrates with Pay Now to connect the LWC to a secure payment system that processes the interaction.

Where: This feature is available in the Field Service mobile app for Android and iOS with the Salesforce Payments and Pay Now licenses.

When: Tap-to-Pay is available later in Winter '25.

Reduce Distractions and Stay Focused with Standby Mode

Now mobile workers can pause notifications, data syncs, and location sharing with just a tap so they remain undisturbed during critical tasks. When they exit Standby mode and return to the app, they can continue right where they left off—no need to download records. Previously, workers had to log out and download records again for offline work when logging back in. Enable Standby Mode for your mobile team in Field Service Settings.

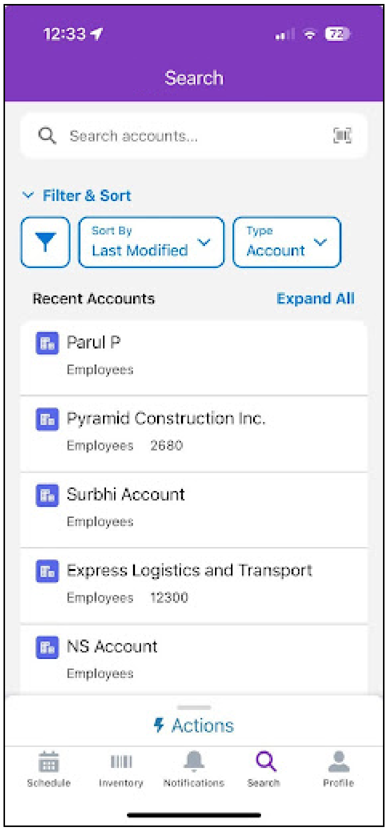
Where: This feature is available in the Field Service mobile app for Android and iOS.

Search for Records Easily in the Field Service Mobile App

Let mobile workers quickly find the records they need to get the job done faster with a simple search view that includes filtering and sorting capabilities.

Where: This feature is available in the Field Service mobile app for Android and iOS.

How: Create a Search tab on the main screen of the app.



SEE ALSO:

Salesforce Help: Set Up the Search Tab (can be outdated or unavailable during release preview)

Launch Flows Silently Based on Geolocation

Run flows automatically based on platform alerts that are triggered when mobile workers arrive and leave job sites. With platform alerts, you don't need mobile worker interaction to run flows. For example, when Field Service receives an alert that the mobile worker has left the job site, start a flow to update a timesheet, or send the customer a survey. Previously, geolocation-based actions only opened quick actions or a specific record, which required the mobile worker to interact with the app.

Where: This change applies to the Field Service mobile app for Android and iOS.

How: Create a flow that connects geolocation-based actions to service appointments. Then, create an action that's triggered when the mobile worker arrives or leaves a location.

SEE ALSO:

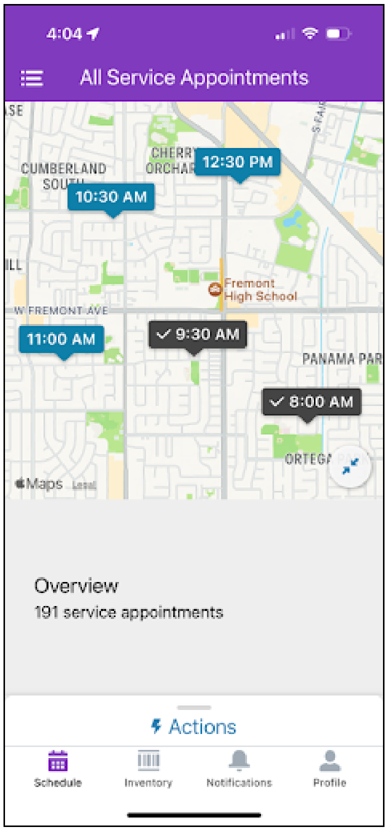
Salesforce Help: Set Up Geolocation-Based Actions for the Field Service Mobile App (can be outdated or unavailable during release preview)

See the Status of Appointments on the Map at a Glance

Easily identify and manage service appointments with color-coded map pins that clearly distinguish between completed and scheduled appointments. Previously, mobile workers couldn't see the difference between the appointments on the map.

Where: This change applies to the Field Service mobile app for Android and iOS.

How: Here's how the appointment pins look on the map.



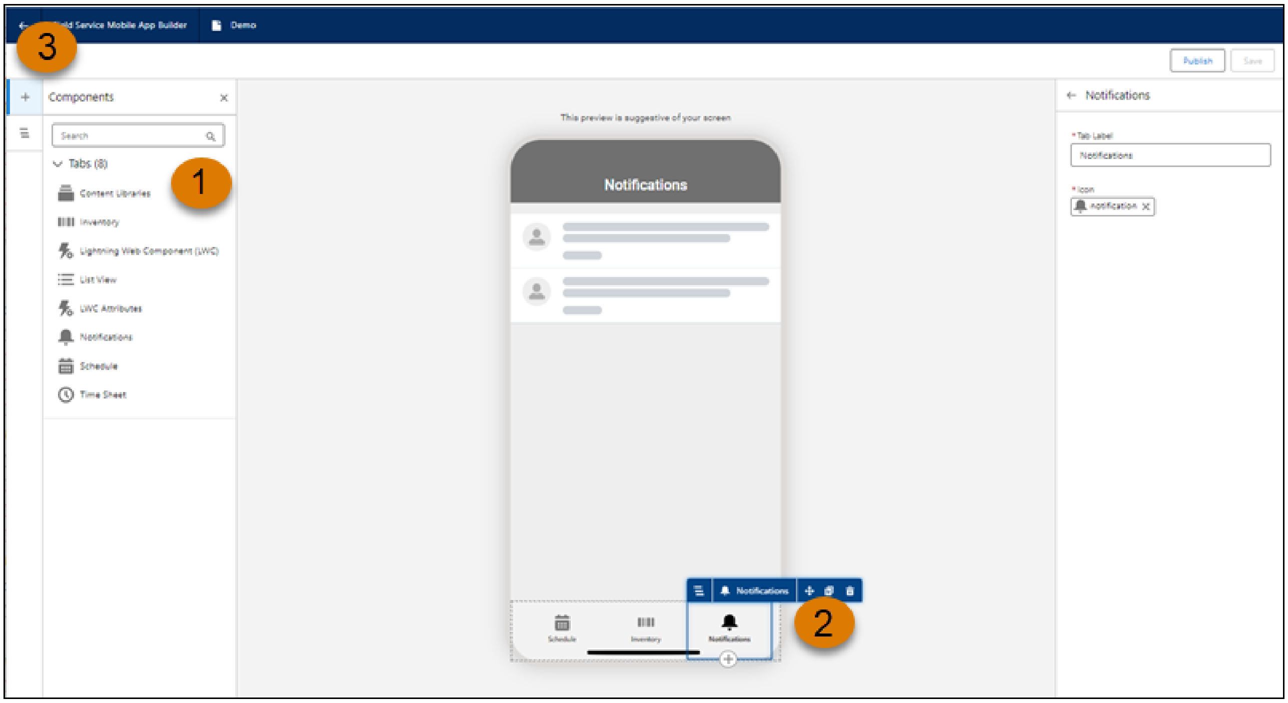
SEE ALSO:

Salesforce Help: Field Service Mobile App (can be outdated or unavailable during release preview)

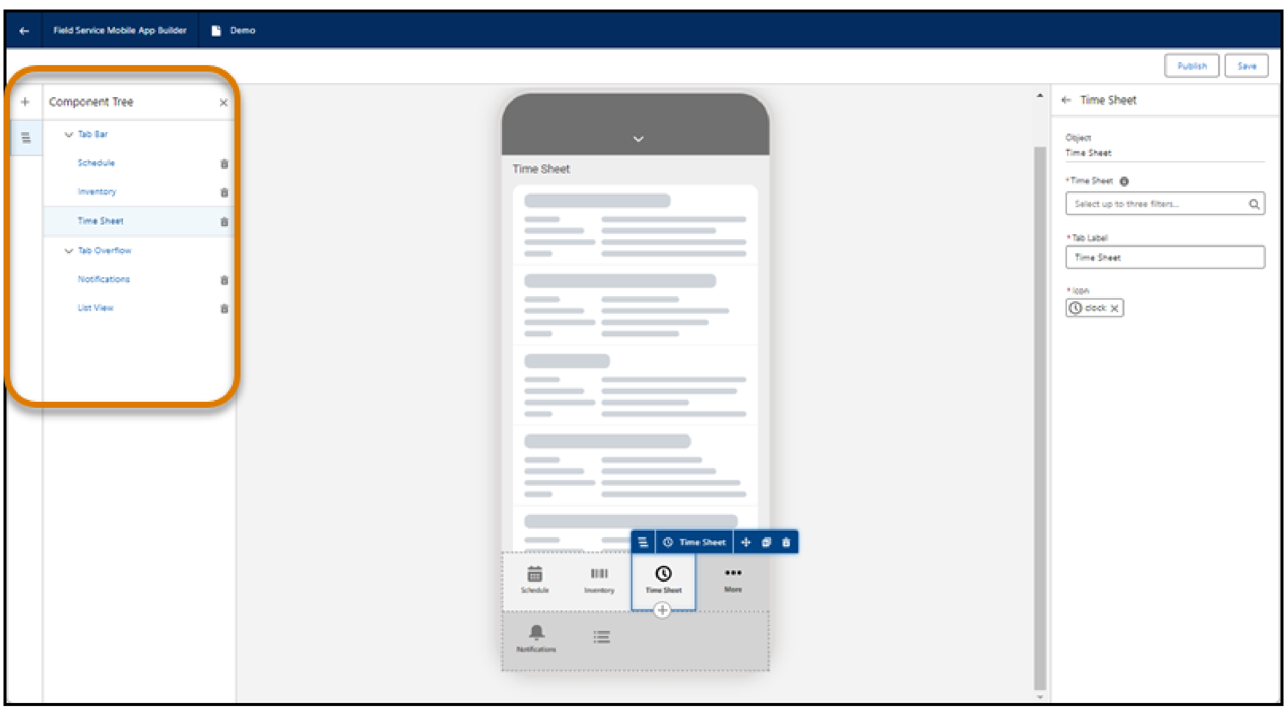
Customize Tabs More Easily in the Field Service Mobile App Builder

We made some improvements to the Field Service Mobile App Builder user interface, making it easier to use. The changes include an interactive canvas to add and configure tabs, a palette that lets you drag components onto the canvas, and improved usability in the properties pane.

Where: This change applies to the Field Service mobile app for Android and iOS.



Drag a component directly on to the canvas (1). To move, delete, or edit a tab, click it in the canvas (2). Toggle the component tree on or off (3).



When you toggle to the component tree, you can select and delete tabs right there. You also easily see what tabs are in the Tab Overflow area, and show under the **More** section in the app.

SEE ALSO:

Salesforce Help: Customize Tabs with the Field Service Mobile App Builder (can be outdated or unavailable during release preview)

Add Lightning Web Components with Attributes in Mobile Builder

Add a Lightning Web Component (LWC) that contains attributes as a tab, configure those attributes in the Field Service Mobile App Builder, and it's available in the app.

Where: This feature is available in the Field Service mobile app for Android and iOS.

SEE ALSO:

New and Changed Targets for Lightning Web Components

Salesforce Help: Customize Tabs with the Field Service Mobile App Builder (can be outdated or unavailable during release preview)

Lightning Web Components Developer Guide: XML Configuration File Elements

Spotlight on Field Service Content

Discover high-impact content to help you get your Field Service work done.

IN THIS SECTION:

Improve Your Scheduling and Optimization Proficiency with Revamped Salesforce Help Content

Explore updated documentation that boosts your self-sufficiency, enhances user engagement, and facilitates the adoption of our automated features, maximizing your ROI. We enriched the Salesforce Help content on scheduling and optimization to simplify the implementation process. For example, get insights into feature configurations, more details on tools for scheduling automation and optimization, and scenario-based best practices tailored to various roles and industries. Learn about the differences between the optimization engines and the advantages of transitioning to Enhanced Scheduling and Optimization.

Switch to Lightning Data Service for the Best Mobile Experience

Turn on Lightning Data Service in the Field Service mobile app by using a simple setup. Lightning Data Service lets you unlock the latest features, like AI, Data Capture, High Volume priming, and Lightning web component customization.

Start Your Journey with Einstein for Field Service

Learn how to set up Einstein for Field Service and transform your operations. The setup documentation guides you through the process of getting started with Einstein features for Field Service.

Improve Your Scheduling and Optimization Proficiency with Revamped Salesforce Help Content

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Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

SEE ALSO:

Salesforce Help: Get Started with Schedule Automation and Optimization in Field Service (can be outdated or unavailable during release preview)

Salesforce Help: Field Service Scheduling and Optimization Solutions (can be outdated or unavailable during release preview)

Salesforce Help: Manage Field Service Scheduling Overlaps (can be outdated or unavailable during release preview)

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

Salesforce Help: Manage Optimization Conflicts (can be outdated or unavailable during release preview)

Salesforce Help: Guidelines for Setting Up a Scheduling Policy (can be outdated or unavailable during release preview)

Switch to Lightning Data Service for the Best Mobile Experience

Turn on Lightning Data Service in the Field Service mobile app by using a simple setup. Lightning Data Service lets you unlock the latest features, like AI, Data Capture, High Volume priming, and Lightning web component customization.

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

SEE ALSO:

Salesforce Help: Move to Lightning Data Service for Field Service Mobile (can be outdated or unavailable during release preview)

Start Your Journey with Einstein for Field Service

Learn how to set up Einstein for Field Service and transform your operations. The setup documentation guides you through the process of getting started with Einstein features for Field Service.

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.

Note: 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:

Salesforce Help: Einstein for Field Service

Hyperforce

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

Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Get the most out of your assets by using Asset Service Lifecycle Management. Automotive Cloud optimizes vehicle loans and leases with Digital Lending for Automotive. Consumer Goods Cloud helps tour drivers sell directly from their trucks. Financial Services Cloud gets more service process templates and introduces business relationship plans. Health Cloud improves the scheduling experience for Home Health and Intelligent Appointment Management. Life Sciences Cloud helps organizations make trials more accessible with support for financial assistance programs. Salesforce for Education integrates with Data Cloud and expands its generative AI capabilities. We also have plenty of changes for Manufacturing Cloud, Loyalty Management, Industries common features, and much more.

IN THIS SECTION:

Financial Services Cloud

Enhance your applicants' and underwriters' experience with Digital Lending using integration orchestration, product configurator, loan calculator, and guest user access. Accelerate the development of service processes by using prebuilt service process templates. Use Metadata API to migrate Stage Management configurations to streamline your setup processes and ensure consistency across environments. Simplify the client planning process for your relationship team with Business Relationship Plan. Aggregate financial information from Financial Services Cloud standard objects with Financial Summary Rollup.

Health Cloud

Improve productivity with Health Cloud's AI-generated summaries and emails. Enhance patient satisfaction with Home Health's self-scheduling capabilities. Schedule all the resources a patient needs during their appointment using Intelligent Appointment Management. Save MCG assessments for later and update care plans using recommendations from MCG assessments. Utilize Roster File Mapping for efficient data handling and empower providers to auto-fill their information using NPPES integration. Unlock the power of Health Cloud with a simplified guided setup.

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 Winter '25.

Life Sciences Cloud

Enhance the therapy management system by adding ad hoc tasks. Convert sales agreements into quotes and vice versa using a guided flow. Help eligible patients with unaffordable, out-of-pocket medication expenses with financial assistance. Match candidates to clinical trials with AI-enabled Einstein Candidate Matching. Help site coordinators operate efficiently by organizing metrics, tasks, and events on Clinical Excellence FlexiPage. Reverify pharmacy coverage benefits for a care program using a guided flow to initiate a review request.

Loyalty Management

Breeze through the setup of your loyalty program by using the simplified loyalty program setup. Create bundled product promotions for your business customers. Decide your promotion's target audience by using actionable lists and identify the segments your customers and loyalty program members belong to with prebuilt Data Cloud data graphs. Trace how members use their points. Offer time-based vouchers and reserve vouchers while members complete their order.

Manufacturing Cloud

Modernize your commercial operations, manage the entire lifecycle of asset service operations, and boost your team's productivity with Manufacturing Cloud. Drive more run-rate business by making the most of the enhancements to sales agreements. Speed up the sales process by quickly converting quotes to sales agreements. Request the return of parts from dealers by using the existing warranty claims. Elevate traceability of inventory and easily transfer inventory across locations. Track recalls, repairs, upgrades, and other services performed for impacted assets in product service campaigns.

Media Cloud

Use the Media Cloud application suite to manage subscribers and subscriptions, create and manage ad campaigns, and more, through community self-service interfaces or an agent console.

Net Zero Cloud

Improve the efficiency, credibility, and transparency of disclosure responses with new features and enhancements to Net Zero Cloud and Disclosure and Compliance Hub. Use the Information Library to collect and organize environmental, social, and governance (ESG) snippets into a central, unified source. Use Einstein generative AI to automatically generate draft responses from disclosure documents and save them in a Microsoft 365 Word document. Boost efficiency by using Einstein to revise disclosure responses by summarizing, elaborating, or rephrasing them for accuracy. Maintain your questions and their responses year over year by saving them from the Microsoft 365 Word document to the Assessment Framework.

Public Sector Solutions

Optimize your recruitment and hiring process by using tools and workflows that are designed for public sector organizations. Enable recruiters to drive a faster and coordinated hiring effort, simplify the evaluation process for interviewers, and enhance the overall experience for candidates. Help investigators and caseworkers quickly understand cases and manage critical case data with a unified interface and guided flows. Improve caseworker productivity and efficiency with data-driven insights.

Referral Marketing

View the configuration of referral promotions with ease. Find out a customer's Data Cloud segment using prebuilt data graphs. Person account is no longer required to implement Referral Marketing. Use APIs to view advocate details and to track the source of referrals.

Salesforce for Education

Connect, organize, and unify data in Education Cloud by using the power of Data Cloud. Review metrics on the engagement level of an alumnus in the areas of experience, communication, volunteerism, and philanthropy by using Data Cloud for Education. Use Einstein generative AI to summarize information about mentors and mentees, to summarize learners' advising cases, and to quickly and efficiently respond to inquiries. Bridge admissions and student success by automating student enrollment. Advisors can create and assign pulse checks to get feedback from learners and use watchlist tracking to proactively monitor learners who need additional support. Staff can create templates for degree program plans, and learners can compare programs side by side to find the best fit. Learners can get an overview of their academic progress on the learner portal. Use a flow to request and collect recommendation details for applications. Use Inquiry Management to help prospects sign up for a mailing list, request a call or email from your institution, or ask a question. Create and manage your learning catalog with new REST and Apex compatible APIs.

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.

Industries Common Features

Some products in Industries share features. In this release we've enhanced some of the features that help you stay efficient and streamlined. Create modular business rules, use CSV files to upload large amounts of data, search for actions based on semantic search, and more.

Accounting Subledger

Significantly reduce Accounting Subledger's processing time by bypassing reversal logic and current value field mapping.

IN THIS SECTION:

Reduce Processing Time for Accounting Subledger

Reduce Accounting Subledger's processing time by bypassing reversal logic and current value field mapping. Enable the new Skip Reversal Logic setting to make sure that Accounting Subledger considers all field mappings as point-in-time. Accounting Subledger ignores mappings from secondary objects in three-object models and tertiary objects in four-object models, which is reflected in the new Account Field Mapping column.

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Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Accounting Subledger license is enabled.

Who: Users with the Manage Accounting Subledger permission set can use this feature.

How: From Setup, in the Quick Find box, enter `Accounting`, and then select **Accounting Settings**. Enable Skip Reversal Logic.

Asset Service Lifecycle Management

Maximize asset uptime, derive revenue from aftermarket asset services, and boost your service team's productivity by using Asset Service Lifecycle Management. Inventory managers can track and search for product and part stocks at various locations and transfer inventory to meet demand by using Inventory Search and Transfer. Service agents can easily monitor the delivery of services such as product recall and upgrade by using Product Service Campaign. Field service technicians can easily create return requests for damaged parts while executing work orders by using Service Parts Return. Service agents and managers can adjust estimates, enrich work orders, schedule appointments, and resume work estimation from where they left off by using Work Order Estimation. Field service technicians can improve the accuracy of timesheet entries in the Field Service Mobile app by using Timesheet Automation and Labor Cost Association.

IN THIS SECTION:

Inventory Search and Transfer

Build a search experience to give inventory managers visibility into stock at manufacturing plants, warehouses, and other locations by using Criteria-Based Search and Filter. Consolidate inventory data that's spread across multiple objects in a single object that's the index for the search experience. Use and extend a new data processing engine definition to keep your searchable inventory data fresh, relevant, and accurate. Empower inventory managers to transfer products across inventory locations to fulfill demand and prevent overstocking and stockouts.

IN THIS SECTION:

Unify and Transform Your Inventory Data for Search

Help users search for product and part stock at inventory locations by consolidating searchable inventory data into a single source of truth and refreshing that data at regular intervals. Use the new Product Inventory Searchable Field object to gather complex sets of inventory data from multiple Salesforce objects and act as the basis for the inventory search. Transform the inventory data in the source objects and populate the data in Product Inventory Searchable Field by using the new Update Product Inventory Searchable Field Values Data Processing Engine (DPE) definition.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Inventory Search and Transfer and Data Pipelines Base User permission sets.

Why: In Salesforce, inventory data is spread across multiple objects but users can search for data in only one object at a time. Now, Salesforce admins can create a Criteria-Based Search and Filter search experience and use the Product Inventory Searchable Field as the basis of the search. The Product Inventory Searchable Field object consolidates inventory data from multiple objects, such as Product Item, Associated Location, Serialized Product, and Business Brand, and keeps the data in a searchable format. Inventory managers can search for inventory by business brand, model year, and other attributes.

How: On the Criteria-Based Search and Filter Settings page in Setup, click **New** on the Searchable Object Configuration tab. Select **Product Inventory Searchable Field** as the searchable object. Select your activated copy of the Update Product Inventory Searchable Field Values DPE definition as the data synchronization job.

Transfer Products and Parts Across Inventory Locations

Maintain optimal inventory levels, meet production requirements, and fulfill maintenance requests by transferring serialized and non-serialized products across inventory locations. Inventory managers, service managers, and operations managers use the Criteria-Based Search and Filter search experience to select multiple product items to transfer to a location and specify each product item's transfer quantity. They can also select the serial number for each unit of a serialized product to transfer.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Criteria-Based Search and Filter and Inventory Search and Transfer permission sets.

Why: Users can track and transfer inventory across locations based on the Criteria-Based Search and Filter search results. To help users transfer products, Salesforce admins can create an action configuration by using the new Product Transfer lightning web component. Users can use this quick action in the search results to easily transfer multiple products to the same location.

How: On the Criteria-Based Search and Filter Settings page in Setup, click **New** on the Action Configuration tab. Select **LightningWebComponent** as the action type and **Product Transfer** as the action reference.

Service Parts Return

Help your field technicians collaborate with dealers for work order returns. They can directly request the return of damaged parts during a service appointment. Track the parts until they are shipped to the destination location.

Create Part Return Requests During Field Service Appointments

Field service technicians can now easily request for return of parts when they visit the dealer location with the Salesforce Field Service mobile app. Technicians can analyze the issue and quickly record information such as the dealer details, source location, and destination location in a work order. If the technician is in an area with no internet access, this app seamlessly works offline as well and syncs the data automatically when the internet is available.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud, where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Service Part Return Management permission set.

Why: During service appointments at the dealer's location, field technicians can request part returns for a work order when a part is recalled, and needs to be replaced, or upgraded.

How: From the Salesforce Field Service mobile app, go to a service appointment, tap on a work order record, and then tap on **New Service Part Return**.

Create Part Return Requests from the Desktop App

Service managers can create a part return request for one or more products related to a work order. For each part that must be returned, they can specify the dealer details, source and destination locations, and the reason for return. Each part return request can contain multiple requests for all the parts that the manufacturer is expecting back.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud, where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Service Part Return Management permission set.

How: On a work order record, from the Quick Actions menu, click **New Service Part Return**.

Product Service Campaign

Manage and monitor the recalls, upgrades, repairs, and other services for assets and vehicles at scale by using Product Service Campaign. Service managers can swiftly generate work orders for multiple items in a product service campaign to track service delivery. With minimal effort, they can identify, segment, and search for product service campaign items with generated work orders.

IN THIS SECTION:

Generate Work Orders for Campaign Items with a Single Click

Service managers can generate a work order for each product service campaign item or selected product service campaign items in a product service campaign in bulk. Work orders describe the installation, repair, and other service work that service technicians and agents perform for the impacted assets and vehicles. It's cumbersome to create individual work orders for each item in a product service campaign. So, service managers can save time and effort by generating work orders for product service campaign items in bulk.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Product Service Campaign permission set.

How: On a Product Service Campaign record page, click **Create Work Orders for All Items**. Or, select records in the Product Service Campaign Items related list, and click **Create Work Orders for Selected Items**.

Easily Track Work Orders Created for a Campaign Item

Service managers can swiftly segment the work orders generated for product service campaign items by using the Generation Source field on work order records. Quickly filter the product service campaign items that have associated work orders by using the Generated Target Record Type field on the product service campaign item records. Reduce the time spent searching for work orders, prevent errors in work order creation, and maintain data integrity.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Product Service Campaign permission set.

How: To view the product service campaign items that have work orders associated with them, create a list view for the Product Service Campaign Item object. Create a list view filter with Work Order as the generated target record type.

To view the work orders created for product service campaign items by the application, create a list view for the Work Order object. Create a list view filter with Product Service Campaign Item as the generation source.

Work Order Estimation

Boost your service operations with the latest Work Order Estimation features. These enhancements help you adjust estimates, enrich existing work orders, and provide seamless appointment scheduling. With these capabilities, your team gains greater flexibility in revisiting estimates and managing appointments, and ultimately improving customer satisfaction and operational efficiency.

IN THIS SECTION:

Schedule Appointments for Work Orders

Your agents can effortlessly view, book, reschedule, or cancel service appointments for work orders and their child work orders. This feature is built into the Work Order Estimation flow. You can access this feature directly from a work order.

Where: This feature is available in Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Work Order Estimation permission set.

Initiate and Update Quotes for Existing Work Orders

Empower your service agents to effortlessly initiate quotes for existing work orders. They can add, update, or remove work types and products, and choose to merge the new quote into the same work orders or create a new set. This flexibility makes sure that your team can deliver precise estimates faster, enhancing customer satisfaction and operational efficiency.

Where: This feature is available in Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Work Order Estimation permission set.

Improve Technician Experience with Timesheet Automation and Labor Cost Association

Reduce manual entries for technicians and the load on supervisors by automatically validating timesheets based on labor union rules in Business Rules Engine. Ensure labor union compliance with improved accuracy of time sheet entries and labor cost associations. Generate records of data to gain insights for improving efficiencies for technicians.

Where: This feature is available in Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled. This feature is available in the Field Service mobile app for Android and iOS.

Who: Salesforce admins with the Labor Cost Optimization PSL can configure the Timesheets app. Field service technicians with the Labor Cost Optimization PSL can add and edit timesheets.

Why:

With the Timesheets app, you can easily validate and categorize timesheet entries. You can associate a vehicle to a technician so that it's automatically added to timesheets that have drive time entries. Technicians can individually add or edit their timesheets. All timesheets roll up to crew leads and supervisors who no longer need to check exact hours or labor cost associations.

Automotive Cloud

Manage the vehicle loan and lease origination process with ease by using the Digital Lending for Automotive suite of features. Right from intake to decisioning, bring customers, agents, and dealers on a single platform to process applications. Use Salesforce Flows in actionable event orchestrations. Make the most of the enhancements to vehicle inventory search and sales agreements. Manage the asset lifecycle better with enhancements to parts search and transfer, product service campaigns, work order estimations, and labor costs and timesheets.

IN THIS SECTION:

Digital Lending for Automotive (Generally Available)

Unify automotive lending, decisioning, and servicing processes on a single platform. Simplify the vehicle loan and lease origination process, expedite decision making, and increase efficiency and transparency across an application's lifecycle. Customers can use the self-intake guided flow to submit vehicle loan and lease applications from Experience Cloud. Alternatively, lending agents can use the Agent Assisted Application Management app to submit applications on behalf of customers. Underwriters can use a customized console to review all submitted applications, create proposals, and assign action items to dealers. Dealers can use the Experience Cloud site to review applications, accept or reject proposals, and modify proposals based on the stipulations that the underwriters add.

IN THIS SECTION:

Capture Granular Details About Vehicle Loans and Leases

Use catalogs, categories, products, and attributes to design the terms of vehicle loans and leases that you offer as financial products to customers. Product Catalog Management works seamlessly with the prebuilt Digital Lending for Automotive processes, so financial managers can configure and customize the maximum amount, minimum amount, and duration of a loan or lease. Additionally, use Salesforce Pricing to dynamically determine the interest rate for the financial products that you offer to customers.

Help Customers Easily Apply for Vehicle Loans and Leases from Experience Cloud

Customers can use a guided self-intake flow on an Experience Cloud site to quickly submit vehicle loan and lease applications at their convenience. The guided flow captures comprehensive information about the applicant's income, expenses, address, payment terms, and personal details. The applicant can select their preferred dealer, upload the required documents, complete a credit verification, add co-applicants, and specify the vehicle details during the self-intake process. Based on the information that the customer provides, the self-intake process automatically calculates the terms of an eligible offer, and the customer can select the offer or recalculate the terms to get better options.

Submit Vehicle Loan and Lease Applications on Behalf of Customers

Offer a seamless application intake process to your financial agents who assist customers in applying for a vehicle loan or lease. First-time applicants are often overwhelmed by the amount of information they must provide during a vehicle lending application. Offer customers the guidance and expertise of agents to submit the form on their behalf. Agents can now use the Agent Assisted Application Management app in Automotive Cloud to quickly launch a guided application intake flow, fill out all the customer details, and upload the required documents.

Take Better-Informed Decisions on Vehicle Loan and Lease Applications

Underwriters at financial institutions and captive finance companies can use the customized Application Form Product page in the Vehicle and Asset Lending Console app to adjudicate applications for vehicle loans and leases. The page shows key insights such as debt-to-income ratio, expense-to-income ratio, and loan-to-value percentage for the applicant. Underwriters can also glean insights about the applicants from the Know Your Customer (KYC) information, related assets, additional income and expense sources, and liabilities. The page also shows the vehicle details such as make, model, price, and intended use. The underwriter can assign actions to dealers, review proposals, add stipulations to proposals, and verify the uploaded documents, all from a single consolidated view.

Optimize Proposals by Using Stipulations in the Underwriter Console

Underwriters at captive finance and banking institutions can use the Vehicle and Asset Lending app in Automotive Cloud to manage multiple proposals related to a vehicle loan or lease application. Underwriters can create or clone a proposal and add stipulations based on their evaluation before sharing with dealers for review. These stipulations serve as key indicators, guiding dealers and customers on how to reduce risks and improve likelihood of application approval, or assisting with conditional approvals. By clearly outlining conditions and recommendations, underwriters can reduce the time spent on application decisioning and increase customer satisfaction.

Control Dealers' Access to Sensitive Information About Applicants

Give your dealers visibility into an applicant's sensitive financial information related to expenses, liabilities, income, asset ownership, and employment. Records such as Party Credit Profile, Party Expense, Party Income, Person Employment, Party Financial Asset, and Party Financial Liability can be shared by dealers on Experience Cloud for better collaboration with underwriters during the decisioning process. Depending on the level of involvement of dealers in the application review process for vehicle loans and leases at your company, you can manage the access to these records at an org level.

Help Dealers Accept or Reject Automotive Lending Proposals from Experience Cloud

Dealers can use the Experience Cloud site to view the proposals submitted by customers and reviewed by underwriters for a vehicle loan or lease application. To secure better loan or lease terms for customers, dealers can review and act upon the stipulations added by the underwriter. For example, if an underwriter includes a stipulation for adding co-applicants to an application, the dealer can consult the customer and modify the application accordingly. When an underwriter shares the final proposal for a dealer's review, the dealer can use the work guide to accept or reject the proposal upon discussion with the customer.

Offer Comprehensive Vehicle Lending Solutions to Financial Institutions

Unify the end-to-end vehicle financing process on a single platform for your business. Use Digital Lending for Automotive to manage loan and lease applications across various stages of application intake, review, and decisioning. Collaborate with dealers to iterate over proposals, add and edit stipulations, and accept or reject a proposal. Capture comprehensive information about the customer from the self-intake application form or enable agents to assist customers with their applications. Seamlessly manage disclosures and consent, document verification, and compliant data sharing. Powered by Omnistudio and Product Catalog Management, the automotive lending process is flexible and caters to multiple users such as customers, underwriters, agents, and dealers.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: Depending on the user's role, assign the Vehicle and Asset Lending, Vehicle And Asset Lending For Agents, Vehicle and Asset Lending for Partners, or Vehicle and Asset Lending for Customers permission set.

Capture Granular Details About Vehicle Loans and Leases

Use catalogs, categories, products, and attributes to design the terms of vehicle loans and leases that you offer as financial products to customers. Product Catalog Management works seamlessly with the prebuilt Digital Lending for Automotive processes, so financial managers can configure and customize the maximum amount, minimum amount, and duration of a loan or lease. Additionally, use Salesforce Pricing to dynamically determine the interest rate for the financial products that you offer to customers.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending, Vehicle and Asset Lending, and Salesforce Pricing.

Who: Users must have the Product Catalog Management Designer, Salesforce Pricing Design Time, Rules Engine Designer, and Context Service Admin permission sets assigned to them.

Help Customers Easily Apply for Vehicle Loans and Leases from Experience Cloud

Customers can use a guided self-intake flow on an Experience Cloud site to quickly submit vehicle loan and lease applications at their convenience. The guided flow captures comprehensive information about the applicant's income, expenses, address, payment terms, and personal details. The applicant can select their preferred dealer, upload the required documents, complete a credit verification, add co-applicants, and specify the vehicle details during the self-intake process. Based on the information that the customer provides, the self-intake process automatically calculates the terms of an eligible offer, and the customer can select the offer or recalculate the terms to get better options.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: Users must have the Vehicle and Asset Lending for Customers permission set assigned to them.

Why: Customers can now complete a vehicle lending application online without communicating with anyone at a bank or a captive finance institution. The self-service application intake experience reduces the stress of applying for a loan or lease, and helps applicants pause and resume their application at their convenience.

How: Log in to Experience Cloud as a customer user. Go to the Finance tab and click **Products**. Select **Automotive Loan** or **Automotive Lease**. Click **Start Application**.

Submit Vehicle Loan and Lease Applications on Behalf of Customers

Offer a seamless application intake process to your financial agents who assist customers in applying for a vehicle loan or lease. First-time applicants are often overwhelmed by the amount of information they must provide during a vehicle lending application. Offer customers the guidance and expertise of agents to submit the form on their behalf. Agents can now use the Agent Assisted Application Management app in Automotive Cloud to quickly launch a guided application intake flow, fill out all the customer details, and upload the required documents.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: Users must have the Vehicle and Asset Lending for Agents permission set assigned to them.

How: In the App Launcher, find and select the **Agent Assisted Application Management** app. Open a catalog record, select a product, and click **Start Application**.

Take Better-Informed Decisions on Vehicle Loan and Lease Applications

Underwriters at financial institutions and captive finance companies can use the customized Application Form Product page in the Vehicle and Asset Lending Console app to adjudicate applications for vehicle loans and leases. The page shows key insights such as debt-to-income ratio, expense-to-income ratio, and loan-to-value percentage for the applicant. Underwriters can also glean insights about the applicants from the Know Your Customer (KYC) information, related assets, additional income and expense sources, and liabilities. The page also shows the vehicle details such as make, model, price, and intended use. The underwriter can assign actions to dealers, review proposals, add stipulations to proposals, and verify the uploaded documents, all from a single consolidated view.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: Users must have the Use Vehicle and Asset Lending Underwriter Console user permission assigned to them.

How: In the App Launcher, find and select the **Vehicle and Asset Lending Console** app. Open an application form product record.

Optimize Proposals by Using Stipulations in the Underwriter Console

Underwriters at captive finance and banking institutions can use the Vehicle and Asset Lending app in Automotive Cloud to manage multiple proposals related to a vehicle loan or lease application. Underwriters can create or clone a proposal and add stipulations based on their evaluation before sharing with dealers for review. These stipulations serve as key indicators, guiding dealers and customers on how to reduce risks and improve likelihood of application approval, or assisting with conditional approvals. By clearly outlining conditions and recommendations, underwriters can reduce the time spent on application decisioning and increase customer satisfaction.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: Users must have the Use Vehicle and Asset Lending Underwriter Console user permission assigned to them.

How: In the App Launcher, find and select the **Vehicle and Asset Lending Console** app. Open an application form product record. Go to the Proposals tab. Create a proposal, clone an existing proposal, or select a proposal as the final offer.

Control Dealers' Access to Sensitive Information About Applicants

Give your dealers visibility into an applicant's sensitive financial information related to expenses, liabilities, income, asset ownership, and employment. Records such as Party Credit Profile, Party Expense, Party Income, Person Employment, Party Financial Asset, and Party Financial Liability can be shared by dealers on Experience Cloud for better collaboration with underwriters during the decisioning process. Depending on the level of involvement of dealers in the application review process for vehicle loans and leases at your company, you can manage the access to these records at an org level.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: Users must have the Vehicle and Asset Lending permission set assigned to them.

How: In Setup, on the General Settings page under Financial Services, enable the feature Turn on access to Party Credit Profile, Party Expense, Party Income, Person Employment, Party Financial Asset, and Party Financial Liability for Partner Users in Experience Cloud. This setting is available only if the Turn off access to Party Credit Profile, Party Expense, Party Income, Person Employment, Party Financial Asset, and Party Financial Liability for Experience Cloud feature is enabled.

Help Dealers Accept or Reject Automotive Lending Proposals from Experience Cloud

Dealers can use the Experience Cloud site to view the proposals submitted by customers and reviewed by underwriters for a vehicle loan or lease application. To secure better loan or lease terms for customers, dealers can review and act upon the stipulations added by the underwriter. For example, if an underwriter includes a stipulation for adding co-applicants to an application, the dealer can consult the customer and modify the application accordingly. When an underwriter shares the final proposal for a dealer's review, the dealer can use the work guide to accept or reject the proposal upon discussion with the customer.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: Users must have the Vehicle and Asset Lending for Partners permission set assigned to them.

How: Log in to Experience Cloud as a partner user. Go to the Finance tab and click **Application Forms**. On the Related tab of an application form record, select an application form product record. On the Related tab of the application form product record, select an application form product proposal record. On the Work Guide component, click **Accept** or **Reject** for a proposal shared by the underwriter for your review.

Connected Vehicle Enhancements

Get additional usage-based entitlements to create flow-based actionable event orchestrations. Design actionable event orchestrations that directly invoke a flow to automatically trigger complex business processes based on the critical events shared by a telematics provider.

IN THIS SECTION:

Get Additional Entitlements for Flow-Based Orchestrations

Get a monthly entitlement of 300 actionable event orchestrations per connected vehicle with the Vehicle Connected Services Monthly Per Unit Entitlement add-on license. Previously, users could execute up to 150 orchestrations of usage type Automotive for each connected vehicle. Now, the entitlements are further categorized by execution procedure type of an actionable event orchestration. Users can execute 1500 expression set-based orchestrations and 150 flow-based orchestrations of usage type Automotive to process inbound events.

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.

Execute Complex Actionable Event Orchestrations By Using Flows

Enhance your business processes with flow-based actionable event orchestrations. Previously limited to expression-sets, you can now use actionable event orchestrations to trigger flows that automatically trigger complex multistep processes based on the type of vehicle telematics events. Enjoy greater flexibility and use flows to perform complex actions such as calculations, appointment scheduling, and adding more nuanced filter conditions.

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 Manage Flows permissions assigned to them.

Why: For example, automatically run a flow to determine the type of service required for a vehicle and the nearest dealer location for a customer based on the telematics event data shared when an engine malfunction occurs, Schedule a vehicle service appointment and create a maintenance work plan. You can also enhance the flow to send emails, update records, and share price estimates of the scheduled work with the customer.

How: Users must have the Actionable Event Orchestration Designer, Context Service Admin permission sets and the Manage Flows user permission assigned to them.

Vehicle Inventory Search and Transfer Enhancements

Vehicle inventory search is now supported on Experience Cloud for partner and customer users. Inventory managers now get in-app notifications after the vehicle transfer action is completed. The prebuilt search action reference for vehicle inventory transfer has been renamed.

IN THIS SECTION:

Allow Dealers and Customers to Search for Vehicles

Dealers and customers can now use the Experience Cloud site to search for vehicles across various locations by using Criteria-Based Search and Filter. The Vehicle Searchable Field object, now supported on Experience Cloud, forms the basis of vehicle inventory search. Customers can quickly apply criteria such as make, model, and location to find the car of their dreams. Or, dealers can quickly apply filter criteria to check inventory availability during sales and service engagement with customers.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Criteria-Based Search and Filter are enabled.

Who: Users must have the Automotive Foundation for Experience Cloud and Criteria-Based Search and Filter for Experience Cloud permission sets assigned to them.

How: Create an Experience Cloud site for partners or customers by using the Automotive template, and add the Criteria-Based Search and Filter component to the site. Select one or more search configurations. Also, make sure the external user has access to Vehicle Searchable Field records.

Get Notified When Vehicles Are Transferred

Get an in-app notification after you transfer one or more vehicles by using the Criteria-Based Search and Filter component. Previously, users couldn't leave the page until the vehicle transfer action was completed, and the process took longer especially when the count of vehicles was higher. Now, users can easily multitask and get notifications within the app when the action is completed. The in-app notification updates the user on whether the action succeeded or failed, and on the next steps in case of a failure.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Criteria-Based Search and Filter are enabled.

Who: Users must have the Automotive Foundation User and Criteria-Based Search and Filter permission sets assigned to them.

Easily Identify the Action Reference for Vehicle Transfer

The prebuilt action reference for vehicle inventory transfer is renamed to avoid confusion between similar actions. Admins can now create a vehicle transfer search action configuration by using the Lightning Web Component-based action reference Vehicle Transfer, which was previously called Product Transfer. A new action called Product Transfer is also available now, and admins can use it to transfer serialized and nonserialized products and parts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Criteria-Based Search and Filter are enabled.

Who: Users must have the Automotive Foundation User and Criteria-Based Search and Filter permission sets assigned to them.

How: In Setup, on the Criteria-Based Search and Filter Settings page, click **New** on the Action Configuration tab. Select **Lightning Web Component** as the action type and **Vehicle Transfer** as the action reference.

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, Multiplay Subscription Management, and business solutions including Asset Service Lifecycle Management, Einstein Quick Quote, Configure, Price, Quote (Industries CPQ), and Enterprise Product Catalog (EPC).

IN THIS SECTION:

Enterprise Sales Management

Easily move assets, and enjoy greater flexibility modifying in-progress orders by creating quotes. Save time by applying discounts to large carts.

IN THIS SECTION:

Easily Apply Discounts to an Entire Cart with a Large Number of Quote Line Items

Enterprise Sales Management integrates with Industries Configure, Price, Quote (CPQ) to apply discounts to a maximum of 50,000 quote line items.

Support for New and Enhanced Industries Configure, Price, Quote (CPQ) Standard Cart-Based APIs

Enterprise Sales Management uses Industries Configure, Price, Quote (CPQ) APIs. Your sales reps can experience improved functionality with the enhancements made to the deletePromotionItems, deleteCartDiscount, and deleteCartsItems APIs. Your sales reps can also asynchronously apply discounts to an entire cart, and delete discounts for up to 1,000 quote line items.

New Features for Communications, Media, and Energy & Utilities (CME) Managed Package

Enterprise Sales Management includes access to some features that are available across clouds and products in the CME Managed Package. Enjoy real-time price updates and early adoption of Salesforce's future default pricing engine. Use Salesforce Contracts for a significant upgrade over Industries Contract Lifecycle Management (CLM). With the Attribute Propagation feature, you can define how attributes propagate across product instances during design time and make sure that this behavior is applied to the Quote and Order cart during runtime. By using the Reverse Cardinality feature, you can define reverse cardinality for a Relies On product relationship and validate the cardinality in the cart at runtime—in addition, you can also specifiy the minimum and maximum number of source product instances that a target product instance can support when the product relationship type is Relies On.

Optimize Resource Usage by Easily Moving Assets

Your sales reps can move their customer's assets to a new location on designated disconnect and connect dates. When sales reps move the assets, they can also check serviceability and perform address validation to verify eligibility of assets.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

SEE ALSO:

Salesforce Help: Move Assets to a New Location (can be outdated or unavailable during release preview)

Modify In-Progress Orders by Creating Quotes

Your sales reps can easily amend in-progress orders by creating supplemental or follow-on quotes based on the Point of No Return (PONR) status of the orders. They can change product configurations, quantities, and add new products. Your sales reps can also create and submit supplemental or follow-on orders without interrupting the order processing flow.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

SEE ALSO:

Salesforce Help: Modify In-Progress Orders by Creating Quotes in Enterprise Sales Management (can be outdated or unavailable during release preview)

Easily Apply Discounts to an Entire Cart with a Large Number of Quote Line Items

Enterprise Sales Management integrates with Industries Configure, Price, Quote (CPQ) to apply discounts to a maximum of 50,000 quote line items.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

SEE ALSO:

Salesforce Help: Apply Discounts to Carts with a Large Number of Line Items (can be outdated or unavailable during release preview)

Salesforce Help: Salesforce Industries CME Application Constraints (can be outdated or unavailable during release preview)

Support for New and Enhanced Industries Configure, Price, Quote (CPQ) Standard Cart-Based APIs

Enterprise Sales Management uses Industries Configure, Price, Quote (CPQ) APIs. Your sales reps can experience improved functionality with the enhancements made to the deletePromotionItems, deleteCartDiscount, and deleteCartsItems APIs. Your sales reps can also asynchronously apply discounts to an entire cart, and delete discounts for up to 1,000 quote line items.

SEE ALSO:

Salesforce Help: Flexibility in Removing Products with Applied Promotions (can be outdated or unavailable during release preview)

Communications, Media, and Energy (CME) Common APIs Developer Guide: Delete Applied Promo Items (can be outdated or unavailable during release preview)

Salesforce Help: Remove Discounts From Cart(can be outdated or unavailable during release preview)

Communications, Media, and Energy (CME) Common APIs Developer Guide: Delete Discounts(can be outdated or unavailable during release preview)

Salesforce Help: Remove Items From Cart(can be outdated or unavailable during release preview)

Communications, Media, and Energy (CME) Common APIs Developer Guide: Remove Items from Cart(can be outdated or unavailable during release preview)

Salesforce Help: Salesforce Industries CME Application Constraints(can be outdated or unavailable during release preview)

New Features for Communications, Media, and Energy & Utilities (CME) Managed Package

Enterprise Sales Management includes access to some features that are available across clouds and products in the CME Managed Package. Enjoy real-time price updates and early adoption of Salesforce's future default pricing engine. Use Salesforce Contracts for a significant upgrade over Industries Contract Lifecycle Management (CLM). With the Attribute Propagation feature, you can define how attributes propagate across product instances during design time and make sure that this behavior is applied to the Quote and Order cart during runtime. By using the Reverse Cardinality feature, you can define reverse cardinality for a Relies On product relationship and validate the cardinality in the cart at runtime—in addition, you can also specifiy the minimum and maximum number of source product instances that a target product instance can support when the product relationship type is Relies On.

SEE ALSO:

Salesforce Help: Get a More Flexible Pricing Solution in Communications, Media, and Energy & Utilities (CME) Managed Package

Salesforce Help: Move to Salesforce Contracts in Communications, Media, and Energy & Utilities (CME) Managed Package

Salesforce Help: Relies On with Attribute Propagation

Salesforce Help: Reverse Cardinality of Relies On Product Instances

Einstein Generative AI Solutions for Enterprise Sales Management

Boost your sales representatives' efficiency with Einstein generative AI in Enterprise Sales Management. With Einstein Quick Quote, support your sales reps in creating budgetary quotes with generative AI-driven needs analysis and product recommendations for their customers.

Create Budgetary Quotes Quickly with Einstein Conversational AI

With generative AI assistance, your sales reps can analyze their customers' requirements to see product recommendations and give an initial budgetary quote to their customers. With Einstein, prompt your sales reps to ask relevant questions to their customers, including questions about business scope, budget constraints, security needs, future plans, and so on. Products are recommended based on needs analysis, serviceability check, and address validation to ensure eligibility of products before recommending them.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management. Einstein generative AI is available in Lightning Experience.

Who: To use Einstein Quick Quote, you need the licenses required for Enterprise Sales Management and the Einstein Platform Starter or Einstein Platform Plus licenses. You also need the Einstein for Sales and Einstein for Service user licenses.

SEE ALSO:

Salesforce Help: Einstein Generative AI (can be outdated or unavailable during release preview)

Salesforce Help: Generative AI Solutions for Enterprise Sales Management (can be outdated or unavailable during release preview)

Communications Cloud Agent Console

Empower customer support representatives to handle billing disputes swiftly and accurately with a rule-driven process, ensuring clear communication and effective resolution directly from the Communications Cloud Agent Console.

Efficiently Manage Billing Disputes

Empower your customer support representatives to handle billing disputes more efficiently with Communications Cloud Dispute Management. This feature enables representatives to quickly address billing errors using a consistent, rule-driven process, setting clear expectations with customers in real time. For example, if a customer disputes unexpected fees, the representative can now identify the specific charges, negotiate, and validate dispute amounts, and then provide accurate information at each step of the process. The rule-driven architecture ensures that only legitimate claims are escalated for adjudication. Representatives can easily view current and past disputes directly from within the Communications Cloud Agent Console.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Customer Service Management.

Who: To use this feature, you need the licenses for Communications Cloud Agent Console, Business Process Engine, Omnistudio, and Industry Service Excellence (required for Service Process Studio).

Asset Service Lifecycle Management — Communications Cloud

Asset Service Lifecycle Management empowers businesses to build customer-centric field service operations, maximize asset lifetime value, and elevate the experience of service teams. Built on the Salesforce platform, Asset Service Lifecycle Management is a new suite of solutions that helps businesses simplify their work order management process. It equips users to estimate field service work before they create a work order and allows them to book appointments seamlessly.

Data Cloud Features for Communications Cloud

Unify, transform, and analyze your communications data in Salesforce Data Cloud with new data model objects tailored for Communications Cloud. Data Cloud enables real-time data streaming, efficient monitoring, and comprehensive reporting, ensuring high-quality communications data and operational efficiency. Leverage these data model objects to enhance data integration, improve user interfaces, and streamline data management processes.

IN THIS SECTION:

Monitor User Activity and Analyze Usage Patterns

Use the Network Usage data model object to bring service usage records data into Data Cloud. This integration helps you monitor user activity, analyze usage patterns, and generate detailed reports. Also, the seamless integration with the Salesforce ecosystem ensures reliable data management, even with high volumes of usage records. In addition, optimize scalability and performance to keep your data operations running smoothly.

Where: This feature is available in Lightning Experience in Communications Cloud with Salesforce Data Cloud.

How: In Data Cloud, navigate to the Data Model Objects tab to view and customize the Network Usage data model object. To load data to this data model object, go to the Data Streams tab and then configure data streaming for your Network Usage data model object.

Track and Optimize Service Performance with Service Level Objectives

Define, monitor, and manage your Service Level Objectives (SLOs) with the Asset Service Level Objective data model object. Set measurable SLOs to track service performance in real time, and configure alerts for deviations. Maintain service quality by addressing performance issues proactively. You can also generate compliance reports to ensure transparency and accountability.

Where: This feature is available in Lightning Experience in Communications Cloud with Salesforce Data Cloud.

How: In Data Cloud, navigate to the Data Model Objects tab to view and customize the Asset Service Level Objective data model object and the Asset Service Level Objective Consequences object. To load data into this data model object, go to the Data Streams tab and configure data streaming for your Asset Service Level Objective data model object.

Consumer Goods Cloud

Tour drivers can now boost their sales by selling products directly from their trucks. Process more pricing conditions per batch run with improved batch performance for Penny Perfect Pricing. Sales reps can access live data and make informed decisions during visits by using remote API calls from the Consumer Goods Cloud offline mobile app. Key account managers can create promotions faster by using customized promotion workflows. Include custom month and quarter data in real-time reports and transfer manually adjusted custom month and quarter data to new promotions when copying promotions.

IN THIS SECTION:

Retail Execution

Deliver products directly to customers and maximize sales using van sales orders. Improve batch performance with Penny Perfect Pricing Batch V2 and Effective Account Manager Sync batches. Upgrade your mobile ergonomic experience with external Bluetooth devices.

IN THIS SECTION:

Boost Mobile App Productivity with Bluetooth Keyboards

Connect a Bluetooth keyboard to your mobile device and easily enter single or multiline text (such as notes) when processing orders and during other retail execution activities on the Consumer Goods Cloud offline mobile app.

Manage Tab and User Permissions for Deployed Profiles

If you create profiles through Metadata API version 60 or later, you must assign the new unmanaged permission set `CGCloud Retail Standard User` to all existing and new retail users. Use the new unmanaged permission to ensure your retail users have the necessary tab access for standard objects and user permissions for retail execution activities. If you clone and manually create profiles, you already have the required permissions and don't need to assign the new unmanaged permission set to the users.

Ensure Accurate Inventory Reconciliation

Inventory Reconciliation Batch updates product quantities to ensure that the reconciled inventory records are accurate and current. Use this batch process when using the inventory framework in Retail Execution and Direct Store Delivery solutions. Streamline inventory management and ensure product availability using the Inventory Reconciliation Batch.

Increase the Effective Account Manager Sync Batch Performance

Consumer Goods Cloud batch process runs a new, enhanced version of the account manager batch (`EffectiveAccountManagerSyncBatch`) by default. The new version creates or updates an account team member record only when there are changes in customer managers. This prevents re-creation of account team members with each batch. New customers automatically get the enhanced version; however, existing customers must configure a custom setting to use the new version.

Generate Reports in Non-Latin or Custom Fonts in Consumer Goods Offline Mobile App

Sales reps can now generate and preview reports such as Order Confirmation PDF reports in non-Latin fonts like Korean, Chinese, and Thai, or custom fonts in their Consumer Goods offline mobile app.

Use Consumer Goods Cloud Offline Mobile App in Hybrid Mode With Remote API Calls

Consumer Goods offline mobile app now supports online interactions with Salesforce. This change helps the offline mobile app receive data directly from Salesforce or from external endpoints set up via Salesforce using remote API calls. For example, sales reps can make informed order decisions by referring to real-time data in Salesforce. You can implement workflows that require online data by integrating the offline mobile app with Salesforce endpoints (Apex-based REST API calls).

Other Improvements in Retail Execution

Learn about the other changes for retail execution in Winter '25.

New and Changed Objects for Retail Execution

Do more with the new and updated Retail Execution objects.

Streamline Delivery with Van Sales Delivery Execution

With van sales orders, the tour drivers can place orders and deliver products during each visit with available on-truck inventory. During delivery execution, the tour drivers can initiate a visit and deliver products or collects returns through orders. Tour drivers then finalize the orders, generate cash invoices, print or share invoices, and complete orders. Use van sales orders to optimize the efficiency of truck drivers, streamline the delivery process, and integrate sales, merchandising, and logistics.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

Who: To set up visits and orders 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 Delivery Cockpit on the Consumer Goods Cloud offline mobile app, you need the CGCloud Tour Driver permission set.

How: Use the Delivery Cockpit to view the summary, track orders, and create orders for a visit. Tour drivers can access the Delivery Cockpit by selecting a tour from the Tour Cockpit.

SEE ALSO:

Salesforce Help: Van Sales Delivery Execution (can be outdated or unavailable during release preview)

Experience Enhanced Performance with Penny Perfect Pricing Batch V2

With Penny Perfect Pricing Batch V2, increase batch performance by increasing the number of pricing conditions processed in a batch run. Run the enhanced batch process to improve logging, support rebuild mode, and provide better scalability of processed pricing conditions. However, you can continue to use the existing version (Batch V1) of Penny Perfect Pricing.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: The enhanced and the existing versions of the Penny Perfect Pricing Batch are available through the `ScheduleCGCloudServiceComplexPricing` Apex class in the Consumer Goods Cloud Managed package. To run the enhanced version of the batch when you schedule the Apex batch process, create a `CGCloudServiceComplexPricing` custom setting and enable it.

SEE ALSO:

Salesforce Help: Create a Custom Setting to Run the Enhanced Pricing Worker (can be outdated or unavailable during release preview)

Salesforce Help: Schedule a Processing Services Batch (can be outdated or unavailable during release preview)

Boost Mobile App Productivity with Bluetooth Keyboards

Connect a Bluetooth keyboard to your mobile device and easily enter single or multiline text (such as notes) when processing orders and during other retail execution activities on the Consumer Goods Cloud offline mobile app.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: To enable the Bluetooth keyboard, open the Consumer Goods Cloud offline mobile app, go to the External Device Settings section, and in My Settings, set the Bluetooth Device field as **Keyboard**.

Alternatively, you can set the Bluetooth Device field as **Keyboard** in User Settings on the Consumer Goods Cloud desktop app and sync with the mobile app.

SEE ALSO:

Salesforce Help: Connect External Devices to the Consumer Goods Cloud Offline Mobile App (can be outdated or unavailable during release preview)

Manage Tab and User Permissions for Deployed Profiles

If you create profiles through Metadata API version 60 or later, you must assign the new unmanaged permission set `CGCloud Retail Standard User` to all existing and new retail users. Use the new unmanaged permission to ensure your retail users have the necessary tab access for standard objects and user permissions for retail execution activities. If you clone and manually create profiles, you already have the required permissions and don't need to assign the new unmanaged permission set to the users.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

SEE ALSO:

Salesforce Help: Metadata API Profile (can be outdated or unavailable during release preview)

Salesforce Help: Assign Permission Sets to Managed Package Users (can be outdated or unavailable during release preview)

Ensure Accurate Inventory Reconciliation

Inventory Reconciliation Batch updates product quantities to ensure that the reconciled inventory records are accurate and current. Use this batch process when using the inventory framework in Retail Execution and Direct Store Delivery solutions. Streamline inventory management and ensure product availability using the Inventory Reconciliation Batch.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

SEE ALSO:

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

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

Increase the Effective Account Manager Sync Batch Performance

Consumer Goods Cloud batch process runs a new, enhanced version of the account manager batch (`EffectiveAccountManagerSyncBatch`) by default. The new version creates or updates an account team member record only when there are changes in customer managers. This prevents re-creation of account team members with each batch. New customers automatically get the enhanced version; however, existing customers must configure a custom setting to use the new version.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: To run the new batch version when you schedule the Apex batch process, existing customers must create an `EffectiveAccountManagerSyncBatch` custom setting and enable it.

SEE ALSO:

Salesforce Help: Create a Custom Setting to Run the Enhanced Effective Account Manager Sync Batch (can be outdated or unavailable during release preview)

Generate Reports in Non-Latin or Custom Fonts in Consumer Goods Offline Mobile App

Sales reps can now generate and preview reports such as Order Confirmation PDF reports in non-Latin fonts like Korean, Chinese, and Thai, or custom fonts in their Consumer Goods offline mobile app.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: Import and configure custom fonts as external files in Visual Studio Code based Modeler. Use the `Facade.setPrintFont` function to set the custom print font to be used either from a custom business logic method or directly from a process flow by using a Logic action. Test the implementation on the simulator app and then deploy the custom font to Consumer Goods offline mobile app on sales reps' devices.

SEE ALSO:

Custom Font Setup

Use Consumer Goods Cloud Offline Mobile App in Hybrid Mode With Remote API Calls

Consumer Goods offline mobile app now supports online interactions with Salesforce. This change helps the offline mobile app receive data directly from Salesforce or from external endpoints set up via Salesforce using remote API calls. For example, sales reps can make informed order decisions by referring to real-time data in Salesforce. You can implement workflows that require online data by integrating the offline mobile app with Salesforce endpoints (Apex-based REST API calls).

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: In Setup, go to the Remote Site Settings page and add a remote site with the HTTP base URL of the Apex endpoint. Implement and test the endpoint to ensure that it's secure and functions correctly. Configure business logic contracts in your customization project in Visual Studio Code based Modeler and define the `remoteApiCallAsync` API with the request payload.

SEE ALSO:

Set Up Remote API Calls (can be outdated or unavailable during release preview)

RemoteCalls.remoteApiCallAsync Framework API(can be outdated or unavailable during release preview)

Other Improvements in Retail Execution

Learn about the other changes for retail execution in Winter '25.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

Why: Retail execution offers these new enhancements.

- Customize the order proposal list with additional parameters such as `Order ID` and `Account ID` added to the `RE_Order_Proposal_List APEX` customization hook.
- The `Denominator` field value in the Pricing Condition Stage object is automatically set to 1 if you provide *0* or a nonnumeric value.
- Starting with Spring '25, visit access will be available only to the owner of the visit. To prevent loss of visit access and related records, implement platform-based sharing of visit records. For more information, see Implementation of Sharing Records.
- Customize the pricing engine user exits easily with these user exit templates available in the contractSnippets folder of your Visual Studio Code based Modeler workspace.
  - MyUserExitComplexPricingEngine.UserExitAffectCurrentConditionBase.bl.js
  - MyUserExitComplexPricingEngine.UserExitAffectCalculationResult.bl.js
  - MyUserExitComplexPricingEngine.UserExitSkipCurrentCalcStep.bl.js
  - MyUserExitComplexPricingEngine.UserExitSkipCurrentSearchStrategyStep.bl.js

  Existing users must update their Visual Studio Code based Modeler to Winter '25 and then upgrade their workspace to get these templates.

  For more information, see User Exits for Consumer Goods Cloud Offline Mobile App and Complex Pricing User Exits.
- You can now add and customize the top, left, and right borders of editable and read-only input areas on the Consumer Goods Cloud offline mobile app. Use the `secondaryBorderColor` and `secondaryBorderFocusColor` settings of the `inputArea` component in your Salesforce mobile themes.

SEE ALSO:

Salesforce Help: Customize the Retail Order Proposal List Creation Process (can be outdated or unavailable during release preview)

Salesforce Help: Consumer Goods Cloud Batch Processes (can be outdated or unavailable during release preview)

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

New and Changed Objects for Retail Execution

Do more with the new and updated Retail Execution objects.

Van Sales Delivery Execution

Capture a tour driver's GPS location at the start of a visit
Use the new `cgcloud__Loc_Capture_At_Start__c` field on the cgcloud__Visit_Template__c object.

Capture the business partner's location coordinates (latitude and longitude) at the start of a visit
Use the new `cgcloud__Start_Geolocation__c` field on the Visit object.

Define the behavior of the invoice number generation in an order
Use the new `cgcloud__Invoice_Id_Generation __c` field on the cgcloud__Order_Template__c object.

Define the format of the system-generated invoice ID for order PDFs
Use the new `cgcloud__Invoice_Number_Definition __c` field on the cgcloud__Order_Template__c object.

Determine whether the inventory products are considered for the order disposal list
Use the new `cgcloud__Consider_Inventory__c` field on the cgcloud__Order_Template__c object.

Determine whether the order disposal list is filtered based on products in the inventory
Use the new `cgcloud__Inventory_Filter__c` field on the cgcloud__Order_Template__c object.

Store the unique invoice identifier
Use the new `cgcloud__Invoice_ID__c` field on the cgcloud__Order__c object.

Sync Management

Assess the device's sync performance by monitoring the sync completion time
Use the `Sync_Completion_Time__c` field in the Sync History object.

Analyze the queuing time for sync requests and identify performance enhancements to reduce wait time
Use the `Time_In_Queue__c` field in the Sync History object

SEE ALSO:

Consumer Goods Cloud Developer Guide (can be outdated or unavailable during release preview)

Trade Promotion Management

Create real-time reports with data for custom months and quarters. Key account managers (KAM) can create promotions faster with the customized derive and copy promotions workflow. When KAMs copy promotions, they can also copy manually adjusted KPIs for custom months and quarters to new promotions. Use the new permission sets included in the Consumer Goods Managed package to avoid managing permission sets during every upgrade.

IN THIS SECTION:

Include data for custom months and quarters in real-time reports and export KPIs for custom months and quarters. Previously, you could include data only for custom weeks in real-time reports or KPI exports. When you copy a promotion to create the new one, save time and effort by transferring any manually adjusted data for custom months and quarters to the new promotion.

Do More with Enhanced Support for Custom Months and Quarters

Include data for custom months and quarters in real-time reports and export KPIs for custom months and quarters. Previously, you could include data only for custom weeks in real-time reports or KPI exports. When you copy a promotion to create the new one, save time and effort by transferring any manually adjusted data for custom months and quarters to the new promotion.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

Create Promotions Faster with Customized Promotion Workflows

Give your key account managers customized derive and copy promotion workflows to help them create promotions with their business-relevant details faster. Use customizations to add fields to newly created promotions or delete a field from the current derive and copy wizards. Configure a metadata wizard to customize user interface workflows for derive and copy promotions. Use the Business Object APIs to customize the Apex process that derives and copies promotions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: From the App Launcher, go to Metadata Wizard, click the relevant configuration. Update the JSON to make the changes, such as add a field to the workflow.

Manage TPM Permission Sets Efficiently

The Consumer Goods managed package now has new permission sets, such as TPM Finance User and TPM RBF User. These permission sets are automatically updated whenever the managed package is upgraded. Assign your users these permission sets to save the hassle of managing permission sets every time you upgrade to the latest version of the Consumer Goods managed package.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: Based on their role, assign the new permission sets to relevant users and delete the older assignments.

Enhance Prediction Accuracy by Clustering Your Sales Data

Segment your sales data based on historical sales patterns to create meaningful data clusters for training prediction models. Use the Scoring Framework to create a CRM Analytics app that effectively clusters accounts and product categories, enhancing the relevance of your data for baseline predictions. This feature streamlines data preparation and eliminates the manual selection of required accounts and products before installing the TPO Baseline app.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management, CRM Analytics for Consumer Goods Cloud, and Scoring Framework are enabled.

Who: This feature is available to Trade Promotion Management users with the CRM Analytics for Consumer Goods or Revenue Intelligence for Consumer Goods permission set licenses.

How: To cluster the data for prediction, go to the Scoring Framework page in Setup. Create a CRM Analytics template configuration by using the Clustering (Trade Promotion Optimization) template configuration type. To view and analyze account clusters in detail, based on sales volume, products, and sales variance use the Account Cluster Insights dashboard

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.

SEE ALSO:

Salesforce Help: Consumer Goods Clouds Processing Service Preview (can be outdated or unavailable during release preview)

Energy and Utilities Cloud

Energy and Utilities Cloud service apps, such as Agent Console and Self-Service Portal, are now deployed on Salesforce's Einstein platform. Improve the accuracy of timesheet entries with timesheet automation and labor cost association in the Timesheet app. Provide AI-generated summaries of customer calls with Einstein Work Summaries.

IN THIS SECTION:

Summarize Customer Calls with Einstein Work Summaries

Save time for your service agents by summarizing their customer calls in the Agent Console. With Einstein Work Summaries for Energy and Utilities Cloud, your service agents can receive an AI-generated summary, issue, and resolution after a call in Agent Console.

Improve Technician Experience with Timesheet Automation and Labor Cost Association

Reduce manual entries for technicians and the load on supervisors by automatically validating timesheets based on labor union rules in Business Rules Engine. Ensure labor union compliance with improved accuracy of time sheet entries and labor cost associations. Generate records of data to gain insights for improving efficiencies for technicians.

Calculate Energy Savings and Rebates with Context Service

Use Context Service with Business Rules Engine to add flexibility to automating energy savings calculations in Clean Energy Program Management.

Monitor Connected Assets with Data Cloud Visualization

Configure Flexcards to show the insights stored in Data Cloud, such as operating metrics and charging history of EV chargers. Sales and service teams can view calculated insights by embedding the Flexcards into the Asset record. Use Data Cloud visualization to monitor assets, drive proactive service, predict maintenance needs, and optimize performance.

Product Catalog Management for Energy and Utilities

Organize and manage products, product attributes, and measures for Clean Energy Program Management with Product Catalog Management. Product Catalog Management is built directly on the Salesforce platform and is an updated version of Enterprise Product Catalog, which is delivered through a managed package. You can easily use Product Catalog Management with other Energy and Utilities applications in the Salesforce platform.

Efficiently Manage Mass Asset Recalls, Services, and Upgrades

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.

Streamline Supplier Recovery Claims

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. Suppliers can adjudicate claims from an Experience Cloud site.

Easily Estimate Field Service Work and Quote Costs to Customers

Improve customer relationships by helping service agents provide quotes and an estimate of the work on a utility asset before customers approves a request. Generate quotes for assets based on work types, required products, cost of services, warranties, and discounts from associated coverages. Automatically create work orders if customers approve the quotes.

New and Updated Objects in Energy and Utilities Cloud

Energy and Utilities Cloud includes new objects that support the Timesheets app, changed objects to expand Clean Energy Programs, and an enhanced data model that's built on the Salesforce platform for service apps.

New and Enhanced Features for Energy and Utilities Cloud

Energy and Utilities Cloud includes access to some features that are available across Industries clouds and products. Use these features to extend and customize Energy and Utilities Cloud based on your business needs.

- Actionable List Members

  Help sales agents view actionable list members or prospects, including existing customers. Set up and assign actionable lists to sales agents or service agents. The agents can then engage with and build trusted relationships with the prospects.

- Business Rules Engine

Create and edit rules to automatically calculate the energy savings in Clean Energy Programs.

- Data Processing Engine

  Transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can aggregate energy savings from a heat pump rebate and compare actual values to the program's goals in Clean Energy Program Management.

- Intelligent Document Reader

  Save time spent in data entry by easily extracting unstructured content and tables from documents.

- Outcome Management

  Create, manage, and track to your goals on a metrics dashboard for your Clean Energy programs or projects.

- Action Launcher

  Help service agents find and launch common actions in the Agent Console.

- Actionable Relationship Center

  Help service agents view customers' relationships in an interactive graph.

- Timeline

  Help service agents view key events of a customer in a single source of truth.

- Interest Tags

  Capture the needs and interests of customers in Interest Tags to deepen customer relationships. Group interests into tag categories to uncover common themes and interests across your target audience.

- Knowledge

  Reduce customer cases by helping your customers self-serve. Create a knowledge base of articles, such as frequently asked questions and best practices, and share them with customers and partners.

Drive Customer Support with Agent Console

Gain a 360-degree view of your customers and help customer support agents respond quickly to customer questions and requests by using the Agent Console. Agents can verify the identity of incoming calls, and assist customers by checking usage statistics, updating customer account details, and managing service locations. They can also gather billing details by integrating the console with external billing solutions. Salesforce admins can use the improved instrumentation capabilities to monitor and troubleshoot the Agent Console.

Where: The Agent Console is available in Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Who: Salesforce admins and service agents with the Energy & Utilities Cloud, Energy & Utilities Cloud Billing Account, and Energy & Utilities Other Features PSLs can use the Agent Console.

Why: The Agent Console is built on the Salesforce platform with an enhanced data model and user interface. Agent Console is an updated version of Contact Center Console, built directly on the Salesforce platform instead of in a managed package.

The Agent Console uses features such as Audit Trails, Actionable Relationship Center, Timeline, Interest Tags, Identity Verification, and Chat.

How: The Agent Console is available for all Salesforce orgs with the Winter '25 release. Enable the features of the Agent Console in Setup. Then, to access the app, go to App Launcher, then find and select **Agent Console**.

Minimize Customer Service Calls with Self-Service Portal

Help customers manage their utility accounts with a simple interface for common customer actions. Customers can pay their bills, set up autopay, address bill concerns, track usage metrics, change service address, and even shop for Clean Energy Programs. Use the portal's enhanced data model to seamlessly transfer information to the Agent Console to help service agents assist customers.

Where: The Self-Service Portal is available in Lightning Experience, Salesforce Classic in Professional, Performance, and Unlimited editions.

Who: Salesforce admins with the Energy & Utilities Platform for Experience Cloud and Energy & Utilities Platform Billing Account for Experience Cloud PSLs can use the Self-Service Portal.

Why: The Self-Service Portal app is built as an Experience Cloud template with an enhanced data model and user interface. The Self-Service Portal app is an updated version of the Utility Self Serve Portal, built directly on the Salesforce platform instead of in a managed package.

The Self-Service Portal uses Salesforce platform capabilities such as Omnistudio and Experience Cloud.

How: The Self-Service Portal is available for all Salesforce orgs with the Winter '25 release. In Setup, enable the features of the Self-Service Portal, and then access the Self-Service Portal template from Experience Cloud sites.

Summarize Customer Calls with Einstein Work Summaries

Save time for your service agents by summarizing their customer calls in the Agent Console. With Einstein Work Summaries for Energy and Utilities Cloud, your service agents can receive an AI-generated summary, issue, and resolution after a call in Agent Console.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Einstein for Service add-on.

Who: Salesforce admins and service agents with the Energy & Utilities Cloud and Einstein for Service add-on licenses can use the Agent Console with Einstein Work Summaries.

How: From Setup, in the Quick Find box, enter `Work Summaries`, and then select **Einstein for Service: Work Summaries**. Then, turn on Einstein for Service: Work Summaries.

SEE ALSO:

Show AI-Generated Summaries with Einstein Work Summaries

Improve Technician Experience with Timesheet Automation and Labor Cost Association

Reduce manual entries for technicians and the load on supervisors by automatically validating timesheets based on labor union rules in Business Rules Engine. Ensure labor union compliance with improved accuracy of time sheet entries and labor cost associations. Generate records of data to gain insights for improving efficiencies for technicians.

Where: This feature is available in Lightning Experience in Energy and Utilities Cloud where Asset Service Lifecycle Management is enabled. This feature is available in the Field Service mobile app for Android and iOS.

Who: Salesforce admins with the Labor Cost Optimization PSL can configure the Timesheets app. Field service technicians with the Labor Cost Optimization PSL can add and edit timesheets.

SEE ALSO:

Improve Technician Experience with Timesheet Automation and Labor Cost Association

Calculate Energy Savings and Rebates with Context Service

Use Context Service with Business Rules Engine to add flexibility to automating energy savings calculations in Clean Energy Program Management.

Where: This feature is available in Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Energy and Utilities cloud enabled.

How: From Setup, find Context Service Settings and then enable **Context Definitions**.

SEE ALSO:

Context Service

Monitor Connected Assets with Data Cloud Visualization

Configure Flexcards to show the insights stored in Data Cloud, such as operating metrics and charging history of EV chargers. Sales and service teams can view calculated insights by embedding the Flexcards into the Asset record. Use Data Cloud visualization to monitor assets, drive proactive service, predict maintenance needs, and optimize performance.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Data Cloud and Energy And Utilities Cloud are enabled.

Who: Users need the Data Cloud Metrics Visualization permission set to use this feature.

SEE ALSO:

Data Cloud Visualization

Product Catalog Management for Energy and Utilities

Organize and manage products, product attributes, and measures for Clean Energy Program Management with Product Catalog Management. Product Catalog Management is built directly on the Salesforce platform and is an updated version of Enterprise Product Catalog, which is delivered through a managed package. You can easily use Product Catalog Management with other Energy and Utilities applications in the Salesforce platform.

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

SEE ALSO:

Product Catalog Management

Efficiently Manage Mass Asset Recalls, Services, and Upgrades

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.

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

Note: The user interface of this product is available only in English and is not fully supported in other languages.

Who: This feature is available to users who have the Product Service Campaign permission sets.

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.

SEE ALSO:

Product Service Campaign

Streamline Supplier Recovery Claims

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. Suppliers can adjudicate claims from an Experience Cloud site.

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

Who: This feature is available to users with the Warranty Lifecycle Management, Claims Foundation, and Warranty Supplier Recovery for Experience Cloud 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**. To define the supplier recovery terms, enter into a contract with a supplier. Stipulate the recovery terms in the supplier contract to determine the payout.

SEE ALSO:

Supplier Recovery Management

Easily Estimate Field Service Work and Quote Costs to Customers

Improve customer relationships by helping service agents provide quotes and an estimate of the work on a utility asset before customers approves a request. Generate quotes for assets based on work types, required products, cost of services, warranties, and discounts from associated coverages. Automatically create work orders if customers approve the quotes.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Energy and Utilities Cloud where Asset Service Lifecycle Management is enabled.

Note: The user interface of this product is available only in English and is not fully supported in other languages.

Who: This feature is available to users with 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 proposal. After the customer approves the quote, work orders are generated.

SEE ALSO:

Work Order Estimation

New and Updated Objects in Energy and Utilities Cloud

Energy and Utilities Cloud includes new objects that support the Timesheets app, changed objects to expand Clean Energy Programs, and an enhanced data model that's built on the Salesforce platform for service apps.

New Objects

Here are the new objects in the Energy and Utilities Cloud.

These objects require the Labor Cost Optimization permission set license:

Store details about a field technician's labor union organization

Use the new Labor Union object.

Store the overtime category code

Use the new Overtime Type object.

Store the overtime approver's account details
Use the new Overtime Approver object.

Store validation error details for time sheets
Use the new Time Sheet Validation Error object.

These objects require the E&U Cloud Program Access permission set:

Store a template for an application form for a program
Use the new Program Application Form Template objects.

Associate a case and an object impacted by the case.
Use the new Case Related Subject object.

Changed Objects

Here are the changed objects in Energy and Utilities Cloud.

Store your labor cost optimization data
Use up to 17 new fields in each of these existing objects: Work Order Line Item, Service Resource, Work Type, Time Sheet Entry, Service Resource Cost Rule, Pay Grade, Time Sheet, Time Sheet Entry Item.

Financial Services Cloud

Enhance your applicants' and underwriters' experience with Digital Lending using integration orchestration, product configurator, loan calculator, and guest user access. Accelerate the development of service processes by using prebuilt service process templates. Use Metadata API to migrate Stage Management configurations to streamline your setup processes and ensure consistency across environments. Simplify the client planning process for your relationship team with Business Relationship Plan. Aggregate financial information from Financial Services Cloud standard objects with Financial Summary Rollup.

IN THIS SECTION:

New and Enhanced Common Features for Financial Services Cloud

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

  Migrate stage management configurations to streamline your setup processes.

Einstein Autofill (Pilot)

Streamline form completion by providing your teams access to the AI-powered Einstein Autofill feature.

IN THIS SECTION:

Boost Operational Efficiency with AI-powered Einstein Autofill (Pilot)

Use Einstein Autofill to get AI-driven recommendations that transform real-time call and chat discussions into instant suggestions. These recommendations help your team fill forms accurately and swiftly. Empower your team to deliver faster, more accurate responses while reducing manual effort and boosting customer satisfaction. Seamlessly embed this feature into Omniscript to auto-fill any form based on voice or chat conversations.

Where: Einstein generative AI is available in Lightning Experience. To purchase an add-on license, contact your Salesforce account executive.

Note: This feature 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 Director. Use of this pilot or beta service is at the Customer's sole discretion.

Business Relationship Plan

Simplify the client planning process for your relationship team with Business Relationship Plan, which is designed to enhance efficiency by integrating AI-powered summaries and reducing manual tasks. This tool addresses the issue of siloed data, helping you create personalized, objective-driven client plans. The tool also enables easy sharing with senior management, ensuring that they actively monitor and drive objectives to foster long-term, beneficial relationships.

IN THIS SECTION:

Obtain Key Information About Your Clients

Relationship teams can use the prebuilt Account Plan Overview template on the Account Plan Lightning page to get a quick overview of Case, Financial Deal, and Opportunity records associated with the account plan. You can customize the Account Plan Overview template or create multiple templates to meet the specific data requirements of different business lines, ensuring flexibility and support for diverse needs.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Sales Cloud and Business Relationship Plan are enabled.

Why: To understand the client's current position and to plan future strategies, relationship managers need comprehensive information. Business Relationship Plan uses the extensible account plan data model that captures details such as strategic priorities, industry trends, internal risk ratings, and overall business information associated with the account.

How: Turn on Business Relationship Plan: Go to the Account Plans page in Setup and enable Account Plans. Then, from Setup, turn on Business Relationship Plan Settings from the Business Client Engagement Setup page. Next, configure fields specific to business relationship plans on the Account Plan Lightning page in the Commercial Banking App.

SEE ALSO:

Salesforce Help: Enable Business Relationship Plan

Salesforce Help: Configure Fields Specific to Business Relationship Plan

Salesforce Help: Configure Account Plan Lightning Page in the Commercial Banking App

Quantify Objectives and Track Progress by Defining Measures

Develop an efficient goal-setting practice from the Objectives tab on the Account Plan Lightning page. Relationship managers can use this feature to set specific, measurable outcomes, or objectives, ranging from monetary goals such as boosting the daily average balance in operating accounts to nonmonetary goals such as strengthening partnerships with key stakeholders. Track the progress of these objectives by creating measures from the Related tab on the objective record page. Your relationship team can then evaluate the success and impact of these objectives by reviewing Financial Deal, Case, and Opportunity records associated with the measures.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Sales Cloud and Business Relationship Plan are enabled. To use Account Plan Lightning page in the Commercial Banking app, users need FSC Sales permission set.

How: End users can create objectives and measures: In the Commercial Banking app, go to the Objectives tab on the Account Plan Lightning page and create objectives. To create measures, go to the Account Plan Objective record page and create measures from the Related tab.

SEE ALSO:

Salesforce Help: Create Account Plans By Using Flexcard Templates for Business Relationship Plan

Salesforce Help: Add Objectives to an Account Plan

Salesforce Help: Define Account Plan Objective Measures

Get Client Relationship Insights Quickly with Prebuilt, AI-Powered Summary Templates

Equip your relationship managers with AI-powered Einstein Summary prompt templates that quickly summarize relationships and interactions for business relationship plans. The Summarize a Relationship and Summarize an Interaction prompt templates give valuable insights about client meeting interactions, win-loss trends, open opportunities, and unresolved cases, gearing relationship managers with client relationship dynamics and executive summaries for informed decisions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where FSC Sales & Service license or the FSC Sales license and Einstein for Sales Add-On are enabled. To purchase the add-on license, contact your Salesforce account executive.

How: From Setup, go to the Einstein Setup page, and turn on Einstein. Next, go to the Financial Services AI Settings page, and turn on Business Relationship Plan AI.

Note: GenAI features are not supported in Government Cloud Plus. Don't turn on the feature in Government Cloud Plus orgs. Contact your Salesforce account executive for more details.

SEE ALSO:

Salesforce Help: Enable Business Relationship Plan AI

Salesforce Help: Considerations for Setting Up Einstein Summaries for Business Relationship Plan

Complaints Management

Swiftly address customer complaints by providing your service agents with instant access to the AI-powered Auto Complaint Summarization feature.

IN THIS SECTION:

Resolve Complaints Faster with Einstein Generative AI for Complaints Management

Enhance your team's productivity with the AI-powered Auto Complaint Summarization feature that collects data from case-related records, including case emails, chatter messages, case feed, and comments. Get the details of each complaint, such as case progression, key interactions, and potential resolution. Integrate AI insights to save time and increase efficiency. Your service agents can respond faster and strategically to complaints.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Einstein generative AI is available in Lightning Experience.

Why: You must have the FSC Sales & Service license or the FSC Service license and the Einstein for Service add-on license. To purchase the add-on license, contact your Salesforce account executive.

Note: GenAI features are not supported in Government Cloud Plus. Don't turn on the feature in Government Cloud Plus orgs. Contact your Salesforce account executive for more details.

Digital Lending

Grant guest user access to view loan products, help applicants with loan calculations using the loan calculator, empower underwriters with integrations to complete loan application tasks, show applicants real-time product offers using the Product Configurator, and customize underwriter experience using Data Mappers.

IN THIS SECTION:

Simplify Loan Estimates with the Loan Calculator

Help applicants with basic calculations on common loan types, such as mortgages, student loans, and personal loans by adding the loan calculator to any phase of the loan application journey. Clients can find how much they can afford to borrow based on their income, expenses, and other factors. Clients, whether they're first-time home buyers or owners of multiple investment properties, can use the loan calculator to quickly calculate their loan payments and view their amortization schedule, payment, and interest rates.

Quickly Complete Loan Approval Steps by Using Integrations

Use Integration Orchestration to empower underwriters with integrations so that they can complete important loan application verification tasks. Create integration callout plans so that underwriters can review the status of integrations with different external endpoints. Underwriters can easily track the progress of all integration callouts, resulting in quicker loan approval.

Dynamically Show Loan Offers by Using Product Configurator

Customize loan product attributes that dynamically adjust and show applicants real-time product offers by using Product Configurator. Show complex loan offers to your customers efficiently. Use the intuitive user interface to select the right options for your loan products. Applicants can view product details, such as attributes, pricing, and purchasing options.

Customize the Underwriter Console by Using Omnistudio

Use Omnistudio Data Mappers to read, transform, and write Salesforce data to extend and configure the Underwriter Console. Data Mappers supply data to Omniscripts, Integration Procedures, and Flexcards, and write updates from Omniscripts, Integration Procedures, and Flexcards to Salesforce. Previously, you customized the Underwriter Console only by using file-based APEX.

Give Guest Users Access to Your Product Catalog

Enhance the self-service loan application experience by specifying the level of access that guest users have to your loan products. Applicants can have visibility to the Home Page, Product List Page, and Product Detail Page components without setting up an account. Previously, users were required to create an account before they began the loan application journey, which prevented new applicants from exploring your loan products before they started their application.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Provide value to the applicants before asking for their personal data. When you enable public access to an Experience Cloud site, guest users can view asset files on public pages, by default. Loan applicants are now prompted to create a username and password later in the loan application journey.

How: In Setup, create sharing rules for Digital Lending guest users and enable sharing settings for product fee and product list rate. In an Experience Cloud site, select **Publicly Available** for the menu items that you want to provide guest user access to. In page settings, update the page access to Public. Select **Read Access** for the Product Fee and Product List Rate objects.

SEE ALSO:

Salesforce Help: Create Sharing Rules for Digital Experience Guest Users

Salesforce Help: Control Public Access to Your Experience Builder Sites

Salesforce Help: Navigation Menu

Salesforce Help: Page Properties and Types in Experience Builder

Salesforce Help: Assign an OmniStudio Permission Set to Digital Experience Guest Users

Salesforce Help: Create an OmniStudio Permission Set for Digital Experience Guest Users

Simplify Loan Estimates with the Loan Calculator

Help applicants with basic calculations on common loan types, such as mortgages, student loans, and personal loans by adding the loan calculator to any phase of the loan application journey. Clients can find how much they can afford to borrow based on their income, expenses, and other factors. Clients, whether they're first-time home buyers or owners of multiple investment properties, can use the loan calculator to quickly calculate their loan payments and view their amortization schedule, payment, and interest rates.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Educate applicants on the impact that loan terms and interest rates have on their overall financial contribution to a loan. For example, in the easy-to-use loan calculator, clients can update the loan amount, loan term, and interest rate to view the monthly payment, principal, and interest rate. They can customize the values in the loan calculator view and compare the total loan amount, principal, and interest paid over the loan term.

How: Add the DigitalLendingLoanCalculator Flexcard to a record page.

Quickly Complete Loan Approval Steps by Using Integrations

Use Integration Orchestration to empower underwriters with integrations so that they can complete important loan application verification tasks. Create integration callout plans so that underwriters can review the status of integrations with different external endpoints. Underwriters can easily track the progress of all integration callouts, resulting in quicker loan approval.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Save the underwriter's time when they verify the documents submitted by an applicant. Add the Integration Execution Status component to the Underwriter Console and integrate it with external tools that help underwriters complete the essential steps to verify the documents. For example, underwriters must verify the employment status of the applicant. Integrate with a third-party tool so that underwriters can verify the applicant's employment status without moving away from the Underwriter Console.

How: In the Lightning App Builder, add the Integration Execution Status component to the Underwriter Console.

SEE ALSO:

Salesforce Help: Integration Orchestration

Dynamically Show Loan Offers by Using Product Configurator

Customize loan product attributes that dynamically adjust and show applicants real-time product offers by using Product Configurator. Show complex loan offers to your customers efficiently. Use the intuitive user interface to select the right options for your loan products. Applicants can view product details, such as attributes, pricing, and purchasing options.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Configure your loan products with attributes that are compatible with other products in the offering. With configuration rules, make sure that applicants choose the loan product that meets their needs. For example, to view mortgage products, create qualification rules that require an applicant to have a credit score above 600, a minimum income of US$2,000 per month, and an address in the United States.

How: In Setup, turn on Product Configurator. Customize the qualification rules for your loan products.

SEE ALSO:

Salesforce Help: Product Configurator

Customize the Underwriter Console by Using Omnistudio

Use Omnistudio Data Mappers to read, transform, and write Salesforce data to extend and configure the Underwriter Console. Data Mappers supply data to Omniscripts, Integration Procedures, and Flexcards, and write updates from Omniscripts, Integration Procedures, and Flexcards to Salesforce. Previously, you customized the Underwriter Console only by using file-based APEX.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: With Omnistudio Data Mappers' drag-and-drop setup and low-code tools, you no longer need a Salesforce Developer to write APEX code to customize the Underwriter Console. You can easily create experiences with guided interactions for underwriters with data from your Salesforce org and external sources.

SEE ALSO:

Salesforce Help: Omnistudio

Digital Lending—India

Help your relationship managers with a smooth and efficient intake of loan product and applicant details. Reduce the risk of errors in a loan workflow by automating loan origination services with new integration templates.

IN THIS SECTION:

Simplify the Loan Application Intake Process

Save time and effort for your relationship managers with an Omniscript that combines capturing loan product and applicant details with verifying applicant data. Improve accuracy and efficiency during application intake, and avoid going to multiple pages to capture data. Previously, relationship managers used a screen flow on the application form record page to capture product details, and an Omniscript on the assessment record page to capture loan applicant details.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Digital Lending—India is enabled.

Who: To use this feature, users need the Digital Lending India Admin User permission.

How: As an admin, from the Discovery Framework Sample Templates settings in Setup, deploy the Digital Lending—India Integrated template. Then, clone and activate the DigitalLendingIndia_ApplicationFormOnboarding Omniscript. After an application form is created either directly or from a lead, an end user can go to the application form record page.

Offer More Loan-Related Verification and Screening Capabilities to Your Users

Use new integration templates to connect with your preferred external systems for enhanced loan origination services. Easily configure the integration templates, and add them to the loan workflow to assist your users in performing purposeful and timely loan-related checks. Use these integrations to reduce manual effort and to verify applicants more accurately so that they meet the necessary loan approval criteria.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Digital Lending—India is enabled.

Who: To use this feature, users need the Digital Lending India Admin User permission.

Why: Use the integration templates to build integrations for these loan origination services.

KYC OCR plus for PAN
Check if a structurally valid PAN card is uploaded, and then extract the PAN card details.

Face Match
Verify an applicant's identity by comparing the applicant's uploaded photo with the downloaded image of their Aadhaar card.

Form 16 OCR
Assess an applicant's financial stability by extracting the income details from the uploaded Form 16 document.

ITR-V OCR
Verify an applicant's declared income by extracting the income tax return details from the uploaded ITR-V document.

Email verification
Confirm the authenticity of the applicant's email address.

Email fraud check
Prevent identity theft by analyzing the applicant's emails for signs of fraud or suspicious activity.

Mobile authentication through OTP
Confirm that the applicant's phone number is active and under their control by sending a one-time password (OTP).

Vehicle RC authentication
Confirm ownership and vehicle details by verifying the applicant's vehicle registration certificate (RC).

Property tax verification
Establish ownership and property value by confirming the payment and status of property taxes.

E-Sign
Provide a way for applicants to sign documents electronically to facilitate a quicker and more secure loan application process.

Service Process Automation

Prebuilt service process templates help you get started quicker.

IN THIS SECTION:

Prebuilt service process templates with process attributes, intake forms, and fulfillment flows help you accelerate the development of service processes. Clone these templates to get the required API endpoints which help reduce development time. The Omniscripts related to these templates are available for both assisted and self-service channels.

Accelerate Service Process Setup with Prebuilt Templates

Prebuilt service process templates with process attributes, intake forms, and fulfillment flows help you accelerate the development of service processes. Clone these templates to get the required API endpoints which help reduce development time. The Omniscripts related to these templates are available for both assisted and self-service channels.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use the prebuilt service process templates, users need these permission sets and permission set licenses:

- Industries Service Process permission set
- Omnistudio User permission set
- Industry Service Excellence permission set
- Financial Services Cloud Extension, Financial Services Cloud Basic, Financial Services Cloud Service, or Financial Services Cloud Standard permission set license

Why: These prebuilt service processes support the Financial Account data model in the Financial Services Cloud managed package or the Financial Account Management Standard Objects. Here are the service processes that you can easily create from the templates:

- **Manage Standing Instructions:** Set up recurring, on-time payments with standing instructions.
- **Order Checkbook:** Order checkbooks with ease.
- **Stop Check Payment:** Cancel check payments.
- **Report and Replace Cards:** Report lost or stolen cards and request replacements.
- **Request Statement Copies:** Request copies of account statements.
- **Transfer Funds to Own Account:** Transfer funds between accounts.
- **Update Email or Phone:** Update email and phone details.

How: In Setup, find and select **Service Process Studio**. Click **New Service Process** and select **Create from Template**. Select a service process template and follow the on-screen instructions to set up your process.

SEE ALSO:

Standard Retail Banking Service Processes for Financial Services Cloud

Wealth Management

Drive financial success and transform client interactions through AI-powered personalized insights that empower financial advisors to anticipate needs and take action to improve their client's wealth.

IN THIS SECTION:

Identify Client Wealth Goals with a Fact-Finding Questionnaire

Help financial advisors deepen customer trust with a fact-finding process, available out-of-the-box and natively within the Financial Services Cloud, to understand the financial needs, aspirations, and risk tolerance of clients. Use a fact-finding assessment to view risk tolerance scores for a client or household account, view historical completions, and export Fact Finding questions and answers for your client.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need the Financial Services Cloud Extension and Manage Rollup Definitions permission sets.

How: Use a prebuilt template questionnaire powered by Omniscript and Discovery Framework, to quickly customize your questions and establish the investment objectives of your client.

Analyze Client Wealth and Create Financial Plans with AI-Generated Summaries

Use Generative AI to give your financial advisors insights into their client's financial performance. Generative AI wealth client summaries use the Record Summary Prompt Template flow to create financial plans. On the account record page, advisors can view their client's portfolio performance, financial plans and goals progress, financial holdings, financial accounts, and open cases.

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. Customers need FSC for Service Einstein or FSC for Sales Einstein to access gen AI client summaries.

- To configure the Record Summary Prompt Template, users need the Prompt Template Manager.
- To use the Record Summary Prompt Template, users need the Prompt Template User.
- To see the Einstein summary component, users need Einstein for Service Innovations. Only admin users can enable the Einstein For Wealth Management setting.

How: The prompt template ingests and shows the financial plans on the account's record page. To view the plans, simply drag the Einstein Summary component on the page and configure the attributes.

Data Cloud for Financial Services Cloud

Provide financial advisors and wealth managers a holistic financial picture of consumers by surfacing data from Data Cloud and Financial Services Cloud. Help key stakeholders drive insights and actionability to achieve consumers' financial well-being.

IN THIS SECTION:

Integrate Data Cloud and Financial Services Cloud for Financial Insights

Provide an integrated financial consumer picture to financial advisors and wealth managers. Surface data from Data Cloud and Financial Services Cloud to drive insights and actionability to achieve consumers' financial well-being. Use financial insights to increase employee efficiency. Use underlying data to identify signals that a customer requires help. Provide contextual alerts to bankers, agents, and advisors to help them address priorities or opportunities with their customers. Improve customer satisfaction and loyalty by providing guidance based on the customers' real-time financial context.

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 must buy the new Financial Services Cloud Contextual Alerts, which includes all the required services.

Stream More Financial Services Cloud Objects

Allocate additional Financial Services Cloud objects and grant permissions to enable streaming of those objects in Data Cloud. Data streams are the connections and the associated data ingested into Data Cloud.

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.

Why: Provide customers the access to stream all of their Financial Services Cloud data into Data Cloud.

Create a Single View of Insurance Data Across Financial Services Cloud and Data Cloud

Create a unified view of insurance data that spans third-party systems and Financial Services Cloud. Use the Insurance Data Model Objects in Data Cloud so that insurance firms can deliver enhanced service and support to their customers through a single policy holder view.

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.

Financial Summary Rollup

Aggregate financial information from Financial Services Cloud standard objects by using predefined Data Processing Engine templates. Use the Financial Summary Rollup feature without installing the Financial Services Cloud managed package.

IN THIS SECTION:

Get Meaningful Insights into Customer's Financial Information with Financial Summary Rollup

Create rollup summaries for a customer's financial information from Financial Account and related standard objects easily by using a set of predefined Data Processing Engine templates. Show the financial summary rollup results in a clear and organized format on the account and party relationship group record details page by using the Related Records Detail Display component. Clone and customize the predefined Data Processing Engine definitions according to your business requirements, and aggregate financial information for a household or for an individual account. Run these definitions periodically by using a simple schedule-triggered flow.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To set up Financial Summary Rollup, users need the Data Pipelines Base User permission set and one of these permission sets:

- Financial Services Cloud Extension
- FSC Sales
- FSC Service
- Financial Services Cloud Foundations
- FSC Sales for European Union Operating Zone
- FSC Service for European Union Operating Zone
- Financial Service Cloud EUOZ

Why:

The financial summary for a household or an account helps your relationship managers derive intelligent insights about their customer's financial information that is scattered across Financial Account and related standard objects.

Your relationship managers can provide personalized financial advice to their customers by using the aggregated financial summaries, such as the total investment value, total liability value, total bank deposit value, total sum insured, and total policy count associated with a household or an account.

How: From Setup, go to the Data Processing Engine page and clone the Data Processing Engine definitions of the type Financial Summary Rollup. Customize the cloned definitions according to your business requirements.

SEE ALSO:

Salesforce Help: Financial Summary Rollup

Object Documentation: Account Financial Summary

Strengthen Your Business and Customer Relationships by Using CRM Analytics

Get CRM Analytics dashboards for Financial Services Cloud to gain insights into client goals, satisfaction, leads, and referrals. Use the new app templates for Wealth Management and Retail Banking to create analytics dashboards that align with Financial Services Cloud features and specific use cases. These new analytics apps templates are now the standard option for Financial Services Cloud CRM Analytics.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Financial Services Cloud and CRM Analytics are enabled.

Who: To create apps from the Wealth Starter Analytics, Consumer Banking Starter Analytics, Retail Banking Analytics, and Analytics for Wealth Management templates, users need an FSCAnalyticsPlus license.

Why: Use CRM Analytics to create dashboards with advanced visualizations of KPIs for managers, advisors, and bankers to monitor customers and analyze growth opportunities.

- Wealth Starter Analytics helps advisors deepen client relationships and enhance assets under management (AUM) through insightful visualizations of client data.

- Consumer Banking Starter Analytics supports personal bankers in managing client relationships by analyzing managed assets, held-away assets, market share insights, and referral opportunities. The insights help the expansion of the asset management portfolio and effective cross-selling of products.
- Retail Banking Analytics provides comprehensive metrics and performance indicators for personal bankers to strengthen client relationships.
- Analytics for Wealth Management offers a complete customer intelligence solution for financial advisors, personal bankers, and managers to manage their clients' wealth portfolios.

How: To configure an analytics app, go to Analytics Studio, select the required app template, and follow the instructions on the template installation page.

Watch Financial Services Cloud Videos

New videos help your users learn about the capabilities of Financial Services Cloud.

- Learn How to Prefill Data from Previously Submitted Assessments in Other Assessments explores how to add the prefill integration procedure to an Omniscript to access data from previously submitted assessments.
- The Report and Replace Cards service process helps you effectively manage various card-related issues. Get to know the Report and Replace Cards Service Process for Financial Services Cloud demonstrates the service agent and self-service experiences when you deploy the prebuilt Report and Replace Cards service process template.
- The Stop Check Payment service process facilitates the cancellation of pending check payments that haven't been processed yet. Get to Know the Stop Check Payment Service Process for Financial Services Cloud demonstrates the service agent and self-service experiences when you deploy the prebuilt Stop Check Payment service process template.
- The Update Email or Phone service process helps maintain accurate contact information. Get to Know the Update Email or Phone Service Process for Financial Services Cloud demonstrates the service agent and self-service experiences when you deploy the prebuilt Update Email or Phone service process template.

New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

Financial Summary Rollup

Store aggregated financial summaries for an account

Use the new `AccountFinancialSummary` object.

Business Relationship Plan

Represent a strategic outline of customer information to manage customer relationships

Use the new `AccountPlan` object.

Represent strategic initiatives pursued by a relationship team with a customer

Use the new `AccountPlanObjective` object.

Represent the performance of target metrics for an objective associated with the account plan

Use the new `AccountPlanObjectiveMeasure` object.

Represent a junction between an account plan objective measure and the related objects

Use the new `AccounPlanObjMeasRela` object.

Represent an objective category that's used to group the account plan objectives

Use the new `AccounPlanObjCategory` object.

New and Changed Invocable Actions in Financial Services Cloud

Use the new and changed invocable actions for Financial Services Cloud.

Business Relationship Plan

Create a response for the Field Generation prompt template powered by Einstein Generative AI using a specified record ID and prompt template API name

Use the new `createFieldGnrnPromptTmplResp` action.

Health Cloud

Improve productivity with Health Cloud's AI-generated summaries and emails. Enhance patient satisfaction with Home Health's self-scheduling capabilities. Schedule all the resources a patient needs during their appointment using Intelligent Appointment Management. Save MCG assessments for later and update care plans using recommendations from MCG assessments. Utilize Roster File Mapping for efficient data handling and empower providers to auto-fill their information using NPPES integration. Unlock the power of Health Cloud with a simplified guided setup.

IN THIS SECTION:

Provider Network Management Enhancements

Transform your Health Cloud experience with advanced automation and enhanced data upload. To ensure an efficient, accurate, and user-friendly experience for Provider Network Management, providers can use their 10-digit unique National Provider Identifier (NPI) for automatic data pre-filling during registration. Payers can use Roster File Mapping for efficient roster management through sophisticated import capabilities.

Accelerate Your Health Cloud Setup

Maximize your productivity with a one-click setup to install basic Health Cloud features. Streamline onboarding with automated metadata insertion, clear prerequisites, and process setups. View and address failed steps easily, and access guided support for a smooth configuration experience.

Health Cloud Has New and Changed Objects

Store and access more data with these new and changed Health Cloud objects.

New and Changed Invocable Actions in Health Cloud

Use the new and changed invocable actions for Health Cloud.

New and Enhanced Common Features for Health Cloud

Health Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Health Cloud based on your business needs.

- Action Launcher

  Contact center agents can now search for actions based on semantic search.

- Business Rules Engine

  Keep your business rules modular using context-aware subexpressions. Update business rules easily by saving a selected expression set version as a new expression set or as a new version within the existing expression set. Test expression sets comprehensively with all available context mappings. Migrate expression set versions efficiently using ranks. Leverage string functions in your expression set calculation steps to streamline and simplify the implementation of complex business logic. Create decision tables effortlessly using the unified experience. Use a CSV to create a decision table to save time and effort. Determine the complexity of your decision table using the decision table type options. Use source filters to narrow down the source object records if the source object has a large number of rows. Use Salesforce objects with large volumes of data such as Account, Lead, and so on in decision tables.

- Context Service

  Use data model objects as a source for mapping nodes and attributes of a context definition. Conveniently generate input mapping for the blank attributes of a single node or all nodes. Easily activate and deactivate to change a context definition's status. Auto sync effortlessly upgrades the standard definition components that are used in the extended custom definitions.

- Data Processing Engine

  Upload large amounts of external data into your Data Processing Engine definitions by using CSV files. Write to related objects in writeback nodes in Data Cloud runtime. Automatically save recipes and output records by running your definitions in debug mode.

- Service Process Studio

  Service Process Studio now supports screen flow request forms in service process definitions.

Einstein for Health Cloud

Pave the way for transformative advancements in healthcare by embedding Einstein generative AI in Health Cloud. Empower healthcare professionals to use our built-in prompt templates to quickly summarize healthcare content and create personalized outreach emails. Harness this technology to save time, improve quality of care, and streamline various healthcare processes from communication workflows to medical documentation management.

IN THIS SECTION:

Boost the Efficiency of Healthcare Processes with Einstein

Alleviate information overload and streamline data management with AI-powered summarization of patient history, medications, and assessments, provider information, and appointment notes. Use the built-in healthcare-specific prompt templates to analyze and condense large volumes of healthcare data stored across several Health Cloud objects. Create concise, contextual, and informative summaries without navigating multiple pages and tabs, saving time and enhancing productivity.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud, EinsteinGPTSalesAddOn, and EinsteinForSvcInovtAddOn add-on licenses. Einstein generative AI is available in Lightning Experience.

Who: This feature is available to users with the Action Plans, Care Plans Access, Health Cloud Foundation, and Einstein for Service Innovations permission sets.

How: From Setup, go to the Einstein Setup page, and turn on Einstein. Next, from Setup, turn on Context Service, Discovery Framework, Integrated Care Management, and Sales Emails. In the Lightning App Builder, place the Einstein Summary lightning component on the Person Account and Contact record pages.

SEE ALSO:

Salesforce Help: Set Up Einstein Embedded AI for Health Cloud

Salesforce Help: Einstein for Health Cloud

Salesforce Help: Enable Embedded AI for Health Cloud

Salesforce Help: Configure the Einstein Summary Component

Revolutionize Healthcare Communication with Einstein's Email Generation

Promote timely communication within the healthcare sector using impactful and personalized referral acknowledgement emails generated by Einstein. Providers can use the built-in prompt templates to generate email messages for acknowledging the receipt of a patient referral. Enjoy the flexibility to tailor the message while retaining the critical referral information before you send the email to the patient and the referring provider. This Einstein solution ensures that the recipients receive relevant and easily understandable health-related content, enhancing engagement, experience, and overall communication effectiveness.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud, EinsteinGPTSalesAddOn, and EinsteinForSvcInovtAddOn add-on licenses. Einstein generative AI is available in Lightning Experience.

Who: This feature is available to users with the Health Cloud Foundation, Einstein for Service Innovations, and Einstein Sales Emails permission sets.

How: From Setup, go to the Einstein Setup page, and turn on Einstein. Next, from Setup, turn on Context Service, Discovery Framework, Integrated Care Management, and Sales Emails.

SEE ALSO:

Salesforce Help: Set Up Einstein Embedded AI for Health Cloud

Salesforce Help: Einstein for Health Cloud

Salesforce Help: Enable Embedded AI for Health Cloud

Home Health Enhancements

Revitalize patient interaction and optimize home visit scheduling with advanced patient self-service capabilities. Patients now gain the flexibility to manage their home visits, fostering greater independence in managing their healthcare. Schedulers can efficiently handle patient-requested home visits, improving service quality and facilitating quicker response times. Use the updated guided setup during configuration to enjoy operational efficiency and ensure effective utilization of the patient portal.

IN THIS SECTION:

Promote Patient-Centered Care with Self-Service Capabilities

Boost patient engagement, improve scheduler efficiency, reduce wait times, and enhance health outcomes with the updated Home Health portal for patients. Empower your patients to take charge of their own healthcare by raising requests to schedule, reschedule, or cancel home visits at their convenience. Schedulers can then review the patient's requests, approve or reject the requests, and manage the patient's 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 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. Activate the latest version of the Schedule Home Healthcare Visit flow and the Reschedule Home Healthcare Visit flow. Configure the Notify Patients About Home Visits flow.

SEE ALSO:

Salesforce Help: Home Health Portal for Patients

Salesforce Help: Set Up Home Health for Patients

Expedite Your Home Health Setup

Use the enhanced guided setup for Home Health to configure the patient portal and enable self-scheduling. Maximize your productivity with simple, clear steps for prerequisite checks and process setups. Stay focused and on track with links to 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

Intelligent Appointment Management Enhancements

Enhance patient care by scheduling all of the resources a patient needs during their appointment, including clinics, rooms, and equipment. Book providers, assets, or both providers and assets for an appointment. Optimize provider availability by scheduling multiple appointments in the same time slot. When self-scheduling an appointment outside the US, find providers in your postal code more easily. Centralize appointment scheduling workflows and guidance on the Intelligent Appointment Management Home Page. Run Health Cloud Troubleshooter to resolve data and permissions issues faster.

IN THIS SECTION:

Book Assets for Patient Appointments

Efficiently book clinics, rooms, equipment, and other assets exclusively or along with providers. Search and filter assets to find the best matches, and then reserve assets to ensure they're available when they're needed. Add non-bookable assets such as a wheelchair and a cane to multi-resource and multi-step appointments.

Book Multiple Resources for Patient Appointments

Improve care coordination by ensuring that all relevant resources are available for patient appointments. Find the common open time slots for selected providers, clinics, rooms, equipment, and other assets. Book multiple resources at the same time, designate provider attendance as required or optional, and easily add or remove resources from existing appointments.

Schedule Multiple Patient Appointments in the Same Time Slot

Concurrent time slots are now available in Intelligent Appointment Management. Concurrent scheduling makes it easy to schedule multiple appointments in the same time slot to reduce downtime.

Boost Scheduler Efficiency with the Appointment Scheduling Home Page

Give schedulers and care coordinators access to appointment scheduling workflows and appointment guidance in one convenient location. When scheduling appointments, easily identify which appointment type best meets a patient's needs and start the single-resource, multi-resource, or multi-step appointment workflow with a single click. To tailor the appointment scheduling experience to the unique needs of your organization, customize the home page Omniscript and Flexcards.

Search for Providers Based on Postal Code

When patients and plan members book their own appointments, they can now enter their postal code in search criteria. More accurate search results help patients across the globe connect with the most suitable providers. Previously, self-scheduling used only US-based ZIP codes in provider search criteria.

Troubleshoot Intelligent Appointment Management Configuration

Save time during implementation and resolve configuration issues that come up later by running Health Cloud Troubleshooter. This diagnostic tool helps you verify that required records are set up correctly and that users have the relevant permissions. It identifies and fixes invalid data, missing data, and missing permissions.

Book Assets for Patient Appointments

Efficiently book clinics, rooms, equipment, and other assets exclusively or along with providers. Search and filter assets to find the best matches, and then reserve assets to ensure they're available when they're needed. Add non-bookable assets such as a wheelchair and a cane to multi-resource and multi-step appointments.

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: Add the Asset Type field to the asset page layout. To represent assets, create asset type, asset, and work type asset type records. In asset types, select **Available to Schedule** and **Active**. To make assets schedulable, create and assign shifts to them, and then set them up as service resources. If you use an external scheduling system, create identifiers for assets and customize asset type categories to align with the scheduling system. To give users the option to schedule assets, edit a page with the Intelligent Appointment Management console, such as a person account. In the Healthcare Appointment Scheduler component on that page, for Appointment Resources, select either **Assets** or **Providers and Assets**.

For guided setup steps about asset scheduling, from Setup, in the Quick Find box, enter `Appointment`, and then select **Intelligent Appointment Management Settings**. If you haven't done so already, turn on Intelligent Appointment Management.

SEE ALSO:

Book Multiple Resources for Patient Appointments

Salesforce Help: Set Up Asset Scheduling for Intelligent Appointment Management (can be outdated or unavailable during release preview)

Book Multiple Resources for Patient Appointments

Improve care coordination by ensuring that all relevant resources are available for patient appointments. Find the common open time slots for selected providers, clinics, rooms, equipment, and other assets. Book multiple resources at the same time, designate provider attendance as required or optional, and easily add or remove resources from existing appointments.

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 give users the option to schedule multi-resource appointments, edit a page with the Intelligent Appointment Management console, such as a person account. In the Healthcare Appointment Scheduler component on that page, select **Show multi-resource scheduling**. From Setup, in Salesforce Scheduler Settings, turn on Multi-Resource Scheduling. From Setup, in the Intelligent Appointment Management Configuration, configure a timeout for getting time slot statuses.

For guided setup steps about multi-resource scheduling, from Setup, in the Quick Find box, enter `Appointment`, and then select **Intelligent Appointment Management Settings**. If you haven't done so already, turn on Intelligent Appointment Management.

SEE ALSO:

Salesforce Help: Set Up Multi-Resource Scheduling for Intelligent Appointment Management (can be outdated or unavailable during release preview)

Schedule Multiple Patient Appointments in the Same Time Slot

Concurrent time slots are now available in Intelligent Appointment Management. Concurrent scheduling makes it easy to schedule multiple appointments in the same time slot to reduce downtime.

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: If you haven't already done so, in Salesforce Scheduler Settings, turn on Concurrent Scheduling and Multiple Topics For Shifts. If you already have shift records in your org, before you turn on the Multiple Topics For Shifts setting, complete the prerequisites described in the Salesforce Scheduler documentation. After you turn on both settings, set concurrency for the work types associated with a shift.

For guided setup steps about concurrent scheduling, from Setup, in the Quick Find box, enter `Appointment`, and then select **Intelligent Appointment Management Settings**. If you haven't done so already, turn on Intelligent Appointment Management.

SEE ALSO:

Salesforce Help: Set Up Concurrent Scheduling for Intelligent Appointment Management (can be outdated or unavailable during release preview)

Salesforce Scheduler Help: Enable Concurrent Scheduling

Salesforce Scheduler Help: Prerequisites to Enable Multiple Topics for Shifts Setting

Salesforce Scheduler Help: Enable the Multiple Topics for Shifts Setting

Salesforce Scheduler Help: Configure Shift Settings

Boost Scheduler Efficiency with the Appointment Scheduling Home Page

Give schedulers and care coordinators access to appointment scheduling workflows and appointment guidance in one convenient location. When scheduling appointments, easily identify which appointment type best meets a patient's needs and start the single-resource, multi-resource, or multi-step appointment workflow with a single click. To tailor the appointment scheduling experience to the unique needs of your organization, customize the home page Omniscript and Flexcards.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

When: This feature will be available in sandbox releases starting in mid-September, 2024, no earlier than September 10. It will be generally available starting in late-September, 2024, no earlier than September 25.

Who: This feature is available to users with the Health Cloud Appointment Management permission set and the Omnistudio User or Omnistudio Admin permission set.

How: To add the home page to the Intelligent Appointment Management console, in the Lightning App Builder, edit a page such as the account page. Select the Healthcare Appointment Scheduler component on that page and then, for Home Page, select an Omniscript. To use the Omniscript included with Health Cloud, select **healthCloudIAM_HomePage_multiLanguage**. To customize the home page, in Omnistudio Designer, create new versions of the home page Omniscript and Flexcards. Then add, edit, or remove elements as needed.

SEE ALSO:

Saleforce Help: Customize the Intelligent Appointment Management Home Page (can be outdated or unavailable during release preview)

Search for Providers Based on Postal Code

When patients and plan members book their own appointments, they can now enter their postal code in search criteria. More accurate search results help patients across the globe connect with the most suitable providers. Previously, self-scheduling used only US-based ZIP codes in provider search criteria.

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.

SEE ALSO:

Salesforce Help: Enable Patients to Schedule Their Own Appointments (can be outdated or unavailable during release preview)

Troubleshoot Intelligent Appointment Management Configuration

Save time during implementation and resolve configuration issues that come up later by running Health Cloud Troubleshooter. This diagnostic tool helps you verify that required records are set up correctly and that users have the relevant permissions. It identifies and fixes invalid data, missing data, and missing permissions.

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: To troubleshoot Intelligent Appointment Management configuration, make sure Intelligent Appointment Management is enabled. To use Health Cloud Troubleshooter, from Setup, in the Quick Find box, enter `Troubleshooter`, and then select **Troubleshooter** under Health Cloud.

Keep in mind that Troubleshooter doesn't identify every possible issue. For example, Troubleshooter doesn't diagnose configuration issues related to self-scheduling.

SEE ALSO:

Salesforce Help: Troubleshoot Intelligent Appointment Management Setup Issues (can be outdated or unavailable during release preview)

Integrated Care Management Enhancements

Easily complete MCG assessments at your own pace in Integrated Care Management by saving the assessments and resuming them at a later time. Update the problems, goals, and interventions in care plans using recommendations from completed MCG assessments. Configure your Experience site with the care plan component so that authenticated site users can quickly view and edit care plans. Set MCG Assessments as the default value for assessment search when care managers create or update care plans.

IN THIS SECTION:

Save and Resume MCG Assessments

Care managers can now save their progress on MCG assessments and continue from where they left off at a later time. If a newer edition of an MCG assessment is available at the time of resumption, care managers can choose to start the new edition or resume the older edition. This update provides more flexibility in administering MCG assessments, ensures continuity, increases assessment completion rates, and saves time.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Care Plans Access permission set license. Users also need MCG API credentials to access MCG care guidelines from Health Cloud.

How: No configurations required. These changes are automatically available when you upgrade to Winter '25.

SEE ALSO:

Salesforce Help: Complete an Assessment to Use with Integrated Care Management

Update Care Plans Using MCG Assessments

Update the problems, goals, and interventions in existing care plans using MCG assessments. The updated Omniscript flow shows the recommended problems, goals, and interventions based on the MCG assessments that a user selects. A comparative view of the recommended and current problems, goals, and interventions makes it easier to update care plans as needed. You can maintain a single, comprehensive care plan for a patient, instead of creating a new care plan every time you want to update the components. This makes it easier to manage patient 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: No configurations required. These changes are automatically available when you upgrade to Winter '25.

SEE ALSO:

Salesforce Help: Update Care Plans

Expose Care Plans to Experience Site Users

Experience site users can now access the care plan component. Patients and their care teams can view the care plans assigned to a patient and edit the problems, goals, and interventions on each care plan.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud and the Health Cloud Community Add-on license.

Who: This feature is available to users with the Care Plans Access permission set license, Omnistudio Runtime for Communities permission set license, and the HealthCloud For Community permission set license. Users also need the Integrated Care Management for Experience Cloud Sites permission set.

How: Enable Digital Experiences in Setup. Assign the required permissions to the portal users. Create sharing rules so that authenticated site users can access Omnistudio components and Health Cloud records. Then, configure the care plan component on your site.

SEE ALSO:

Salesforce Help: Expose Care Plans to Experience Site Users

Search for MCG Assessments by Default

When care managers create or update care plans using assessments, they can select if they want to search MCG assessments or Discovery Framework–based internal assessments from a dropdown menu. You can now set MCG assessments as the default value for this dropdown menu. This helps care managers select relevant assessments and ensure patients receive the right 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: Open a patient account record page in Lightning App Builder and navigate to the care plan component. In the properties pane, select **Set MCG Assessments as the default value for Search Assessments** and save your changes.

SEE ALSO:

Salesforce Help: Add MCG-Related Components to Record Pages

Participant Management Enhancements

Reduce the time and cost required to identify and recruit suitable participants for clinical trials by using AI-based Einstein Candidate Matching. Enhance the efficiency and effectiveness of site coordinators or clinical trial recruiters by organizing metrics, tasks, and events that enable them to operate efficiently. Simplify the setup of Participant Management by using the new guided setup.

For more information, see Participant Management Enhancements in Life Sciences Cloud.

Provider Network Management Enhancements

Transform your Health Cloud experience with advanced automation and enhanced data upload. To ensure an efficient, accurate, and user-friendly experience for Provider Network Management, providers can use their 10-digit unique National Provider Identifier (NPI) for automatic data pre-filling during registration. Payers can use Roster File Mapping for efficient roster management through sophisticated import capabilities.

IN THIS SECTION:

Simplify Provider Roster Management with Roster File Mapping

Enhance efficiency, boost data accuracy, and save time with the advanced import capabilities of the Roster File Mapping feature in Provider Network Management. Empower payers to map data from roster files to the Provider Network Management data model. Use Roster File Mapping to streamline the data import process while ensuring consistency.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

How: To enable Roster File Mapping, go to the Provider Network Management Settings page in Setup. Turn on Roster File Mapping and then follow the guided setup.

SEE ALSO:

Salesforce Help: Roster File Mapping

Salesforce Help: Upload Provider Roster Data Files from Cases

Optimize Provider Registration with NPPES Integration

Use the National Plan and Povider Enumeration System (NPPES) integration to ensure standardization and accurate identification of healthcare providers. Providers can now use their 10-digit unique National Provider Identifier (NPI) to fill in their information directly from the NPPES directory during the provider registration process. Additionally, a user can search for and nominate a provider by using demographic data directly from the NPPES registry. Reduce manual data entry, improve data accuracy, and simplify registration with this streamlined approach.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud provisioned with the Health Cloud Provider Network Management Add-On license.

How: To enable providers to register by using NPPES integration:

- Allowlist the NPPES API (https://npiregistry.cms.hhs.gov/).

- In your Salesforce Health Cloud experience portal or site, place the HealthCloudPNMJoinOurNetworkCardWithNPPES Flexcard to launch the ProviderRegistrationWorkflowWithNPPES Omniscript for Provider Registration. Additionally, place the HealthCloudPNMNominatePeerWithNPPES Flexcard to launch the ProviderNominationWorkflowWithNPPES Omniscript for Provider Nomination.

SEE ALSO:

Salesforce Help: Build an Experience Cloud Site for the Provider Portal

Salesforce Help: Allowlist the NPPES API

Salesforce Help: Set up an Integration Definition for Apex Class

Salesforce Help: Nominate a Provider to Join a Payer Network Using NPPES

Salesforce Help: Register to Join a Payer Network With NPPES

Accelerate Your Health Cloud Setup

Maximize your productivity with a one-click setup to install basic Health Cloud features. Streamline onboarding with automated metadata insertion, clear prerequisites, and process setups. View and address failed steps easily, and access guided support for a smooth configuration experience.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud.

How: From Setup, go to Feature Settings. Under Health Cloud, select Health Cloud Setup to find the new guided setup step.

Health Cloud Has New and Changed Objects

Store and access more data with these new and changed Health Cloud objects.

Where: This change applies to Enterprise and Unlimited editions.

Assessments

Represent a session of an assessment that's saved to resume for later.
Use the new `AssessmentSavedSession` object.

Home Health

Specify the recurrence pattern of the appointment that's associated with the appointment request
Use the new `AppointmentRecurrencePattern` field in the PartyAppointmentRequest object.

Specify the type of appointment that's associated with the appointment request
Use the new `AppointmentType` field in the PartyAppointmentRequest object.

Represent the clinical service request that's associated with the appointment request
Use the new `ClinicalServiceRequestId` field in the PartyAppointmentRequest object.

Represent the document generation process that's associated with the appointment request
Use the new `DocumentGenerationProcessId` field in the PartyAppointmentRequest object.

Represent the operating hours of the appointment that's associated with the appointment request
Use the new `OperatingHoursId` field in the PartyAppointmentRequest object.

Represent the quote that's associated with the appointment request
Use the new `QuoteId` field in the PartyAppointmentRequest object.

Represent the referral or opportunity that's the source of the appointment request

Use the new `SourceReferenceRecordId` field in the PartyAppointmentRequest object.

Represent the service territory of the appointment that's associated with the appointment request

Use the new `ServiceTerritoryId` field in the PartyAppointmentRequest object.

Represent the quote or party appointment request that's the source of the care service visit

Use the new `SourceReferenceRecordId` field in the CareServiceVisit object.

Intelligent Appointment Management

Represent a type of item, physical space, or service offering

Use the new `AssetType` object.

Specify the asset type associated with an asset

Use the new `AssetType` field in the `Asset` object.

Represent a junction between a Service Appointment and an Asset

Use the new `ServiceAppointmentAsset` object.

Represent a junction between a Work Type and an Asset Type

Use the new `WorkTypeAssetType` object.

Specify the number of milliseconds before a request to retrieve time slot statuses from a scheduling system times out

Use the new `GetSlotStatusTimeout` field in the `ApptBookingConfig` object.

Indicate whether a provider is required at an appointment or not

Use the new `IsRequired` field in the `CarePractnFacilityAppt` object.

Provider Network Management

Represents the details of a file attached to a case, such as file properties, file processing details, and other additional relevant information.

Use the new `CaseRelatedFile` object.

SEE ALSO:

Health Cloud Developer Guide: CaseRelatedFile

Industries Common Resources Developer Guide: AssessmentSavedSession

New and Changed Invocable Actions in Health Cloud

Use the new and changed invocable actions for Health Cloud.

Use a reference record as a source to schedule home visits

Use the new visitSourceId input field on the existing scheduleRecurringHomeVisit action.

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 Winter '25.

SEE ALSO:

Salesforce Help: Insurance Winter '25 Release Notes (can be outdated or unavailable during release preview)

Life Sciences Cloud

Enhance the therapy management system by adding ad hoc tasks. Convert sales agreements into quotes and vice versa using a guided flow. Help eligible patients with unaffordable, out-of-pocket medication expenses with financial assistance. Match candidates to clinical trials with AI-enabled Einstein Candidate Matching. Help site coordinators operate efficiently by organizing metrics, tasks, and events on Clinical Excellence FlexiPage. Reverify pharmacy coverage benefits for a care program using a guided flow to initiate a review request.

IN THIS SECTION:

Advanced Therapy Management Enhancements

Enhance the flexibility and responsiveness of your therapy management system by adding ad hoc tasks. Then, assign the tasks to ensure they're handled by the right person.

IN THIS SECTION:

Add Ad Hoc Tasks to a Therapy Step

Use ad hoc tasks to fulfill specific patient requirements, handle emergencies, and address regulatory requirements. Add an ad hoc task to a therapy step for a Care Program Enrollee, then assign it to a user or a group. You can create the task by using an action plan template or from the beginning by using the available options. You can mark the task as mandatory or optional.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud.

When: The ad hoc tasks feature is available starting in August 2024.

Who: This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and Health Cloud Advanced Therapy Orchestration permission set license.

How: In the Care Program Enrollee record page, click the dropdown next to **My Tasks**, and then select **Add Task**.

SEE ALSO:

Salesforce Help: Create an Ad Hoc Task by Using an Action Template

Salesforce Help: Create an Ad Hoc Task Without an Action Template

Review and Update Task Assignees

If you created the ad hoc task by using an action plan template, the assignees are selected automatically. However, you can update the task assignees after adding a task.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud.

When: The ad hoc tasks feature is available starting in August 2024.

Who: This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and Health Cloud Advanced Therapy Orchestration permission set license.

How: This feature is automatically available in your org and doesn't require setup. Users can update task assignees from the **Review Task Assignments** screen that appears after adding a task.

SEE ALSO:

Salesforce Help: Create an Ad Hoc Task by Using an Action Template

Commercial Excellence Enhancements

Boost sales productivity by using a guided flow to quickly convert sales agreements into quotes and quotes into sales agreements.

IN THIS SECTION:

Increase Sales Productivity by Automating Sales Agreement and Quote Conversions

Streamline your sales processes by using a screen flow to quickly turn sales agreements into quotes, and quotes into sales agreements. This automation reduces manual data entry tasks and ensures consistency and accuracy, helping sales teams concentrate on closing deals.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud.

Who: This feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set, and Manage Flow and Run Flow permissions.

How: To use the Convert Record screen flow, click **Convert Record** on the sales agreement or quote record.

SEE ALSO:

Salesforce Help: Configure Record Conversion for Quotes and Sales Agreements (can be outdated or unavailable during release preview)

Financial Assistance Program for Life Sciences

The Financial Assistance Program increases adherence to prescribed drugs by helping eligible patients get financial assistance for unaffordable, out-of-pocket medication expenses. The program also improves patient enrollment in, and reduces attrition from, relevant patient service programs.

IN THIS SECTION:

View the Eligible Financial Assistance Programs for a Care Program Enrollee

Based on the benefit verification process outcome, a care program enrollee can be eligible for multiple financial assistance programs conducted by the healthcare providers. A case agent can view the list of these financial assistance programs, and help the care program enrollees to decide which programs to apply for.

Where: This feature applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud, and Omnistudio, and Business Rules Engine (BRE) license.

When: The Financial Assistance Program is available starting in August 2024.

Who: This feature is available to users with Health Cloud Starter, Manage Financial Assistance Program, Omnistudio Admin, Omnistudio User, Health Cloud Foundation, Rule Engine Runtime, and Rule Engine Designer permission sets.

How: Add the `FinancialAssistanceProgramContainer` Flexcard to the Care Program Enrollee record page. Case agents can then view eligible programs from the Care Program Enrollee page by clicking **Financial Assistance Programs**, and then clicking **Available Programs**.

SEE ALSO:

Salesforce Help: Apply for a Financial Assistance Program

Apply for a Financial Assistance Program

Enable your case agents to apply for a financial assistance program on behalf of a care program enrollee who requires financial assistance to procure a prescribed drug.

Where: This feature applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud and Omnistudio licenses, and Business Rules Engine (BRE) license.

When: The Financial Assistance Program is available starting in August 2024.

Who: This feature is available to users with Health Cloud Starter, Manage Financial Assistance Program, Omnistudio Admin, Omnistudio User, Health Cloud Foundation, Rule Engine Runtime, and Rule Engine Designer permission sets.

How: Add the `FinancialAssistanceProgramContainer` Flexcard to the Care Program Enrollee record page. Case agents can then apply for an eligible program from the Care Program Enrollee page by clicking **Financial Assistance Programs**, and then clicking **Apply** under Available Programs.

SEE ALSO:

Salesforce Help: Add Financial Assistance Program to the Care Program Enrollee Record Page

Salesforce Help: Apply for a Financial Assistance Program

View Financial Assistance Program Application Status

After submitting an application for a financial assistance program on behalf of a Care Program Enrollee, a case agent can view the status and application details. The information includes the application status, application date, total expense of the drug, and the probable benefit amount. The application stage details include the stage name, assignee, and the status.

Where: This feature applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud and Omnistudio licenses, and Business Rules Engine (BRE) license.

When: The Financial Assistance Program is available starting in August 2024.

Who: This feature is available to users with Health Cloud Starter, Manage Financial Assistance Program, Omnistudio Admin, Omnistudio User, Health Cloud Foundation, Rule Engine Runtime, and Rule Engine Designer permission sets.

How: Add the `FinancialAssistanceProgramContainer` Flexcard to the Care Program Enrollee record page. Case agents can then view the application status in the page that appears after submitting the application.

SEE ALSO:

Salesforce Help: Apply for a Financial Assistance Program

Reapply for a Financial Assistance Program

If an application for a financial assistance program is rejected, a case agent can quickly identify and correct any errors, then apply again.

Where: This feature applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud and Omnistudio licenses, and Business Rules Engine (BRE) license.

When: The Financial Assistance Program is available starting in August 2024.

Who: This feature is available to users with Health Cloud Starter, Manage Financial Assistance Program, Omnistudio Admin, Omnistudio User, Health Cloud Foundation, Rule Engine Runtime, and Rule Engine Designer permission sets.

How: Add the `FinancialAssistanceProgramContainer` Flexcard to the Care Program Enrollee record page. Case agents can then reapply for the program by clicking **Assistance History**, and then clicking **Reapply** that corresponds to the rejected financial assistance program

SEE ALSO:

Salesforce Help: Reapply for a Financial Assistance Program

View the Details of Approved Financial Assistance Program Claims

Enable your case agents to view the details of approved financial assistance program claims for a care program enrollee and the benefit disbursement details. The disbursement details include the count of benefit coupons and cards.

Where: This feature applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud.

When: The Financial Assistance Program is available starting in August 2024.

Who: This feature is available to users with Health Cloud Starter, Manage Financial Assistance Program, Omnistudio Admin, Omnistudio User, Health Cloud Foundation, Rule Engine Runtime, and Rule Engine Designer permission sets.

How: Add the `FinancialAssistanceProgramContainer` Flexcard to the Care Program Enrollee record page. Case agents can then view the approved program claims from the Care Program Enrollee page by clicking **Financial Assistance Programs**, and then clicking **Assistance History**.

SEE ALSO:

Salesforce Help: View Benefit Disbursements Details for a Patient

Participant Management Enhancements

Reduce the time and cost required to identify and recruit suitable participants for clinical trials by using AI-based Einstein Candidate Matching. Enhance the efficiency and effectiveness of site coordinators or clinical trial recruiters by organizing metrics, tasks, and events that enable them to operate efficiently. Simplify the setup of Participant Management by using the new guided setup.

IN THIS SECTION:

Reduce the time and cost required to identify and recruit suitable participants for clinical trials by using AI-based Einstein Candidate Matching. Life Sciences Cloud's Participant Management feature uses Einstein's capabilities to understand a research study's inclusion and exclusion criteria and automatically analyzes participants' medical records to determine their suitability for trials. As a result, your clinical recruiters can select from a pool of the most suitable participants, which enhances trial accuracy, reduces attrition, and improves participant conversion rates.

Identify the Best Candidates for Clinical Trials by Using AI

Reduce the time and cost required to identify and recruit suitable participants for clinical trials by using AI-based Einstein Candidate Matching. Life Sciences Cloud's Participant Management feature uses Einstein's capabilities to understand a research study's inclusion and exclusion criteria and automatically analyzes participants' medical records to determine their suitability for trials. As a result, your clinical recruiters can select from a pool of the most suitable participants, which enhances trial accuracy, reduces attrition, and improves participant conversion rates.

Where: This change applies to Enterprise and Unlimited editions with Health Cloud or Life Sciences Cloud and the Participant Enrollment Add-On license.

Who: This feature is available to users with the clinical trial manager permission set license.

How: From Setup, find and select Participant Management Settings. On the setup page, turn on Participant Enrollment. Next, go to Match Candidates to Trials, and turn on the Einstein setting.

Improve Recruitment and Enrollment Efficiency

The Clinical Excellence console organizes participant or candidate data in one place so that site coordinators and clinical trial recruiters can meet enrollment targets. The dashboard provides visibility into enrollment progress, candidate rejection percentage, candidate conversion rate percentage, and enrollment status. Enhance the efficiency and effectiveness of site coordinators or clinical trial recruiters by organizing metrics, tasks, and events that enable them to operate efficiently. Organize metrics, tasks, and events on the dashboard in a way that helps site coordinators and clinical education recruiters to do their jobs more efficiently.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud or Life Sciences Cloud and the Participant Enrollment Add-On license.

Who: This feature is available to users with the clinical trial manager permission set license.

How: From Setup, search for and select Participant Management. Turn on Participant Enrollment. Then, under Set Up Participant Management, click Install Reports.

Expedite Your Participant Management Setup

Simplify the setup process for Participant Management by using the new guided setup assistants.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud or Life Sciences Cloud and the Participant Enrollment add-on license.

Who: This feature is available to users with the Clinical Trial Manager permission set license.

Why: The Participant Management guided setup experience includes these new assistants.

- Set Up Participant Management: Streamline the process of recruiting and enrolling participants in clinical trials.
- Set Up Participant Registration: Enable users to digitally sign up for clinical trials by using participant registration forms.
- Match Candidates to Trials: Automatically match candidates to clinical trials.

- Configure Digital Experiences: Build a community portal, help center, or website.
- Manage Sharing Access: Extend sharing access to users in public groups, roles, or territories.

How: From Setup, find and select Participant Management Settings. Turn on Participant Enrollment. Then select an assistant to begin. Within an assistant, click links to access Help articles that provide more information for each setup task.

Life Sciences Cloud Has New and Changed Objects

Store and access more data with these new and changed Life Sciences Cloud objects.

Financial Assistance Program

Represents a junction between Care Program and Program objects
Use the new `CareProgramAssistance` object.

Represents the eligibility criteria and recommendation for a program.
Use the new `ProgramRecommendationRule` object.

Represents a junction between Program and Enrollment Eligibility Criteria objects
Use the new `ProgramEnrlEligibilityCrit` object.

Specify the care program enrollee represented as an applicant
Use the new `CareProgramEnrollee` field in the Applicant object.

Specify the amount limit allocated to enrollee for a corresponding program
Use the new `EnrolleeAmountLimit` field in the Benefit object.

Specify the assigned frequency for an enrollee limit for a corresponding program
Use the new `EnrolleeLimitFrequency` field in the Benefit object.

Specify the enrollee transaction amount limit for a corresponding program
Use the new `EnrolleeTrxnAmountLimit` field in the Benefit object.

Specify the budget amount used by an employee after enrolling in a corresponding program
Use the new `BudgetAmountUsed` field in the Benefit object.

Specify the amount the member contributes towards the pharma products
Use the new `PharmaCopayAmount` field in the CoverageBenefit object.

Specify the care program enrollee associated with the program enrollment
Use the new `CareProgramEnrollee` field in the ProgramEnrolment object.

Specify the product that is associated with the medication
Use the new `Product` field in the Medication object.

Specify the program that's offering financial assistance for this product
Use the new `Program` field in the Care Program Enrollee Product object.

Participant Management

Represent the result of an evaluation done to assess the eligibility of a participant enrolling in a research study or care program
Use the new `CareProgramEnrollmentEvaluationResult` object.

Specify the number of inclusion criteria fulfilled by the candidate during automatic evaluation
Use the new `MatchedInclusionCritCount` field in the ResearchStudyCandidate object.

Specify the number of exclusion criteria fulfilled by the candidate during automatic evaluation
Use the new `MatchedExclusionCritCount` field in the ResearchStudyCandidate object.

Specify the type of source where the information about the candidate is obtained
Use the new `SourceType` field in the ResearchStudyCandidate object.

Specify whether the automatic evaluation of the candidate was completed (true) or not (false)
Use the new `IsAutomaticEvaluationCmpl` field in the ResearchStudyCandidate object.

Specify the content document associated with a diagnostic summary
Use the new `ContentDocument` field in the DiagnosticSummary object.

Specify whether the rule is included or excluded when determining care program eligibility
Use the new `InclusionRule` field in the CareProgramEligibilityRule object.

Specify the retention of the collected participant samples in a biorepository
Use the new `BiospecRetention` field in the ResearchStudy object.

Specify the protocol content document associated with the research study
Use the new `ProtocolDocument` field in the ResearchStudy object.

Specify the description related to the identifier
Use the new `Description` field in the Identifier object.

Represents details of the research study protocol document
Use the new `ResearchStudyProtocolInfo` object.

Pharmacy Benefits Verification

Specify the original care benefit verify request from which the current request is cloned
Use the new `RelatedCareBnftVerifyRequest` field in the `CareBenefitVerifyRequest` object.

Specify the care program enrollee associated with the care benefit verify request
Use the new `CareProgramEnrollee` field in the `CareBenefitVerifyRequest` object.

Specify the user assigned to the care benefit verify request
Use the new `AssignedTo` field in the `CareBenefitVerifyRequest` object.

Specify the purchaser plan from the member plan associated with the care program enrollee
Use the new `Plan` field in the `CareBenefitVerifyRequest` object.

Specify the care program associated with the care benefit verify request
Use the new `CareProgram` field in the `CareBenefitVerifyRequest` object.

Specify the initial fill quantity of the authorized prescription
Use the new `InitialFillQuantity` field in the `CareBenefitVerifyRequest` object.

Specify the initial fill duration of the authorized prescription
Use the new `InitialFillDuration` field in the `CareBenefitVerifyRequest` object.

Specify the medication code or medication name of the authorized prescription
Use the new `PrescriptionMedication` field in the `CareBenefitVerifyRequest` object.

New Invocable Actions in Life Sciences Cloud

Use the new invocable actions for the Life Sciences Cloud.

Identify the number of inclusion and exclusion criteria met by the candidate for a research study by evaluating the criteria-matching response from Einstein GPT

Use the new `processCriteriaMatchingResp` action.

Loyalty Management

Breeze through the setup of your loyalty program by using the simplified loyalty program setup. Create bundled product promotions for your business customers. Decide your promotion's target audience by using actionable lists and identify the segments your customers and loyalty program members belong to with prebuilt Data Cloud data graphs. Trace how members use their points. Offer time-based vouchers and reserve vouchers while members complete their order.

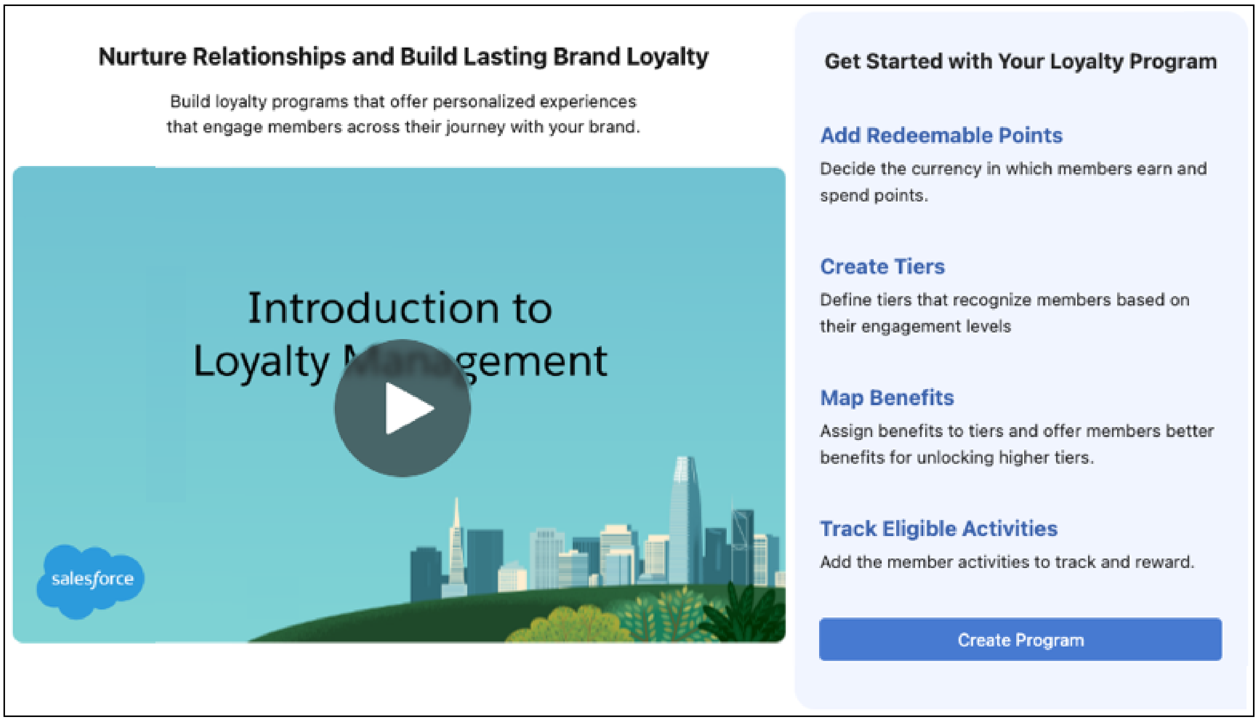
IN THIS SECTION:

Create Programs Easily With Simplified Loyalty Program Setup

Create, configure, and activate loyalty programs quickly by using a step-by-step, intuitive process. Seamlessly configure currencies, tier groups, tiers, benefits, and activities. For advanced configurations, use the respective record pages. After you set up a program, you can review the program summary at a glance, and also update the configurations based on your business requirements. The changes go live in the active program.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available.

How: On the Home page of the Loyalty Management app, use the Loyalty Program Simplified Setup.



Check out this video for a preview of Simplified Loyalty Program Setup.

Watch a video

Promotions

Run product bundle-based promotions for your business customers and create context definitions tailored to your business needs. Use actionable lists to decide the target audience of your loyalty promotions and use data graphs to find segments that your customers and loyalty program members belong to. Deploy promotion rules in target orgs in the same status as source orgs. Help customer service reps find the eligible promotions of corporate members.

IN THIS SECTION:

Simplify Promotion Targeting Through Actionable Lists

Loyalty program managers can decide the target audience for promotions by using actionable lists. Program managers can work with admins to configure the actionable list definition. After an actionable list is created, program managers can easily link a promotion with an actionable list.

Find Members' Data Cloud Segments Faster with Data Graphs

Save time by using prebuilt data graphs to find out which Data Cloud segments loyalty program members belong to. Earlier, you could only use Data Cloud's Query API, but now you can choose between data graphs and the Query API to find a member's segments.

Easily Find Eligible Promotions for Corporate Members

Service reps can now view the list of promotions that are eligible for corporate members on the Promotion Eligible component. When loyalty program managers test a loyalty program's processes and rules, they can simulate transaction journals that belong to corporate members and verify whether promotion-based rules are eligible for the transactions.

Maintain the Process and Rules Status During Deployment

Admins can now deploy processes and rules of a loyalty program to target orgs in the same status as the source org, maintaining uniformity during deployments. Earlier, the LoyaltyProgramSetup metadata type deployed rules as inactive.

Global Promotions Management

Design promotions for your bundled products with attribute-based eligibility, and target the promotions to business customers. Create context definitions that align with your industry and company's requirements. Check customers' segment-based promotion eligibility with data graphs and enable team members to view promotion configuration.

IN THIS SECTION:

Run Bundle and Attribute-Based Promotions for Businesses and Individuals

Use the new Buy X (Bundle or Product Variants), Get Discounts + Reward promotion template to run promotions for bundled products. Define the promotion's rules with eligibility criteria for each product in the bundle and the overall bundle. Marketing managers can add eligibility criteria based on product attributes and product selling models. They can also add an amount-based or quantity-based aggregate condition for each criteria, and an additional criteria of their choice. Along with rewards such as vouchers, points, and games, the promotion can offer a discount on the unit price or on the combined line item price of multiple products.

Create Context Definitions Based on Your Unique Requirements

The eligibility criteria of each promotion can vary based on your industry and the promotion's goals. Admins can create context definitions that use terms from your industry and align with your promotion's requirements. Marketing managers can easily map their promotion's rule eligibility criteria with the tags from the promotion's context definition. While integrating the Eligible Promotions API, developers can effortlessly map the company's cart or order structure with the API's request parameters.

Add Bundled Products to Your Promotion's Scope

Marketing managers can design promotions that are targeted towards bundled products. A promotion's list of eligible products can now include bundled products along with simple products. Marketing managers can also view a summary of the products and categories that they select, and remove the ones that they don't need.

Quickly Check Customers' Segment-Based Promotion Eligibility

Improve the response times of the Eligible Promotions API by using prebuilt data graphs. By default, the Eligible Promotions API uses Data Cloud's Query API. You can now choose whether the Eligible Promotions API uses data graphs or the Query API to find out whether customers belong to a promotion's segment.

Easily Access Promotion Configurations

Enhance team collaboration by enabling review of promotion details by using the new View Promotion Configuration button on the promotion page. Grant view only permissions to users to view promotion configurations. This ensures that users can view promotion details safely, preventing unintended modifications.

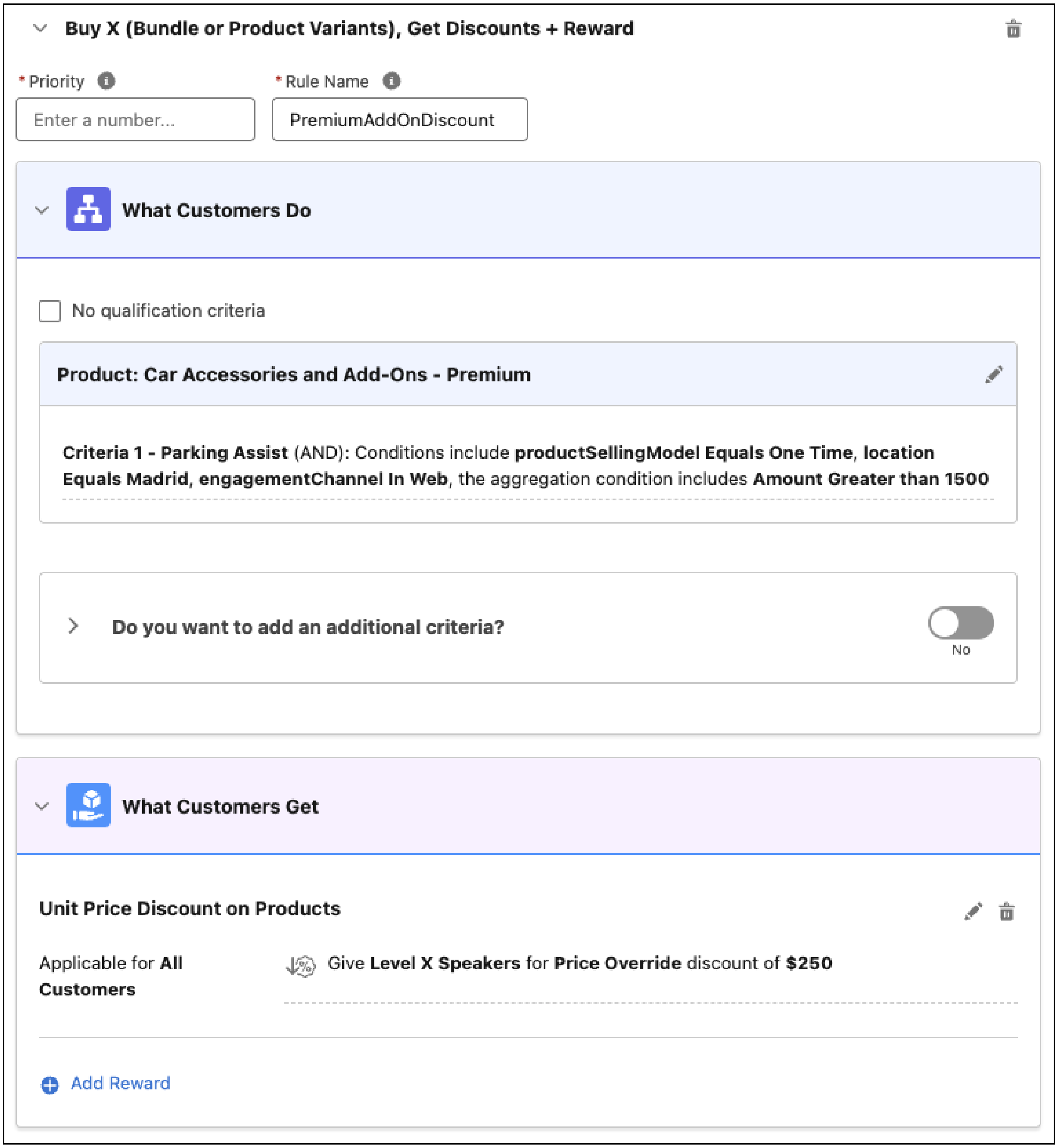
Run Bundle and Attribute-Based Promotions for Businesses and Individuals

Use the new Buy X (Bundle or Product Variants), Get Discounts + Reward promotion template to run promotions for bundled products. Define the promotion's rules with eligibility criteria for each product in the bundle and the overall bundle. Marketing managers can add eligibility criteria based on product attributes and product selling models. They can also add an amount-based or quantity-based aggregate condition for each criteria, and an additional criteria of their choice. Along with rewards such as vouchers, points, and games, the promotion can offer a discount on the unit price or on the combined line item price of multiple products.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management where Global Promotions Management is enabled.

Why: For example, an automotive company wants to offer discounts for vehicle add-on packages to its business customers and individual customers. Each add-on package is modeled as a bundled product, and individual add-on options are modeled as products within the bundled products. The company wants to offer discounts based on the material and the color that customers want for each individual add-on and the number of cars requested in the quote. The marketing manager creates promotion rules for each add-on package and the rule criteria check for the material and color requested in product attribute-based conditions. Each rule also has an additional condition to check for the number of cars quoted. For each rule, the marketing manager adds the discount that customers get on the add-on package based on the configuration of their requested individual add-ons.

How: In the Select Promotion Template step in the Quick Promotions guided flow, select **Buy X (Bundle or Product Variants), Get Discounts + Reward**. Add the rule eligibility criteria in the What Customers Do section and the rewards in the What Customers Get section.



SEE ALSO:

Salesforce Help: Buy X (Bundle or Product Variants), Get Discounts + Reward (can be outdated or unavailable during release preview)

Create Context Definitions Based on Your Unique Requirements

The eligibility criteria of each promotion can vary based on your industry and the promotion's goals. Admins can create context definitions that use terms from your industry and align with your promotion's requirements. Marketing managers can easily map their promotion's rule eligibility criteria with the tags from the promotion's context definition. While integrating the Eligible Promotions API, developers can effortlessly map the company's cart or order structure with the API's request parameters.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management where Global Promotions Management is enabled.

Why: For example, an airline promotion is different from a banking promotion. The eligibility criteria of an airline promotion can be based on the class of seats booked, whereas a banking promotion's eligibility criteria can focus on the count of transactions completed. In both cases, the airline and the bank can create context definitions unique to their promotion requirements.

SEE ALSO:

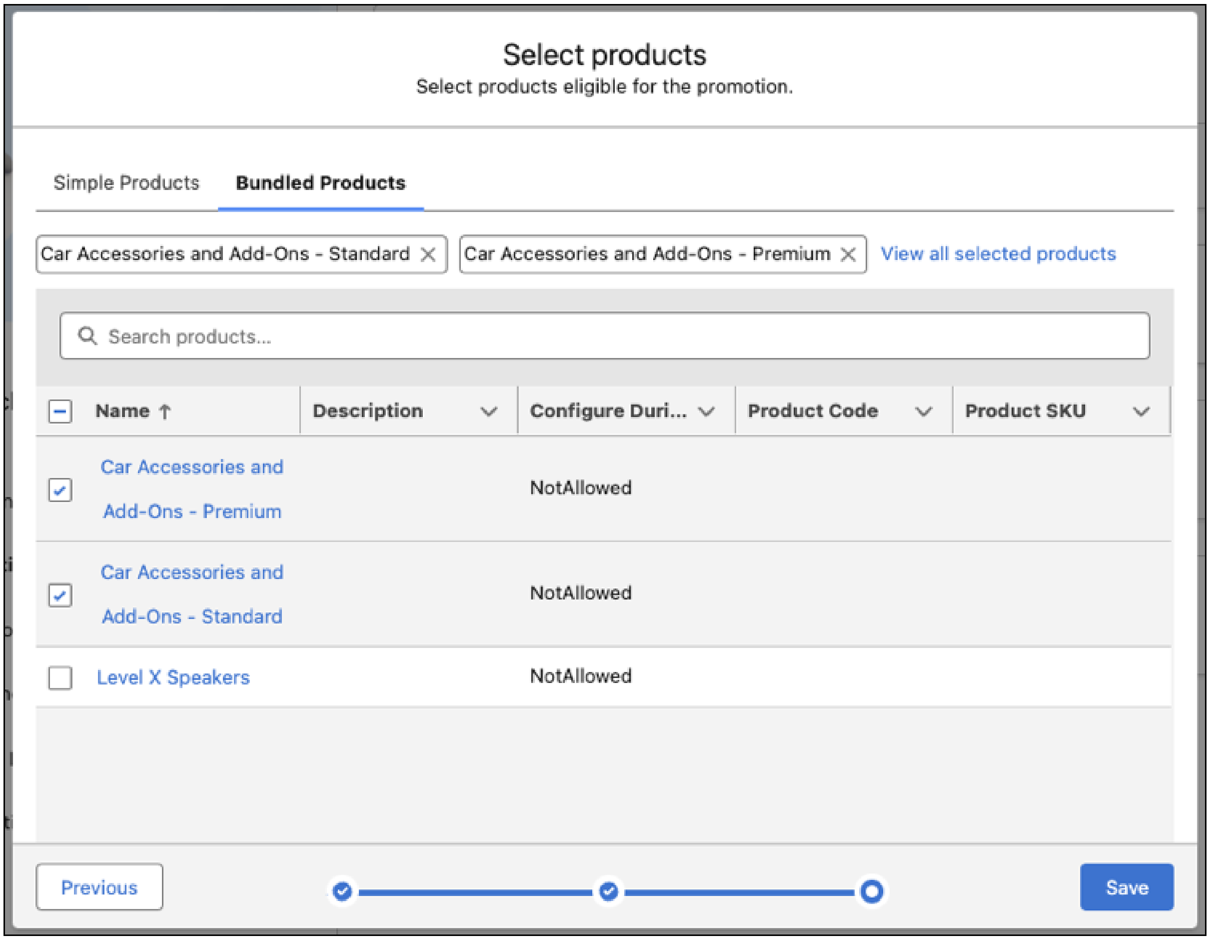
Salesforce Help: Context Definition for Global Promotions Management (can be outdated or unavailable during release preview)

Add Bundled Products to Your Promotion's Scope

Marketing managers can design promotions that are targeted towards bundled products. A promotion's list of eligible products can now include bundled products along with simple products. Marketing managers can also view a summary of the products and categories that they select, and remove the ones that they don't need.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management where Global Promotions Management is enabled.

How: To enable marketing managers to select product bundles for their promotions, admins must turn on Product Catalog Management on the Global Promotions Management page in Setup. After bundled products are added, marketing managers add a promotion's bundled products from the Define Promotion Eligibility step in the Quick Promotion guided setup.



SEE ALSO:

Salesforce Help: Turn on Product Catalog Management for Bundled Product Promotions (can be outdated or unavailable during release preview)

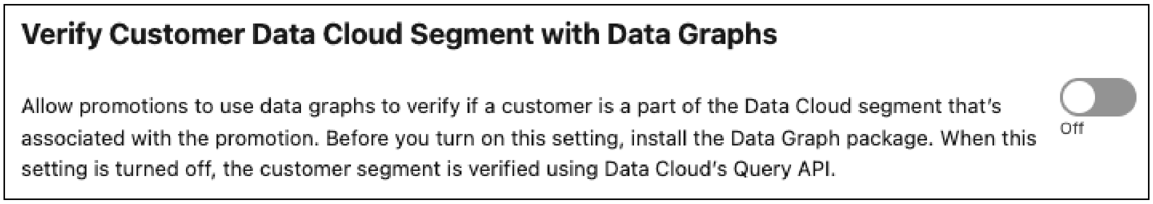
Salesforce Help: Define Promotion Eligibility (can be outdated or unavailable during release preview)

Quickly Check Customers' Segment-Based Promotion Eligibility

Improve the response times of the Eligible Promotions API by using prebuilt data graphs. By default, the Eligible Promotions API uses Data Cloud's Query API. You can now choose whether the Eligible Promotions API uses data graphs or the Query API to find out whether customers belong to a promotion's segment.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management and Data Cloud where Global Promotions Management is enabled.

How: After you deploy the standard data bundles for Data Cloud and configure customer segments in Data Cloud, install the Customer Engagement Data Graphs package. Next, turn on Verify Customer Data Cloud Segment with Data Graphs on the Global Promotions Management Settings page in Setup.



SEE ALSO:

Salesforce Help: Data Cloud Segment-Based Promotion Audience Segmentation (can be outdated or unavailable during release preview)

Easily Access Promotion Configurations

Enhance team collaboration by enabling review of promotion details by using the new View Promotion Configuration button on the promotion page. Grant view only permissions to users to view promotion configurations. This ensures that users can view promotion details safely, preventing unintended modifications.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management where Global Promotions Management is enabled.

Who: Users with the View Promotion permission set can use this button.

SEE ALSO:

Salesforce Help: Data Cloud Segment-Based Promotion Audience Segmentation (can be outdated or unavailable during release preview)

Simplify Promotion Targeting Through Actionable Lists

Loyalty program managers can decide the target audience for promotions by using actionable lists. Program managers can work with admins to configure the actionable list definition. After an actionable list is created, program managers can easily link a promotion with an actionable list.

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

How: On the Promotion Actionable Lists related list of a promotion, click **Add**. Next, select the actionable list and save your changes.

SEE ALSO:

Salesforce Help: Decide Eligible Promotion Audience using Actionable Segmentation (can be outdated or unavailable during release preview)

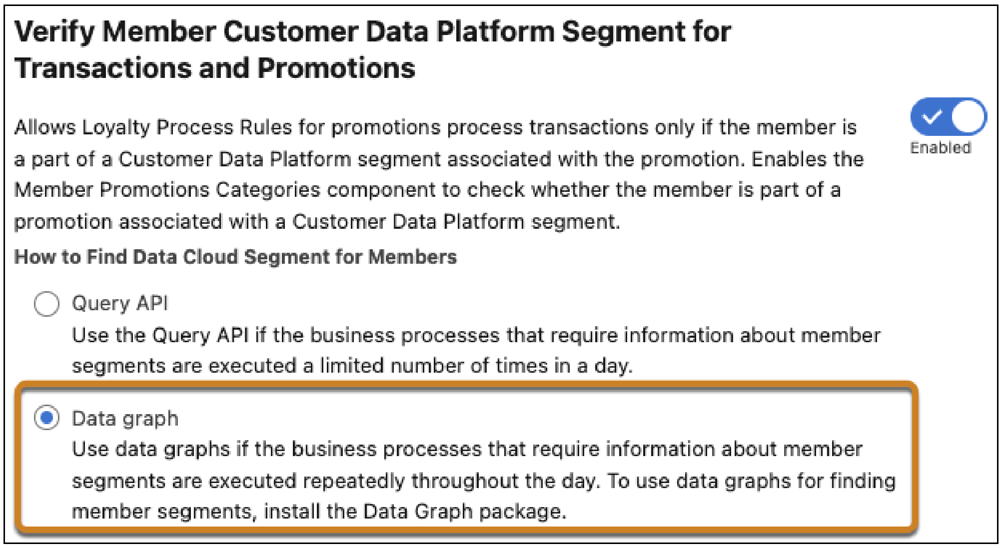
Salesforce Help: Creating Actionable Lists by Using Actionable Segmentation (can be outdated or unavailable during release preview)

Find Members' Data Cloud Segments Faster with Data Graphs

Save time by using prebuilt data graphs to find out which Data Cloud segments loyalty program members belong to. Earlier, you could only use Data Cloud's Query API, but now you can choose between data graphs and the Query API to find a member's segments.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management and Data Cloud.

How: After you install Loyalty Management's standard data bundles and set up your loyalty program-specific segments, install the Customer Engagement Data Graphs package. Next, turn on Verify Member Data Cloud Segment for Transactions and Promotions on the Loyalty Management Settings page in Setup and select Data graph.



SEE ALSO:

Salesforce Help: Verify Member’s Data Cloud Segment When Processing Transactions and Checking Promotion Eligibility (can be outdated or unavailable during release preview)

Easily Find Eligible Promotions for Corporate Members

Service reps can now view the list of promotions that are eligible for corporate members on the Promotion Eligible component. When loyalty program managers test a loyalty program's processes and rules, they can simulate transaction journals that belong to corporate members and verify whether promotion-based rules are eligible for the transactions.

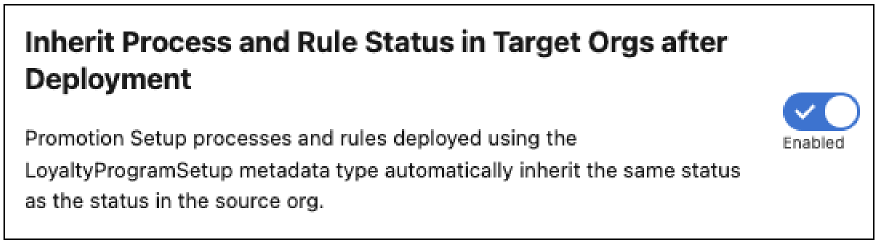
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management.

Maintain the Process and Rules Status During Deployment

Admins can now deploy processes and rules of a loyalty program to target orgs in the same status as the source org, maintaining uniformity during deployments. Earlier, the LoyaltyProgramSetup metadata type deployed rules as inactive.

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

How: In Setup, find and select **Loyalty Management Settings**. Turn on Inherit Process and Rule Status in Target Orgs after Deployment.



SEE ALSO:

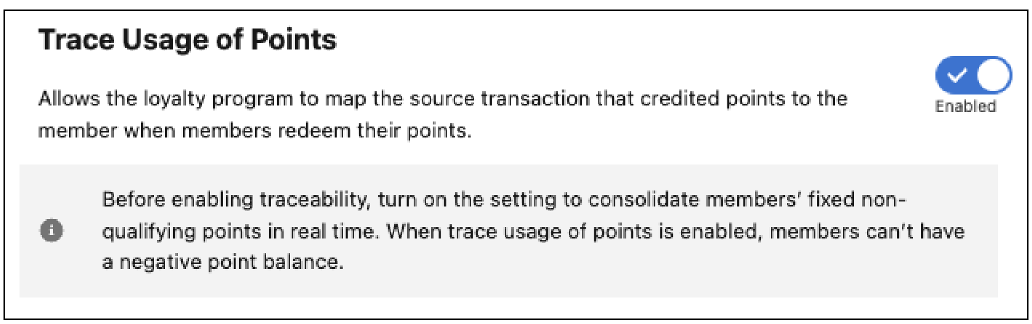
Salesforce Help: Enable Processes and Rules to Inherit Status in Target Orgs (can be outdated or unavailable during release preview)

Control Liability with Currency Subtypes

Loyalty program managers can trace the link between a redemption transaction and its source accrual transaction. Manage currencies more granularly by defining currency subtypes for fixed-type non-qualifying currencies. Restrict the accrual and redemption of specific currency subtypes for better control over liability. In addition, associate costs with currencies and currency subtypes to create accurate liability reports.

Where: This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions with Loyalty Management - Growth or Loyalty Management - Advanced.

How: On the Loyalty Management Setting page in Setup, turn on Trace Usage of Points. After enabling the setting, loyalty program managers must also select **Allow Ledger Tracing** for fixed-type non-qualifying currencies associated with promotions. Create currency subtypes for non-qualifying currencies, and define a logic for how they're used at the time of redemption. Track the redemptions from the Traceability Loyalty Ledger list view, where every debit-type record has an associated credit-type record.



Vouchers

Reserve vouchers that customers want to use for an order. Add a sense of urgency to your promotions with time-based vouchers. Offer vouchers to contacts and easily provide customers access to their vouchers on Experience Cloud sites.

IN THIS SECTION:

Relieve Member Anxiety During Voucher Redemption

Reserve vouchers that members want to redeem during a purchase. When a member uses a voucher during checkout, move the voucher to the Reserved status. After the member's order is placed, move the voucher from the reserved to redeemed status. During reservation, you can add a reservation key for an added layer of security. The reservation key is used to move a voucher from reserved to redeemed when a cart converts to an order. For failed orders or abandoned carts, use the reservation key to reinstate a reserved voucher back to the Issued status.

Drive Customer Engagement and Boost Sales with Time-Based Vouchers

Brands can now offer time-based vouchers during peak shopping seasons and holidays to increase footfall and web traffic. Nudge customers to revisit abandoned carts and to complete in-progress orders with personalized time-based vouchers.

Make Vouchers a Key Element of Your Customer Engagement Strategy

Admins can use the Issue Voucher action in flows to design business processes that issue vouchers to contacts. Previously, vouchers were only available to members of your loyalty program. Admins can now set up automated processes that issue vouchers as a service recovery action or to reward engaged customers.

Automate Voucher Access for Customers

Instead of manually assigning loyalty program members access to their vouchers on your company's Experience Cloud site, admins can now create a sharing set that automatically provides site users access to their vouchers.

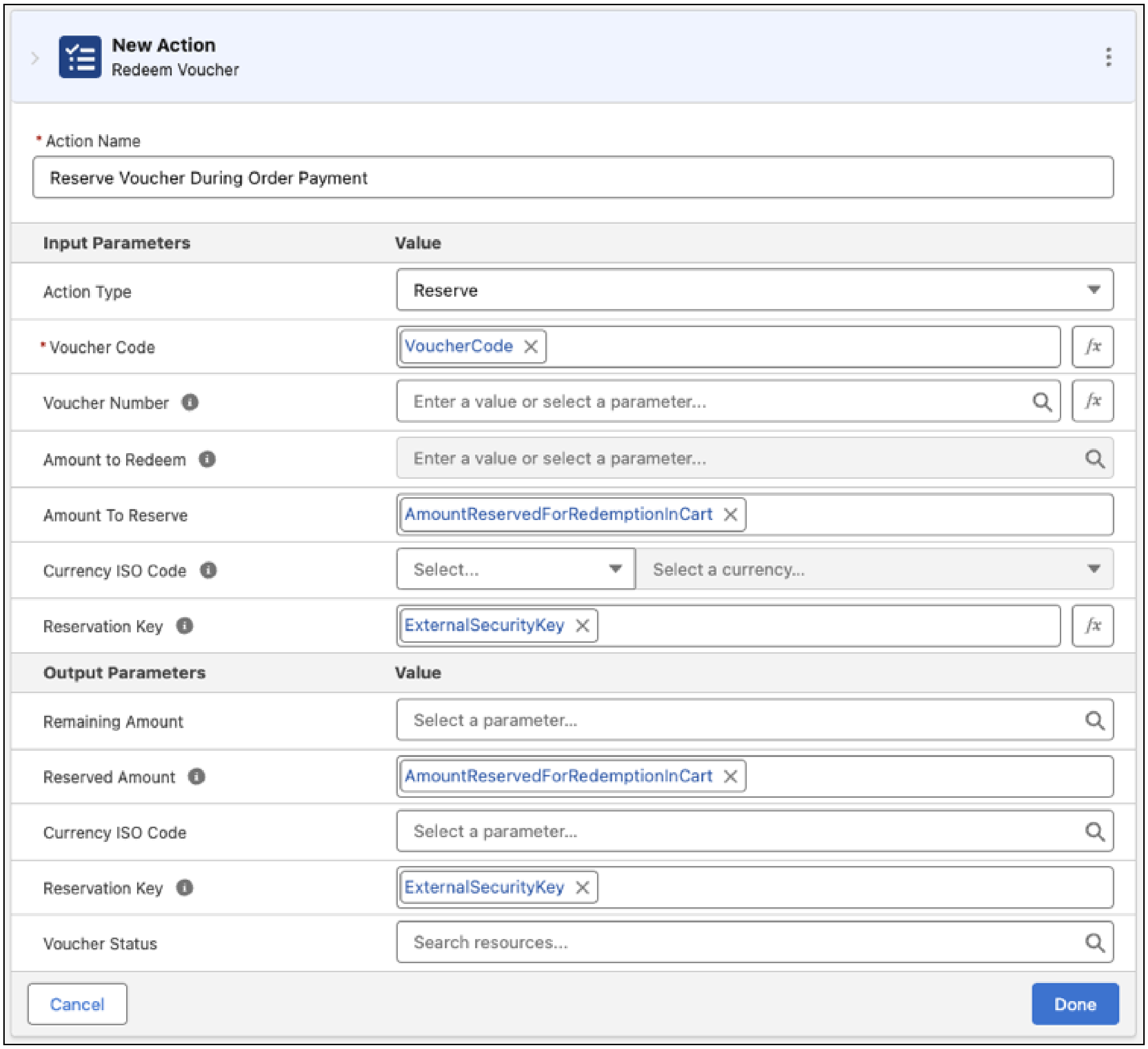
Relieve Member Anxiety During Voucher Redemption

Reserve vouchers that members want to redeem during a purchase. When a member uses a voucher during checkout, move the voucher to the Reserved status. After the member's order is placed, move the voucher from the reserved to redeemed status. During reservation, you can add a reservation key for an added layer of security. The reservation key is used to move a voucher from reserved to redeemed when a cart converts to an order. For failed orders or abandoned carts, use the reservation key to reinstate a reserved voucher back to the Issued status.

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

Why: To manage order cancellations and order returns more efficiently, reserve vouchers until orders are past their cancellation or return period. For partially redeemable vouchers, you can specify the amount that members have reserved for their current order. After an order is placed or fulfilled, partially redeemable vouchers are moved automatically to either the Issued status or the Redeemed status depending on whether the voucher has any value remaining.

How: Automate the process of reserving vouchers with the Redeem Voucher Connect API or the Redeem Voucher action in Promotion Setup.



SEE ALSO:

Salesforce Help: Ways to Reserve and Redeem Vouchers (can be outdated or unavailable during release preview)

Drive Customer Engagement and Boost Sales with Time-Based Vouchers

Brands can now offer time-based vouchers during peak shopping seasons and holidays to increase footfall and web traffic. Nudge customers to revisit abandoned carts and to complete in-progress orders with personalized time-based vouchers.

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

How: On a voucher definition, select **Time-Based Voucher Period**. For voucher definitions with a fixed expiration date, enter the expiration date and time. And for voucher definitions that have period-based expiration, enter the number of minutes after which vouchers expire.

SEE ALSO:

Salesforce Help: Add Your Company's Voucher Definitions (can be outdated or unavailable during release preview)

Make Vouchers a Key Element of Your Customer Engagement Strategy

Admins can use the Issue Voucher action in flows to design business processes that issue vouchers to contacts. Previously, vouchers were only available to members of your loyalty program. Admins can now set up automated processes that issue vouchers as a service recovery action or to reward engaged customers.

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

SEE ALSO:

Salesforce Help: Issue Vouchers for Eligible Customer and Member Activities with Flow Builder (can be outdated or unavailable during release preview)

Automate Voucher Access for Customers

Instead of manually assigning loyalty program members access to their vouchers on your company's Experience Cloud site, admins can now create a sharing set that automatically provides site users access to their vouchers.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management and Data Cloud.

How: From Setup, in the Quick Find box, enter `Digital Expereinces`, and select **Settings**. In the Sharing Sets section, click **New**. Decide which profiles get access to vouchers and move the Voucher object to the Selected Objects list. Save the sharing set.

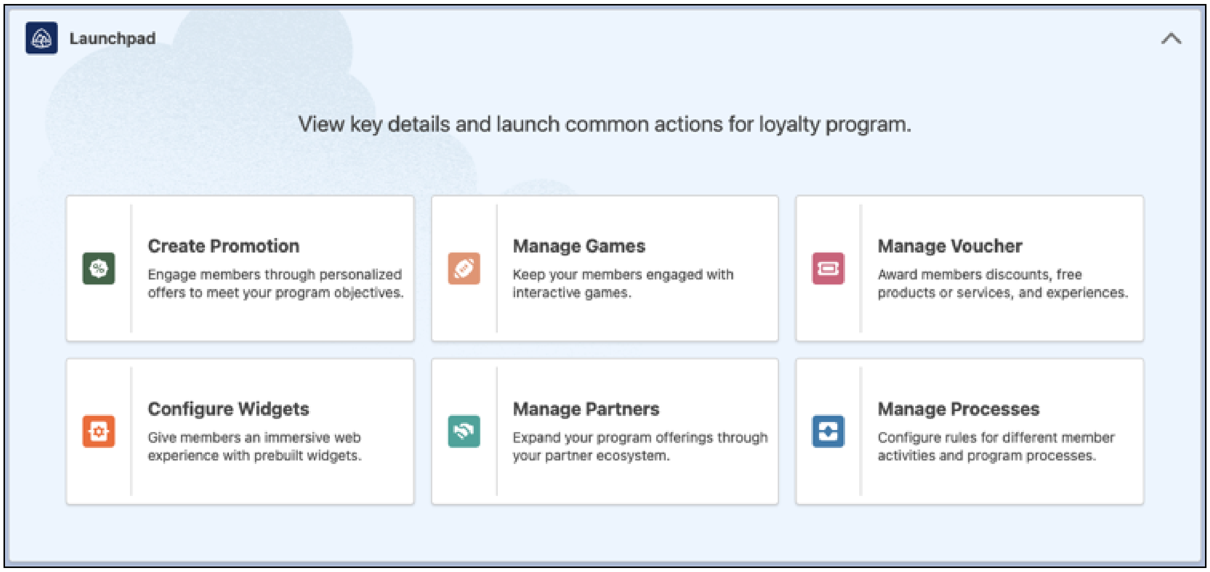
SEE ALSO:

Salesforce Help: Provide Members Access to Vouchers on Your Company's Site (can be outdated or unavailable during release preview)

Make the Most of the Revamped Loyalty Program Home Page

The loyalty program home page is now reorganized to be more informative. View a short summary of the program at one glance. Program managers can manage their day-to-day activities such as creating promotions, configuring widgets, and managing games, vouchers, partners, and processes with a single click.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available.



New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

Add subtypes for fixed-model non-qualifying currencies

Use the new LoyaltyPgmCurrencySubtype object.

Track how debit ledgers consume points from credit ledgers for member redemptions and accrual cancellations

Use the new LoyaltyLedgerTraceability object.

Decide a promotion's target audience with actionable lists

Use the new PromotionActionableList object.

Indicate whether a fixed-model non-qualifying currency supports tracing how members are redeeming points accrued for the currency

Use the new `DoesAllowLedgerTracing` field on the LoyaltyProgramCurrency object.

View the loyalty program currency subtype associated with a loyalty ledger

Use the new `LoyaltyPgmCrcySubtypeId` field on the LoyaltyLedger object.

Decide the color of a loyalty program tier

Use the new `Color` field on the LoyaltyTier object.

Select your promotion's rule library

Use the new `RuleLibraryId` field on the Promotion object.

Create voucher definitions that issue vouchers that expire at a specific time

Use the new `HasTimeBasedVoucherPeriod`, `EffectiveDateTime`, and `ExpirationDateTime` fields on the VoucherDefinition object.

Specify the date and time between which members can redeem vouchers

Use the new `EffectiveDateTime` and `ExpirationDateTime` fields on the Voucher object.

Reserve vouchers that members want to redeem for a transaction

Use the new `ReservedDateTime` and `ReservedValue` fields on the Voucher object.

Redeem reserved vouchers after members complete their transaction

Use the new `ReservationKey` field on the Voucher object.

Issue vouchers to accounts

Use the new `AccountId` field on the Voucher 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

Trace how members redeem their fixed-model non-qualifying points

Use the `enablePointsLifecycleTracking` field on the IndustriesLoyaltySettings metadata type.

Decide whether you want to find out the Data Cloud segments that members belong to using data graphs

Use the `enableSegmentQueryByDataGraph` field on the IndustriesLoyaltySettings metadata type.

Decide whether Promotion Setup processes and rules are deployed in target orgs in the same status as the source org

Use the `enablePromSetupProcRuleStatusInheritDplymt` field on the IndustriesLoyaltySettings metadata type.

Turn on Product Catalog Management for bundle and product attribute-based promotions

Use the `enableGlobalPromotionsProductCatalogManagement` field on the IndustriesUnifiedPromotionsSettings metadata type.

SEE ALSO:

Loyalty Management Developer Guide: IndustriesLoyaltySettings (can be outdated or unavailable during release preview)

Loyalty Management Developer Guide: IndustriesUnifiedPromotionsSettings (can be outdated or unavailable during release preview)

Changed Invocable Actions

New fields are added to the following invocable actions.

Debit Points

The input payload for this invocable action has one new field:

`LoyaltyProgramCurrencySubtypeName`—The name of the loyalty program currency subtype used to debit points from the member.

Credit Points

The input payload for this invocable action has one new field:

`LoyaltyProgramCurrencySubtypeName`—The name of the loyalty program currency subtype used to credit points from the member.

New and Changed Connect REST APIs

Here's a list of new and changed connect REST APIs.

Changed Connect REST APIs

Eligible Promotions

A new query parameter is added to send requests to Eligible Promotions:

`ruleLibraryApiName`—This field requires the API Name of an active Rule Library with the Usage Type as Global Promotion Management.

Member Vouchers

The response body includes three new fields:

`effectiveDateTime`—The date and time from when the voucher is available for redemption.

`expirationDateTime`—The date and time when the voucher expires and is no longer available for redemption.

`hasTimeBasedVoucher`—Indicates whether the voucher has an effective date and time (true) or not (false).

Redeem Vouchers

The input payload includes three new fields:

`action`—Specify whether to redeem, reserve, or reinstate the voucher.

`reservedValue`—Specify the amount reserved for partially redeemable vouchers.

`reservationKey`—Specify the key used to redeem or reinstate a reserved voucher.

The response body includes three new fields:

`status`—Specifies the status of the voucher.

`reservationKey`—Specifies the key used to redeem or reinstate a reserved voucher.

`reservedValue`—Specifies the amount reserved for partially redeemable vouchers.

New Connect REST APIs

Promotion Configuration

View configuration of a promotion, including its definition, eligibility criteria, rules, limits, and related rule library version.

Clone Promotion

Clone an existing promotion along with its associated records

Manufacturing Cloud

Modernize your commercial operations, manage the entire lifecycle of asset service operations, and boost your team's productivity with Manufacturing Cloud. Drive more run-rate business by making the most of the enhancements to sales agreements. Speed up the sales process by quickly converting quotes to sales agreements. Request the return of parts from dealers by using the existing warranty claims. Elevate traceability of inventory and easily transfer inventory across locations. Track recalls, repairs, upgrades, and other services performed for impacted assets in product service campaigns.

IN THIS SECTION:

Easily Create Part Return Requests from a Warranty Claim or Work Order

The warranty claim process with the dealer is enhanced to facilitate seamless return of damaged parts. You can request the dealer to return the damaged part if you want to inspect it to determine the cause of failure. The claim adjudicator can create a part return request from an existing claim or a work order, specifying the destination location.

Close Deals Quickly by Automating Quote and Sales Agreement Conversion

Key account managers can use simple workflows to easily convert sales agreements to quotes and quotes to sales agreements. Quote and sales agreement conversions helps your sales teams deliver a seamless sales experience, speed up the sales cycle, and prevent errors. After a sales agreement or a quote is converted, its products are added to the converted records.

Search For and Transfer Products and Parts Across Inventory Locations

Maintain optimal inventory levels, fulfill product and part demand, and transform your inventory processes by using Inventory Search and Transfer. Design a search experience to help inventory managers search for and track inventory stock at warehouses, distribution centers, manufacturing plants, and other locations. Unify inventory data that's spread across multiple objects in a single object, Product Inventory Searchable Field, that acts as the basis of the search experience. Give inventory managers accurate, relevant search results by using a new data processing engine definition to keep the searchable inventory data up to date. Transfer serialized and non-serialized products between locations based on customer demand and stock level.

Swiftly Generate Work Orders for Product Service Campaigns

Service managers can efficiently plan and track services for impacted assets in a product service campaign. With a single click, they can generate work orders for selected or all product service campaign items related to a product service campaign to track the delivery of services, such as asset upgrade and recall. They can filter and identify the work orders generated for product service campaign items with minimum hassle.

Consider Decimal Values When Calculating Forecasts

Accurately calculate the forecasted quantities with the new decimal quantity fields on Sales Agreements. To calculate product quantities for Advanced Account Forecasting, a new node is added to the Data Processing Engine (DPE) templates. This new node is mapped to the fields that support decimal values for Sales Agreements and it automatically identifies integer or decimal quantity fields for forecast calculations.

Get Improved Mobile and Reports Support for Manufacturing Cloud Objects

Standard Salesforce reports and custom report types now support all Manufacturing Cloud objects. Admins can easily enable all standard objects in Manufacturing Cloud in the Salesforce Mobile App. For example, if you enable the Sales Agreement object in the Manufacturing org on your mobile device, you can create customized reports and access the object on your mobile.

New Connect APIs

Manufacturing Cloud includes this new Connect API.

New and Enhanced Common Features for Manufacturing Cloud

Manufacturing Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Manufacturing Cloud based on your business needs.

- Action Launcher

  Service agents can now search for actions based on semantic search.

- Business Rules Engine

  Keep your business rules modular using context-aware subexpressions. Update business rules easily by saving a selected expression set version as a new expression set or as a new version within the existing expression set. Test expression sets comprehensively with all available context mappings. Migrate expression set versions efficiently using ranks. Leverage string functions in your expression set calculation steps to streamline and simplify implementation of complex business logic. Create decision tables effortlessly using the unified experience. Use a CSV to create a decision table to save time and effort. Determine the complexity of your decision table using the decision table type options. Use source filters to narrow down the source object records if the source object has a large number of rows. Use Salesforce objects with large volumes of data such as Account, Lead, and so on in decision tables.

- 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.

- CSV Data Management

  Use the basic CSV import feature to upload a CSV file with a variety of delimiter options, eliminating the need to convert the CSV into comma-delimited format. Using the basic CSV import feature, import CSV data into a single Salesforce object. Use the advanced CSV import feature to perform complex data transformations, and efficiently import large amounts of CSV data into one or more Salesforce objects in a single import process.

- Data Processing Engine

  Upload large amounts of external data into your Data Processing Engine definitions using CSV files. Write to related objects in writeback nodes in Data Cloud runtime. Automatically save recipes and output records by running your definitions in debug mode.

- Engagement

  The Engagement Interaction object now supports record types that determine the business processes, page layouts, and picklist values that users have access to. Use record types to create customized user experiences for different business processes.

- List Builder for Data Cloud Segment

  Synchronize actionable lists with Data Cloud segments more reliably to keep actionable lists up to date.

- Service Process Studio

  Service Process Studio now supports screen flow request forms in service process definitions

Sales Agreement

Manage your run-rate business with greater control, ease, and granularity. Prevent revenue leakage by entering quantities with decimal values in sales agreements. Choose to manually specify or automatically populate the planned quantities of products across various schedules in sales agreements. Make it easier to identify products in the sales agreement table by specifying product display names. Get more detailed instructions on the Sales Agreement setup page when you set up Sales Agreements.

IN THIS SECTION:

Choose to Specify or Autopopulate Planned Quantities for Sales Agreement Products

Key account managers can now choose to either specify the planned quantities of products across various schedules or get them automatically distributed. Previously, the initial planned quantities for each product in a sales agreement were automatically distributed across all schedules by default. To modify the values, key account managers had to manually replace the prepopulated values for one or more schedules. Editing the quantities for multiple schedules can be tedious, especially if sales agreements have numerous products. Now, if key account managers choose to directly specify the planned quantities of products, they don't need to modify prepopulated values for multiple schedules across multiple products. They can manually specify the planned quantities for different schedules when they add products to a sales agreement or can configure automated processes that populate the values based on business rules.

Make Products Easily Recognizable in the Sales Agreement Table

Key account managers can now specify product display names for the sales agreement table that are different from the default names from product records. They can make the display names for products more recognizable, to better suit the context of the agreements, and tailored to customer preferences.

Easily Identify Schedules On the Sales Agreement Table

The column header names for sales agreement product schedules are now more intuitive for users. Previously, the column headers for weekly, monthly, quarterly, and yearly schedules didn't specify the start or end date of a specific schedule. This also led to duplicate column header names, especially when sales agreements started after the 25th of a month. Now, users can easily identify the periods in the sales agreement table, and there are no discrepancies in the data.

Get More Guidance for Setting Up Sales Agreements

Efficiently set up and configure Sales Agreements by using the more intuitive user interface text on the Sales Agreements page in Setup. Get simplified descriptions for each setting and easily go to the relevant Salesforce Help articles for detailed instructions.

Minimize Revenue Leakage with Decimal Precision in Quantity Metrics

Key account managers can now enter quantities with decimal values for products in sales agreements. Previously, manufacturers could only use integer values, resulting in misrepresentation of data and revenue leakage, especially for process manufacturers. Now, with decimal support for quantity metrics, data is accurately represented.

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 Agreement Psl permission set.

How: For orgs with existing Sales Agreement implementations, on the Sales Agreement Product page layout and the Sales Agreement Product multi-line layout, replace the existing metric fields with the new decimal-supporting metric fields, such as Initial Planned Quantity Value and Total Planned Quantity Value. Also, add the Quantity in Decimals field to the Sales Agreement Product page layout. On the Sales Agreement Product Schedule page layout, replace the existing metric fields with the new decimal-supporting metric fields, such as Planned Quantity Value and Actual Quantity Value.

On the Sales Agreements page in Setup, specify the default decimal scale for quantity metrics for all sales agreements. To let key account managers override the default decimal scale for individual sales agreements, add the Decimal Scale field to the Sales Agreement page layout.

To specify quantities with decimals for specific products in a sales agreement, when key account managers add the products to the sales agreement, they must select **Quantity in Decimals** for each product and specify the values in the new decimal-supporting metric fields.

Choose to Specify or Autopopulate Planned Quantities for Sales Agreement Products

Key account managers can now choose to either specify the planned quantities of products across various schedules or get them automatically distributed. Previously, the initial planned quantities for each product in a sales agreement were automatically distributed across all schedules by default. To modify the values, key account managers had to manually replace the prepopulated values for one or more schedules. Editing the quantities for multiple schedules can be tedious, especially if sales agreements have numerous products. Now, if key account managers choose to directly specify the planned quantities of products, they don't need to modify prepopulated values for multiple schedules across multiple products. They can manually specify the planned quantities for different schedules when they add products to a sales agreement or can configure automated processes that populate the values based on business rules.

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 Agreement Psl permission set.

How: For orgs with existing Sales Agreement implementations, admins must add the User Specifies Planned Quantity field to a Sales Agreement page layout. Key account managers can choose to specify or autopopulate planned quantities only for new sales agreements. Existing sales agreements aren't impacted by this feature.

To specify the planned quantity for products in a sales agreement, when you create the sales agreement, they must select **User Specifies Planned Quantity**. To distribute the initial planned quantity across all schedules automatically, deselect the checkbox.

Make Products Easily Recognizable in the Sales Agreement Table

Key account managers can now specify product display names for the sales agreement table that are different from the default names from product records. They can make the display names for products more recognizable, to better suit the context of the agreements, and tailored to customer preferences.

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 Agreement Psl permission set.

How: For orgs with existing Sales Agreement implementations, admins must add the Display Name field to a Sales Agreement Product page layout and a Sales Agreement Product multi-line layout.

To show a product's display name in the sales agreement table, on the sales agreement product record page, enter a name in the Display Name field. To show the product's default name, leave the field blank.

Easily Identify Schedules On the Sales Agreement Table

The column header names for sales agreement product schedules are now more intuitive for users. Previously, the column headers for weekly, monthly, quarterly, and yearly schedules didn't specify the start or end date of a specific schedule. This also led to duplicate column header names, especially when sales agreements started after the 25th of a month. Now, users can easily identify the periods in the sales agreement table, and there are no discrepancies in the data.

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

How: Open a sales agreement record and review these changes to the schedule names:

- For monthly schedules, the column header name follows the format of Mar 01, 2024.
- For quarterly schedules, the column header name follows the format of Jan 31, 2024 – Apr 29, 2024.
- For yearly schedules, the column header name follows the format of 2023-2024.
- For weekly schedules, the column header name follows the format of Mar 01, 2024.

Get More Guidance for Setting Up Sales Agreements

Efficiently set up and configure Sales Agreements by using the more intuitive user interface text on the Sales Agreements page in Setup. Get simplified descriptions for each setting and easily go to the relevant Salesforce Help articles for detailed instructions.

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

Why: The user interface text for these settings and their descriptions are updated to help you easily understand what each setting does.

Old User Interface Text	Updated User Interface Text
Enable Sales Agreements	Sales Agreements Foundations
Renewal	Renewal Period Start
Actuals Calculation	Default Actuals Calculation Mode
Metrics Mapping	Field Mappings for Custom Metrics
Agreement Terms Metrics	Metric Groups

The descriptions for the Default Analytics Dashboard, Approval Process, and Email Notifications settings are also updated.

Easily Create Part Return Requests from a Warranty Claim or Work Order

The warranty claim process with the dealer is enhanced to facilitate seamless return of damaged parts. You can request the dealer to return the damaged part if you want to inspect it to determine the cause of failure. The claim adjudicator can create a part return request from an existing claim or a work order, specifying the destination location.

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 Warranty Lifecycle Management permission set.

How: From the App Launcher, find and select **Claims**. Open a warranty claim record from the list view, and click **New Part Return Request**. Field service technicians can request for return of parts when they visit the user location with the Salesforce Field Service mobile app or the desktop app.

Close Deals Quickly by Automating Quote and Sales Agreement Conversion

Key account managers can use simple workflows to easily convert sales agreements to quotes and quotes to sales agreements. Quote and sales agreement conversions helps your sales teams deliver a seamless sales experience, speed up the sales cycle, and prevent errors. After a sales agreement or a quote is converted, its products are added to the converted records.

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 Agreement Psl permission set.

Why: Key account managers typically create quotes to outline the terms of potential sales. After customers and partners approve the quotes, the key account managers create sales agreements based on the quotes to commit to sell products over a period of time. Manually creating sales agreements from quotes can be error-prone and time-consuming. Key account managers can now quickly create sales agreements from quotes through a simple workflow. If some manufacturers create quotes after they create sales agreements, they can also convert their sales agreements to quotes.

How: To convert a sales agreement to a quote, on a sales agreement record, in the quick action menu, click **Convert Sales Agreement to Quote**. Specify the required details, and save your changes.

To convert a quote to a sales agreement, on a quote record, in the quick action menu, click **Convert Quote to Sales Agreement**. Specify the required details, and save your changes.

Search For and Transfer Products and Parts Across Inventory Locations

Maintain optimal inventory levels, fulfill product and part demand, and transform your inventory processes by using Inventory Search and Transfer. Design a search experience to help inventory managers search for and track inventory stock at warehouses, distribution centers, manufacturing plants, and other locations. Unify inventory data that's spread across multiple objects in a single object, Product Inventory Searchable Field, that acts as the basis of the search experience. Give inventory managers accurate, relevant search results by using a new data processing engine definition to keep the searchable inventory data up to date. Transfer serialized and non-serialized products between locations based on customer demand and stock level.

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

Who: This feature is available to users with the Criteria-Based Search and Filter and Inventory Search and Transfer permission sets.

Swiftly Generate Work Orders for Product Service Campaigns

Service managers can efficiently plan and track services for impacted assets in a product service campaign. With a single click, they can generate work orders for selected or all product service campaign items related to a product service campaign to track the delivery of services, such as asset upgrade and recall. They can filter and identify the work orders generated for product service campaign items with minimum hassle.

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 Product Service Campaign permission set.

Consider Decimal Values When Calculating Forecasts

Accurately calculate the forecasted quantities with the new decimal quantity fields on Sales Agreements. To calculate product quantities for Advanced Account Forecasting, a new node is added to the Data Processing Engine (DPE) templates. This new node is mapped to the fields that support decimal values for Sales Agreements and it automatically identifies integer or decimal quantity fields for forecast calculations.

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 Advanced Account Forecast permission set.

How: Create a definition by using the updated Generate Account Forecast, Rollover Account Forecast, Recalculate Account Forecast, or Regenerate Account Forecast templates or modify your existing definitions based on the updated templates. To modify an existing definition, add the Compute Sales Agreement Quantity Based on Quantity Decimal Value Indicator.

Get Improved Mobile and Reports Support for Manufacturing Cloud Objects

Standard Salesforce reports and custom report types now support all Manufacturing Cloud objects. Admins can easily enable all standard objects in Manufacturing Cloud in the Salesforce Mobile App. For example, if you enable the Sales Agreement object in the Manufacturing org on your mobile device, you can create customized reports and access the object on your mobile.

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

How: You can create customized reports and mobile layouts in the Salesforce Mobile App.

New Connect APIs

Manufacturing Cloud includes this new Connect API.

Warranty To Supplier Claims

Warranty to Supplier Claims API clones the existing warranty claim and its hierarchy such as claim items, claim coverage, and claim coverage payment details.

Media Cloud

Use the Media Cloud application suite to manage subscribers and subscriptions, create and manage ad campaigns, and more, through community self-service interfaces or an agent console.

The Winter '25 release contains updates to the Advertising Sales Management business app.

IN THIS SECTION:

Advertising Sales Management

Advertising Sales Management users can create related media product bundles, customize the spot calendar for radio ad placements, and leverage Intelligent Document Reader for Request For Proposal (RFP) ingestion.

IN THIS SECTION:

Boost Ad Impact With Related Media Product Bundles

Help media planners curate and manage comprehensive advertising packages across media types to deliver integrated proposals to advertisers and agencies. Set up auto-add rules that associate product bundles of one media type (such as digital, TV, print, and radio) with product bundles of other media types. When you add a bundle for which the auto-add rules are set, the related bundles are added to the respective tabs in the media planning grid, without requiring you to leave the current media tab.

Where: This feature is available in Lightning Experience in all editions.

Customize the Spot Calendar's Style and Display

Implement customized styling of the spot calendar, and conditionalize the information shown, according to your business logic.

Where: This feature is available in Lightning Experience in all editions.

How: To use this feature, create:

- Apex Class: MediaAdSalesCustomRadioHandler
- Integration Procedure: BulkCheckAvailability

- Lightning Web Component: sfiAdsCustomRadioPaginationHandler

You must also update the sfiAdsRadioParentGrid Flexcard.

Net Zero Cloud

Improve the efficiency, credibility, and transparency of disclosure responses with new features and enhancements to Net Zero Cloud and Disclosure and Compliance Hub. Use the Information Library to collect and organize environmental, social, and governance (ESG) snippets into a central, unified source. Use Einstein generative AI to automatically generate draft responses from disclosure documents and save them in a Microsoft 365 Word document. Boost efficiency by using Einstein to revise disclosure responses by summarizing, elaborating, or rephrasing them for accuracy. Maintain your questions and their responses year over year by saving them from the Microsoft 365 Word document to the Assessment Framework.

IN THIS SECTION:

Allowlist the Domains that You Trust for Disclosures

To safeguard your users and your network, allow the Salesforce Disclosure and Compliance Hub Connector app to show your disclosures in an inline frame to make requests only to the external websites that you trust. Add the domains that you trust for your disclosures to an allowlist in Session Settings.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Growth license and the Disclosure and Compliance Hub add-on licenses.

SEE ALSO:

Salesforce Help: Allowlist External Domains To Show Disclosures in an Inline Frame (can be outdated or unavailable during release preview)

Collect and Manage ESG Content in Centralized Information Library for Use Across ESG Disclosures

In the Information Library, manage environmental, social and governance (ESG) information as snippets. Create and edit the content of your snippets, link them directly to data in Salesforce by using Data Links, and organize them into topics. Get approval from stakeholders on your ESG snippets and collaborate on your reports with the centralized content.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Growth license, Disclosure and Compliance Hub add-on license, and Materiality Assessment add-on license.

Who: To edit Microsoft Word documents, you need a Microsoft 365 license.

How: From Setup, find and select **Disclosure and Compliance Hub Settings**. Turn on Information Library. Then from Setup, find and select **Net Zero Settings**. Turn on Manage Materiality Assessments.

SEE ALSO:

Salesforce Help: Author Disclosures by Using Microsoft 365 Word (can be outdated or unavailable during release preview)

Salesforce Help: Configure Information Library (can be outdated or unavailable during release preview)

Salesforce Help: Manage Snippets in Information Library (can be outdated or unavailable during release preview)

Salesforce Help: Link Report Content With Source to Create Latest and Auditable Reports (can be outdated or unavailable during release preview)

Einstein for Disclosure and Compliance Hub

Check out the latest Einstein for Disclosure and Compliance Hub features to automatically generate the first draft of responses for ESG disclosures and revise disclosure responses by summarizing, elaborating, or rephrasing them for accuracy.

IN THIS SECTION:

Revise Information Library Snippets via Einstein Generative AI

Summarize, elaborate, or rephrase Information Library snippets with Einstein generative AI. Revising the snippet content not only improves process efficiency but also shows your company's commitment to environmental, social, and governance practices. Alleviate the burden of rephrasing and editing disclosures with the Einstein for Information Library feature. This feature enhances the disclosure authoring experience and results in an overall improvement in the quality of the snippets.

Generate First Draft of ESG Disclosure Automatically (Beta)

Enhance the environmental, social, and governance (ESG) reporting workflow by using Einstein generative AI in Disclosure and Compliance Hub to automatically generate the first draft of responses for ESG disclosures in a Microsoft 365 Word document. The Einstein to Generate Draft Response Document feature analyzes your data, such as previous years' reports, policy documents, and Information Library, to automatically generate responses that are accurate and consistent. ESG reporting managers can review and modify these automatically generated responses as needed.

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

Note: Einstein to Generate Draft Response Document 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 Microsoft Word documents, you need a Microsoft 365 license.

To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

How: From the Microsoft store, install the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in.

In Salesforce, from Setup, find and select **Disclosure and Compliance Hub Settings**. Turn on Use Disclosure and Compliance Hub Plugin for Microsoft 365, Einstein for Disclosure Authoring, and Einstein to Generate Draft Response Document.

SEE ALSO:

Salesforce Help: Enable the Disclosure and Compliance Hub

Salesforce Help: Author Disclosures by Using Microsoft 365 Word

Salesforce Help: Manage First Draft of ESG Disclosure (Beta)(can be outdated or unavailable during release preview)

Revise Disclosure Responses Accurately with Enhanced Efficiency

Summarize, elaborate, or rephrase disclosure responses by using Einstein generative AI. Revising the disclosure responses not only improves process efficiency but also shows your company's commitment to environmental, social, and governance practices. Enhance the authoring experience by alleviating the burden of manual rephrasing and editing, which saves time and results in an overall improvement in the quality of the disclosure report.

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

Who: To edit Microsoft Word documents, you need a Microsoft 365 license.

To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

How: From the Microsoft store, install the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in.

In Salesforce, from Setup, find and select **Disclosure and Compliance Hub Settings**. Turn on Use Disclosure and Compliance Hub Plugin for Microsoft 365, Einstein for Disclosure Authoring, and Einstein for Response Enrichment.

SEE ALSO:

Salesforce Help: Enable the Disclosure and Compliance Hub

Salesforce Help: Create a Custom ESG Revise Response Prompt Template (can be outdated or unavailable during release preview)

Salesforce Help: Revise Disclosure Responses During Authoring with Einstein Generative AI (can be outdated or unavailable during release preview)

Revise Information Library Snippets via Einstein Generative AI

Summarize, elaborate, or rephrase Information Library snippets with Einstein generative AI. Revising the snippet content not only improves process efficiency but also shows your company's commitment to environmental, social, and governance practices. Alleviate the burden of rephrasing and editing disclosures with the Einstein for Information Library feature. This feature enhances the disclosure authoring experience and results in an overall improvement in the quality of the snippets.

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

How: From Setup, find and select **Disclosure and Compliance Hub Settings**. Turn on Information Library and Einstein for Information Library.

SEE ALSO:

Salesforce Help: Enable the Disclosure and Compliance Hub

Salesforce Help: Revise Snippets with Einstein Generative AI(can be outdated or unavailable during release preview)

Save Disclosure Responses to Assessment Framework

Maintain assessment question responses year over year by saving them from Microsoft 365 Word documents to the Assessment Framework. By doing so, users can store assessment responses for historical reference.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Growth license and the Disclosure and Compliance Hub add-on license.

Who: To edit Microsoft Word documents, you need a Microsoft 365 license.

How: From the Microsoft store, install the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in.

In Salesforce, from Setup, find and select **Disclosure and Compliance Hub Settings**. Turn on Use Disclosure and Compliance Hub Plugin for Microsoft 365.

SEE ALSO:

Salesforce Help: Enable the Disclosure and Compliance Hub

Salesforce Help: Save Disclosure Responses to Assessment Framework(can be outdated or unavailable during release preview)

Synchronize Report Content to Create Latest and Auditable Reports

Create accurate and auditable environmental, social, and governance (ESG) reports in Microsoft 365 Word documents. Link data in the report with its source by using snippets and data links. You can synchronize the content linked in the Microsoft Word document with Salesforce records, ensuring that the latest content is available to users. When creating reports, use data links to connect content directly to Salesforce fields and snippets to link document content to the Information Library.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Growth license and the Disclosure and Compliance Hub add-on license.

Who: To edit Microsoft Word documents, you need a Microsoft 365 license.

How: From the Microsoft store, install the Salesforce Disclosure and Compliance Hub for Microsoft 365 Word add-in.

In Salesforce, from Setup, find and select **Disclosure and Compliance Hub Settings**. Turn on Use Disclosure and Compliance Hub Plugin for Microsoft 365 and Information Library. Then find and select **Net Zero Settings**. Turn on Manage Materiality Assessments.

SEE ALSO:

Salesforce Help: Enable the Disclosure and Compliance Hub

Salesforce Help: Enable Net Zero Cloud

Salesforce Help: Link Report Content With Source to Create Latest and Auditable Reports(can be outdated or unavailable during release preview)

Enhance Scope 3 Emissions Calculations with Einstein Generative AI (Beta)

Identify and associate the procurement emissions factor sets with Scope 3 GHG categories with Einstein generative AI. Then match the procurement summary data to emissions factors.

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

Note: Einstein for Carbon Accounting and Einstein for Scope 3 Procurement Hub 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.

Why: These improvements use generative AI to help with GHG Protocol compliance. To suggest the GHG categories for the emissions factor set items, generative AI uses your existing data for grounding.

- Review multiple emissions sets and match the procurement emissions factor sets with the Scope 3 GHG categories. This association of GHG categories helps with emissions categorization, which aligns emissions categorization based on the GHG Protocol.
- Match procurement summary data to emissions factors, which helps to convert spent amounts into scope 3 emissions and in categorizing the emissions into GHG categories.

How: From Setup, find and select **Net Zero Settings**. Turn on Einstein for Net Zero Cloud, Einstein for Carbon Accounting, and Einstein for Scope 3 Procurement Hub.

SEE ALSO:

Salesforce Help: Enable Net Zero Cloud Features

Salesforce Help: Match Procurement Emissions Factor Sets to GHG Scope 3 Categories

Salesforce Help: Match Procurement Data to Emission Factors

New and Changed Objects for Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

Changed Objects

Generate the draft response document using Einstein Search for the disclosure
Use the new `ShouldGenDrftRespDocFrEinstein` field on the Disclosure object.

Store information about your snippets in Information Library
Use the new `ReportingYear`, `BusinessUnit`, `Country`, `Region`, `Organization`, `ValidStartDate`, `ValidEndDate`, and `DataSource` fields on the DocumentClause object.

Store information to identify the materiality topics
Use the new `Identifier`, `Name`, `Category`, `Description`, `ParentTopic`, and `OrderSequence` fields on the MaterialityTopic object.

New Object

Store information about the content source
Use the new ContentLink object.

Store information about the data source that's referenced by an object
Use the new ContentSource object.

Store information about the topic and a document clause set
Use the new MaterialityTopicDocClauseSet object.

Store information about two related topics
Use the new MaterialityTopicReference object.

Store information about the external document that's used to collaborate on Information Library content
Use the new InfoLibraryExternalDocument object.

SEE ALSO:

Net Zero Cloud Developer Guide

Public Sector Solutions

Optimize your recruitment and hiring process by using tools and workflows that are designed for public sector organizations. Enable recruiters to drive a faster and coordinated hiring effort, simplify the evaluation process for interviewers, and enhance the overall experience for candidates. Help investigators and caseworkers quickly understand cases and manage critical case data with a unified interface and guided flows. Improve caseworker productivity and efficiency with data-driven insights.

IN THIS SECTION:

Investigative Case Management

Manage your investigative process from case creation to its resolution from the Investigative Case Management console app. Provide investigators and caseworkers a single interface to quickly understand a case and manage critical case data that includes related complaints, case participants, evidence, and violation details. Use data-driven insights to improve caseworker productivity and efficiency.

Speed Up Referral Authorization with Out-of-the-Box Flow

Quickly configure referral authorization with a readily-available Salesforce flow template. Previously, you downloaded a flow from the Public Sector Solutions process library and then deployed it.

Effortlessly Build Omnistudio Components

Use the new intuitive designers for Flexcard, Omniscript, Integration Procedure, and Omnistudio Data Mappers in the standard runtime. Easily view your Omnistudio components from their new list view pages, and open them in the new designers. All the existing elements and configurations from the designer on a managed package are available in the new designers.

Use Omniscripts in Multiple Languages

Support global audiences by showing Omniscripts in the language that's configured in your Salesforce org or Experience Cloud site. Previously, these Omniscripts supported only English. If you use a customized version of any of these Omniscripts, make sure that you customize the corresponding Omniscripts in the new language before using them.

New and Changed Objects in Public Sector Solutions

Do more with these new and changed objects.

New and Enhanced Common Features for Public Sector Solutions

Public Sector Solutions includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Public Sector Solutions based on your business needs.

- Accounting Subledger

  Significantly reduce Accounting Subledger's processing time by bypassing reversal logic and current value field mapping.

- Action Launcher

  Contact center agents can now search for actions based on semantic search.

- Business Rules Engine

  Keep your business rules modular using context-aware subexpressions. Update business rules easily by saving a selected expression set version as a new expression set or as a new version within the existing expression set. Test expression sets comprehensively with all available context mappings. Migrate expression set versions efficiently using ranks. Leverage string functions in your expression set calculation steps to streamline and simplify implementation of complex business logic. Create decision tables effortlessly using the unified experience. Use a CSV to create a decision table to save time and effort. Determine the complexity of your decision table using the decision table type options. Use source filters to narrow down the source object records if the source object has a large number of rows. Use Salesforce objects with large volumes of data such as Account, Lead, and so on in decision tables.

- Data Processing Engine

  Upload large amounts of external data into your Data Processing Engine definitions by using CSV files. Write to related objects in writeback nodes in Data Cloud runtime. Automatically save recipes and output records by running your definitions in debug mode.

- Engagement

  The Engagement Interaction object now supports record types that determine the business processes, page layouts, and picklist values that users have access to. Use record types to create customized user experiences for different business processes.

- Grantmaking

By using an enhanced, easy-to-implement form framework, users can create, publish, and review progress reports on grant applications. Grants managers can review all submitted applications from a single screen.

- Omnistudio

  Omnistudio Standard offers new designers and list views for all components. It also offers customization of Omniscript elements.

- Service Process Studio

  Service Process Studio now supports screen flow request forms in service process definitions.

Talent Recruitment Management

Help your recruiters manage talent recruitment and hiring activities from position management to employment offer extension. Give job seekers an engaging site to discover career opportunities and a streamlined application process. Make hiring decisions faster by giving hiring managers and interviewers the tools to coordinate and evaluate applicants.

IN THIS SECTION:

SEE ALSO:

Salesforce Help: Talent Recruitment Management (can be outdated or unavailable during release preview)

Streamline How You Manage Positions, Requisitions, and Job Postings

Help HR staff create and maintain your organizational structure by using the Talent Recruitment Management data model. They can define and group occupations, classify positions and pay grades, and add job positions based on your workforce needs. Create requisitions for job vacancies and track approvals. Quickly prepare a job posting for a vacancy by using a guided flow and publish the postings on your Experience Cloud site for job seekers.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Classify Occupations and Positions (can be outdated or unavailable during release preview)

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

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

Attract the Best Talent and Offer a Seamless Job Application Experience

On your Experience Cloud site for job seekers, tell them about your organization's mission and values, career paths and benefits, and the work environment. Share success stories, employee testimonials, and the opportunities for employees to make a positive impact. Enable them to search for jobs that match their interests and preferences. Give them a guided flow to complete job applications, and help them track their application status.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Build a Career Site for Your Organization (can be outdated or unavailable during release preview)

Evaluate, Vet, and Hire Talent More Efficiently with the Talent Recruitment Management Console App

Your recruiters can filter job applications to match hiring requirements. They can assign interviewers to evaluate applicants, share the assessment criteria, and track interviewer feedback. Make tentative employment offers to selected candidates and track their vetting evaluations. Review vetting outcomes and finalize employment offers for successful candidates.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Create and Assign Evaluations (can be outdated or unavailable during release preview)

Salesforce Help: Make a Tentative Employment Offer to a Selected Applicant (can be outdated or unavailable during release preview)

Salesforce Help: Create Vetting Evaluations for a Selected Applicant (can be outdated or unavailable during release preview)

Accelerate Hiring Decisions with an All-In-One Hiring Experience

Streamline the hiring and evaluation process for hiring managers and interviewers by providing an Experience Cloud site for employees. Hiring managers can easily work with recruiters to review and approve requisitions and job postings. Interviewers can assess the applicants that they are assigned. Based on interviewer assessments, hiring managers can make informed hiring recommendations.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Build an Employee Site for Talent Recruitment Management in Public Sector Solutions (can be outdated or unavailable during release preview)

Share Information with Select Hiring Team Members

Review your hiring process and policies, and determine which team members need access to recruitment requisitions and application form evaluations. Use Compliant Data Sharing to define roles and the levels of access permitted. To share a record with a hiring team member, add them as a participant and assign them an appropriate role.

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 Compliant Data Sharing for Talent Recruitment Management (can be outdated or unavailable during release preview)

Investigative Case Management

Manage your investigative process from case creation to its resolution from the Investigative Case Management console app. Provide investigators and caseworkers a single interface to quickly understand a case and manage critical case data that includes related complaints, case participants, evidence, and violation details. Use data-driven insights to improve caseworker productivity and efficiency.

IN THIS SECTION:

Efficiently Manage Investigations with Casework Overview

Give your investigators and caseworkers a single interface to manage case critical data and to gain a comprehensive view of a case, including a chronological view of the case activities. Expedite investigations with guided flows to handle interactions such as interviews, to gather evidence, and to proceed to case and risk assessments.

Easily Capture Evidence for a Case by Using a Guided Flow

Make it easy for caseworkers and investigators to add evidence as custody items to a case in Casework Overview. Add custody item details, create the chain of custody, and add relevant regulatory code violations—all in a single workflow.

Get Insights into Caseworker Productivity

Use Caseworker Productivity analytics to manage workloads and make informed staffing decisions based on caseloads and case trends. Give supervisors insights into caseload distribution, caseworker performance, and case processing times to help them improve caseworker productivity and efficiency.

Share Complaints and Case Proceedings with Select Users

To comply with policies and maintain data privacy, control who has access to the complaint and case proceeding records. Use Compliant Data Sharing to define roles and the level of access permitted to complaint and case proceeding participants. To share a record with an internal user, a partner, or a constituent, add them as a participant and assign them an appropriate role.

SEE ALSO:

Salesforce Help: Investigative Case Management (can be outdated or unavailable during release preview)

Efficiently Manage Investigations with Casework Overview

Give your investigators and caseworkers a single interface to manage case critical data and to gain a comprehensive view of a case, including a chronological view of the case activities. Expedite investigations with guided flows to handle interactions such as interviews, to gather evidence, and to proceed to case and risk assessments.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Easily Capture Evidence for a Case by Using a Guided Flow

Make it easy for caseworkers and investigators to add evidence as custody items to a case in Casework Overview. Add custody item details, create the chain of custody, and add relevant regulatory code violations—all in a single workflow.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Get Insights into Caseworker Productivity

Use Caseworker Productivity analytics to manage workloads and make informed staffing decisions based on caseloads and case trends. Give supervisors insights into caseload distribution, caseworker performance, and case processing times to help them improve caseworker productivity and efficiency.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Share Complaints and Case Proceedings with Select Users

To comply with policies and maintain data privacy, control who has access to the complaint and case proceeding records. Use Compliant Data Sharing to define roles and the level of access permitted to complaint and case proceeding participants. To share a record with an internal user, a partner, or a constituent, add them as a participant and assign them an appropriate role.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Compliant Data Sharing in Public Sector Solutions (can be outdated or unavailable during release preview)

Speed Up Referral Authorization with Out-of-the-Box Flow

Quickly configure referral authorization with a readily-available Salesforce flow template. Previously, you downloaded a flow from the Public Sector Solutions process library and then deployed it.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Configure Referral Authorization (can be outdated or unavailable during release preview)

Effortlessly Build Omnistudio Components

Use the new intuitive designers for Flexcard, Omniscript, Integration Procedure, and Omnistudio Data Mappers in the standard runtime. Easily view your Omnistudio components from their new list view pages, and open them in the new designers. All the existing elements and configurations from the designer on a managed package are available in the new designers.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Public Sector Solutions and Omnistudio are enabled.

SEE ALSO:

Omnistudio

Use Omniscripts in Multiple Languages

Support global audiences by showing Omniscripts in the language that's configured in your Salesforce org or Experience Cloud site. Previously, these Omniscripts supported only English. If you use a customized version of any of these Omniscripts, make sure that you customize the corresponding Omniscripts in the new language before using them.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Why: These Omniscripts now support multiple languages.

- LicensingAndPermitting/BusinessLicenseApplication
- LicensingAndPermitting/Prescreening
- LicensingAndPermitting/Salon
- CaseProceeding/ServiceRequest
- CaseProceeding/AddParticipants
- CaseProceeding/ComplaintIntake

New and Changed Objects in Public Sector Solutions

Do more with these new and changed objects.

Associate an action plan template with a related object
Use the new ActionPlanBaseTemplateAsgn object.

Capture information about a job application
Use the new ApplicationForm object.

Capture information about an application form's evaluation
Use the new ApplicationFormEvaluation object.

Assign an application form evaluation to a user or group
Use the new ApplicationFormEvalPtcp object.

Share an application form with a user or group
Use the new ApplicationFormParticipant object.

Associate an application form with a related record
Use the new ApplicationFormRelation object.

Capture information about an employee in your organization
Use the new Employee2 object.

Capture information about a user's employment in an organization
Use the new Employment object.

Capture the details of an employment offer made to a candidate
Use the new EmploymentOffer object.

Associate an employment offer with a vetting evaluation
Use the new EmploymentOfferVettingEval object.

Store the denormalized job application details for search
Use the new JobAppInSearchableField object.

Define an instance of employment in a particular position
Use the new JobPosition object.

Associate a job position with a pay grade
Use the new JobPositionPayGrade object.

Store the denormalized job posting details for search
Use the new JobPostingSearchableField object.

Associate a job position with a recruitment requisition
Use the new JobPstnRecruitmentRqs object.

Define an occupation for positions that require specific skills, knowledge, or qualifications in a specialized field
Use the new Occupation object.

Group occupations that involve broadly similar functions, skills, or equipment
Use the new OccupationGroup object.

Capture a job applicant's profile information
Use the new PartyProfile object.

Capture a job applicant's address
Use the new PartyProfileAddress object.

Define a pay band for a set of positions that require sufficiently similar responsibilities and competencies
Use the new PayGrade object.

Define a pay range within the pay band for a pay grade
Use the new PayGradeStep object.

Define the pay grade step for a work location
Use the new PayGradeStepLocation object.

Define a functional role that has specific duties and responsibilities, and required skills and qualifications
Use the new Position object.

Associate a position with a pay grade
Use the new PositionPayGrade object.

Store the details that you want to include in a job posting section
Use the new RecruitmentContentSection object.

Create a job posting for a vacancy in your organization
Use the new RecruitmentPosting object.

Associate a job posting with a job posting section
Use the new RecruitmentPostingCntntSect object.

Create a formal request to recruit for a job vacancy
Use the new RecruitmentRequisition object.

Associate a recruitment requisition with the location of the job vacancy
Use the new RecruitmentRequisitionLoc object.

Associate a user or group with a recruitment requisition
Use the new RecruitmentRequisitionPtcp object.

Capture the details of a candidate's vetting evaluation
Use the new VettingEvaluation object.

Store the information provided by an applicant in a JSON representation
Use the new `ApplicantInformation` field on the existing PreliminaryApplicationRef object.

Referral Marketing

View the configuration of referral promotions with ease. Find out a customer's Data Cloud segment using prebuilt data graphs. Person account is no longer required to implement Referral Marketing. Use APIs to view advocate details and to track the source of referrals.

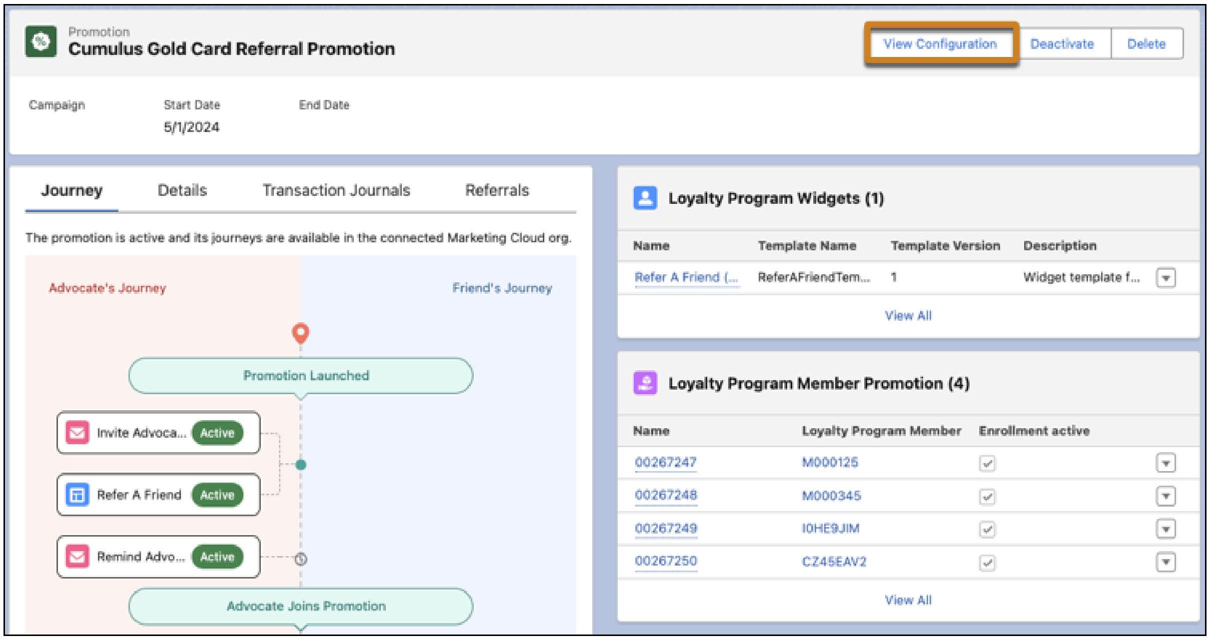
IN THIS SECTION:

Easily View Configurations of a Referral Promotion

View the detailed configuration of a referral promotion with just one click. Users with read-only access to referral promotion-related objects can view the promotion configurations. Also, promotion owners can review the details and determine the changes they want to make without deactivating a referral promotion.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is available.

How: To view the configuration of an active referral promotion, click **View Configuration** on the referral promotion record.

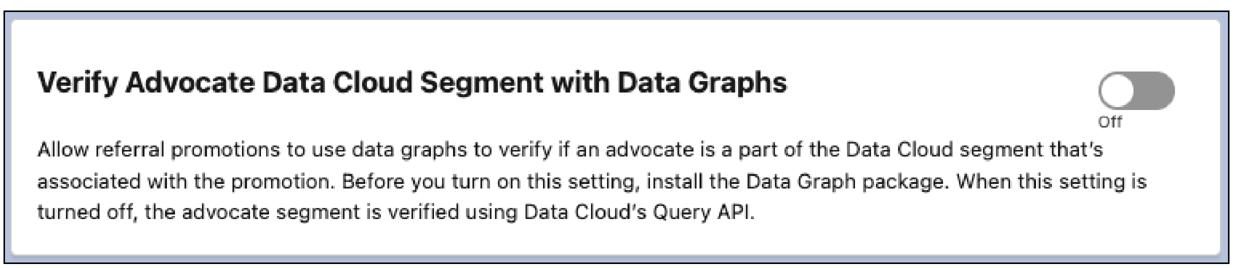


Accelerate Customer Segment Verification for Promotions

Use prebuilt Data Cloud data graphs to verify whether customers are part of a referral promotion's segment when they try to join a promotion as an advocate. By default, Data Cloud's Query API is used to check whether customers belong to the promotion's segment. To verify a customer's segment faster, use data graphs.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management and Data Cloud.

How: After you create the standard data bundles that you require for Data Cloud and configure customer segments in Data Cloud, install the Customer Engagement Data Graphs package. Next, turn on Verify Advocate Data Cloud Segment with Data Graphs on the Referral Marketing Settings page in Setup.



SEE ALSO:

Salesforce Help: Data Cloud Segment-Based Referral Promotion Audience Segmentation (can be outdated or unavailable during release preview)

Implement Referral Marketing Without a Person Account

You no longer need a person account to implement Referral Marketing in your org. However, we recommend you to have a person account.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is available.

Enable Advocates to Manage Referrals on Experience Cloud Sites

Experience Cloud site users such as referral promotion advocates can now refer friends and track referrals and rewards on your company's referral program website.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is available.

How: Assign the Manage Referral Records permission set to grant Experience Cloud site users access to view and create referral records.

Referral Mobile SDK

Integrate the referral program feature into a mobile app using the new Referral Mobile SDK for Android and iOS.

You can now extend the sample `MyNTORewards` app to include referral promotions. Or, build a custom mobile app and include the referral program feature using the Referral Mobile SDK for Android and iOS. Referral Mobile SDK works on iOS 15.0+ and Android 8.0+ versions.

EDITIONS

Available in: all editions that have Referral Marketing enabled

New and Changed Connect REST APIs

Here's a list of new and changed connect REST APIs.

Changed Connect REST APIs

Referral Event

The input includes three new fields and the response includes one new fields:

`referralChannel`—Channels such as email and social media that are used to refer a friend.

`referralStage`—The event type to consider based on the stage of the referral promotion.

`referredPartyJournalSubtype`—The activity for which the referred members are rewarded.

New Connect REST APIs

Referral Advocate Profile

View the profile of a referral program advocate.

Salesforce for Education

Connect, organize, and unify data in Education Cloud by using the power of Data Cloud. Review metrics on the engagement level of an alumnus in the areas of experience, communication, volunteerism, and philanthropy by using Data Cloud for Education. Use Einstein generative AI to summarize information about mentors and mentees, to summarize learners' advising cases, and to quickly and efficiently respond to inquiries. Bridge admissions and student success by automating student enrollment. Advisors can create and assign pulse checks to get feedback from learners and use watchlist tracking to proactively monitor learners who need additional support. Staff can create templates for degree program plans, and learners can compare programs side by side to find the best fit. Learners can get an overview of their academic progress on the learner portal. Use a flow to request and collect recommendation details for applications. Use Inquiry Management to help prospects sign up for a mailing list, request a call or email from your institution, or ask a question. Create and manage your learning catalog with new REST and Apex compatible APIs.

IN THIS SECTION:

Manage Your Learning Catalog with APIs

Import your course catalog data by using APIs that support external IDs and simplify the migration process. Use the new REST and Apex APIs createLearnings, updateLearnings, and getLearning to create, edit, or access your learning courses and programs, including the related outcomes, achievements, and foundation items.

Visualize Imported Catalog Data in Learning Program Plan Builder

Manage all your imported learning program plan requirements within Learning Program Plan Builder. View, edit, save, cancel, and publish all your program plans in the intuitive interface without creating courses and programs from scratch.

Accelerate Degree Planning with Learner Pathway Templates

Streamline the degree planning experience by providing prebuilt pathway templates for learners. Staff can also use Intelligent Degree Planner's drag-and-drop interface to create recommended pathways for learners to customize. You can offer multiple pathway templates for the same program so that learners can choose the template that best suits their objectives.

Clarify Prerequisites and Corequisites in Intelligent Degree Planner

Help learners capture their prerequisites and corequisites in their degree plan to make sure they're on the right track for graduation. Intelligent Degree Planner automatically notifies learners when they planned a course but didn't plan its associated requirements. Notifications include the names of missing requirements, their categories, or direct links to course detail pages where the learner can view a complete list of prerequisites and corequisites.

Help Learners Make Informed Decisions with the Intelligent Program Comparison Engine

Give learners a side-by-side comparison of the learning program that they're enrolled in with up to three other programs that they're considering. They can see a detailed view of the requirements that they fulfill against each program. Learners can also generate, download, and print a What-If report for a detailed audit of a program's required and elective coursework, and the elements that they fulfilled.

Strengthen Prospect Engagement With Recruitment Inquiry and Opportunity Management

Help prospective learners get the information they need quickly and easily by adding intuitive inquiry tools to your Experience Cloud site. Distinguish between general inquiries, requests for contact, and case initiations and route each request accordingly to ensure responses are comprehensive and timely. Run analytics on response time, time between inquiry and application, and inquiries that lead to applications or enrollments. Assign opportunities to recruitment and admissions staff and seamlessly forecast revenue for students.

Streamline the Recommendation Process with Recommender Experience

Save time and effort for applicants, recommenders, and admissions staff by automating the main elements of the recommendation cycle. Applicants can nominate recommenders directly in their application, which sends a recommendation request email to the recommender. A form linked in the email collects recommendation details for evaluation, and reminders help minimize back-and-forth communication during the busy application submission process.

Use Fundraising Updates for Advancement

Updates to Fundraising make it easy to manage and track donor information. Create outreach source codes in bulk, sync person account addresses with the primary contact point address, generate donor briefs, and enhance the tracking of pledges. Match donors with an external ID during gift entry, update the tax receipt status of gift transactions in a batch, and capture and track soft credits on gift commitments.

New and Changed Objects in Education Cloud

Do more with the new and updated Education Cloud objects.

New and Enhanced Common Features for Education Cloud

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

Updates to Action Launcher help you 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.

- Compliant Data Sharing

  Universities and K-12 institutions can use Compliant Data Sharing to easily tailor access to student-specific confidential data based on the context of each user's role. Grant users access to only the data that they need depending on their level of engagement with a student. By default, Compliant Data Sharing bypasses role hierarchy-based sharing, enabling institutions to comply with stringent student data sharing policies.

- Disclosure and Compliance Hub

  Updates to Disclosure and Compliance Hub help you organize questions, answers, and generate reports that can be easily accessed and tracked.

- Feedback Management

  Universities and K-12 institutions can use Feedback Management to easily survey stakeholders across campus, including students, parents, alumni, faculty, and staff.

- Service Process Studio

  Updates to Service Process Studio help you design seamless customer service processes quickly and efficiently. Staff can launch these service processes and get started with the customer service operations for the learner.

Unify Your Learner Data with Data Cloud for Education

Bring scattered data from disparate systems throughout your institution together in a central location and put it to work for your learners. Use new education-specific data model objects within Data Cloud to bring learner data from external learning management, student information, engagement, and enterprise resource planning systems into Data Cloud, where you can harmonize the data to build segments, create calculated insights, and analyze key metrics. Then Education Cloud users from every area of your institution can use it to gain insight and take action.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud and Data Cloud licenses are enabled.

Who: Only users with the Education Cloud Full Access and Data Cloud permission sets can use Data Cloud for Education.

SEE ALSO:

Salesforce Help: Data Cloud for Education (can be outdated or unavailable during release preview)

Build Stronger Alumni Relationships with Einstein and Data Cloud for Education: Alumni Metrics

Understand the full picture of alumni and supporter engagement through the power of Alumni Metrics, which brings together their information from across the institution. This tool combines Education Cloud, Data Cloud, calculated insights, and generative AI to show relationship officers descriptions and ratings of an alumnus' personal impact based on their experience, communication, volunteerism, philanthropic history, and participation in activities that are relevant to your institution. The components are extremely configurable, which means you can use them not just on alumni pages, but anywhere you want to get insight about. You can decide which metrics to highlight and include prompt templates to create emails, summaries, outreach messages, and other generative AI elements.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license and the Einstein for Sales or Einstein for Service add-on license are enabled, with Data Cloud as part of an Einstein add-on or as a standalone license. Einstein generative AI is available in Lightning Experience.

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

Who: Only users with the Education Cloud Full Access, Einstein for Education Cloud, and Data Cloud permission sets can use Data Cloud for Education: Alumni Metrics.

SEE ALSO:

Salesforce Help: Data Cloud for Education: Alumni Metrics (can be outdated or unavailable during release preview)

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

Enroll Admitted Students into Learning Programs

Use the new Enroll Applicant action on the individual application record page to enroll a newly admitted student. Schedule the Enroll Applicant Bulk flow to process enrollments for multiple students at a time.

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.

SEE ALSO:

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

Monitor Learners with Watchlist Tracking

Proactively monitor learners who require enhanced support. Add learners to the watchlist from the academic term enrollments list view page, cases list view page, or case record page. Escalate a watchlisted learner's record to provide timely intervention and personalized assistance for academic success.

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.

SEE ALSO:

Salesforce Help: Learner Watchlist for Advisors (can be outdated or unavailable during release preview)

Get Learner Feedback with Pulse Checks

Assess learner engagement, satisfaction, and overall wellbeing by using pulse checks. Create recurring or one-time pulse checks from templates and assign them to advisees. Learners are notified when pulse checks are assigned to them, and can respond on the learner portal. Advisors can view the status and submitted responses on the Pulse Checks tab of the learner's case record page, and view score graphs that track learner sentiment over time.

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.

SEE ALSO:

Salesforce Help: Pulse Checks for Feedback (can be outdated or unavailable during release preview)

Summarize Advising Cases by Using Einstein

Use Einstein generative AI to get an advising summary that includes details about a learner's case, including details of the interaction summaries, academic terms, program enrollments, intake assessments, record alerts, and pulse checks associated with the case. Configure the case record page to view the saved summaries on a tab.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license and the Einstein for Sales or Einstein for Service add-on license is enabled. Einstein generative AI is available in Lightning Experience.

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

Who: Users with the Education Cloud Full Access permission set can use this feature.

SEE ALSO:

Salesforce Help: Einstein Advising Summary for Advisors (can be outdated or unavailable during release preview)

Find Accurate Mentor Matches with Einstein Mentoring Summaries

Get a comprehensive view of the information you need to facilitate well-suited mentoring pairings with Einstein-generated summaries of mentor and mentee skills, experience, and relationships. Einstein Mentoring Summaries brings the power of generative AI to the existing Mentor Comparison screen flow. Staff can see overviews of mentors and mentees, including the differences and similarities between them. You can also provide the summaries to mentors and mentees during the introduction phase of your mentoring program.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license and the Einstein for Sales or Einstein for Service add-on license is enabled. Einstein generative AI is available in Lightning Experience.

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

Who: Users with the Education Cloud Full Access or the Education Cloud Limited Access permission set can use this feature.

SEE ALSO:

Salesforce Help: Einstein Mentoring Summaries (can be outdated or unavailable during release preview)

View Academic Highlights with Learner Progress Summary

Use the new Learner Progress Overview Flexcard so learners can get an overview of their academic progress on the learner portal. Learners can select the learning program and learner pathway to view the completion percentage, credits overview, and other details. Advisors can use the dropdown on the Learner Overview card to view the academic highlights 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 use this feature.

SEE ALSO:

Salesforce Help: Learner Progress Summary for Learners and Staff (can be outdated or unavailable during release preview)

Manage Your Learning Catalog with APIs

Import your course catalog data by using APIs that support external IDs and simplify the migration process. Use the new REST and Apex APIs createLearnings, updateLearnings, and getLearning to create, edit, or access your learning courses and programs, including the related outcomes, achievements, and foundation items.

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.

SEE ALSO:

Salesforce Help: Education Cloud Business APIs (can be outdated or unavailable during release preview)

Visualize Imported Catalog Data in Learning Program Plan Builder

Manage all your imported learning program plan requirements within Learning Program Plan Builder. View, edit, save, cancel, and publish all your program plans in the intuitive interface without creating courses and programs from scratch.

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 or the Education Cloud Limited Access permission set can use this feature.

SEE ALSO:

Salesforce Help: Learning Program Plan Builder (can be outdated or unavailable during release preview)

Accelerate Degree Planning with Learner Pathway Templates

Streamline the degree planning experience by providing prebuilt pathway templates for learners. Staff can also use Intelligent Degree Planner's drag-and-drop interface to create recommended pathways for learners to customize. You can offer multiple pathway templates for the same program so that learners can choose the template that best suits their objectives.

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 or the Education Cloud Limited Access permission set can use this feature.

SEE ALSO:

Salesforce Help: Create Pathway Templates (can be outdated or unavailable during release preview)

Clarify Prerequisites and Corequisites in Intelligent Degree Planner

Help learners capture their prerequisites and corequisites in their degree plan to make sure they're on the right track for graduation. Intelligent Degree Planner automatically notifies learners when they planned a course but didn't plan its associated requirements. Notifications include the names of missing requirements, their categories, or direct links to course detail pages where the learner can view a complete list of prerequisites and corequisites.

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 or the Education Cloud Limited Access permission set can use this feature.

SEE ALSO:

Salesforce Help: Understand How Learners Experience Intelligent Degree Planner (can be outdated or unavailable during release preview)

Help Learners Make Informed Decisions with the Intelligent Program Comparison Engine

Give learners a side-by-side comparison of the learning program that they're enrolled in with up to three other programs that they're considering. They can see a detailed view of the requirements that they fulfill against each program. Learners can also generate, download, and print a What-If report for a detailed audit of a program's required and elective coursework, and the elements that they fulfilled.

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 or the Education Cloud Limited Access permission set can use this feature.

SEE ALSO:

Salesforce Help: Intelligent Program Comparison (can be outdated or unavailable during release preview)

Strengthen Prospect Engagement With Recruitment Inquiry and Opportunity Management

Help prospective learners get the information they need quickly and easily by adding intuitive inquiry tools to your Experience Cloud site. Distinguish between general inquiries, requests for contact, and case initiations and route each request accordingly to ensure responses are comprehensive and timely. Run analytics on response time, time between inquiry and application, and inquiries that lead to applications or enrollments. Assign opportunities to recruitment and admissions staff and seamlessly forecast revenue for students.

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 or the Education Cloud Limited Access permission set can view and respond to inquiries. Any user, including guest users, can create an inquiry.

SEE ALSO:

Salesforce Help: Recruitment Inquiry and Opportunity Management (can be outdated or unavailable during release preview)

Streamline the Recommendation Process with Recommender Experience

Save time and effort for applicants, recommenders, and admissions staff by automating the main elements of the recommendation cycle. Applicants can nominate recommenders directly in their application, which sends a recommendation request email to the recommender. A form linked in the email collects recommendation details for evaluation, and reminders help minimize back-and-forth communication during the busy application submission process.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled. This feature leverages Salesforce Feedback Management. Customers are limited to 100,000 individual recommendations per org, per year. Contact your Salesforce account executive to purchase additional capacity.

Who: Users with the Education Cloud Full Access or the Education Cloud Limited Access permission set can view and manage recommendations. Users with the Education Cloud Experience Cloud Access permission set can nominate recommenders. Any nominated user, including guest users, can complete recommendations.

SEE ALSO:

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

Use Fundraising Updates for Advancement

Updates to Fundraising make it easy to manage and track donor information. Create outreach source codes in bulk, sync person account addresses with the primary contact point address, generate donor briefs, and enhance the tracking of pledges. Match donors with an external ID during gift entry, update the tax receipt status of gift transactions in a batch, and capture and track soft credits on gift commitments.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license and Fundraising are enabled.

Who: To use Fundraising with Education Cloud, enable Fundraising in Education Cloud, and then create and assign a permission set to your users.

SEE ALSO:

Fundraising Release Notes (can be outdated or unavailable during release preview)

Salesforce Help: Set Up and Use Fundraising for Alumni and Advancement (can be outdated or unavailable during release preview)

New and Changed Objects in Education Cloud

Do more with the new and updated Education Cloud objects.

Represent a prospect's academic interests
Use the new AcademicInterest object.

Relate a recommendation application item to an individual application task
Use the new IndividualApplicationTaskItem object.

Collect and track application recommendation details and status
Use the new `DoesSendSurvey`, `SurveyDeveloperName`, `VerificationStatus`, `VerificationDate`, and `SurveySubject` fields on the ApplicationRecommender object.

Associate a survey response with an application
Use the new `SurveyResponse` field on the ApplicationRecommendation object.

Associate a product with a learning program
Use the new `Product2` field on the LearningProgram object.

Link all of an applicant's academic interests to a single opportunity
Use the new `DoesGroupOpportunities` field on the LearnerProgram object.

Indicate whether a learning outcome item is primary
Use the new `IsPrimary` field on the LearningOutcomeItem object.

Indicate whether a learner pathway is primary
Use the new `IsPrimary` field on the LearnerPathway object.

Associate a reusable learning program plan with a learning program plan requirement
Use the new `ReusableLearningProgramPlan` field on the LearningProgramPlanRqmt object.

Associate a learning program plan with a program term application timeline
Use the new `LearningProgramPlan` field on the ProgramTermApplnTimeline object.

Represent a learner's wellbeing based on a primary metric or criteria at a specified date and time
Use the new PulseCheck object.

Represent a common template to create pulse check records
Use the new PulseCheckTemplate object.

Represent details for a learner that needs to be monitored for support

Use the new WatchlistedLearner object.

Specify the usage type, learner case, and learner program enrollment for an assessment envelope

Use the new `UsageType`, `LearnerCase`, and `LearnerProgramEnrollment` fields on the AssessmentEnvelope object.

Specify the expiration datetime and pulse check occurrence for an assessment envelope item

Use the new `ExpirationDateTime` and `PulseCheckOccurrence` fields on the AssessmentEnvelopeItem object.

Set an application recommendation status to canceled

Use the new `Canceled` picklist value in the `RecommendationStatus` field on the ApplicationRecommender object.

Indicate that an applicant should take action on an application task

Use the new `Correction Requested` picklist value in the Status field on the IndividualApplicationTask 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

Updates to gift commitments, outreach source codes generation, and gift entry make it easier and faster to complete tasks and keep data accurate. Quickly prepare for meetings with major donors by automatically creating donor briefs. Set up, review, complete, and submit grant management progress reports. Simplify the grantmaking process by reviewing the grant application, add review comments, and rate the application all on a single window.

Salesforce for Nonprofits Managed Packages

The Elevate and foundationConnect managed packages are retiring.

Nonprofit Cloud

Updates to gift commitments, outreach source codes generation, and gift entry make it easier and faster to complete tasks and keep data accurate. Quickly prepare for meetings with major donors by automatically creating donor briefs. Set up, review, complete, and submit grant management progress reports. Simplify the grantmaking process by reviewing the grant application, add review comments, and rate the application all on a single window.

IN THIS SECTION:

Provider Management Is Now Available for Nonprofit Cloud

Capture and track all your service provider details, including details about their facilities and specialties, to efficiently search and refer participants to the providers as needed. In addition, map the benefits and services that you administer for your constituents to the specialties that those providers offer.

Fundraising

Nonprofit Cloud for Fundraising makes it easy to manage and track donor information. You can create outreach source codes in bulk, sync person account addresses with the primary contact point address, generate donor briefs, and track and credit pledges as revenue. You can also match donors with an external ID during gift entry, update the tax receipt status of gift transactions in a batch, capture and track soft credits on gift commitments, enter gifts from an account page, and visualize CRM analytics with Nonprofit Intelligence for Fundraising.

Nonprofit Cloud for Grantmaking

Use an enhanced, easy-to-implement form framework to create, publish, and review progress reports on grant applications. Grants managers can review all submitted applications on a single page.

Einstein Generative AI for Nonprofit Cloud

To efficiently summarize important information and generate compelling proposals use Einstein Generative AI.

New and Enhanced Common Features for Nonprofit Cloud

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

  Deliver better donor support by adding actions in the Action Launcher Lightning Web component to launch functions to resolve donor requests. Customize the title shown on the Action Launcher component to provide a more branded experience.

- CSV Data Management on page 447

  Use a CSV file to review potential errors and then import gift records into Nonprofit Cloud.

- Data Processing Engine on page 448

  Refresh data on a schedule to keep rollups and lists up to date. 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.

Provider Management Is Now Available for Nonprofit Cloud

Capture and track all your service provider details, including details about their facilities and specialties, to efficiently search and refer participants to the providers as needed. In addition, map the benefits and services that you administer for your constituents to the specialties that those providers offer.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Provider Management is enabled.

Who: Users need the Customize Application permission to enable Provider Management settings.

How: Enable Provider Management in Setup.

Fundraising

Nonprofit Cloud for Fundraising makes it easy to manage and track donor information. You can create outreach source codes in bulk, sync person account addresses with the primary contact point address, generate donor briefs, and track and credit pledges as revenue. You can also match donors with an external ID during gift entry, update the tax receipt status of gift transactions in a batch, capture and track soft credits on gift commitments, enter gifts from an account page, and visualize CRM analytics with Nonprofit Intelligence for Fundraising.

IN THIS SECTION:

Bulk Create Outreach Source Codes

Increase the efficiency of your campaign management work by generating source codes for a campaign in bulk. Maintain consistency in the source code formatting and naming conventions, reduce the chances for manual entry errors, and speed up the process of creating codes for the marketer or campaign manager through such bulk requests.

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

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set.

SEE ALSO:

Salesforce Help: Create Outreach Source Codes for a Campaign (can be outdated or unavailable during release preview)

Sync Person Account Mailing Address with Primary Contact Point Address

For constituents with multiple addresses, automate the mailing address sync between person accounts and the primary contact point address, including undeliverable addresses, for easy reference on donor profiles.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where both Fundraising and the Automatic Person Account Mailing Address Synchronization feature are enabled.

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set.

SEE ALSO:

Salesforce Help: Set Up Automatic Address Synchronization (can be outdated or unavailable during release preview)

Salesforce Help: Automatically Sync the Person Account Mailing Address and the Contact Point Address (can be outdated or unavailable during release preview)

Create Tailored Donor Briefs

Quickly prepare for high-touch donor meetings when you create customized donor brief templates and generate custom-built donor briefs from donor profiles. Easily share the donor brief with board members and other stakeholders.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising and Document Generation General Settings are enabled.

Who: To set up donor briefs in Nonprofit Cloud for Fundraising, users must have the FundraisingAccess permission set and the DocGen Designer permission set. Users with the FundraisingAccess and DocGen User permission sets can generate donor briefs.

SEE ALSO:

Salesforce Help: Create Donor Briefs (can be outdated or unavailable during release preview)

Track and Credit Pledges as Revenue

Track committed recurring revenue and booked pledges more accurately and gain a clear understanding of expected revenues with enhanced forecasting. Budget planners and expenditure managers can use these rollups to provide reliable revenue projections.

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

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set.

How: See the pledged commitments and projected revenue in the Projected Committed Revenue Information section of the commmitment record.

SEE ALSO:

Salesforce Help: Track Gift and Donor Trends with Rollups (can be outdated or unavailable during release preview)

Match Donors with External ID in Gift Entry

Improve matching accuracy and increase data entry speed by using a customer-configured external ID to search for and match donors. Reduce the number of IDs related to each account by using your third-party donor IDs as an external ID in Salesforce to precisely match donors with gifts.

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

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set.

How: Set up external ID matching in the Fundraising settings.

SEE ALSO:

Salesforce Help: Turn on Fundraising (can be outdated or unavailable during release preview)

Update the Tax Receipt Status and Generate a Donor Report

Set the tax receipt status on the gift transactions included in the batch of gift acknowledgments. Generate a report of the donors who were included in the acknowledgment batch and use the addresses in the report as envelope labels for mailing the acknowledgments or tax receipts. Find the donors and their associated generated documents in the Document Generation Query Result object.

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

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set.

SEE ALSO:

Salesforce Help: Gift Acknowledgments and Tax Receipts (can be outdated or unavailable during release preview)

Capture Soft Credits on a Gift Commitment

Recognize those who contribute to your fundraising efforts by easily attributing influence as a soft credit to the person who helped secure a gift commitment. The soft credit can be in full or partial percent or an amount of the gift commitment.

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

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set.

SEE ALSO:

Salesforce Help: Capture Giving Influence with Soft Credits (can be outdated or unavailable during release preview)

Enter Gifts from the Account Page

Quickly and conveniently enter a gift from the donor's account page in the Fundraising Operations, Fundraising Strategy, and Donor Engagement apps.

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

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set.

How: From the person account or organization account page highlights panel, click the down arrow. Select **New Gift Entry**, and then enter the donation from that account.

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 Fundraising objects.

Attribute soft credit to influencers for gift commitments

Use the new GiftDefaultSoftCredit object.

Track booked pledge revenue on the Donor Gift Summary

Use the new `BookedPledges` and `TotalBookableRevenue` fields on the existing DonorGiftSummary object.

Note the status of the tax receipt for a gift transaction

Use the new `TaxReceiptStatus` field on the existing GiftTransaction object.

Track the total value of all gift commitments by time period

Use the new `TotalCurrentMonth`, `TotalCurrentQuarter`, `TotalCurrentYear`, and `TotalNextYear` fields on the existing GiftCommitment object.

Get a report of the donors and their addresses from the document generation batch job

Use the new `ReportFolder` field on the existing DocGenerationQueryResult object.

Add information about the audience of an outreach source code

Use the new `AudienceInformation` field on the existing OutreachSourceCode object.

SEE ALSO:

Salesforce Nonprofit Cloud Developer Guide: Fundraising Standard Objects (can be outdated or unavailable during release preview)

Updated Metadata Type in Fundraising

Use the update to a metadata type in Nonprofit Cloud for Fundraising to identify donors with an external ID.

Configure an External ID Field for Donors

Use the new `DonorExternalIDField` field on the existing FundraisingConfig metadata type. Introduced in API version 61.0, these fields are added to the Fundraising Tooling API Objects page in the *Nonprofit Cloud Developer Guide*.

SEE ALSO:

Salesforce Nonprofit Cloud Developer Guide: FundraisingConfig (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 for External IDs

The request bodies for all Fundraising Business Process APIs now support the use of External IDs for Donor, Campaign, Gift Transaction, Gift Commitment, and Gift Designation.

SEE ALSO:

Salesforce Nonprofit Cloud Developer Guide: Fundraising Business APIs (can be outdated or unavailable during release preview)

Nonprofit Cloud for Grantmaking

Use an enhanced, easy-to-implement form framework to create, publish, and review progress reports on grant applications. Grants managers can review all submitted applications on a single page.

- View Progress Reports for Updates on Applications on page 451

  After grant managers make grant awards, they typically request progress reports from their grantees. With Nonprofit Cloud, users can create, manage, publish, and review grantee progress reports. Grantees can complete progress reports on the Grantmaking portal.

- Review Submitted Applications from a Single Page

  Grants managers can assign reviewers to evaluate the applications. From the Application Review Workspace, reviewers can review application details and provide feedback and ratings on a single common page.

- Use Flow-Based Forms in Grantmaking

  Nonprofit Cloud for Grantmaking now supports additional types of forms, including the ability to build forms with flows for grant applications, progress reports, and soliciting reviewer feedback. An enhanced form framework supports a user-defined UI that best suits specific use cases.

- New and Changed Objects in Grantmaking

  To build complex grant applications and define and measure the impact of your grants, use the new and updated Grantmaking objects and fields. These new objects and fields are built to support the form framework for applications, progress reports, and reviews.

Einstein Generative AI for Nonprofit Cloud

To efficiently summarize important information and generate compelling proposals use Einstein Generative AI.

IN THIS SECTION:

Quickly Create a Summary of a Program and Its Benefits with Einstein (Beta)

Generate an accurate and succinct summary of a program that describes the program's benefits that can be shared with internal and external stakeholders. The summary is developed from the data in the Program and Benefits objects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Nonprofit Cloud where Program Management, Einstein generative AI with Einstein for Sales or Einstein for Service add-on, and Data Cloud Provisioning or Data Cloud Starter are enabled. Einstein Program Benefits Summary 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.

When: This summary is available starting the week of October 21, 2024.

Who: Users with the Program and Benefit Management Access permission set can access Nonprofit Cloud for Program Management.

Catch Up On Notes by Using Einstein (Beta)

No more reading through batches of notes to find the pertinent information. Generate a summary of notes to quickly gain information and identify actions or tasks that were logged but not completed. The summary is developed from data on the Account, Interaction, and Interaction Summaries objects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Nonprofit Cloud where Einstein generative AI with Einstein for Sales or Einstein for Service add-on, and Data Cloud Provisioning or Data Cloud Starter are enabled. Einstein Notes Summary 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.

When: This summary is available starting the week of October 21, 2024.

Who: Users with the Interaction Summary permission set can access Nonprofit Cloud for Case Management.

Generate a Specialized Version of a Grant Application for Board Review (Beta)

To create a concise version of the grant application for board member review, use Einstein. This version of the application is based on the Individual Application and Application Review objects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Nonprofit Cloud where Grantmaking, Einstein generative AI with Einstein for Sales or Einstein for Service add-on, and Data Cloud Provisioning or Data Cloud Starter are enabled. Einstein Board Version of Grant Application 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.

When: This summary is available starting the week of October 21, 2024.

Who: Users with the Grantmaking Manager permission set can access Nonprofit Cloud for Grantmaking.

Create a Funding Award Summary with Einstein (Beta)

To inform engagement, disbursement, and future funding awards decisions, get a summary of current grant status data. This summary is based on the Funding Award, Funding Award Requirement, Indicator Performance Period, Indicator Results, and Funding Disbursement objects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Nonprofit Cloud for Grantmaking, Einstein generative AI with Einstein for Sales or Einstein for Service add-on, and Data Cloud Provisioning or Data Cloud Starter are enabled. Einstein Funding Award Summary 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.

When: This summary is available starting the week of October 21, 2024.

Who: Users with the Grantmaking Manager permission set can access Nonprofit Cloud for Grantmaking.

Create a Summary of a Donor's Engagement History with Einstein (Beta)

Save time and improve efficiency when preparing for critical meetings with major donors by reviewing a summary of the donor's engagement history. This summary is based on the Account and Donor Gift Summary objects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Nonprofit Cloud for Fundraising, Einstein generative AI with Einstein for Sales or Einstein for Service add-on, and Data Cloud Provisioning or Data Cloud Starter are enabled. Einstein Major Donor Engagement Summary 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.

When: This summary is available starting the week of October 21, 2024.

Who: Users with the FundraisingAccess permission set can access Nonprofit Cloud for Fundraising.

Generate a Major Gift Proposal with Einstein (Beta)

Quickly create a compelling and personalized gift proposal that highlights the donor's previous contributions. This proposal is based on the Account, Donor Gift Summary, and Contact Profile objects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Nonprofit Cloud for Fundraising, Einstein generative AI with Einstein for Sales or Einstein for Service add-on, and Data Cloud Provisioning or Data Cloud Starter are enabled. Einstein Major Gift Summary 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.

When: This summary is available starting the week of October 21, 2024.

Who: Users with the FundraisingAccess permission set can access Nonprofit Cloud for Fundraising.

Salesforce for Nonprofits Managed Packages

The Elevate and foundationConnect managed packages are retiring.

IN THIS SECTION:

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.

Industries Common Features

Some products in Industries share features. In this release we've enhanced some of the features that help you stay efficient and streamlined. Create modular business rules, use CSV files to upload large amounts of data, search for actions based on semantic search, and more.

IN THIS SECTION:

Engagement

The Engagement Interaction object now supports record types that determine the business processes, page layouts, and picklist values that users have access to. Use record types to create customized user experiences for different business processes.

Grantmaking

Use an enhanced, easy-to-implement form framework to create, publish, and review progress reports on grant applications. Grants managers can review all submitted applications on a single page.

Industries Configure, Price, Quote (CPQ)

Use Industries CPQ in Lightning Web Components (LWC) for faster product configuration, mobile support, and bulk quote discounts. In addition, Industries CPQ also improves asset management and leverages standard Salesforce Pricing. Learn about these and other important enhancements.

Integration Solutions with MuleSoft Direct

The Industry Integration Solutions and Integrations Setup are renamed as MuleSoft and MuleSoft Direct, respectively. The navigation in the Salesforce UI, along with the documentation, is also updated.

List Builder for Data Cloud Segment

Synchronize actionable lists with Data Cloud segments more reliably to keep actionable lists up to date.

Omnistudio Document Generation

Prevent long-running document generation requests from affecting system efficiency by using a scheduled job.

Service Process Studio

Service Process Studio now supports screen flow request forms in service process definitions.

Stage Management

Use Metadata API to migrate Stage Management configurations across Salesforce orgs.

Action Launcher

Contact center agents can now search for actions based on semantic search.

IN THIS SECTION:

Reduce the Cognitive Load of Contact Center Agents with Semantic Search

Contact center agents (CCAs) can find recommended actions in Action Launcher by using semantic search, which is based on the meaning of search keywords and intents derived from a chat or voice call transcript. With semantic search, CCAs can find actions quickly without entering the exact search keyword.

SEE ALSO:

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

Reduce the Cognitive Load of Contact Center Agents with Semantic Search

Contact center agents (CCAs) can find recommended actions in Action Launcher by using semantic search, which is based on the meaning of search keywords and intents derived from a chat or voice call transcript. With semantic search, CCAs can find actions quickly without entering the exact search keyword.

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

Who: To use this feature, users need the Data Cloud license and the Industry Service Excellence, Data Cloud Semantic Search, Einstein Generative Services, Digital Engagement, and Service Cloud Voice add-on licenses.

How: From Setup, in the Quick Find box, enter `Action Launcher`, and then select **Recommended Actions**. Enable recommended actions. To run semantic search, turn on **Recommended Actions** on Action Launcher and type the search keyword or click **Show Key Interaction Topics** and then select an interaction topic.

AI Accelerator and Scoring Framework

Get predictions across multiple Industries clouds by using AI Accelerator. Effortlessly build generic propensity models without writing any code by using Scoring Framework.

IN THIS SECTION:

Get Customized Prediction Insights By Using AI Accelerator

AI Accelerator now supports binary classification and prediction scores with descriptive text use cases. Customize AI deployments across various sectors by using Lightning App Builder.

Where: This change applies to Lightning Experience of multiple Industries clouds.

Who: AI Accelerator is available to these users.

- Automotive Cloud users with the Revenue Intelligence for Automotive license.
- Communications Cloud users with the Revenue Intelligence for Communications Intelligence license.
- Consumer Goods Cloud users with the Revenue Intelligence for Consumer Goods license.
- Education Cloud users with the CRM Analytics for Education license.
- Energy and Utilities Cloud users with the Revenue Intelligence for Energy and Utilities license.
- Financial Services Cloud users with the Revenue Intelligence for Financial Services license.
- Health Cloud users with the Revenue Intelligence for Health license.
- Manufacturing Cloud users with the Revenue Intelligence for Manufacturing license.
- Media Cloud users with the Revenue Intelligence for Media license.

Scoring Framework (Generally Available)

Build and deploy propensity models effortlessly by using Scoring Framework. Define template configurations to create CRM Analytics apps, Data Cloud apps, Einstein Discovery models, and recipes without writing any code.

IN THIS SECTION:

Get Predictions for Your Data Cloud Apps

Scoring Framework now supports Data Cloud-based apps. Use the Scoring Framework Setup page to define template configurations for creating Data Cloud apps. Get accurate predictions for your use case by selecting the appropriate data space and the necessary data model objects for training and scoring.

Where: This change applies to Lightning Experience of multiple Industries clouds.

Who: Scoring Framework is available to users in Automotive, Communications, Consumer Goods, Education, Energy and Utilities, Financial Services, Health, Manufacturing, and Media Clouds with their respective Revenue Intelligence licenses.

How: To create a template configuration for a Data Cloud app, go to the Scoring Framework Setup page, and select the relevant template configuration type.

Improve Workflow Efficiency by Removing Record Counting

You can now save and continue your work in Data Checker without waiting for the record counting to complete. Proceed with your tasks without delays from lengthy record counting processes.

Where: This change applies to Lightning Experience of multiple Industries clouds.

Who: Scoring Framework is available to users in Automotive, Communications, Consumer Goods, Education, Energy and Utilities, Financial Services, Health, Manufacturing, and Media Clouds with respective Revenue Intelligence licenses.

Simplify Customization in the Scoring Framework

Use the new text input component to easily define and streamline parameters in the Scoring Framework for improved usability.

Where: This change applies to Lightning Experience of multiple Industries clouds.

Who: Scoring Framework is available to users in Automotive, Communications, Consumer Goods, Education, Energy and Utilities, Financial Services, Health, Manufacturing, and Media Clouds with respective Revenue Intelligence licenses.

How: To update the text input component, go to the Scoring Framework Setup page, open a relevant template configuration, and select **Configure User Input**.

Business Rules Engine

Keep your business rules modular with context-aware subexpressions. Update business rules easily by saving a selected expression set version as a new expression set or as a new version within the existing expression set. Test expression sets comprehensively with all available context mappings. Migrate expression set versions efficiently using ranks. Leverage string functions in your expression set calculation steps to streamline and simplify the implementation of complex business logic. Create decision tables effortlessly using the unified experience. Save time and effort by using a CSV to create a decision table. Manage the volume and complexity of your decision table using the decision table type options. Use Salesforce objects with such as Account, Lead in the medium volume decision table type. Narrow down the source object records if the source object has a large number of rows by using source filters in decision tables. Reduce the time taken to refresh the decision table data in Flows by using the InvocableRefreshDecisionTable parameter.

IN THIS SECTION:

Improve Decision-Making with the Newly Supported Objects in Medium Volume Decision Tables

Unlike earlier releases, you can now use Salesforce objects such as Account, Lead, Contact, Opportunity, and Case in medium volume decision tables to enhance your decision-making capabilities.

Increase Efficiency with Faster Refresh for Decision Table Data in Flows

Use the InvocableRefreshDecisionTable parameter in the Decision Table Refresh Action invocable action to get the changed data from the decision table to the flow. Data changes such as addition and deletion rows since the last refresh are updated in the decision table, leading to faster refresh cycles.

Support for Rule Engine Designer Role to Refresh Decision Tables

Now, users with the Rule Engine Designer role can refresh Decision Tables. You can refresh the decision table to make sure that the outcomes are based on the latest data.

Changed Business Rules Engine Objects

Do more with this changed object in Business Rules Engine.

Simplify Business Rules with Context-Aware Subexpressions

Keep your business rules modular by adding context-aware subexpressions to context-aware expression sets and list groups. Context-aware expression sets and subexpressions are associated with context definitions and use the definitions' tags as list variables. So, you no longer need to use input and output variables to pass information between expression sets and subexpressions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Context Service are enabled.

Who: Users with System Administrator permissions can create context definitions. Users with Rule Engine Advanced Designer permissions can use context definitions in expression set versions.

SEE ALSO:

Salesforce Help: List Variables in Expression Sets and Subexpressions(can be outdated or unavailable during release preview)

Simulate Expression Sets Comprehensively with All Available Context Mappings

Simulate an expression set version by using any selected context mapping defined in the context definition. Previously, you could simulate context-aware expression set versions only with the default context mapping. This feature is particularly useful when multiple context mappings are present in the context definition, because it enables comprehensive testing of expression sets with all available context mappings.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Context Service are enabled.

How: To use this enhancement, select **Advanced Input Mode** in the Simulation Details of the Expression Set Builder. Select your preferred context mapping from the available options to simulate the expression set version.

Who: Users with System Administrator permissions can create context definitions. Users with Rule Engine Advanced Designer permissions can use context definitions in expression set versions and simulate them.

SEE ALSO:

Salesforce Help: Simulate and Activate Your Expression Set Version(can be outdated or unavailable during release preview)

Save and Manage Expression Set Versions Effortlessly

Save an expression set version as a version in a new expression set or as a new version within the existing expression set. Update the saved expression set version to implement business rules changes easily. This enhancement eliminates the need to clone the entire expression set along with all its versions to make business rules updates. Assign meaningful names and version numbers to your expression sets and versions, to manage and identify them easily. This new feature streamlines the rule editing process, making it simpler to update business rules as requirements change.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

How: To take advantage of this enhancement, click **Save As** in the Expression Set Builder. Click **New Expression Set** to save your version in a new expression set or click **New Expression Set Version** to save as a new version within the existing expression set. Assign a meaningful name and version number to your new expression set or version.

SEE ALSO:

Salesforce Help: Create An Expression Set (can be outdated or unavailable during release preview)

Migrate Expression Set Versions Efficiently by Using Ranks

Assign ranks to expression set versions in the source org to make sure that the correct expression set version is invoked after migration. Migration of ranks with expression set versions eliminates the need to manually define the rank and activate the expression set version in the target org. After migration, the appropriate expression set version is automatically selected from multiple valid versions, ensuring quicker go-live time for business rule updates.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

SEE ALSO:

Salesforce Help: Considerations for Migrating Expression Sets (can be outdated or unavailable during release preview)

Configure Complex Business Rules Easily by Using String Functions

Use string functions such as FIND, TRIM, UPPER, VALUE, and REVERSE in your expression set calculation steps to simplify implementation of complex business logic. These functions help you easily manipulate and transform strings to match your business needs.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

Create Decision Tables More Intuitively by Using the Unified User Interface

The decision table user interface is enhanced to give a unified experience when creating decision tables. Use a simple, guided flow that contains steps to differentiate each stage of your decision table creation such as source data, input and output conditions, filter criteria, and so on. You can use ready-to-use templates also to create decision tables quickly rather than creating it from scratch. The ready-to-use templates are based on your industry.

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: Create a Decision Table (can be outdated or unavailable during release preview)

Manage the Volume and Complexity of Your Decision Tables with the Decision Table Type Options

Control the level of volume and complexity that you want the support in your decision table by using the Decision Table Type options. To create a decision table that supports a large volume of rows and lesser complexity, use medium volume. You can only include optional columns in the logic as a combination of AND and OR conditions in a medium volume decision table. Medium volume also supports multiple Salesforce objects for creating your decision table. To create a decision table that supports complex conditions, use low volume. You can include any column in the logic using the OR condition in a low volume decision table.

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: Create a Decision Table (can be outdated or unavailable during release preview)

Expedite Efficiency by Using CSV Files to Create Decision Tables

Opt for CSV files instead of Salesforce objects to ease the process of creating decision tables, especially when you're dealing with a sizable amount of data. If you use the CSV option when you create a decision table, configure the input and output columns. Then, after you create the decision table, upload the required CSV file. Modify the decision table without deactivating it and continue to use it in expression sets and flows. You can use a CSV file to create only medium volume decision tables.

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: Create a Decision Table (can be outdated or unavailable during release preview)

Narrow Your Source Conditions by Applying Source Filters in Decision Tables

Use the source filter as a prelogic to filter the source object rows when the source object has a large number of rows. When you select an object from the source filter, give specific values to find the exact matching row. Source filter option isn't available for CSV-based decision tables.

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: Create a Decision Table (can be outdated or unavailable during release preview)

Improve Decision-Making with the Newly Supported Objects in Medium Volume Decision Tables

Unlike earlier releases, you can now use Salesforce objects such as Account, Lead, Contact, Opportunity, and Case in medium volume decision tables to enhance your decision-making capabilities.

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: Create a Decision Table (can be outdated or unavailable during release preview)

Increase Efficiency with Faster Refresh for Decision Table Data in Flows

Use the InvocableRefreshDecisionTable parameter in the Decision Table Refresh Action invocable action to get the changed data from the decision table to the flow. Data changes such as addition and deletion rows since the last refresh are updated in the decision table, leading to faster refresh cycles.

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: Invocable Actions (can be outdated or unavailable during release preview)

Support for Rule Engine Designer Role to Refresh Decision Tables

Now, users with the Rule Engine Designer role can refresh Decision Tables. You can refresh the decision table to make sure that the outcomes are based on the latest data.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

SEE ALSO:

Salesforce Help: Refresh a Decision Table (can be outdated or unavailable during release preview)

Changed Business Rules Engine Objects

Do more with this changed object in Business Rules Engine.

Store the input and output CSV data for decision tables

Use the `InputData` and `OutputData` fields on the DecisionTblFileImportData object.

Context Service

Use data model objects as a source for mapping nodes and attributes of a context definition. Conveniently generate input mapping for the blank attributes of a single node or all nodes. Easily activate and deactivate to change a context definition's status. Auto sync effortlessly upgrades the standard definition components that are used in the extended custom definitions.

IN THIS SECTION:

To easily change the status of a context definition from its detail page, use the new Activate and Deactivate buttons. Use this enhancement to avoid navigating back to the Context Definition page to change status. In addition, you can add a description for custom attributes on the Edit Attributes page. Extended context definitions are autoupgraded to their latest version. In case auto sync fails, the Sync button is enabled on the context definition's details page.

Avoid the manual selection of each node and attribute to generate input mapping. Use Regenerate All to generate mapping for attributes of all the existing nodes or a selected node, or use Retain and Generate to generate only for the blank attributes.

Do more with these new Context Service objects.

Use Data Model Objects for Mapping

You can now choose data model objects (DMOs) when you map a definition, to retrieve data from a DMO. The DMOs are listed under the Salesforce Objects tab, along with other standard Salesforce objects.

New Connect REST API Resources

Learn more about the new resources available with Context Service.

Conveniently Activate and Deactivate Definitions, and Other Context Service Enhancements

To easily change the status of a context definition from its detail page, use the new Activate and Deactivate buttons. Use this enhancement to avoid navigating back to the Context Definition page to change status. In addition, you can add a description for custom attributes on the Edit Attributes page. Extended context definitions are autoupgraded to their latest version. In case auto sync fails, the Sync button is enabled on the context definition's details page.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions for Industries clouds where Context Service is enabled.

How: To add a description for an attribute, on the Edit Attributes page, click **Add Attributes**.

Easily Generate Input Mapping for Blank Attributes

Avoid the manual selection of each node and attribute to generate input mapping. Use Regenerate All to generate mapping for attributes of all the existing nodes or a selected node, or use Retain and Generate to generate only for the blank attributes.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions for Industries clouds where Context Service is enabled.

How: To add input mapping to a context definition, start by opening the context definition. On the Context Definition Details page, go to the Map Data tab and select Input Mapping. You can generate all mappings or specific node mappings on the Edit Mapping page.

New Objects in Context Service

Do more with these new Context Service objects.

Represent the relationship between ContextNodeMapping and ContextDictionary objects as a junction table

Use the new ContextNodeAttrDictionary object.

Store information for the sync operation of the custom definition with the standard definition

Use the new ContextDefinitionSync object.

SEE ALSO:

Salesforce Help: Context Service Tooling API Objects (can be outdated or unavailable during release preview)

Use Data Model Objects for Mapping

You can now choose data model objects (DMOs) when you map a definition, to retrieve data from a DMO. The DMOs are listed under the Salesforce Objects tab, along with other standard Salesforce 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 **Salesforce Objects** tab, search for the DMO that you want to map, and click **Done**.

New Connect REST API Resources

Learn more about the new resources available with Context Service.

Get lists of metadata associated with the context definition interfaces

Make a GET request to the new `/connect/context-definition-interfaces` resource.

New response body: Context Definition Interface Metadata List

Get details of a specific context definition interface

Make a GET request to the new `/connect/context-definition-interfaces/`***`contextDefinitionInterfaceName`*** resource.

New response body: Context Definition Interface

SEE ALSO:

Salesforce Common Resources Developer Guide: Query Context Definition Interfaces (GET) (can be outdated or unavailable during release preview)

Salesforce Common Resources Developer Guide: Query Context Definition Interface By Name (GET) (can be outdated or unavailable during release preview)

CSV Data Management

Use the basic CSV import feature to upload a CSV file with a variety of delimiter options without converting the CSV file into comma-delimited format. Using the basic CSV import feature, import CSV data into a single Salesforce object. Use the advanced CSV import feature to perform complex data transformations, and efficiently import large amounts of CSV data into one or more Salesforce objects in a single import process.

IN THIS SECTION:

Import CSV Data by Using Various Supported Delimiters

Directly upload a CSV file without converting it to comma-delimited format. Select the appropriate delimiter that's used in the CSV file during the import process. The supported delimiters are Comma, Pipe, Caret, Backquote, Semicolon, and Tab.

Where: This change applies to Lightning Experience where CSV File Import is available.

Who: Users with the Basic CSV Data Import permission set can use this feature.

Perform Complex Calculations on CSV Data and Import into Salesforce Objects

Easily import large amounts of CSV data into one or more Salesforce objects in a single import process. Carry out complex data transformations when you import CSV data into Salesforce. For example, join two columns of the CSV file, perform calculations on the data, and then import the transformed data into Salesforce.

Where: This change applies to Lightning Experience where CSV Data Import is available.

Who: Users with the Advanced CSV Data Import permission set can use a DPE definition to import CSV data.

How: Create and activate a Data Processing Engine (DPE) definition. Add a source node and one or more writeback objects to the DPE definition. Configure a node in your DPE definition to set up how data is transformed. Use the DPE Definition to import the CSV data from the source node to the writeback objects.

SEE ALSO:

Data Processing Engine: Create and Activate a Data Processing Engine Definition

Data Processing Engine: Add a Node to Data Processing Engine Definition

Data Processing Engine: Configure a Data Processing Engine Node

Data Processing Engine

Upload large amounts of external data into your Data Processing Engine definitions by using CSV files. Write to related objects in writeback nodes in Data Cloud runtime. Automatically save recipes and output records by running your definitions in debug mode.

IN THIS SECTION:

Simplify Transformation of Large Data by Using CSV Files (Pilot)

Use CSV files to upload large volumes of data to your Salesforce org. In Data Cloud runtime, upload the CSV file as data source into your definition. Configure relevant fields to use in the definition and then write back results to a Data Lake Object or Salesforce Object. After running the definition, view any failed writeback 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.

When: This feature is available to all customers starting on October 4, 2024

How: To upload a CSV file, in Data Source node Configuration, select **CSV File**, and then click **Define CSV Schema**.

Write to Related Objects in Writeback Nodes in Data Cloud

Data Cloud runtime now supports writeback nodes for related objects. You can map related fields to populate the lookup or master-detail field of an object when there's no corresponding Salesforce ID for that record. You can map related fields to insert, update, or upsert records. This change aligns Data Cloud runtime with CRM Analytics runtime in Data Processing Engine.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Data Processing Engine is enabled.

Automatically Save your Recipes and Output Records

Opt to run your Data Processing Engine definition in debug mode and autosave your recipes and output records for seven days. You can use the saved information for debugging purposes later.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Data Processing Engine is enabled.

How: When you run your Data Processing Engine definition, in the Debug mode window, select **Save recipes and output records for seven days**.

Get Notified When You Exceed Data Pipelines Usage Limits

View notifications in the notifications tray whenever your Data Pipelines limits go above 80% usage, so that you can review your Data Processing Engine definitions and take action.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Data Processing Engine is enabled.

Metadata API

Do more with the updated metadata types in Data Processing Engine.

Specify whether the target dataset exists, or is new and can be overwritten

Use the new `isExistingTarget` field on the existing BatchCalcJobWritebackObject subtype of the BatchCalcJobDefinition metadata type. Introduced in API version 62.0, this field has been added to the *Industries Common Resources Developer Guide*.

Changed Objects

Do more with the changed objects in Data Processing Engine.

Enable or disable the debug mode when you run your definitions, and check whether the debug recipes are deleted

Use the new `isDebugOn` and `isDebugRecipeDeleted` fields on the existing BatchJob object. Introduced in API version 62.0, this field has been added to the *Industries Common Resources Developer Guide*.

Einstein Bot Templates

Manage cases with Case Management bot templates.

IN THIS SECTION:

Resolve Cases Efficiently with Case Management Bot Templates

The new Case Management enhanced bot templates come with conversational text and flows that automate capturing, tracking, and resolving customer and prospect issues or inquiries. The bot templates allow users to create and close cases and check the status of cases. The bot templates can transfer a chat session to a human agent for additional help. You can use the bot templates' preloaded intent data to instantaneously start using bots, and add new intent data according to your business needs.

SEE ALSO:

Salesforce Help: Einstein Bot Templates (can be outdated or unavailable during release preview)

Resolve Cases Efficiently with Case Management Bot Templates

The new Case Management enhanced bot templates come with conversational text and flows that automate capturing, tracking, and resolving customer and prospect issues or inquiries. The bot templates allow users to create and close cases and check the status of cases. The bot templates can transfer a chat session to a human agent for additional help. You can use the bot templates' preloaded intent data to instantaneously start using bots, and add new intent data according to your business needs.

Where: This feature is available with Lightning Experience and Salesforce Classic in Starter, Professional, Enterprise, and Unlimited editions. Setup for Einstein Bots is available only in Lightning Experience.

Who: To use this feature, users need the Industry Service Excellence add-on license.

How: From Setup, in the Quick Find box, enter `Einstein Bots`, and then click **Einstein Bots**. Next, click **New** and select **Enhanced Bot**. Click **Next**, and select the **Industry Case Management Bot** or **Case Management Lite Bot** template. Click **Next**, and enter additional details.

Engagement

The Engagement Interaction object now supports record types that determine the business processes, page layouts, and picklist values that users have access to. Use record types to create customized user experiences for different business processes.

IN THIS SECTION:

Changed Object

The Engagement Interaction object, which represents information about an interaction between a service representative or specialist and a customer, has a new RecordType field.

SEE ALSO:

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

Industries Common Resources Developer Guide: Engagement (can be outdated or unavailable during release preview)

Changed Object

The Engagement Interaction object, which represents information about an interaction between a service representative or specialist and a customer, has a new RecordType field.

Store the identifier of the record type object

Use the new `RecordType` field on the EngagementInteraction object.

Grantmaking

Use an enhanced, easy-to-implement form framework to create, publish, and review progress reports on grant applications. Grants managers can review all submitted applications on a single page.

IN THIS SECTION:

View Progress Reports for Updates on Applications

Create, manage, publish, and review grantee progress reports. Grantees can complete the progress reports on the Grantmaking portal in Nonprofit Cloud.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

Who: To view progress reports, external users need the Grantmaking for Experience Cloud permission set.

How: To view progress reports in Experience Cloud, go to Award > Requirements. Internal users can go to the Funding Award Requirement tab in Grantmaking.

SEE ALSO:

Help Documentation: Manage Funding Awards with Grantmaking (can be outdated or unavailable during release preview)

Help Documentation: Review and Manage Grant Applications (can be outdated or unavailable during release preview)

Use Flow-Based Forms in Grantmaking

Nonprofit Cloud for Grantmaking now supports additional types of forms, including the ability to build forms with flows for grant applications, progress reports, and soliciting reviewer feedback. An enhanced form framework supports a user-defined UI that best suits specific use cases.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

Who: To use flow-based forms in Grantmaking, external users need the Grantmaking for Experience Cloud permission set. To build and manage forms, internal users need the Grantmaking Manager permission set.

How: Admins create flows for each section of a form. They create the Application Render Method records to reference the flows. They also create the Application Stage Definition records to identify the Application Render Methods for view and edit modes.

SEE ALSO:

Help Documentation: Create a Flow That Launches a Grant Application (can be outdated or unavailable during release preview)

Review Submitted Applications from a Single Page

Grants managers can assign reviewers to evaluate applications. From the Application Review Workspace, reviewers can review application details and provide feedback and ratings on a single common page.

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

How: For internal reviewers, an admin must configure the Application Review detail page (flexipage). Add the Form Review component (for the application sections) and the Form Section component (for the review) to new tabs. For external users, the Application Review Workspace is already configured on the Application Review detail page in the Grantmaking Portal Template.

SEE ALSO:

Help Documentation: Review and Manage Grant Applications (can be outdated or unavailable during release preview)

New and Changed Objects in Grantmaking

To build complex grant applications and to define and measure the impact of your grants, use the new and updated Grantmaking objects and fields. These new objects and fields support the form framework for applications, progress reports, and reviews.

New Fields for Application Reviews

New fields are `IsRequired`, `ApplicationStageDefinition`, `DisplayOrder`, and `IsAssignedToMe`.

Object Updates for Managing Funding Award Requirements

Use the new object FundingAwardRqmtSection. Use the new `OwnerId` field on FundingAwardRqmtSection.

New Fields for Individual Application Task

New field is `Description`

SEE ALSO:

Help Documentation: Grantmaking Object Reference (can be outdated or unavailable during release preview)

Industries Configure, Price, Quote (CPQ)

Use Industries CPQ in Lightning Web Components (LWC) for faster product configuration, mobile support, and bulk quote discounts. In addition, Industries CPQ also improves asset management and leverages standard Salesforce Pricing. Learn about these and other important enhancements.

IN THIS SECTION:

Fine-tune Permissions for vlocity_cmt__CustomObjectMap__c

To improve security, update permissions for Standard User profiles. Enable access to the custom setting vlocity_cmt__CustomObjectMap__c.

Boost Efficiency with Industries CPQ in LWC Interface

Switch to Industries CPQ in a Lightning Web Components (LWC) Interface to streamline product configuration and enhance CPQ operations. Offer your users reduced load times and improved performance with the enhanced product configurator and cart functionalities. Quickly configure products and seamlessly access and modify carts. Use additional lookup fields, multiple price views, catalog with products, promotions, and discounts directly in the cart. Users can also perform CPQ operations from mobile tablets, ensuring greater flexibility and efficiency.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Automate Asset Management with Query Driven Asset Disconnect Scheduler

Use the new Query Driven Asset Disconnect Scheduler cron job to automate the disconnection of assets by raising asset-based orders asynchronously. Use this cron job to easily disconnect subscription products at the end of their cycle and perform scheduled asset clean-up, enhancing operational efficiency and accuracy.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Easily Apply Discounts to an Entire Cart with Large Sets of Quote Line Items

Apply bulk discounts to up to 50,000 quote line items when Globally Unique Identifiers (GUIDs) performance enhancements is enabled. Apply discounts to up to 100,000 quote line items with GUIDs performance enhancements disabled. Use the enhanced API services to manage pricing adjustments, including discounts, for up to 20,000+ quote line items. Additionally, your Sales reps can easily apply discounts to cart items, filter and save subsets of line items, and perform mass actions.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Get a More Flexible Pricing Solution in Communications, Media, and Energy & Utilities (CME) Managed Package

Enjoy real-time price updates and early adoption of Salesforce's future default pricing engine. Use a matrix-based UI pricing builder for quicker offer configuration, declaratively build context rules without custom code, and get insights from the pricing manager with a simulator for verifying pricing steps.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Move to Salesforce Contracts in Communications, Media, and Energy & Utilities (CME) Managed Package

Use Salesforce Contracts for a significant upgrade over Industries Contract Lifecycle Management (CLM), with features such as AI-powered insights and collaborative redlining. Enjoy ongoing innovation and ensure value for your business with early adoption of Salesforce Contracts.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Who: New and existing CME customers who either don't have Industries Contract Lifecycle Management or need more advanced solutions for managing their contracts can use Salesforce Contracts. To use Salesforce Contracts make sure that you are using OmniStudio Standard Objects with Standard Runtime.

Reverse Cardinality of Relies On Product Instances

When modeling network products in the catalog, it is necessary to enforce reverse cardinality at runtime for technical reasons. Without this capability, your customers receive quotes that can't be technically fulfilled. By using the Reverse Cardinality feature, you can define reverse cardinality for a Relies On product relationship and validate the cardinality in the cart at runtime. In addition, you can also specifiy the minimum and maximum number of source product instances that a target product instance can support when the product relationship type is Relies On.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Relies On with Attribute Propagation

When using Linear Relationships, the business team often needs to add new pricing criteria. This usually requires customers to write code and custom Apex, increasing their technical debt, or to duplicate attribute data across products.The Attribute Propagation feature defines how attributes propagate across product instances during design time and makes sure that this behavior is applied to the Quote and Order cart during runtime.This helps in pricing the source product based on the attribute information of the target product.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

How: To implement Attribute Propagation, set up a new pricing plan to initiate the propagation process and complete the attribute propagation step before the Attribute Based Pricing plan step.

Supported propagation actions include:

- SUM: Sum values from target to source.
- COPY: Transfer values from target to source.
- REFER: Use target values in pricing for source.

Achieve Real-Time Catalog and Pricelist Updates with Incremental Caching

Use incremental caching feature to publish incremental catalog and pricelist changes to the cache for standart cart and Digital Commerce APIs. Incremental Caching enables reflecting product catalog and pricelist updates live and ensures error-free data compilation across standard Cart and Digital Commerce APIs.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Table Component Deprecated in the AccountBillingDashboard Component

For optimization and performance improvement purposes, the Table component is no longer offered in the AccountBillingDashboard component.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Who: If you are a Communications Cloud customer, see Analytics for Communications-Business for alternatives to business reports and similar options.

Fine-tune Permissions for vlocity_cmt__CustomObjectMap__c

To improve security, update permissions for Standard User profiles. Enable access to the custom setting vlocity_cmt__CustomObjectMap__c.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

How: These permissions are added to the Communications Cloud sample permission sets.

- CPQ_Runtime_CartOperations_CC_User
- CPQ_Runtime_CartOperations

- CPQ_Runtime_CPQCartUI
- CPQ_Runtime_InvokeOdinNotification
- CPQ_Runtime_ViewAndApplyDiscounts
- DC_Runtime_Shopping_CC_User
- DC_Runtime_Shopping

By default, access to custom settings is limited through the Restrict access to custom settings org-wide preference. Admins can grant API Read access through profiles and permission sets to users without the Customize Application permission.

If you aren't using the sample permission sets, then update the permission set file with this sample code:

```
<customSettingAccesses>
    <enabled>true</enabled>
    <name>vlocity_cmt__CustomObjectMap__c</name>
</customSettingAccesses>
```

SEE ALSO:

Help Documentation: Communications Cloud Sample Permission Sets

Help Documentation: Grant Permissions on Custom Settings

Integration Solutions with MuleSoft Direct

The Industry Integration Solutions and Integrations Setup are renamed as MuleSoft and MuleSoft Direct, respectively. The navigation in the Salesforce UI, along with the documentation, is also updated.

IN THIS SECTION:

Industry Integration Solutions Has a New Name

We've renamed Industry Integration Solutions to MuleSoft, and Integrations Setup to MuleSoft Direct. The Setup navigation changes from Integrations > Industry Integration Solutions > Integrations Setup to Integrations > MuleSoft > MuleSoft Direct. You can see the updated names in the feature names on the Salesforce UI, in the Salesforce org, and in documentation in Salesforce Winter '25 and later. This change doesn't impact your implementations.

Industry Integration Solutions Has a New Name

We've renamed Industry Integration Solutions to MuleSoft, and Integrations Setup to MuleSoft Direct. The Setup navigation changes from Integrations > Industry Integration Solutions > Integrations Setup to Integrations > MuleSoft > MuleSoft Direct. You can see the updated names in the feature names on the Salesforce UI, in the Salesforce org, and in documentation in Salesforce Winter '25 and later. This change doesn't impact your implementations.

Where: This change applies to all editions with MuleSoft licenses.

SEE ALSO:

Salesforce Help: Integration Solutions with MuleSoft Direct (can be outdated or unavailable during release preview)

List Builder for Data Cloud Segment

Synchronize actionable lists with Data Cloud segments more reliably to keep actionable lists up to date.

IN THIS SECTION:

Changed Objects

Use the changed objects in List Builder for Data Cloud Segment to represent an actionable list and an actionable list item.

SEE ALSO:

Salesforce Help: List Builder for Data Cloud Segment (can be outdated or unavailable during release preview)

Changed Objects

Use the changed objects in List Builder for Data Cloud Segment to represent an actionable list and an actionable list item.

Specify the type of operation that's performed when an actionable list synchronizes with a Data Cloud segment

Use the new `SynchronizationOperationType` field on the ActionableList object.

Store the value to determine whether the insert operation is allowed or not on an actionable list when the list synchronizes with a Data Cloud segment

Use the new `InsertOperationOnSync` field on the ActionableListMember object.

Omnistudio Document Generation

Prevent long-running document generation requests from affecting system efficiency by using a scheduled job.

IN THIS SECTION:

Improve Document Generation Performance with Timeout Setting

Contract admins can prevent document generation requests from running indefinitely by turning on the time-out setting. You can specify a time limit for document generation requests. Any individual or batch document generation requests that exceed the specified time limit, but are still in progress, are terminated and marked as failed. Use the TerminateDocGenRequestCronJob scheduled job to maintain performance by preventing long-running requests from affecting system efficiency.

Improve Document Generation Performance with Timeout Setting

Contract admins can prevent document generation requests from running indefinitely by turning on the time-out setting. You can specify a time limit for document generation requests. Any individual or batch document generation requests that exceed the specified time limit, but are still in progress, are terminated and marked as failed. Use the TerminateDocGenRequestCronJob scheduled job to maintain performance by preventing long-running requests from affecting system efficiency.

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

Who: Users need the CLM Admin permission set to run the scheduled job.

How: In Setup, go to Document Generation Settings and verify that Enable InProgress DocGen Request Time Out is turned on. In the InProgress DocGen Request Time Out (hrs) field,specify the time interval (in hours) after which in-progress document generation process records are terminated. The default timeout is set to 6 hours.

Service Process Studio

Service Process Studio now supports screen flow request forms in service process definitions.

IN THIS SECTION:

[Experience Greater Flexibility in Request Form Creation]

You can now add a screen flow request form to a service process definition. If your org doesn't have Omnistudio Runtime, you can still create a request form by using Flow Builder, and then add the form to a service process definition.

[Changed Object]

Use the changed object in Service Process Studio to represent a collection of records that indicate the dependencies of a service process.

SEE ALSO:

Salesforce Help: Create and Activate Service Process Definitions (can be outdated or unavailable during release preview)

Experience Greater Flexibility in Request Form Creation

You can now add a screen flow request form to a service process definition. If your org doesn't have Omnistudio Runtime, you can still create a request form by using Flow Builder, and then add the form to a service process definition.

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

Who: To use this feature, users need the Industry Service Excellence add-on license and the Industry Service Excellence permission set.

How: From Setup, in the Quick Find box, enter *`Service Process Studio`*, and then select **Service Process Studio**. Create a service process definition by adding a screen flow request form.

Changed Object

Use the changed object in Service Process Studio to represent a collection of records that indicate the dependencies of a service process.

Specify the name of the step in the service process definition creation process

Use the new `ProcessStepName` field on the SvcCatalogItemDependency object.

Stage Management

Use Metadata API to migrate Stage Management configurations across Salesforce orgs.

IN THIS SECTION:

[Migrate Stage Management Configurations with Ease]

Use Metadata API to efficiently package and share Stage Management configurations across Salesforce orgs. Metadata API is the fundamental way in which metadata is serialized so that you can read, edit, and deploy data. Use this enhancement to develop and deploy Stage Management definitions across environments.

Migrate Stage Management Configurations with Ease

Use Metadata API to efficiently package and share Stage Management configurations across Salesforce orgs. Metadata API is the fundamental way in which metadata is serialized so that you can read, edit, and deploy data. Use this enhancement to develop and deploy Stage Management definitions across environments.

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

SEE ALSO:

Salesforce Help: Stage Management

Marketing

Salesforce marketing products and features streamline and supercharge your promotional campaigns. Find out what improvements are arriving in our Winter '25 release.

IN THIS SECTION:

Einstein Personalization

Einstein Personalization is a Customer 360 application that works with Data Cloud to provide personalized experiences across Salesforce clouds. The Einstein Personalization app combines optimized business objectives with rules-based targeting and decision making to deliver real-time, personalized decisions across channels. Natively integrated with Marketing Cloud Growth, use Einstein Personalization to extend personalized experiences to other Marketing Cloud products.

Resource Reference Digital Wallet

This resource file contains reusable content about the cross-cloud and cross-product account management tool called Digital Wallet.

Marketing Cloud Account Engagement

Keep your database clean by finding and merging duplicate prospects. Copy your marketing forms and emails directly to Salesforce CMS, and add your landing page and form engagement details to Data Cloud.

Marketing Cloud Engagement

The Winter '25 Marketing Cloud Engagement release occurs October 4, 2024 through October 25, 2024. Some features are made available to you within a week of the release. Check back here for release notes on September 30, 2024.

Marketing Cloud Growth

For Winter '25, Marketing Cloud Growth presents solutions that launch automated campaigns based on specified events, personalize messages with dynamic content variations, and attribute revenue to influential campaigns. Generative AI options now offer Einstein Copilot features and grounding tools. Plus, other updates improve and expand admin and user experience in setup, segments, and content.

Einstein Personalization

Einstein Personalization is a Customer 360 application that works with Data Cloud to provide personalized experiences across Salesforce clouds. The Einstein Personalization app combines optimized business objectives with rules-based targeting and decision making to deliver real-time, personalized decisions across channels. Natively integrated with Marketing Cloud Growth, use Einstein Personalization to extend personalized experiences to other Marketing Cloud products.

IN THIS SECTION:

Provide Personalized Experiences with Einstein Personalization (Generally Available)

Built on Data Cloud, Einstein Personalization provides AI-based recommendations and personalized content to customers in real time. 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.

Provide Personalized Experiences with Einstein Personalization (Generally Available)

Built on Data Cloud, Einstein Personalization provides AI-based recommendations and personalized content to customers in real time. 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.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, Performance, and Developer editions with Data Cloud.

SEE ALSO:

Salesforce Help: Einstein Personalization Help Documentation (can be outdated or unavailable during release preview)

Extend Personalized Experiences in Marketing Cloud Using Einstein Personalization

Extend the functionality of other Marketing Cloud products using Einstein Personalization targeting rules and personalization decisions, natively integrated with Marketing Cloud Growth. For example, you can use targeting rules and personalization decisions to provide individualized, dynamically varied content in Marketing email communications.

Where: Einstein Personalization is available in Lightning Experience in Enterprise, Unlimited, Performance, and Developer editions.

SEE ALSO:

Salesforce Release Note: Personalize Marketing Emails Using Dynamic Content (can be outdated or unavailable during release preview)

Enhance Your Websites with Personalized Experiences Using Web Personalization Manager

Create personalized experiences directly on websites using the new Web Personalization Manager. Using Einstein Personalization and Data Cloud Web SDK, Web Personalization Manager can personalize websites with AI-driven recommendations and dynamic content in real time for eligible site visitors. Select page elements that you want to personalize using a simplified point-and-click approach, preview the results, and then publish personalization experiences.

Where: This change applies to Einstein Personalization. Einstein Personalization is available in Lightning Experience in Enterprise, Unlimited, Performance, and Developer editions.

How: Set personalization points and then configure personalized experiences on your website by using predefined templates or by directly modifying existing website elements with Web Personalization Manager.

SEE ALSO:

Salesforce Help: Web Personalization Manager (can be outdated or unavailable during release preview)

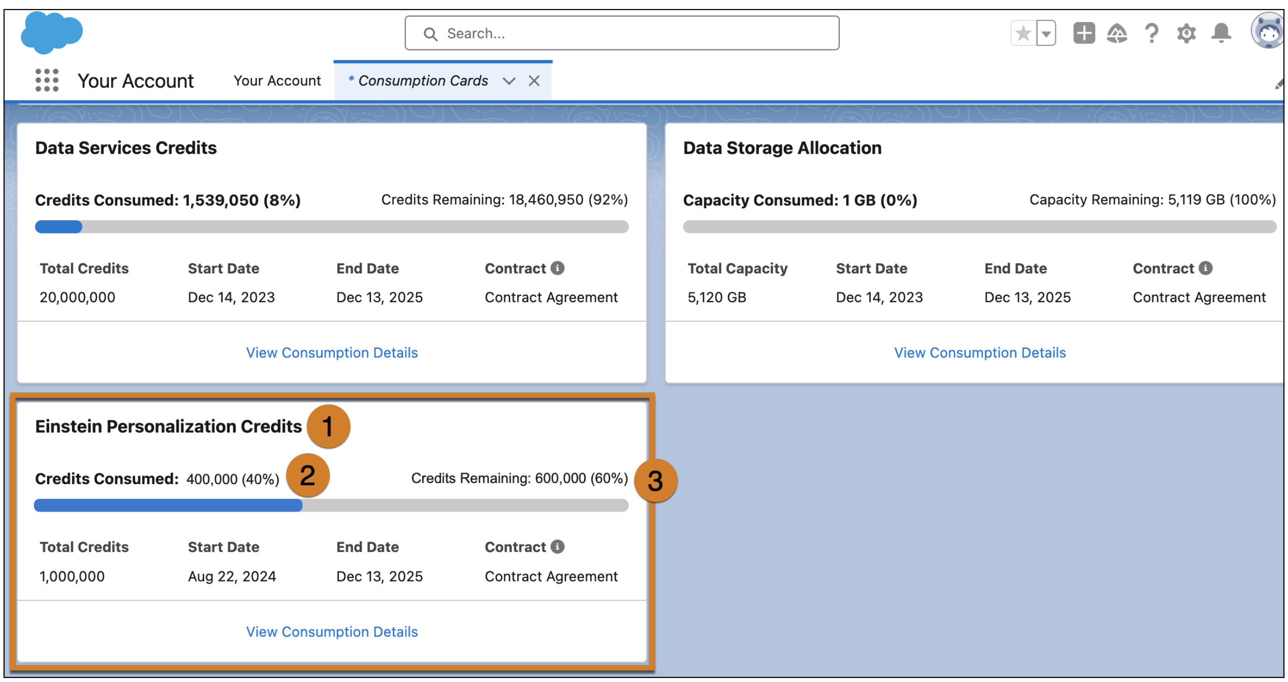
Monitor Einstein Personalization Consumption in Near Real-Time with Digital Wallet

Now you can use the Digital Wallet account management tool to monitor your Einstein Personalization credit usage. On the Digital Wallet Home page, the Einstein Personalization Credits card (1) summarizes how many credits your org has consumed (2) and how many are remaining in near real-time (3). Additionally, Digital Wallet's Consumption Insights page offers detailed breakdowns of usage by type and time period to help you detect trends over time.

Where: Digital Wallet is available in Lightning Experience in Enterprise and Unlimited editions.

Who: Digital Wallet is available to users with the View Consumption user permission. Digital Wallet is also accessible via the Your Account app Home page. 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. Alternatively, in the Your Account app, click the Consumption Cards tab or View Consumption Cards from the tile on the Home page.



SEE ALSO:

Salesforce Help: About Digital Wallet

Salesforce Help: Einstein Personalization

Resource Reference Digital Wallet

This resource file contains reusable content about the cross-cloud and cross-product account management tool called Digital Wallet.

Tip: For this product, you can access Digital Wallet, a free account management tool that offers near real-time consumption data for enabled products across your active contracts. Access Digital Wallet and start tracking your org's usage. To learn more, see About Digital Wallet.

Marketing Cloud Account Engagement

Keep your database clean by finding and merging duplicate prospects. Copy your marketing forms and emails directly to Salesforce CMS, and add your landing page and form engagement details to Data Cloud.

IN THIS SECTION:

General Enhancements

Open system email links in the Lightning App. Build segments in Data Cloud using your form and landing page engagement data. Keep your database clean by finding and merging duplicate prospects.

IN THIS SECTION:

Pause or Cancel Permanent Prospect Deletions

Take control of your prospect deletion bulk action requests by pausing, resuming, or canceling them using the Table Action Manager. This feature is available for deletion requests initiated from the API or UI. Previously, bulk prospect deletions couldn't be paused or resumed from the UI.

Discover a New Campaign Experience with Marketing Cloud

Account Engagement customers now have access to Salesforce Marketing Cloud. Experience a new campaign creation process in Marketing Cloud that uses your historical Account Engagement activity, consent data, and existing assets.

Where: This change applies to Account Engagement **Growth**, **Plus**, **Advanced**, and **Premium** Editions in regions where Marketing Cloud Growth Edition is supported.

When: Access to Marketing Cloud Growth Edition is available now. Access to Marketing Cloud Advanced Edition will be available later in Winter '25. For details about timing and eligibility, contact your Salesforce account executive.

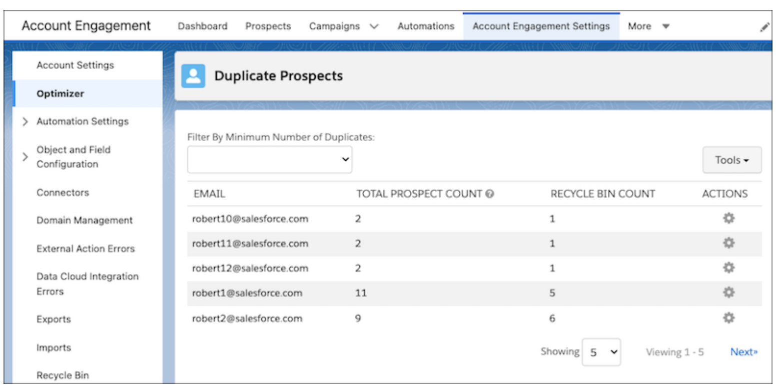
SEE ALSO:

Prepare for a New Campaign Experience with Marketing Cloud Features for Account Engagement

Find and Merge Duplicate Prospect Records

Keep your marketing information accurate and your database clean by merging duplicate prospects. The duplicate prospects tool found under the Optimizer automatically identifies prospect records with a shared email address, so that you can decide which duplicate records to merge.

Where: This change applies to all Account Engagement editions that allow multiple prospects with the same email address



SEE ALSO:

Merge Prospects

Copy Forms and Emails to a Salesforce CMS Workspace

New file types for content copying are also supported, including .pdf, .mp4, and .zip.

Where: This change applies to Marketing Cloud Account Engagement Growth, Plus, Advanced, and Premium editions.

SEE ALSO:

Enable Copy to CMS for Account Engagement Business Units

Gain Insights with Form and Landing Page Engagement Data in Data Cloud

Personalize your marketing efforts, create calculated insights, and build segments through Data Cloud with form, landing page, and tracked web page engagement data. Enable the Account Engagement connector in Data Cloud and then create an engagement data stream.

Where: This change applies to all Account Engagement editions.

SEE ALSO:

Use Account Engagement Data with Data Cloud

Create More Data Cloud Segments per Business Unit

You can now have up to 25 Data Cloud segments per business unit when creating dynamic lists in Account Engagement. Previously, only five segments were allotted per business unit.

Where: This change applies to Marketing Cloud Account Engagement Growth and Plus editions with Data Cloud enabled.

SEE ALSO:

Use Account Engagement Data with Data Cloud

Open System Email Links in the Lightning App

Improve your workflow in Salesforce and open Account Engagement system email links in the Lightning App instead of pardot.com.

Where: This change applies to all Account Engagement editions.

SEE ALSO:

System Emails

Pause or Cancel Permanent Prospect Deletions

Take control of your prospect deletion bulk action requests by pausing, resuming, or canceling them using the Table Action Manager. This feature is available for deletion requests initiated from the API or UI. Previously, bulk prospect deletions couldn't be paused or resumed from the UI.

Where: This change applies to all Account Engagement editions.

SEE ALSO:

Access Account Engagement Optimizer

APIs and Integrations

Manage tags, read and query permanent prospect deletion requests, and send list emails. Gain valuable insights by ingesting Account Engagement form and landing page engagement data into Data Cloud.

IN THIS SECTION:

Account Engagement API: New and Changed Items

Access more of your data with new updates for version 5 of the Account Engagement API.

Updated Objects in Version 5

Manage Tags on Your Marketing Assets
You can now manage tags using the Account Engagement API.

Send List and One-to-One Emails
You can now send list emails and one-to-one prospect emails via the API.

API Changes

Read and Query Prospect Permanent Deletion Requests
You can now read and query permanent prospect deletion requests created from the Account Engagement app.

Marketing Cloud Engagement

The Winter '25 Marketing Cloud Engagement release occurs October 4, 2024 through October 25, 2024. Some features are made available to you within a week of the release. Check back here for release notes on September 30, 2024.

Get an exclusive, in-depth look at the new features by tuning into the Winter '25 Marketing Cloud Engagement Release New Feature Overview. Follow this page for information on the date and time of the Winter '25 webinar.

IN THIS SECTION:

SEE ALSO:

Marketing Cloud Engagement Overview

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
• Spring '24	Spring '24 Marketing Cloud Engagement Release Notes
• Spring '23	2023 Marketing Cloud Engagement Release Notes

Included Releases	PDF Link
• Summer '23 • Winter '24	
• Spring '22 • Summer '22 • Winter '23	2022 Marketing Cloud Engagement Release Notes
• Spring '22 • Summer '22 • Fall '22 • Winter '23	2022 Marketing Cloud Intelligence Release Notes
• Fall '22 • Winter '23	2022 Marketing Cloud Intelligence Data Pipelines Release Notes
• January 2021 • April 2021 • June 2021 • August 2021 • October 2021	2021 Marketing Cloud Engagement Release Notes
• January 2020 • April 2020 • June 2020 • August 2020 • October 2020	2020 Marketing Cloud Engagement Release Notes
• January 2019 • April 2019 • June 2019 • August 2019 • October 2019	2019 Marketing Cloud Engagement Release Notes
• January 2018 • April 2018 • June 2018 • August 2018 • October 2018	2018 Marketing Cloud Engagement Release Notes
• January 2017	2017 Marketing Cloud Engagement Release Notes

Included Releases	PDF Link
• March 2017 • June 2017 • August 2017 • October 2017	

Journeys

Get more accurate success rates on the Journey History page.

IN THIS SECTION:

Get More Accurate Journey Success Rates on the Journey History Page

The Journey History page no longer displays redundant rows or rows with empty activity names or Complete status. The History Download API also doesn't display rows with empty activity names of Complete status. This change prevents artificial inflation of the success rate metrics shown in the Journey History analytic overview.

Where: This change applies to all Marketing Cloud Engagement editions.

Messaging

Reduce SMS size and measure the subscriber-level engagement by shortening SMS links with the Marketing Cloud Engagement link shortener.

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 and view the detailed information in the SMS Link Clicks report.

When: This feature is available on September 3, 2024.

Marketing Cloud Growth

For Winter '25, Marketing Cloud Growth presents solutions that launch automated campaigns based on specified events, personalize messages with dynamic content variations, and attribute revenue to influential campaigns. Generative AI options now offer Einstein Copilot features and grounding tools. Plus, other updates improve and expand admin and user experience in setup, segments, and content.

IN THIS SECTION:

Update the Required Marketing Data Kits

Release changes often result in changes to the data kits that are required for Marketing Cloud Growth. To get the latest updates and to ensure the best results for current functionality, update your data kits.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

How: The table lists which steps are required to update each data kit.

Data Kit	Required Steps
Marketing Setup Objects	In the Basic Settings section of the Marketing Cloud setup assistant, go to the Marketing Data tab and get the latest data kit update.

Data Kit	Required Steps
Sales	Reinstall the Sales data kit. Then, manually deploy the CRM data bundle for Sales.

SEE ALSO | *Salesforce Help*: Install and Deploy Data Streams for Marketing Cloud Growth (can be outdated or unavailable during release preview)

Create More Relevant Messages

The best marketing campaigns are relevant and timely. Marketing Cloud Growth now supports dynamic email content, event-triggered content automation, and merge fields that bring event data into your messages.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

Personalize Marketing Emails by Using Dynamic Content

Create dynamic content variations of your email subject line, preheader, and individual email components. To show the right content to the right people, build one email with a variety of personalized components that appear to your recipients based on targeting rules. And when you draft the content for each new variation, you can even use Einstein Copilot to generate text.

SEE ALSO | *Salesforce Help*: Personalize Your Content in Marketing Cloud Growth (can be outdated or unavailable during release preview)

SEE ALSO | Save Time with Grounded Einstein AI Tools

Launch Event-Based Campaigns

A new campaign template provides a preconfigured flow that's triggered by an event, such as when someone makes a purchase or subscribes to receive emails. Create your campaign using the Event option, and then open the campaign flow to configure the starting event and add email or SMS message content.

SEE ALSO | *Salesforce Help*: Campaigns in Marketing Cloud Growth(can be outdated or unavailable during release preview)

Use Event Data to Personalize Content

Personalize your message content by using contextual event data, such as product purchase or subscription details, in merge fields. Then, use that message in an event-triggered flow. For example, send an order confirmation message that includes order amounts and shipping details, or send a confirmation about recent email or SMS subscriptions.

SEE ALSO | *Salesforce Help*: Create an Email in Marketing Cloud Growth (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: Create an SMS Message in Marketing Cloud Growth (can be outdated or unavailable during release preview)

Improve User Experiences with These Content Enhancements

Clone content to save time, and avoid duplicating content records when you share branded content across content workspaces. Plus, improve the experience for visitors who use assistive technologies when you designate an image as purely decorative.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition, and in Starter and Pro Suite editions. Your edition determines the options that you have.

Work More Efficiently with Workspace Content

To efficiently reuse branded content, you can now share content across workspaces. This solution is a great option for customers using Marketing Cloud Growth together with Salesforce CMS in other Salesforce products. For example, create and manage your company logo image in a marketing workspace, and then share that content with a general workspace so that your colleagues in other departments can easily find and use the image. Create once, use often!

SEE ALSO | *Salesforce Help*: Managing Content and Sharing in Marketing Workspaces (can be outdated or unavailable during release preview)

Skip the Alt Text for Decorative Images

To make your content more efficient for visitors who use screen readers and other assistive technologies, you can now mark an image as decorative. A decorative image doesn't require an alt tag, so the visitor isn't distracted by unnecessary descriptions. Use this option for background images, ornamental icons, and other images that don't contain critical information.

SEE ALSO | *Salesforce Help*: Create Content in Marketing Cloud (can be outdated or unavailable during release preview)

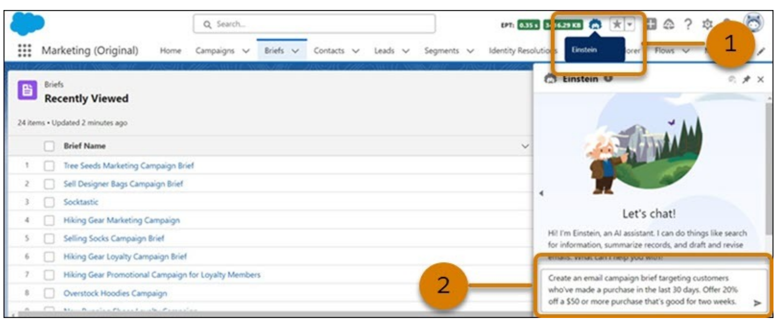
Save Time with Grounded Einstein AI Tools

Updates to generative AI in marketing tools enhance and expedite how you create engaging content.

Where: This change applies to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

Create On-Brand Campaigns with Einstein Copilot

Einstein Copilot is now generally available in Marketing Cloud Growth. 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).



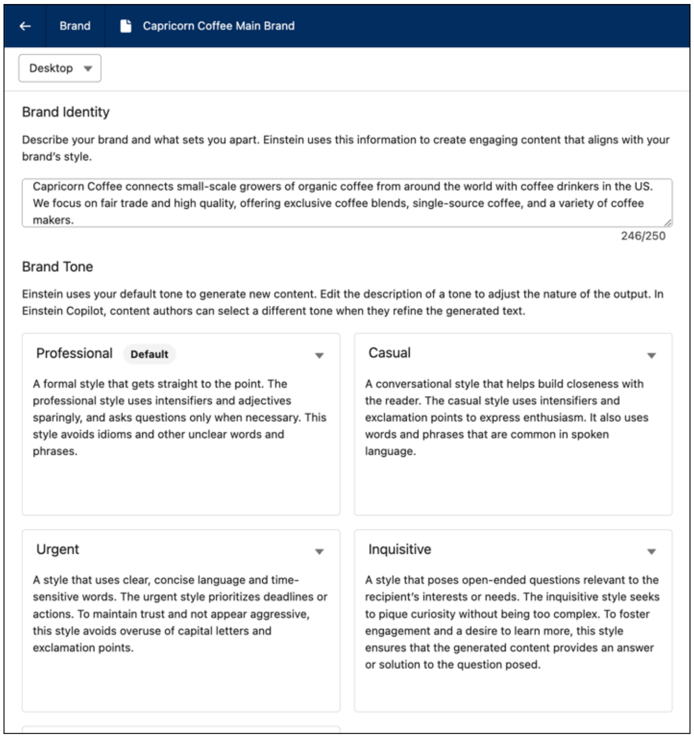
If you're already using Einstein Co-Create, you must make some changes to start using Copilot.

SEE ALSO | *Salesforce Help*: Activate Einstein Features in Marketing Cloud Growth (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: Einstein Copilot (can be outdated or unavailable during release preview)

Use New Branding Fields to Generate Content with Einstein

Now Einstein can create content that reflects your company's personality and voice. Configure your brand identity and select a default tone, so that Einstein can use them to create content. You also can revise content using a different tone. For example, if your company's default tone is Professional, but you want an email or SMS message to sound informal, ask Einstein to revise the text using the Casual tone.



SEE ALSO | *Salesforce Help*: Brand Your Content in Marketing Cloud Growth (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.

Calculate Campaign ROI with Opportunity Influence

Now you can identify the campaigns that are most influential to your deals. Opportunity Influence uses email click engagement data to automatically attribute revenue from each Closed/Won opportunity back to specific campaigns. Select from first-touch and last-touch attribution models to see which campaigns are most effective at different stages of the customer journey.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

How: Create the required objects in Data Cloud, enable Opportunity Influence in Salesforce Setup, and turn on attribution models. You can use first-touch attribution, last-touch attribution, or both. After you enable the feature, Opportunity Influence appears as an option on the sidebar of campaign records under Performance.

SEE ALSO:

Salesforce Help: Attribute Revenue to Specific Campaigns (can be outdated or unavailable during release preview)

Streamline Marketing Setup with These Admin Enhancements

Use the marketing setup assistant to install or update all the required marketing data kits. A new permission helps you make sure that your marketing admins have the access they need to complete setup.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

Get Started Faster with Improved Data Kit Setup

You can now install or update all the required Marketing Cloud Growth data kits with one click. Previously, you installed or updated each data kit individually. From the setup assistant, install or update data kits and allow the system to complete the task. For some data kit updates, you then go to Data Cloud and deploy the ingestion data streams.

SEE ALSO | *Salesforce Help*: Install and Deploy Data Streams for Marketing Cloud Growth (can be outdated or unavailable during release preview)

Give Setup Access to Marketing Admins

We added the MCGSetupUserPerm permission to the default Marketing Cloud Admin permission set. This permission provides users with access to the Marketing Cloud Growth setup assistant. If you previously cloned the Marketing Admin permission set, manually add MCGSetupUserPerm to any cloned permission sets that require this access.

SEE ALSO | *Salesforce Help*: User Permissions in Marketing Cloud Growth (can be outdated or unavailable during release preview)

Interface Updates in Marketing Cloud Growth

Enjoy these improvements throughout the Marketing Cloud Growth app, which make it easier for you to accomplish tasks and get important details at a glance.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition.

How: Review the changes that we made for Winter '25.

- The Home page now features at-a-glance data in campaign and activity widgets, as well as updated links to supporting content.
- Your campaigns now include content status badges. You can also rename a flow or open a specific flow element from a campaign record.
- With the new Replace option in email and landing page Image components, authors can quickly update an image.
- New default settings for new segments take the guesswork out of segment creation. Plus, we added breadcrumbs to the attribute library, so that you always know where you are.
- Einstein Segment Creation attributes are now divided into Suggested Attributes and Additional Attributes sections based on relevance to the description you provide. Suggested attributes appear at the top, so you can find the best options faster.

Other Changes in Marketing Cloud Growth

Learn about other changes we've made this release.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth edition. SMS features require the Salesforce Message Credits - SMS add-on.

Let People Opt In to SMS Messaging and Manage Their Preferences

You now have access to a default preference page for SMS messages so that people can opt in or out of your SMS communication subscriptions. To include a link to the page in a message, use the Preference Manager merge field.

SEE ALSO | *Salesforce Help*: Edit Default Preference Pages in Marketing Cloud Growth (can be outdated or unavailable during release preview)

Create More Specific Scoring Rules

To meet your business needs, you can now create more complex rules for scoring your leads and contacts. Create or edit existing rules to use multiple conditions, or group conditions related to a single object. For example, create a condition group to look for someone who clicks a link in an email and fills out a form on a landing page. You can also combine condition groups with other groups or with single conditions to create a complex scoring rule.

SEE ALSO | *Salesforce Help*: People Scoring in Marketing Cloud Growth (can be outdated or unavailable during release preview)

Track Click Activity Across Sites

Web tracking tools now track link and button clicks on your landing pages and external sites. For landing pages created in Marketing Cloud Growth, click tracking is available automatically with Winter '25. To enable this functionality for external website tracking, reconfigure your External Tracking setup.

SEE ALSO | *Salesforce Help*: Track Activity on External Sites (can be outdated or unavailable during release preview)

The Marketing Consent Component Is Being Retired

The Marketing Consent Status component is being retired with Winter '25. To avoid any interruptions, update your page layouts to use the Privacy Consent Status component instead.

SEE ALSO | *Salesforce Help*: Page Customization (can be outdated or unavailable during release preview)

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.

- 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

Keep up with deals while on the go with the new Seller-Focused Sales Mobile Experience, which is now generally available. Improve productivity when working with records offline, customer messaging, or reports with the latest features available on the Salesforce mobile app. Create a mobile app built on Lightning Web Runtime (LWR) with Mobile Publisher for Experience Cloud LWR sites, which is now generally available. Validate the records available offline to a user with the new Total Unique Records field available in Briefcase Builder.

IN THIS SECTION:

Salesforce Mobile App

Easily resolve sync issues with offline record drafts by using the new force sync button in the Offline App. Mobile customer service agents can now transfer messaging sessions and send compatible messaging components with Messaging in the Salesforce mobile app. Access hyperlinks in reports from anywhere with Enhanced Reports on the Salesforce mobile app.

General Mobile Updates

Manage sales on the go with Seller-Focused Sales Mobile Experience. Review the count of total unique records available to a briefcase user.

Mobile Publisher

Mobile Publisher for Experience Cloud Lightning Web Runtime (LWR) sites is now generally available. Prepare your Experience Cloud Android app users to update their devices to Android 9 and later. Use the new snapshot prevention feature to conceal your app's information when the app is in the background of a device. Enable Marketing Cloud notifications for an Experience Cloud Android app more simply in Setup for Mobile Publisher.

Salesforce Mobile App

Easily resolve sync issues with offline record drafts by using the new force sync button in the Offline App. Mobile customer service agents can now transfer messaging sessions and send compatible messaging components with Messaging in the Salesforce mobile app. Access hyperlinks in reports from anywhere with Enhanced Reports on the Salesforce mobile app.

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 October 14, 2024.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Customer Service Features			
Messaging in the Salesforce Mobile App Is Now Generally Available	✓	✓	✓
Send Messaging Components and Transfer Messaging Sessions with Messaging for Mobile	✓	✓	✓
Reports and Dashboards			
Access Linked Resources Anytime, Anywhere in Enhanced Reports on Salesforce Mobile	✓	✓	

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Offline Access			
Restart Offline Draft Syncs with One Tap	✓	✓	✓

Access Linked Resources Anytime, Anywhere in Enhanced Reports on Salesforce Mobile

You can now see and open hyperlinks in Enhanced Reports on the Salesforce mobile app to keep your workflow uninterrupted and maintain productivity. Previously, you needed a desktop site to interact with an embedded link.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited editions.

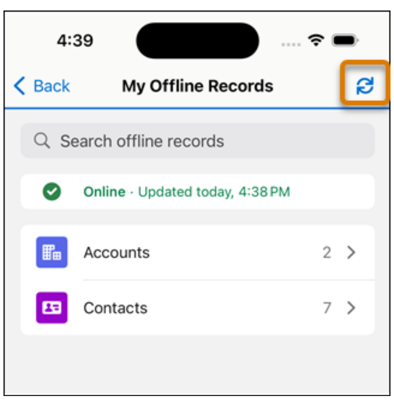
When: Hyperlinks in Enhanced Reports on mobile are available the week of October 14, 2024.

Restart Offline Draft Syncs with One Tap

When you create, update, or delete a record in the Offline App, each data change is recorded as a draft. When you're back online, those drafts are uploaded and data on the server is downloaded to your mobile device. Sometimes, like when your network connection is weak, that upload can get stuck and fail to complete. Instead of doing multiple troubleshooting steps to stop and start the sync again, you can now click the force sync button after any network issues are resolved to restart the upload.

Where: This change applies to the Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

Who: Mobile Offline is available in orgs with the Salesforce Mobile App Plus license and to users within that org who have the Mobile Offline for Salesforce Mobile App Plus user permission.



SEE ALSO:

Salesforce Help: Get Started With Mobile Offline (can be outdated or unavailable during release preview)

Messaging in the Salesforce Mobile App Is Now Generally Available

Modernize your customer service by letting agents message customers from the Salesforce mobile app. Messaging in the Salesforce Mobile App was in beta in Summer '24 and is now generally available.

Where: This change applies to all enhanced messaging channels and Messaging for In-App and Web. View required editions.

Who: Users with a Messaging User permission set license and the Message on Mobile user permission 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 Your Customers from the Salesforce Mobile App (can be outdated or unavailable during release preview)

Send Messaging Components and Transfer Messaging Sessions with Messaging for Mobile

To elevate agent messaging in the Salesforce mobile app and achieve parity with the desktop site, we gave mobile agents a few new tools. Transfer a messaging session from the mobile messaging console to another agent, bot, or queue. Send any type of messaging component that's compatible with your messaging channel. Previously, agents could only send messages and voice notes on mobile.

Where: This change applies to all enhanced messaging channels and Messaging for In-App and Web. View required editions.

Who: Users with a Messaging User permission set license can message customers in the Salesforce app.

How: To access the transfer session and send components actions, click the plus sign in the mobile conversation window.

General Mobile Updates

Manage sales on the go with Seller-Focused Sales Mobile Experience. Review the count of total unique records available to a briefcase user.

IN THIS SECTION:

Boost Your Sales Productivity with a Seller-Focused Mobile App (Generally Available)

The Seller-Focused Sales Mobile Experience helps you easily track and update accounts, contacts, leads, and opportunities while on the go.

Where: Seller-Focused Sales Mobile Experience for Android and iOS on phones and tablets in all editions, except Database.com.

When: This app is available in October 2024.

Who: Einstein Copilot is available to users with the Use Einstein Copilot for Salesforce user permission.

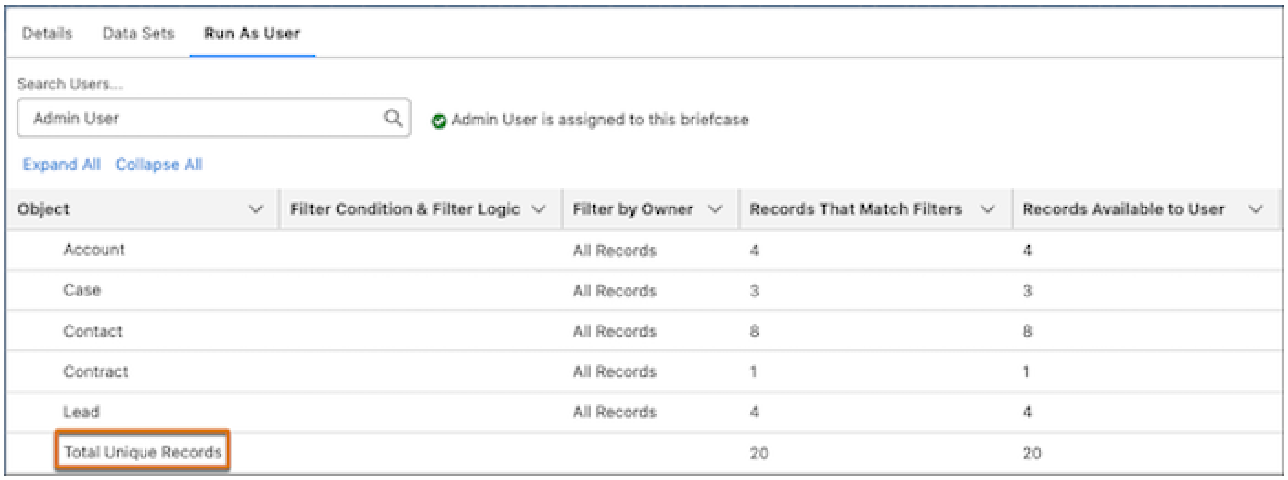
Why: For more information on these changes, see Close Deals Faster With a New Seller-Focused Mobile App (Generally Available).

Verify Briefcase Settings by Using the Count of Total Unique Records

In the Run As User view of a briefcase in Briefcase Builder, you can now review the total number of unique records available offline to a user assigned to the briefcase. This count can help you verify a briefcase's configuration without adding record counts from each rule and deduplicating records counted across rules.

Where: This change applies to Lightning Experience desktop and in Salesforce with Field Service (SFS) enabled. Briefcase Builder supports the Salesforce Field Service mobile app for iOS and Android and Salesforce Mobile App Plus.

How: From Setup, in the Quick Find box, enter `Briefcase Builder`, and then select **Briefcase Builder**. Click a briefcase to view its details. Then click the **Run As User** tab, and select a user to view the count of total unique records accessible to the user.



SEE ALSO:

Salesforce Help: Validate Briefcase Settings (can be outdated or unavailable during release preview)

Mobile Publisher

Mobile Publisher for Experience Cloud Lightning Web Runtime (LWR) sites is now generally available. Prepare your Experience Cloud Android app users to update their devices to Android 9 and later. Use the new snapshot prevention feature to conceal your app's information when the app is in the background of a device. Enable Marketing Cloud notifications for an Experience Cloud Android app more simply in Setup for Mobile Publisher.

IN THIS SECTION:

Create Lightning Web Runtime (LWR) Apps with Mobile Publisher for Experience Cloud (Generally Available)

Develop branded mobile apps from your Build Your Own (BYO) LWR sites that meet high scale, security, and performance demands. Mobile apps built on LWR boast increased speed, scalability, and design flexibility. This feature, now generally available, includes some changes and bug fixes since the beta release.

Android Experience Cloud Apps Now Require Android 9 or Later

To install a Mobile Publisher for Experience Cloud Android app in version 12.6 or later, devices must be updated to at least Android 9. Starting in app version 12.6, Mobile Publisher for Experience Cloud Android apps no longer support devices with Android 8 and earlier.

Conceal Sensitive Information When Your Experience Cloud App Is in the Background

When an app user switches between apps on their device without quitting apps entirely, a snapshot of each app is visible when the user pulls up all apps running in the background. Mobile Publisher for Experience Cloud apps now support a feature to conceal an app's snapshot behind a splash screen (iOS) or a blank screen (Android) when in the background of a device.

Set Up Marketing Cloud Notifications on Experience Cloud Android Apps More Simply

When you create a Mobile Publisher for Experience Cloud Android app, you submit information from Google Firebase to configure the app's standard notifications, but you no longer need to reenter Firebase information to enable Marketing Cloud notifications as well. The Firebase information that you submit for Android standard notifications is now also applied to Marketing Cloud notifications. Previously, you submitted Firebase information in separate fields to enable standard notifications and Marketing Cloud notifications.

Create Lightning Web Runtime (LWR) Apps with Mobile Publisher for Experience Cloud (Generally Available)

Develop branded mobile apps from your Build Your Own (BYO) LWR sites that meet high scale, security, and performance demands. Mobile apps built on LWR boast increased speed, scalability, and design flexibility. This feature, now generally available, includes some changes and bug fixes since the beta release.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Select your BYO LWR site from the Experience Builder Info section in Mobile Publisher Setup.

SEE ALSO:

Salesforce Help: Limitations for Mobile Publisher for Experience Cloud LWR Sites (can be outdated or unavailable during release preview)

Lightning Web Runtime Developer Guide: Lightning Web Runtime (can be outdated or unavailable during release preview)

Android Experience Cloud Apps Now Require Android 9 or Later

To install a Mobile Publisher for Experience Cloud Android app in version 12.6 or later, devices must be updated to at least Android 9. Starting in app version 12.6, Mobile Publisher for Experience Cloud Android apps no longer support devices with Android 8 and earlier.

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)

Conceal Sensitive Information When Your Experience Cloud App Is in the Background

When an app user switches between apps on their device without quitting apps entirely, a snapshot of each app is visible when the user pulls up all apps running in the background. Mobile Publisher for Experience Cloud apps now support a feature to conceal an app's snapshot behind a splash screen (iOS) or a blank screen (Android) when in the background of a device.

Where: This change applies to Mobile Publisher for Experience Cloud app versions 12.6 and later. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

How: To protect sensitive information shown in your app, enable snapshot prevention in Setup for Mobile Publisher. In your app's Mobile Publisher project, go to the Security section, and then select **Snapshot Prevention**.

SEE ALSO:

Salesforce Help: Conceal Your App's Snapshot While in a Device's Background (can be outdated or unavailable during release preview)

Set Up Marketing Cloud Notifications on Experience Cloud Android Apps More Simply

When you create a Mobile Publisher for Experience Cloud Android app, you submit information from Google Firebase to configure the app's standard notifications, but you no longer need to reenter Firebase information to enable Marketing Cloud notifications as well. The Firebase information that you submit for Android standard notifications is now also applied to Marketing Cloud notifications. Previously, you submitted Firebase information in separate fields to enable standard notifications and Marketing Cloud notifications.

Where: This change applies to Mobile Publisher for Experience Cloud Android apps with Marketing Cloud notifications enabled. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Register Your Firebase App to Enable Mobile Publisher Android Push Notifications (can be outdated or unavailable during release preview)

Salesforce Help: Enable Marketing Cloud Push Notifications for Mobile Publisher Apps (can be outdated or unavailable during release preview)

Omnistudio

In the Winter '25 release, Omnistudio Standard offers new designers and list views for all components. It also offers customization of Omniscript elements.

IN THIS SECTION:

Customize Omniscript Elements for Your Business Requirements

Create user journeys that match your brand and business requirements by customizing the Omniscript elements. Add custom behavior and styling to an Omniscript element, such as using your company's fonts and colors or overriding the default behavior of a Radio element for a specific business use case.

Other Improvements in Omnistudio

Learn about the behavior changes to the Navigate action element of an Omniscript in Winter '25.

Omnistudio Minor Releases

Find out about bug fixes and minor updates for Omnistudio made after Winter '25 and before Spring '25.

Effortlessly Build Omnistudio Components By Using New Designers

Use the new intuitive Omnistudio designers for Flexcards, Omniscripts, Integration Procedures, and Omnistudio Data Mappers in the standard runtime. These designers include user-friendly navigation, enhanced accessibility, updated styling, fonts, and colors to create a cohesive and aesthetically pleasing visual experience. The existing elements and configurations from the designer on a managed package are available in the new designers.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

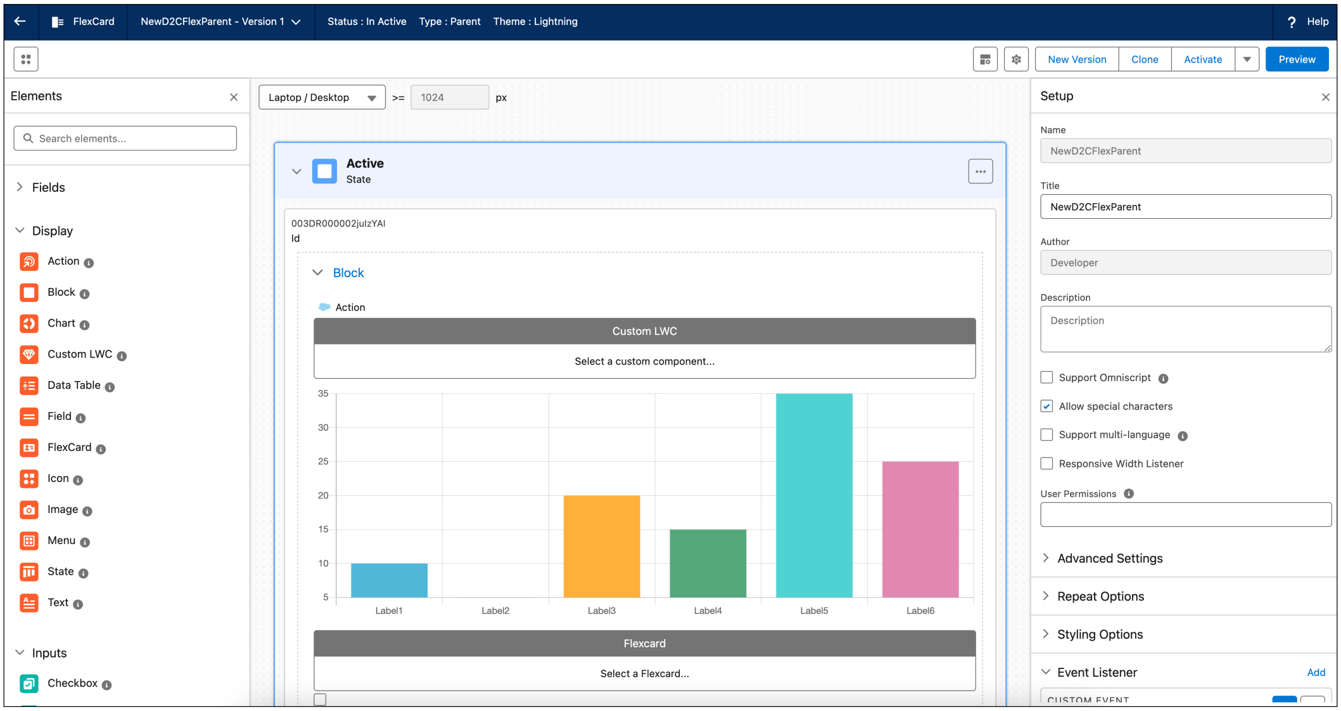
Why: These designers provide the standard components for building user interfaces and integrating these components with other applications within Salesforce. The new, refreshed layouts of these designers offer simplified workflows and an enhanced user experience.

- Flexcard: Create Flexcards in fewer steps. With this new designer, Flexcards activation is instant.
- Omniscript: Drag components to the canvas and edit properties without changing tabs when you create a component. With the new designer, the Omniscript activation is instant.
- Integration Procedure: Configure Integration Procedures in fewer steps and preview either the entire Integration Procedure or a specific component within it.
- Data Mapper: View all elements of Data Mappers inside the Integration Procedure for a more intuitive experience. Create Data Mappers by using the Integration Procedure elements, or directly from the Omnistudio Home Page.

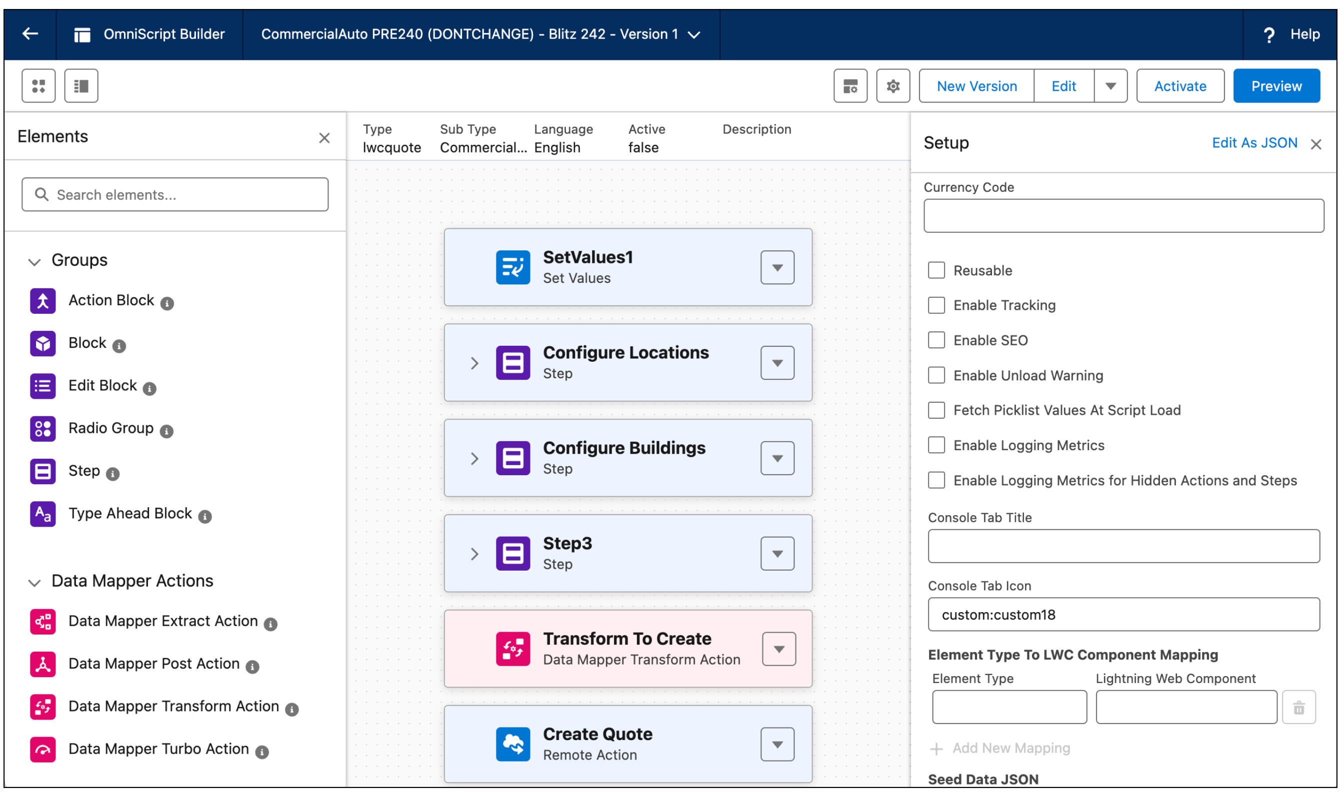
How: To enable these designers, contact your account executive.

From the Omnistudio list page, select a Flexcard, Omniscript, Integration Procedure, or Data Mapper to launch its designer.

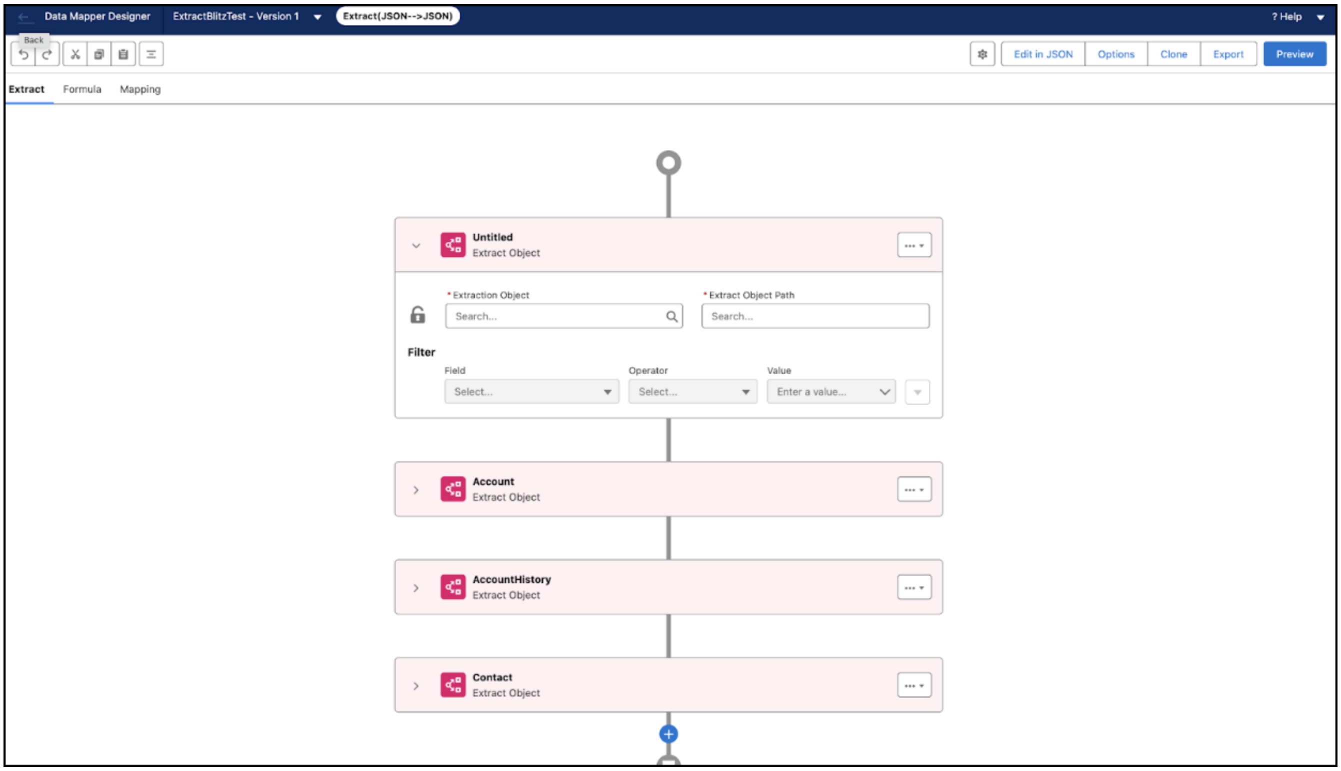
- Flexcard



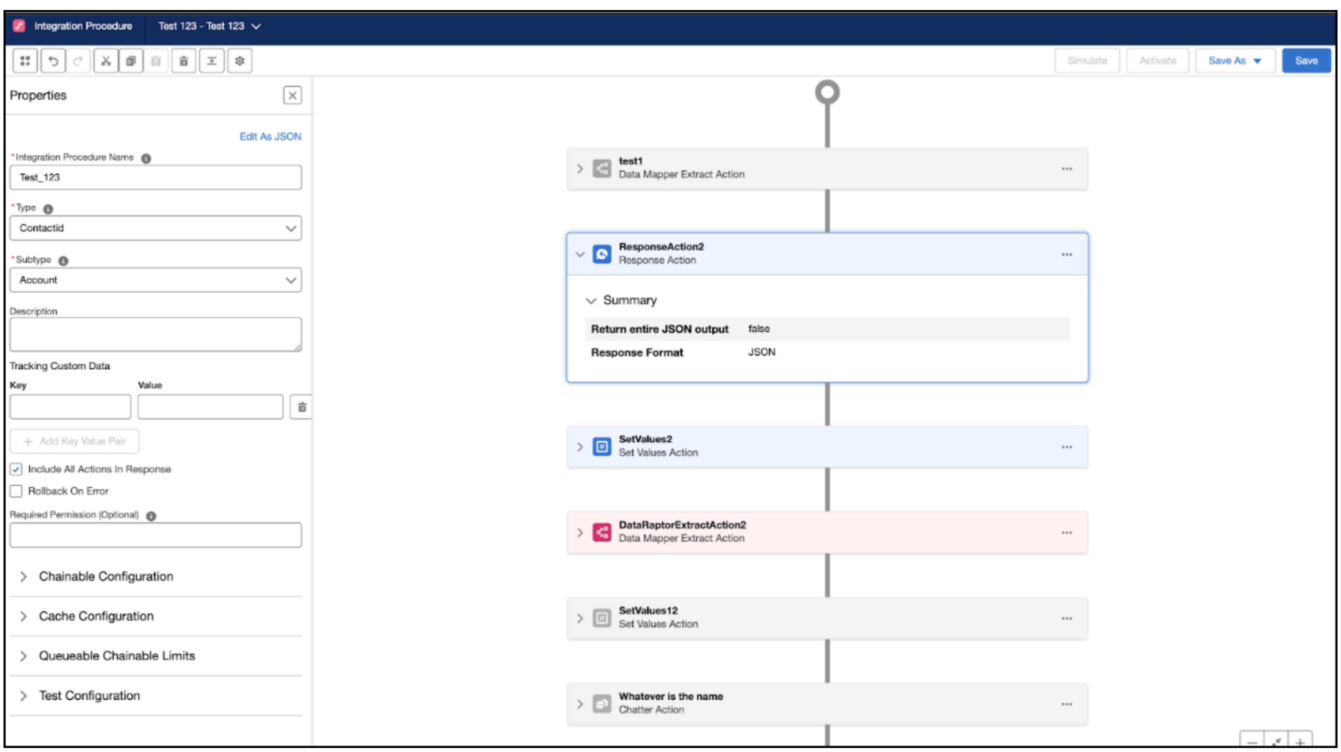
- Omniscript



- Data Mapper



- Integration Procedure



SEE ALSO:

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

Easily Browse Through Omnistudio Components with List Views

Omnistudio introduces a new list view page for each component that is created using the new designer. Easily view your Flexcards, Omniscripts, Integration Procedures, and Data Mappers on the list view pages, and open them in the new designers. The new list view page offers an enhanced user experience and better performance.

Where: This change applies to all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to all new customers of Omnistudio.

Why: The new list view page aligns with the Salesforce standard list view pages. From the list view page, you can:

- Create an Omnistudio component.
- Search, filter, and save your preferred list views.
- View the last modified version of a component.
- View all versions of a component in a new page.
- Activate, deactivate, or delete a component.

How: To launch a list view page for an Omnistudio component, go to App Launcher and choose your component.

Customize Omniscript Elements for Your Business Requirements

Create user journeys that match your brand and business requirements by customizing the Omniscript elements. Add custom behavior and styling to an Omniscript element, such as using your company's fonts and colors or overriding the default behavior of a Radio element for a specific business use case.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime and have disabled the Managed Package Runtime setting.

How: To modify the styling to meet your brand requirements, update the HTML and CSS of an element's Lightning Web Component. You can also implement dynamic behavior and interactions within the component by updating the JavaScript component of the Omniscript element's Lightning Web Component. After you create your customized component, override the existing Omniscript component with the customized component in the LWC Component Override field.

SEE ALSO:

Salesforce Help: Customize Omniscript Elements (can be outdated or unavailable during release preview)

Other Improvements in Omnistudio

Learn about the behavior changes to the Navigate action element of an Omniscript in Winter '25.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime and have disabled the Managed Package Runtime setting.

How: In the Navigate action element, if you set the page reference type to Current Page and the target to a specific step in the Omniscript, when you click **Next** at run time, it takes you to the specified step.

For example, you have an Omniscript with 10 steps and insert a Navigate action between Step 1 and Step 2 with these properties:

- Page Reference Type: `Current Page`
- Target or Additional Parameters: `c__step=Step7`

At run time, clicking the Next button on Step 1 takes the user to Step 7.

Previously, clicking Next on Step 1 took the user to Step 8.

SEE ALSO:

Salesforce Help: Navigate to the Current Page (can be outdated or unavailable during release preview)

Omnistudio Minor Releases

Find out about bug fixes and minor updates for Omnistudio made after Winter '25 and before Spring '25.

Omnistudio Minor Releases

Revenue Cloud

Revenue Cloud brings a suite of enhancements to boost efficiency and elevate user experience. Get notified when orders are created. Product Catalog Management now supports CSV file imports, templates for qualification decision tables, and category and product qualification elements in rule procedures. Use ramp deals for dynamic pricing and other enhancements to support informed decision-making. Your customer community users can access quoting capabilities. The new Invoice Management feature automates and scales invoice generation, ensuring accuracy, compliance, and improved financial reporting. Salesforce Contracts can now compare documents, lock sections, and generate documents in real-time. Learn more about these and other enhancements in Revenue Cloud.

IN THIS SECTION:

Revenue Lifecycle Management Is Now Revenue Cloud

We have updated product documentation and in-app wording to reflect the renaming of Revenue Lifecycle Management to Revenue Cloud. This name change doesn't affect the functionality of Revenue Cloud. During the naming transition, the old name may still appear in some Salesforce resources.

Product Catalog Management

Save time and effort when creating qualification decision tables by using templates. To show only eligible categories and products, use category qualification and product qualification elements in a single qualification rule procedure. Empower your users to effortlessly find products with ease using search terms. The indexed product catalog data has inbuilt typo tolerance and returns relevant search results despite misspellings. Sell your products and services as part of ramp deals where the price or volume changes gradually over time. Organise your bundled product components logically into nested groups with each group having its own cardinality that defines selection limits at runtime.

Salesforce Pricing

Keep all your procedure requirements in one place. Help users make informed decisions with Price Tracking History. With Pricing Batch Jobs, updating multiple records becomes so much easier. Seamlessly integrate Salesforce Pricing with Commerce Cloud and get detailed pricing insights by using the waterfall view. Customize proration settings to ensure accurate subscription prices and use the Roll Up Price feature for efficient product bundle pricing. In addition, the improved Derived Pricing now includes new input fields and improved asset pricing calculations.

Rate Management (Generally Available)

Use Rate Management to define cost-effective rates for customers based on the pay-per-use model. Create customized rate adjustments, define discounts and obtain accurate rates for your usage resources, and calculate the net unit rate by using inbuilt rating elements in rating procedures.

Product Configurator

Create rules faster with fewer choices and actions. Check each rule for errors before using it. Apply rules to entire transaction, not just single items. Add or remove items from quotes based on rules. See clear pricing and quantities for each part of a ramped quote. View how derived product prices are calculated. See usage details right in the summary.

Transaction Management

Give your users the flexibility of charging their customers based on the consumption of your services by using Usage-Based Selling. Create flexible transactions with ramp deals that support your customer's evolving needs by dividing a transaction line into segments, and configure their prices and quantities independently. Automate and manage routine approval tasks with Advanced Approvals. Extend quoting capabilities to customer community users. Organize transactions with Groups, automatically or manually grouping quote and order lines. Streamline quoting and ordering for derived products by automatically adding derived product assets with contributing products. Easily add existing assets to a new quote or order by using the Add Assets action. Save time by adding products instantly to your transactions as transient lines. Notify your users when an order is created from a quote.

Dynamic Revenue Orchestrator

Define how failed callouts are retried by specifying how many times a failed callout retries a connection. Use the enhanced performance and mapping interface for thorough error logging. Partially load decomposition plans by loading a plan in steps to quickly get to what you need. If a fulfillment step doesn't meet its conditions, that step is skipped. Your fulfillment designers can specify whether to skip only a step or an entire branch that relies on the step. Product classifications group a range of similar products, so designers can easily configure the decomposition. Get a robust search function and more information at a glance when you search or view information about a decomposition rule. View decomposition rules even if they don't enrich fulfillment line items.

Invoice Management (Generally Available)

Monetize all the sales models of your business with Invoice Management. Bill in advance or in arrears to generate invoices before or after recurring products and services are delivered. Automate and scale invoice generation. Configure multiple legal and tax entities to best support your business operations and structure. Automate the conversion of negative invoice lines to credit memos and the application of credit to invoices.

Salesforce Contracts

Salesforce Contracts has enhanced its contract management with new features for improved efficiency and accuracy. The internal review workflow is optimized for contract authors. By using the document comparison feature, authors can identify differences between two versions of a contract. Both contract authors and template designers can lock sections within documents to prevent unauthorized edits. Template designers now benefit from real-time document generation by using Single Point Requests (SPR). Additionally, the new file-based prompt APIs help contract admins minimize failures during the extraction of contract details from PDFs. They can refine instructions for both predefined and user-defined fields and test the extraction results before creating a contract record.

Salesforce Billing Managed Package

Leverage Salesforce Billing's usability improvements to easily post large number of invoices in batches without facing any errors.

Revenue Lifecycle Management Is Now Revenue Cloud

We have updated product documentation and in-app wording to reflect the renaming of Revenue Lifecycle Management to Revenue Cloud. This name change doesn't affect the functionality of Revenue Cloud. During the naming transition, the old name may still appear in some Salesforce resources.

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

SEE ALSO:

Salesforce Help: Revenue Lifecycle Management (can be outdated or unavailable during release preview)

Product Catalog Management

Save time and effort when creating qualification decision tables by using templates. To show only eligible categories and products, use category qualification and product qualification elements in a single qualification rule procedure. Empower your users to effortlessly find products with ease using search terms. The indexed product catalog data has inbuilt typo tolerance and returns relevant search results despite misspellings. Sell your products and services as part of ramp deals where the price or volume changes gradually over time. Organise your bundled product components logically into nested groups with each group having its own cardinality that defines selection limits at runtime.

IN THIS SECTION:

Easily Create Qualification Decision Tables by Using Templates

Save time and effort by using predefined templates to create decision tables for the standard qualification and disqualification objects. When you create decision tables by using templates, it ensures that the correct usage type is selected. It also ensures that the mandatory input and output fields for qualification or disqualification are selected.

Show Only Eligible and Available Categories

In addition to product qualification rules, you can now use product category qualification rules in a single qualification rule procedure. Use product category qualification rules to show only the eligible and available categories to your sales reps and customers.

Improve Search Results by Indexing Your Product Catalog

Make it easy for your users to find products at run time through search terms. Index your product catalog and define object fields and dynamic attributes that users can use to search for products. The in-built typo tolerance handles user input errors such as misspellings and typographical errors, and provides relevant search results.

Define Ramp Segment Types for Products Whose Price and Volume Can Change Over Time

Sell your product or service as part of a ramp deal where price or volume change gradually over time as part of the quote, order, or deal. A ramp segment is a specific phase or period within a ramp deal during which certain terms, such as pricing or volume, are in effect.

Organize Bundled Products Better With Nested Groups

Organize bundled product components such as products and product classification under nested groups, making it easier for your sales reps to find and select the right products at run time. You can add a nested group under every root group. Each group has its own cardinality that defines the minimum and maximum number of child components that can be selected at run time.

Product Discovery

Use Guided Product Selection to capture user requirements and then show suitable products. When images play a key role when your users browse products or make buying decisions, accentuate images by using tile view. In the product details view and product bundle details view, show qualification and pricing information only when necessary. Refine the product details view to show only the required options and information to your users. Boost engagement by providing guest users access to catalogs and products by using Product Discovery components and APIs. To extend the product browsing experience beyond the available capabilities, use a custom flow that enables your users to view products, view product details, and add products. When browsing products, experience an enhanced product searching experience, view only supported and available catalogs, and view nested groups.

New and Changed Objects For Product Catalog Management

Do more with the new and changed objects in Product Catalog Management.

Connect REST APIs

Connect REST APIs for Product Catalog Management help customers, partners, and ISVs access data related to products, categories, and catalogs.

Easily Create Qualification Decision Tables by Using Templates

Save time and effort by using predefined templates to create decision tables for the standard qualification and disqualification objects. When you create decision tables by using templates, it ensures that the correct usage type is selected. It also ensures that the mandatory input and output fields for qualification or disqualification are selected.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

SEE ALSO:

Salesforce Help: Create a Decision Table That Uses a Standard Evaluation Object (can be outdated or unavailable during release preview)

Show Only Eligible and Available Categories

In addition to product qualification rules, you can now use product category qualification rules in a single qualification rule procedure. Use product category qualification rules to show only the eligible and available categories to your sales reps and customers.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

How: When you create a qualification rule procedure, select **Product Qualification** as the Usage Type. Then use the qualification and disqualification elements for product categories and products.

SEE ALSO:

Salesforce Help: Create a Qualification Rule Procedure (can be outdated or unavailable during release preview)

Improve Search Results by Indexing Your Product Catalog

Make it easy for your users to find products at run time through search terms. Index your product catalog and define object fields and dynamic attributes that users can use to search for products. The in-built typo tolerance handles user input errors such as misspellings and typographical errors, and provides relevant search results.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

SEE ALSO:

Salesforce Help: Index and Search of Product Catalog (can be outdated or unavailable during release preview)

Define Ramp Segment Types for Products Whose Price and Volume Can Change Over Time

Sell your product or service as part of a ramp deal where price or volume change gradually over time as part of the quote, order, or deal. A ramp segment is a specific phase or period within a ramp deal during which certain terms, such as pricing or volume, are in effect.

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

How: To sell your product or service as part of a ramp deal, associate one or more ramp segments types with the product or service. You can create free trial, yearly, or custom segments. For free trial segments, you also define the trial duration.

SEE ALSO:

Salesforce Help: Product Ramp Segments (can be outdated or unavailable during release preview)

Organize Bundled Products Better With Nested Groups

Organize bundled product components such as products and product classification under nested groups, making it easier for your sales reps to find and select the right products at run time. You can add a nested group under every root group. Each group has its own cardinality that defines the minimum and maximum number of child components that can be selected at run time.

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

SEE ALSO:

Salesforce Help: Local Cardinality and Group Cardinality (can be outdated or unavailable during release preview)

Product Discovery

Use Guided Product Selection to capture user requirements and then show suitable products. When images play a key role when your users browse products or make buying decisions, accentuate images by using tile view. In the product details view and product bundle details view, show qualification and pricing information only when necessary. Refine the product details view to show only the required options and information to your users. Boost engagement by providing guest users access to catalogs and products by using Product Discovery components and APIs. To extend the product browsing experience beyond the available capabilities, use a custom flow that enables your users to view products, view product details, and add products. When browsing products, experience an enhanced product searching experience, view only supported and available catalogs, and view nested groups.

IN THIS SECTION:

Guide Users to Find the Right Products

When too many product choices and complex products are available to your users, identifying products that meet their requirements can be a daunting task. Use Guided Product Selection to show a series of structured, dynamic questions that capture user requirements, and then show suitable products.

Accentuate Product Images with Tile View

If images play a key role when your users browse products or make buying decisions, use the tile view to highlight images. Choose the basic tile view to show only the product image, name, and description. Use the detailed tile view to also show other information such as pricing, configuration options, product selling model, and additional fields based on the configured properties. If necessary, enable the list view and one of the tile views so users can switch between views based on their preference.

Show Qualification and Pricing Information Only When Necessary

Based on your business requirements, enable or disable pricing and qualification procedures for the Product Details and Product Bundle Details components. For example, to show all the products in a bundle, including the disqualified products, disable the qualification procedure for the Product Bundle Details component. These settings are applicable only after you enable and select the pricing and qualification procedures on the Product Discovery Settings page.

Refine Product Detail View

Provide only the required options and information to your sales reps and customers when they view product details. You can now show additional fields, show or hide the option to enter a quantity, and select the object that users can add products to. The object that you can enable users to add products to depends on the availability of other Salesforce products.

Boost Engagement by Granting Guest Users Access to Product Discovery

Provide guest users access to catalogs and products by using Product Discovery APIs and components. From Experience Cloud sites, give them access to these components: Product List, Product Details, Product Attribute Details, and Product Bundle Details. The Product List component helps guest users browse catalogs, categories, and products in a simple, structured way. The other components give a unified, comprehensive view of product information. Use the APIs to provide guest users access to catalogs and products from your company sites or to access catalogs and products from other endpoints.

Create a Custom Product Browsing Experience

To extend the product browsing experience beyond the available capabilities, create and use a custom flow. Create a custom flow that enables your users to view catalogs, view products, and add products. Then select the custom flow in Product Discovery Settings. The custom flow is launched when your users click the Browse Catalogs button on object record pages. For example, in Revenue Cloud, the custom flow is launched when your users click the Browse Catalogs button on quote and order records.

Show Only the Available and Qualified Categories in Product Discovery

In addition to product qualification procedure elements, use category qualification elements in the qualification procedure for Product Discovery.

Experience Enhanced Product Search

After you index product catalogs and configure search options, your sales reps and customers experience enhanced search capabilities from the Product List component.

View Nested Groups for Product Bundles

After product designers configure bundle products with nested groups, sales reps and customers can see the nested groups on the Product Bundle Details component.

Replace the Deprecated Product Discovery Permission Sets

We've deprecated the Product Discovery User permission set license and the associated Product Discovery User and Product Discovery Admin permission sets. Use the Product Catalog Management Viewer and the Product Catalog Management Designer permission sets instead.

Connect REST APIs

Connect REST APIs for Product Discovery help customers, partners, and ISVs access data related to products, categories, and catalogs.

Guide Users to Find the Right Products

When too many product choices and complex products are available to your users, identifying products that meet their requirements can be a daunting task. Use Guided Product Selection to show a series of structured, dynamic questions that capture user requirements, and then show suitable products.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

Who: To use Guided Product Selection, you also need Omnistudio. Omnistudio is available as a part of Salesforce products such as Revenue Cloud, or as a standalone Omnistudio license.

How: Complete the prerequisites required to enable Guided Product Selection, enable it, and then create dynamic assessment forms. Users can click the Guide Me button on the Product List component to access forms and answer assessment questions. After users answer all the questions in a form, they see suitable products on the Product List component.

SEE ALSO:

Salesforce Help: Guided Product Selection (can be outdated or unavailable during release preview)

Accentuate Product Images with Tile View

If images play a key role when your users browse products or make buying decisions, use the tile view to highlight images. Choose the basic tile view to show only the product image, name, and description. Use the detailed tile view to also show other information such as pricing, configuration options, product selling model, and additional fields based on the configured properties. If necessary, enable the list view and one of the tile views so users can switch between views based on their preference.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

How: In Lightning App Builder or Experience Builder, select the Product List component, and then configure the Supported Views, Default View, and Tile View Type settings.

SEE ALSO:

Salesforce Help: Customize Product Browsing Experience (can be outdated or unavailable during release preview)

Show Qualification and Pricing Information Only When Necessary

Based on your business requirements, enable or disable pricing and qualification procedures for the Product Details and Product Bundle Details components. For example, to show all the products in a bundle, including the disqualified products, disable the qualification procedure for the Product Bundle Details component. These settings are applicable only after you enable and select the pricing and qualification procedures on the Product Discovery Settings page.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

How: In Lightning App Builder or Experience Builder, select the **Product Details** or **Product Bundle Details** component. Then select or deselect **Run pricing procedure** and **Run qualification procedure**.

SEE ALSO:

Salesforce Help: Customize Product Browsing Experience (can be outdated or unavailable during release preview)

Refine Product Detail View

Provide only the required options and information to your sales reps and customers when they view product details. You can now show additional fields, show or hide the option to enter a quantity, and select the object that users can add products to. The object that you can enable users to add products to depends on the availability of other Salesforce products.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

How: In Lightning App Builder or Experience Builder, select the **Product Details** or **Product Bundle Details** component. Configure the Display Fields, Let users enter the quantity, and Add Products To settings.

SEE ALSO:

Salesforce Help: Customize Product Browsing Experience (can be outdated or unavailable during release preview)

Boost Engagement by Granting Guest Users Access to Product Discovery

Provide guest users access to catalogs and products by using Product Discovery APIs and components. From Experience Cloud sites, give them access to these components: Product List, Product Details, Product Attribute Details, and Product Bundle Details. The Product List component helps guest users browse catalogs, categories, and products in a simple, structured way. The other components give a unified, comprehensive view of product information. Use the APIs to provide guest users access to catalogs and products from your company sites or to access catalogs and products from other endpoints.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

SEE ALSO:

Salesforce Help: Assign Users to Roles(can be outdated or unavailable during release preview)

Salesforce Help: Control login Access Policies(can be outdated or unavailable during release preview)

Salesforce Help: Configure Digital Experiences Settings (can be outdated or unavailable during release preview)

Salesforce Help: Create an Experience Cloud Site (can be outdated or unavailable during release preview)

Salesforce Help: Customize Product Browsing Experience (can be outdated or unavailable during release preview)

Salesforce Help: Permissions to Access Product Discovery (can be outdated or unavailable during release preview)

Create a Custom Product Browsing Experience

To extend the product browsing experience beyond the available capabilities, create and use a custom flow. Create a custom flow that enables your users to view catalogs, view products, and add products. Then select the custom flow in Product Discovery Settings. The custom flow is launched when your users click the Browse Catalogs button on object record pages. For example, in Revenue Cloud, the custom flow is launched when your users click the Browse Catalogs button on quote and order records.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management and Revenue Cloud are enabled.

SEE ALSO:

Salesforce Help: Configure Product Discovery Settings (can be outdated or unavailable during release preview)

Show Only the Available and Qualified Categories in Product Discovery

In addition to product qualification procedure elements, use category qualification elements in the qualification procedure for Product Discovery.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

SEE ALSO:

Show Only Eligible and Available Categories

Salesforce Help: Create a Qualification Rule Procedure (can be outdated or unavailable during release preview)

Experience Enhanced Product Search

After you index product catalogs and configure search options, your sales reps and customers experience enhanced search capabilities from the Product List component.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

SEE ALSO:

Salesforce Help: Configure Product Discovery Settings(can be outdated or unavailable during release preview)

Improve Search Results by Indexing Your Product Catalog

Salesforce Help: Index and Search of Product Catalog (can be outdated or unavailable during release preview)

View Nested Groups for Product Bundles

After product designers configure bundle products with nested groups, sales reps and customers can see the nested groups on the Product Bundle Details component.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

SEE ALSO:

Organize Bundled Products Better With Nested Groups

Salesforce Help: Local Cardinality and Group Cardinality (can be outdated or unavailable during release preview)

Replace the Deprecated Product Discovery Permission Sets

We've deprecated the Product Discovery User permission set license and the associated Product Discovery User and Product Discovery Admin permission sets. Use the Product Catalog Management Viewer and the Product Catalog Management Designer permission sets instead.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

How: If necessary, clone and customize the Product Catalog Management Viewer and the Product Catalog Management Designer permission sets. Assign the Product Catalog Management Viewer and the Product Catalog Management Designer permission sets to users. Then unassign the Product Discovery User and Product Discovery Admin permission sets.

SEE ALSO:

Salesforce Help: Product Catalog Management Permission Set Licenses (can be outdated or unavailable during release preview)

Salesforce Help: Manage Permission Set Assignments (can be outdated or unavailable during release preview)

Connect REST APIs

Connect REST APIs for Product Discovery help customers, partners, and ISVs access data related to products, categories, and catalogs.

IN THIS SECTION:

New Connect REST API Resource

Learn more about the resource available with Product Discovery.

Changed Connect REST API Request Body

This request body has a change.

Changed Connect REST API Response Bodies

These response bodies have changes.

New Connect REST API Resource

Learn more about the resource available with Product Discovery.

Retrieve a list of products based on the response identifier or search terms of a guided product selection

Make a POST request to the `/connect/cpq/products/guided-selection` resource.

New request body: Guided Selection Input

New response body: Guided Selection

Changed Connect REST API Request Body

This request body has a change.

Products Search Input

This request body has this new property.

- `searchTerm`—String used to get products with the product name containing the search term.

Changed Connect REST API Response Bodies

These response bodies have changes.

Categories List (POST) and Category Details (POST)

CPQ Base List and CPQ Base Details

This response body has this new property.

- `isNavigational`—Indicates whether the category node is navigational (`true`) or not (`false`).

SEE ALSO:

Revenue Lifecycle Management Developer Guide: CPQ Base List (can be outdated or unavailable during release preview)

Revenue Lifecycle Management Developer Guide: CPQ Base Details (can be outdated or unavailable during release preview)

New and Changed Objects For Product Catalog Management

Do more with the new and changed objects in Product Catalog Management.

Create ramp segments for products that are sold as part of a ramp deal

Use the new ProductRampSegment object.

Show the product catalog category and product catalog subcategory as a navigational menu at runtime

Use the new `IsNavigational` field on the existing ProductCategory object.

Specify the usage model for a product or service

Use the new `UsageModelType` field on the existing Product2 object.

View whether a product can be sold as part of a ramp deal or not

Use the new `CanRamp` field on the existing Product2 object.

Define a parent group in a nested group hierarchy for the same parent product

Use the new `ParentGroup` field on the existing ProductComponentGroup object.

Define a bundle to product classification component relationship while adding a product classification component to a bundle hierarchy

Use the new supported value `ClassificationComponent` in the existing `AssociatedProductRoleCat` field on the Product Relationship Type object. Introduced in API version 61.0, this value has been added to the Revenue Cloud Developer Guide.

Connect REST APIs

Connect REST APIs for Product Catalog Management help customers, partners, and ISVs access data related to products, categories, and catalogs.

IN THIS SECTION:

New Connect REST API Resources

Learn more about the resources available with Product Catalog Management.

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 Catalog Management.

Retrieve snapshots and snapshot indexes

Make a GET request to the `/connect/pcm/index/snapshots` resource.

New response body: Snapshot Collection

Retrieve details of catalog records based on a catalog ID

Make a POST request to the `/connect/pcm/index/deploy` resource.

New request body: Snapshot Deployment Input

New response body: Snapshot Deployment

Retrieve related ProductRampSegment or ProductUsageGrant records for Product2 object

Make a POST request to the `/connect/pcm/relatedRecords/`***`entityName`*** resource. The supported object or entity is Product2.

New request body: Related Records Input

New response body: Related Records List

Retrieve the saved index configurations

Make a GET request to the `/connect/pcm/index/configurations` resource.

New response body: Index Configuration Collection

Persist the index configuration

Make a PUT request to the `/connect/pcm/index/configurations` resource.

New request body: Index Configuration Collection Input

New response body: Index Configurations Update

SEE ALSO:

Revenue Lifecycle Management Developer Guide: Product Catalog Management Business APIs (can be outdated or unavailable during release preview)

Changed Connect REST API Request Bodies

These request bodies have changes.

Criteria Input

This request body has this new property.

- `criteriaType`—Type of criteria for the filter.

Product Input

This request body has this new property.

- `searchTerm`—String used to get products with the product name containing the search term.

Changed Connect REST API Response Bodies

These response bodies have changes.

Attribute Picklist Value

This response body has this new property.

- `status`—Status of the attribute picklist value.

Category Output

This response body has this new property.

- `isNavigational`—Indicates whether the category node is navigational (`true`) or not (`false`).

Product Component Group

This response body has these new properties.

- `childGroups`—List of child product components groups.
- `parentGroupId`—ID of the parent group record.

Error Output

This response body has this new property.

- `relatedObjectNodes`—List of related object nodes with errors.

Salesforce Pricing

Keep all your procedure requirements in one place. Help users make informed decisions with Price Tracking History. With Pricing Batch Jobs, updating multiple records becomes so much easier. Seamlessly integrate Salesforce Pricing with Commerce Cloud and get detailed pricing insights by using the waterfall view. Customize proration settings to ensure accurate subscription prices and use the Roll Up Price feature for efficient product bundle pricing. In addition, the improved Derived Pricing now includes new input fields and improved asset pricing calculations.

IN THIS SECTION:

Simplify your pricing processes by managing all the necessary requirements in one central location. This includes defining the context, ensuring accurate mapping, and setting the sequence in which the procedures will be executed. With the Procedure Plan Definition framework, users can easily set up criteria in one place and tailor these procedures based on their specific needs.

Help users make informed purchasing decisions by providing them insights into a product's price history. Hold businesses responsible for avoiding deceptive pricing practices. To calculate a product's price over the selected duration, turn on Price Tracking History. Use the Price Tracking element to record the product's price.

Collectively update multiple pricing records with price changes or other adjustments and track the success or failure of these updates, along with reasons for any failures.

Commerce Cloud users can now adopt the Commerce Pricing element in a pricing procedure to meet their pricing needs.

In a pricing procedure, you can select or turn off the price waterfall view for your pricing element. After simulating a pricing procedure, you can view your pricing information in the waterfall view based on the permissions you've set.

Use the proration element to customize pricing term counts for both the Evergreen and One Time selling models to accurately determine a product's price based on the subscription duration. When calculating a product's prorated price or subscription price by using the Proration element in a pricing procedure, the Selling Model Type variable automatically populates the previously configured values.

With the Roll Up Price feature, you can easily calculate the price of a group of products by first determining the price of each product and then adding the total to the parent product.

Ensure successful execution of a pricing procedure by simulating pricing procedures with various context data. Previously, all pricing procedures used the SalesTransaction context definitions that weren't mapped to a specific Salesforce object.

Derived Pricing Enhancements

Derived Pricing users can now see two new input fields for the Start Date and End Date in the Asset Action Source lookup table to perform asset pricing calculations better. In the Asset Discovery element of a Discovery Procedure, you can combine asset information from different action sources to create a single contributor for each asset. When calculating the derived price of a product by using a pricing procedure, users can now add the contributing product as an input field to ensure that it appears in the waterfall view during simulation.

Operations Console is Now Pricing Operations Console

We've updated the name of our Operations Console to the Pricing Operations Console, aligning it more closely with the specific data it presents. This renaming doesn't affect the functionality or the user experience of the console. All product documentation and in-app terminology have been revised to incorporate this change.

New Objects in Salesforce Pricing

Do more with these new Salesforce Pricing objects.

New Connect REST API Resources

Learn more about the resources available with Salesforce Pricing.

Streamline Pricing Procedure Requirements with Procedure Plan Definitions

Simplify your pricing processes by managing all the necessary requirements in one central location. This includes defining the context, ensuring accurate mapping, and setting the sequence in which the procedures will be executed. With the Procedure Plan Definition framework, users can easily set up criteria in one place and tailor these procedures based on their specific needs.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: To create procedure plan definitions and their versions, from Setup, in the Quick Find box, enter *`Procedure Plan Setup`*, and then select **Procedure Plan Definition Templates**.

SEE ALSO:

Salesforce Help: Procedure Plan Framework (can be outdated or unavailable during release preview)

Ensure Pricing Transparency with Price Tracking History

Help users make informed purchasing decisions by providing them insights into a product's price history. Hold businesses responsible for avoiding deceptive pricing practices. To calculate a product's price over the selected duration, turn on Price Tracking History. Use the Price Tracking element to record the product's price.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

SEE ALSO:

Salesforce Help: Set Price Tracking History (can be outdated or unavailable during release preview)

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

Easily Update Multiple Records by Using Pricing Adjustment Batch Jobs

Collectively update multiple pricing records with price changes or other adjustments and track the success or failure of these updates, along with reasons for any failures.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

SEE ALSO:

Salesforce Help: Pricing Adjustment Batch Jobs (can be outdated or unavailable during release preview)

Salesforce Pricing Now Integrated with Commerce Cloud

Commerce Cloud users can now adopt the Commerce Pricing element in a pricing procedure to meet their pricing needs.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

Who: This feature is developed only for Commerce Cloud users with a predefined Commerce Cart context definition. While Salesforce Pricing admins can access the feature, none of the native Salesforce Pricing elements or procedures work with the Commerce Pricing element or the Commerce Cart context definition.

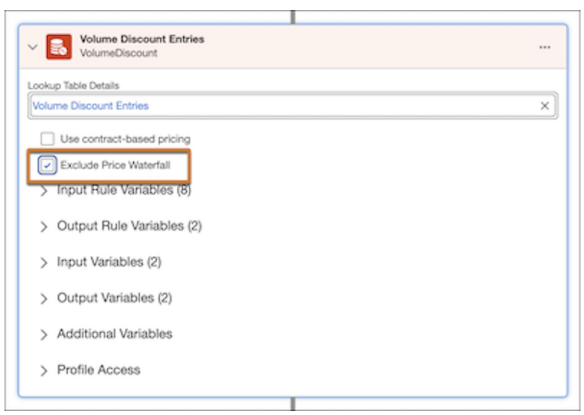
SEE ALSO:

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

Turn Off Price Waterfall for Selected Pricing Elements

In a pricing procedure, you can select or turn off the price waterfall view for your pricing element. After simulating a pricing procedure, you can view your pricing information in the waterfall view based on the permissions you've set.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.



SEE ALSO:

Salesforce Help: Configure Your Pricing Procedure (can be outdated or unavailable during release preview)

Configure Proration Settings to Calculate Product Prices

Use the proration element to customize pricing term counts for both the Evergreen and One Time selling models to accurately determine a product's price based on the subscription duration. When calculating a product's prorated price or subscription price by using the Proration element in a pricing procedure, the Selling Model Type variable automatically populates the previously configured values.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: To set pricing term counts for the Proration element, from Setup, in the Quick Find box, enter `Salesforce Pricing`, and then select **Salesforce Pricing Setup**. Provide values for the Evergreen and One Time selling model types under the Proration Settings section and save your changes.

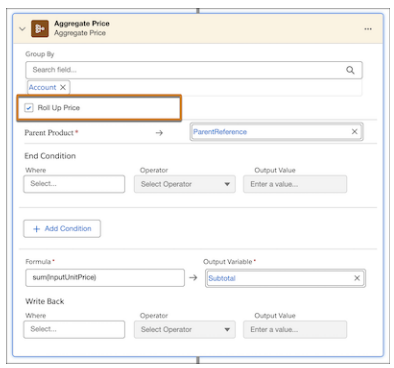
SEE ALSO:

Salesforce Help: Configure Proration Settings (can be outdated or unavailable during release preview)

Calculate the Aggregate Price of a Product Bundle

With the Roll Up Price feature, you can easily calculate the price of a group of products by first determining the price of each product and then adding the total to the parent product.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.



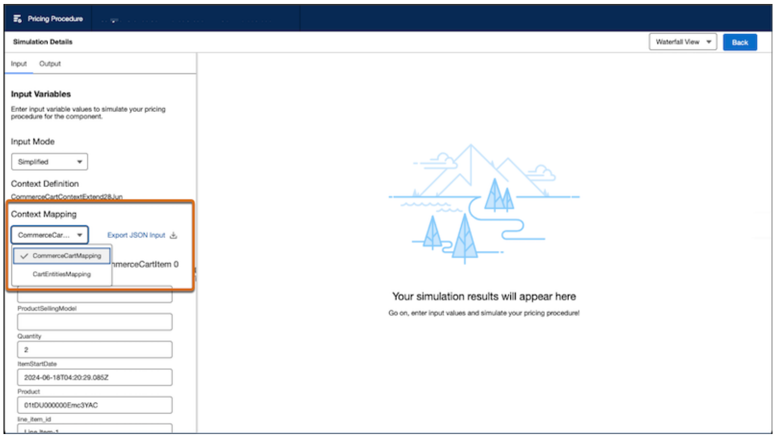
SEE ALSO:

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

Simulate Pricing Procedures with Different Context Mappings

Ensure successful execution of a pricing procedure by simulating pricing procedures with various context data. Previously, all pricing procedures used the SalesTransaction context definitions that weren't mapped to a specific Salesforce object.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.



SEE ALSO:

Salesforce Help: Simulate and Activate Your Pricing Procedure (can be outdated or unavailable during release preview)

Derived Pricing Enhancements

Derived Pricing users can now see two new input fields for the Start Date and End Date in the Asset Action Source lookup table to perform asset pricing calculations better. In the Asset Discovery element of a Discovery Procedure, you can combine asset information from different action sources to create a single contributor for each asset. When calculating the derived price of a product by using a pricing procedure, users can now add the contributing product as an input field to ensure that it appears in the waterfall view during simulation.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

Operations Console is Now Pricing Operations Console

We've updated the name of our Operations Console to the Pricing Operations Console, aligning it more closely with the specific data it presents. This renaming doesn't affect the functionality or the user experience of the console. All product documentation and in-app terminology have been revised to incorporate this change.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

New Objects in Salesforce Pricing

Do more with these new Salesforce Pricing objects.

Update multiple records at the same time

Use the new PricingAdjBatchJob object.

Track the failed adjustment requests

Use the new PricingAdjBatchJobLog object.

Setup a unified procedure from a list of procedures

Use the new ProcedurePlanDefinition object.

View versions of the procedure definitions

Use the new ProcedurePlanDefinitionVersion object.

Setup a certain type of procedure
Use the new ProcedurePlanSection object.

Configure the selection for a procedure
Use the new ProcedurePlanOption object.

View the criterion within a procedure plan option record
Use the new ProcedurePlanCriterion object.

Configure user-defined variable that can be lined to a procedure definition
Use the new ProcedurePlanVariable object.

Track the price range for a product
Use the new ProductPriceRange object.

Store historical pricing data based on the product's price range
Use the new ProductPriceHistoryLog object.

New Connect REST API Resources

Learn more about the resources available with Salesforce Pricing.

Get the records of procedure plan definitions
Make a GET request to the `/connect/procedure-plan-definitions` resource.

New response body: Procedure Plan Definitions

Create a record of procedure plan definition
Make a POST request to the `/connect/procedure-plan-definitions` resource.

New request body: Procedure Plan Definition Input

New response body: Procedure Plan Generic

Get a procedure plan definition record by using the record ID
Make a GET request to the `/connect/procedure-plan-definitions/`***`procedurePlanDefinitionId`*** resource.

New response body: Procedure Plan Definition

Update a procedure plan definition record by using the record ID
Make a PATCH request to the `/connect/procedure-plan-definitions/`***`procedurePlanDefinitionId`*** resource.

New request body: Procedure Plan Definition Input

New response body: Procedure Plan Definition

Delete a procedure plan definition record by using the record ID
Make a DELETE request to the `/connect/procedure-plan-definitions/`***`procedurePlanDefinitionId`*** resource.

Evaluate a procedure plan definition based on a primary object
Make a POST request to the `/connect/procedure-plan-definitions/evaluate` resource.

New request body: Procedure Plan Evaluation Input

New response body: Procedure Plan Evaluation Response

Evaluate a procedure plan definition based on the definition name
Make a POST request to the `/connect/procedure-plan-definitions/evaluate/`***`procedurePlanDefinitionName`*** resource.

New request body: Procedure Plan Evaluation Input

New response body: Procedure Plan Evaluation Response

Create records of a procedure plan version with details

Make a POST request to the `/connect/procedure-plan-definitions/`***`procedurePlanDefinitionId`***`/version` resource.

New request body: Procedure Plan Definition Version Input

New response body: Procedure Plan Generic

Get a procedure plan definition version record by using the record ID

Make a GET request to the `/connect/procedure-plan-definitions/versions/`***`procedurePlanVersionId`*** resource.

New response body: Procedure Plan Definition Version

Update a procedure plan definition version record by using the record ID

Make a PATCH request to the `/connect/procedure-plan-definitions/versions/`***`procedurePlanVersionId`*** resource.

New request body: Procedure Plan Definition Version Input

New response body: Procedure Plan Generic

Delete a procedure plan definition version record by using the record ID

Make a DELETE request to the `/connect/procedure-plan-definitions/versions/`***`procedurePlanVersionId`*** resource.

SEE ALSO:

Revenue Cloud Developer Guide: Resources

Rate Management (Generally Available)

Use Rate Management to define cost-effective rates for customers based on the pay-per-use model. Create customized rate adjustments, define discounts and obtain accurate rates for your usage resources, and calculate the net unit rate by using inbuilt rating elements in rating procedures.

IN THIS SECTION:

Bill Customers Based on Consumption of a Usage Resource

Define rates based on the consumption of a usage resource by creating and organizing multiple rate cards. Use the predefined standard rate card or create custom rate cards based on your business use case.

Manage Discounts with Rate Adjustments

Create rate adjustments to apply discounts consistently to all your usage resources based on the tiers of consumption quantity or usage resource's attributes. For example, you can apply 5, 10, and 15 percentage discounts of the base rate if the usage resource's consumption quantity varies from 1 through 100, 101 through 250, and 251 through 500, respectively.

Calculate Net Unit Rates By Using Predefined Rating Elements

Effortlessly calculate rates by using rating procedures. In Rating Procedure Builder, add rating elements that invoke the relevant decision tables to compute rates and the net unit rate for your usage resources.

Make Better Rating Decisions By Using Rating Waterfall

Get insights and reasons for every step of the rating process by turning on the Rating Waterfall view. For example, use this feature to verify the total cost calculation of a usage resource's consumption, which can differ based on tiers. Or, use the feature to make sure that the discount that you're offering is correct. When you view your rating procedure by using Rating Waterfall, you see the rate at every step, along with the reason for the addition or deduction. You can also customize the explanations for each rating step.

New Objects in Rate Management

Do more with these new Rate Management objects.

New Invocable Action in Rate Management

Use the new invocable action in Rate Management.

New Metadata Type in Rate Management

Learn more about the new metadata type in Rate Management.

New Connect REST API Resource

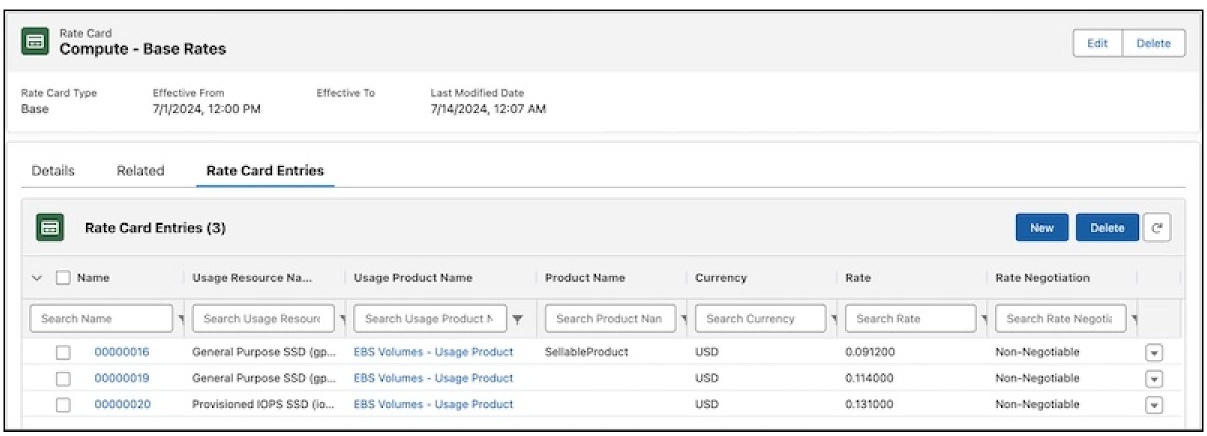
Learn more about the resource available with Rate Management.

Bill Customers Based on Consumption of a Usage Resource

Define rates based on the consumption of a usage resource by creating and organizing multiple rate cards. Use the predefined standard rate card or create custom rate cards based on your business use case.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Rate Management is enabled.

How: From the app navigation menu of Rate Management, search for and select **Rate Card**. On a rate card record, select the Rate Card Entries tab and add a rate card entry.



SEE ALSO:

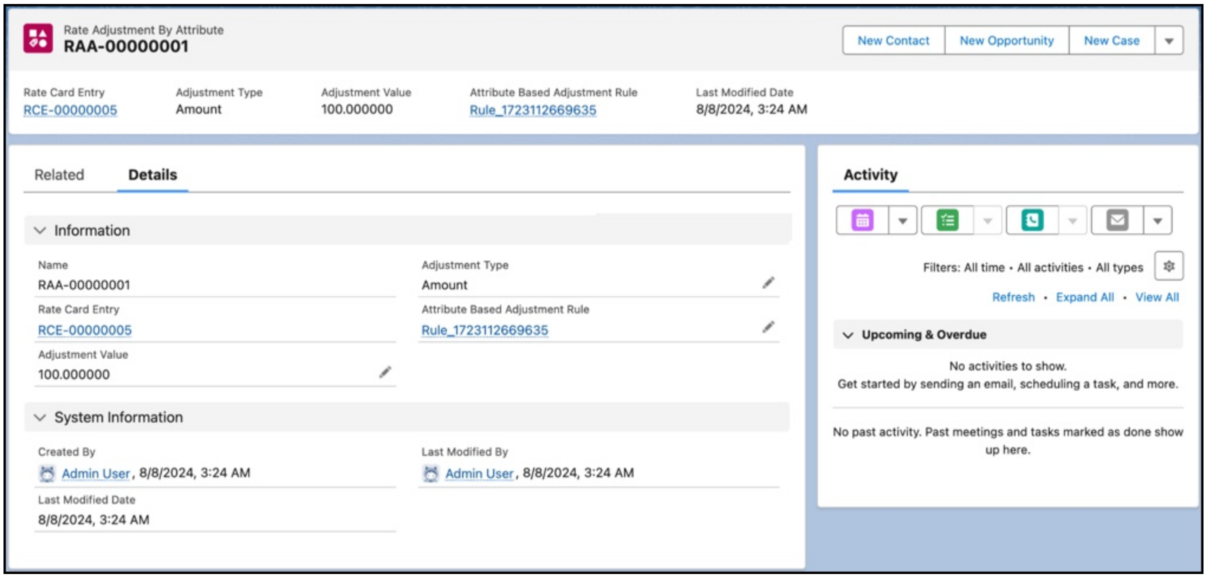
Salesforce Help: Create a Rate Card (can be outdated or unavailable during release preview)

Manage Discounts with Rate Adjustments

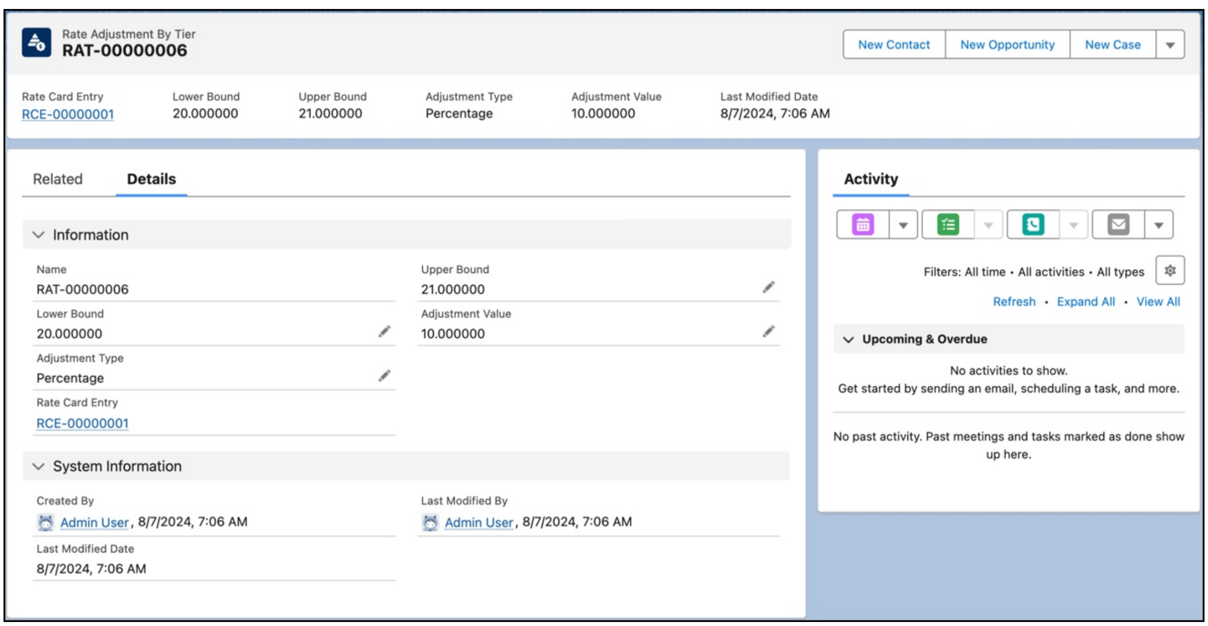
Create rate adjustments to apply discounts consistently to all your usage resources based on the tiers of consumption quantity or usage resource's attributes. For example, you can apply 5, 10, and 15 percentage discounts of the base rate if the usage resource's consumption quantity varies from 1 through 100, 101 through 250, and 251 through 500, respectively.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Rate Management is enabled.

How: Create a Rate Adjustment by Attribute record to define discounts for a usage resource based on its rate-impacting attributes.



Create a Rate Adjustment by Tier record to define discounts for different tiers of quantity consumed for a usage resource.



SEE ALSO:

Salesforce Help: Rate Card Entries (can be outdated or unavailable during release preview)

Salesforce Help: Create a Rate Card Entry For Tier Rate Cards (can be outdated or unavailable during release preview)

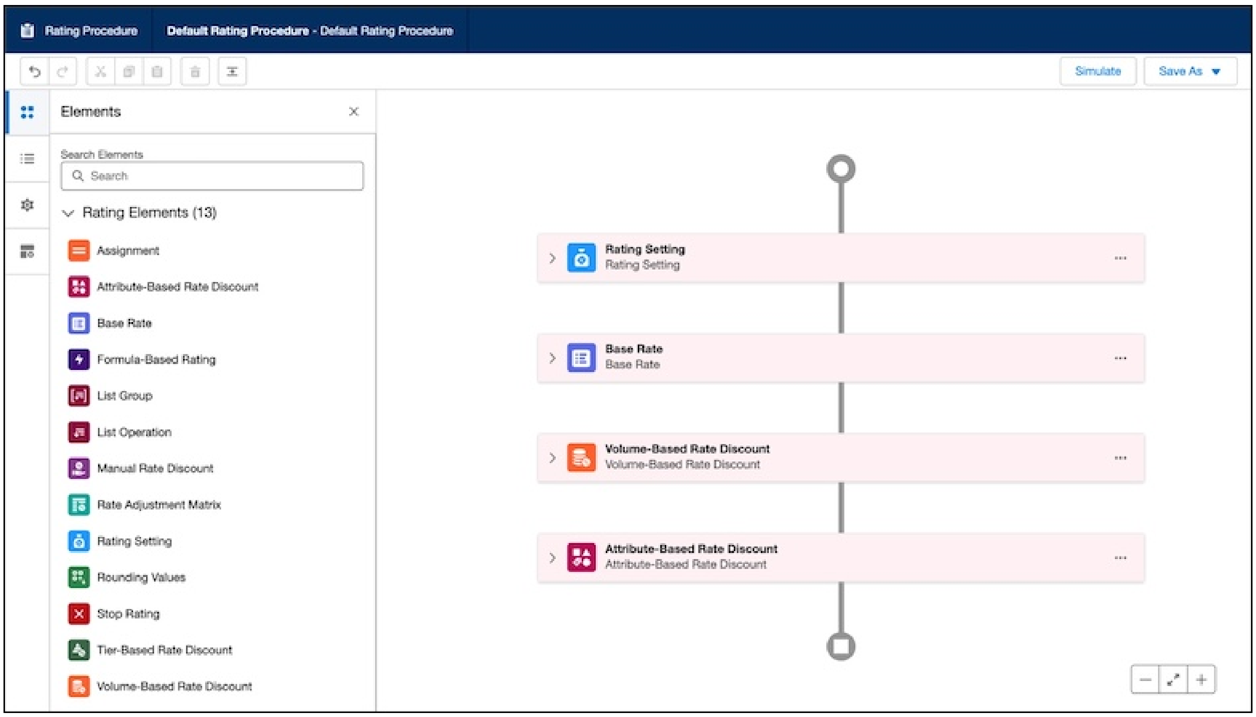
Salesforce Help: Create a Rate Card Entry For Attribute Rate Cards (can be outdated or unavailable during release preview)

Calculate Net Unit Rates By Using Predefined Rating Elements

Effortlessly calculate rates by using rating procedures. In Rating Procedure Builder, add rating elements that invoke the relevant decision tables to compute rates and the net unit rate for your usage resources.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Rate Management is enabled.

How: In the Rating Procedure Builder, click and select a rating element.



SEE ALSO:

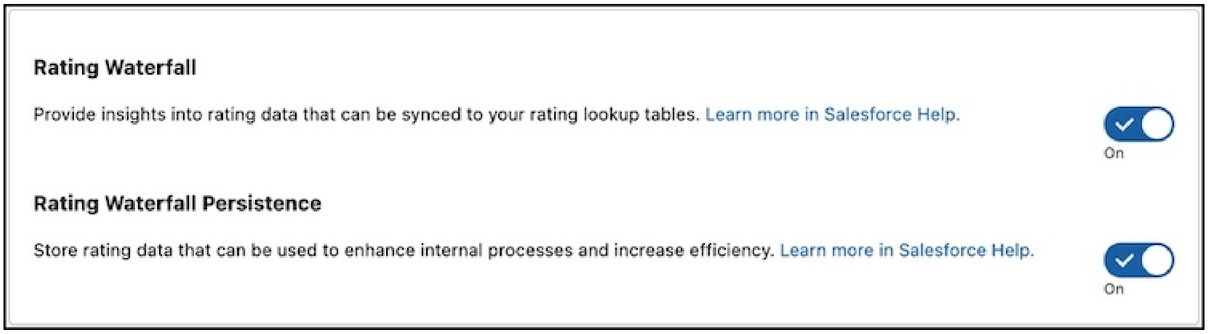
Salesforce Help: Rating Procedures (can be outdated or unavailable during release preview)

Make Better Rating Decisions By Using Rating Waterfall

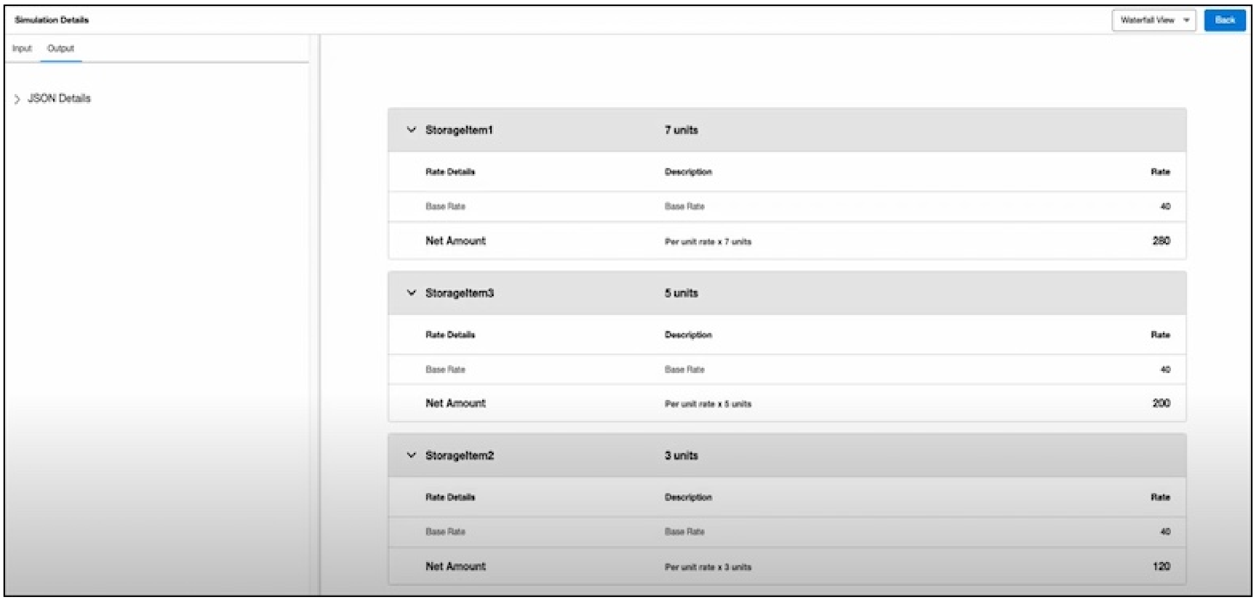
Get insights and reasons for every step of the rating process by turning on the Rating Waterfall view. For example, use this feature to verify the total cost calculation of a usage resource's consumption, which can differ based on tiers. Or, use the feature to make sure that the discount that you're offering is correct. When you view your rating procedure by using Rating Waterfall, you see the rate at every step, along with the reason for the addition or deduction. You can also customize the explanations for each rating step.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Rate Management is enabled.

How: From Setup, in the Quick Find box, enter `Rate Management`, and then select **Rate Management Setup**. Turn on Rating Waterfall.



When you simulate a rating procedure, rating waterfall displays each step of the total calculation.



To view stored rating logs, from Setup, in the Quick Find box, enter `Rate Management`, and then select **Rate Management Setup**. Turn on Rating Waterfall Persistence.

SEE ALSO:

Salesforce Help: Enable Rating Waterfall (can be outdated or unavailable during release preview)

New Objects in Rate Management

Do more with these new Rate Management objects.

Relate a price book with a rate card
Use the new PriceBookRateCard object.

Provide attribute-based rates for a usage resource
Use the new RateAdjustmentByAttribute object.

Provide tier-based rates for a usage resource
Use the new RateAdjustmentByTier object.

Define rules used to rate the consumption of a group of usage resources within a product
Use the new RateCard object.

Define a rule that determines the charge rate for using a usage resource
Use the new RateCardEntry object.

Create a policy to define the frequency at which rating is triggered
Use the new RatingFrequencyPolicy object.

Define context definition and procedure name to invoke rating request
Use the new RatingRequest object.

Relate a rating request with a batch job
Use the new RatingRequestBatchJob object.

SEE ALSO:

Revenue Cloud Developer Guide: Rate Management Standard Objects (can be outdated or unavailable during release preview)

New Invocable Action in Rate Management

Use the new invocable action in Rate Management.

Invoke the rating service to rate the usage records
Use the new `invokeRatingService` action.

SEE ALSO:

Revenue Cloud Developer Guide: Invoke Rating Service Action (can be outdated or unavailable during release preview)

New Metadata Type in Rate Management

Learn more about the new metadata type in Rate Management.

Metadata Type

Manage the settings for Rate Management
Use the new IndustriesRatingSettings metadata type.

Invoke the rating service to rate the usage records
Use the `invokeRatingService` value in the existing `actionType` field, which is on the FlowActionCall subtype on the Flow metadata type.

SEE ALSO:

Revenue Cloud Developer Guide: Rate Management Metadata API Types (can be outdated or unavailable during release preview)

Revenue Cloud Developer Guide: Flow for Rate Management (can be outdated or unavailable during release preview)

New Connect REST API Resource

Learn more about the resource available with Rate Management.

Get a rate plan for a specified set of context input
Make a GET request to the `/connect/core-rating/rate-plan` resource.

New response body: Rate Plan Response

Product Configurator

Create rules faster with fewer choices and actions. Check each rule for errors before using it. Apply rules to entire transaction, not just single items. Add or remove items from quotes based on rules. See clear pricing and quantities for each part of a ramped quote. View how derived product prices are calculated. See usage details right in the summary.

IN THIS SECTION:

Maintain Rule Integrity with Configuration Rule Validation

Configuration Rules are often complex and can become outdated due to catalog changes. To maintain rule integrity, you can now check a single rule for errors before activating it. Validate a configuration rule to identify potential issues caused by changes in the catalog, prevent runtime failures, and improve overall rule reliability.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

Easily Create Diverse Configuration Rules

Create configuration rules with fewer conditions and actions. Use Product Configurator to choose multiple options for resources, attributes, and fields when you create rules. Simplify rule definitions with new action types that include hide, display, and set default.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

Validate Products at Transaction Level

Configuration rules have an impact beyond the current product or bundle that you configure. Apply the configuration rules to a transaction to provide users an option to act at the transaction level. For example, provide users the option to add or remove a line item in the quote.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

Support for Ramped Deals

Your Sales rep can now view accurate pricing and quantity information for each segment of ramp quote line items that have different values for quantity and discount across ramp segments. Any changes made to a product apply to all segments of a ramped quote uniformly.

Where: This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions of Revenue Cloud where Product Configurator is enabled.

Get an Enhanced View of Derived Prices

View the pricing details of products that are derived from another product. Price waterfall shows the calculation details and the derived price. In addition, check the usage parameters for a product at the time of configuration. The Usage Rates tab in the summary component shows the usage-based pricing rate cards.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

View Nested Options Group for Product Bundles

Your Sales reps can now easily select products from complex bundles during configuration. These bundles are organized into groups of products and product categories for easier navigation and configuration.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

Transaction Management

Give your users the flexibility of charging their customers based on the consumption of your services by using Usage-Based Selling. Create flexible transactions with ramp deals that support your customer's evolving needs by dividing a transaction line into segments, and configure their prices and quantities independently. Automate and manage routine approval tasks with Advanced Approvals. Extend quoting capabilities to customer community users. Organize transactions with Groups, automatically or manually grouping quote and order lines. Streamline quoting and ordering for derived products by automatically adding derived product assets with contributing products. Easily add existing assets to a new quote or order by using the Add Assets action. Save time by adding products instantly to your transactions as transient lines. Notify your users when an order is created from a quote.

IN THIS SECTION:

Unlock Quoting Capabilities for Customer Communities

Extend quoting capabilities of Revenue Cloud for customer community users. With permission sets provided by Revenue Cloud, your customer community users can create quotes and convert them into orders. Additionally, add the Transaction Line Editor, Transaction Line Progress Indicator, and the Transaction Summary components on the quote page to help your customers browse and modify complex sales in a quick, seamless manner.

Track Order Creation Efficiently with Timely Notifications

Enhance the efficiency of your sales reps with timely notifications for orders. When sales reps create an order from a quote, they receive a notification that confirms whether the order generation was successful. If successful, the notification directs them to their new order. In case of errors, the notification redirects them to the Revenue Transaction Error Log related list on the quote page, where they can find detailed information about the order creation failure.

Summarize Quotes with Einstein

Use Einstein to easily provide a digestible overview of a quote for approval. Sales Summaries uses your customer data in Salesforce to summarize records with key data points that help reps see the current state of a deal, customer, or prospect.

Generate Quote Emails with Einstein

Enables sales reps to draft emails with Einstein when sending quote proposals.

Accelerate Business Growth with Enhanced Support for Large Transactions (Pilot)

Large businesses often handle substantial sales volumes that require systems that manage these transactions efficiently. With performance-optimized support for large transactions, your sales reps can effortlessly process and fulfill the bulk needs of their customers, managing up to 1000 lines in a single transaction. Additionally, you can leverage existing Transaction Management features such as Browse Catalogs and Instant Pricing to optimize the creation of a large transaction.

New and Changed Objects in Transaction Management

Access more data through these new objects and fields.

Connect REST APIs

Connect REST APIs for Transaction Management help customers, partners, and ISVs access data related to quote creation, order capture, and asset lifecycle.

CommerceOrders Namespace

The CommerceOrders namespace has this new enum.

PlaceQuote Namespace

The PlaceQuote namespace has this new enum.

Give Your Customers More Flexibility with Usage Selling

Honor your customer's preferences by giving them the option to pay for what they need instead of paying fixed fees. Usage selling gives customers visibility into the rate cards and prices per resource, so they can select the products that best meet their business needs. Usage pricing gives your sales reps greater flexibility to sell what the customer wants, providing more opportunities for expanding revenue.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Why: Sales reps can browse the product catalog to discover and select usage products for their customers. Sales reps can add usage products to quotes and to orders. When quoting or ordering usage products, sale reps can override the usage product's base rates and tier rates, if overrides are allowed for the selected product.

How: Rate Management must be enabled and usage products must available for quoting and ordering.

The Usage Rates tab must be added to the Asset record page so sales reps can see rate details for usage-based assets.

SEE ALSO:

Rate Management (Generally Available)

Gain Insight into Asset Usage Rates and Tier Pricing

Gain Insight into Asset Usage Rates and Tier Pricing

Seamlessly manage metered assets that were sold with usage selling. Sales reps can use the new Usage Rates card on the Assets record page to understand what their customer has purchased, and the grant and rate information for each resource. Offer your customers transparency and flexibility in managing the costs associated with purchased services and resources.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Admins with the Customize Application permission can update record page layouts.

Why: The Usage Rates card provides comprehensive visibility into the pricing of purchased services and resources. By providing a clear breakdown of rates per resource, this feature helps businesses make informed decisions that optimize their return on investment.

The Line Item Details section shows the name, list price, and quantity of the purchased sellable usage product. This level of detail helps businesses identify the product that was purchased.

The What's Included section lists the resources that are granted with the purchase of a sellable usage product. This information helps businesses understand precisely what resource grants are included with the asset. It details the granted quantity and the unit of measure for each usage resource. It also specifies the rates per unit of measure that are applicable. Sales reps can override the rates.

The Tier Pricing section provides insight into whether a specific resource is defined to offer tier pricing. Tier pricing is a pricing strategy where the cost per unit decreases as the quantity purchased increases, so your company can offer bulk discounts and incentivize higher usage.

How: Rate Management must be enabled and usage products must available for quoting and ordering.

A Salesforce admin must add the Usage Rates tab to the asset record page. In Lightning App Builder, open the Asset record page, drag the Usage Rates component to the page, and save your work.

Users can view the Usage Rates tab for an asset by opening an asset record page and clicking Usage Rates. If the asset is a usage product, then the tab is populated with data. If the asset isn't a usage product, then the tab is empty.

SEE ALSO:

Rate Management (Generally Available)

Use Ramp Deals for Time-Based Price and Quantity Changes

Sales reps can apply ramps to rampable products on their quotes and orders, and then convert the lines on the quote or order into a ramped quote line or order line. Time-based ramps offer sales reps flexibility in the pricing and quantity of products, and provide customers the incentive, ensuring that asset deals become more valuable over time. A ramp deal is a multi-period agreement for a product or service, with pricing, quantity, or discount rates changing at defined intervals. Sales teams benefit from larger orders and longer contracts, leading to customer retention and increased revenue.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Salesforce admins with the Customize Application and Manage Revenue Lifecycle Management permissions can enable this feature.

Sales reps with the Price and Tax Calculation for Quoting and Manage Revenue Lifecycle Management permissions, and the Create Orders from Quotes permission set can use this feature.

Why: With ramp deals, sales reps get longer-term deals or a larger quantity commitment from customers. Sales reps can configure the deal so that customers start small and then increase the service.

For example, let's say your company sells user licenses for a product. The sales rep structures a deal with a 90-day trial period for 10 user licenses, and then a 3-year ramp:

- Year 1: The customer gets 50 licenses at $100/user/month.
- Year 2: They get 100 licenses at $110/user/month.
- Year 3: They get 150 licenses at $121/user/month.

You want to structure a deal so the licenses that your customer owns throughout the lifecycle of the deal align with expected employee growth. As each ramp can be priced independently, your sales rep includes the discount, and then increases the price by 10% every year.

How: From Setup, find and select **Revenue Settings**. Then, enable the `Ramp Deal` feature.

Advanced Approvals

Automate routine approval tasks. Design and run serial or parallel approval chains. Track approvals with audit trails and notifications.

IN THIS SECTION:

Design Approval Chains with Flow Builder

Use Flow Builder to create approval chains for your sales reps. Also, create parallel approval chains for approvals that require multiple levels or departments to approve.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Why: With Advanced Approvals, design different approvals for your business:

- Serial approvals - Simple approval chains that require approvals in a certain order. For example, let's say your business requires approvals from your sales manager and then from the VP, for discounts greater than 20%. With serial approvals, design approvals that go to the right person, in the right order.

- Parallel approvals - Complex approval chains that require approvals from multiple departments. For example, let's say specific discounts or customers require approvals from the legal, business, and operations departments. Use parallel approvals where each department can approve these discounts in parallel.
- Record-triggered approvals - When records are changed, automatically trigger an approval flow.
- Auto-launched approvals - Approvals that your sales reps can launch from their transactions.

How: In Salesforce Flow Builder, create a flow from scratch with either Autolaunched Approval Orchestration or Record-Triggered Approval Orchestration.

Ensure Transactions Adhere to Policies

Allow your sales reps to get approvals before closing a quote or order. With Advanced Approvals, submit transactions for approval to ensure they adhere to pricing, discounts, or other policies. Ensure that every quote or order that your reps close aligns with your legal or pricing policies.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Why: For example, let's say that every transaction that provides a discount greater than 20% requires approval from legal and sales. Design an approval flow that requires both sets of approvals before the transaction is closed.

Easily See and Respond to Approval Requests

See and approve submitted and pending approvals from the Approvals app. Also, add comments when you decide on an approval.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

How: From the App Launcher, find and select **Approvals**. Click **Pending Approvals** or **Submitted Approvals**.

Unblock Transactions by Administering Approvals

Enable approval administrators to modify submitted approvals that must be changed. Administrators can use Advanced Approvals to reassign, cancel, review, or terminate approvals.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

How: From the App Launcher, find and select **Approvals**. Click **Administer Approvals**.

Organize Your Transactions with Groups

Sales reps can now group quote and order lines to organize their transactions and proposals. Automatically create groups by using dynamic or predefined Group By criteria. Alternatively, manually organize your lines into groups.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Why: A quote or order can contain many lines. With groups, sales reps can automatically or manually group lines to organize and create a digestible proposal for customers.

How: After you add your products to a transaction, for a column that is groupable, click and click **Group By**.

Alternatively, before adding products, click **Add Group** to see the groups interface. Any existing lines are also added to a group and you can then move specific lines to different groups.

Streamline the Quoting and Ordering Process for Derived Products

When you add a contributing product, derived product assets are now automatically added to quotes and orders, streamlining the quoting and ordering process for derived products. Sales reps no longer need to manually add assets, reducing the risk of errors and ensuring that customers are always paying the correct price for their products.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Pricing admins with the Customize Application and Manage Revenue Lifecycle Management permissions can enable this feature.

Why: Adding derived price assets is applicable to new sales, amendments, renewals, and cancellation quotes and orders.

It's important that included sandbox assets are added to the quote when a sales rep changes the Sales or Service Cloud license quantity for customers. This update ensures customers pay the right price for those new sandboxes and not get overcharged or undercharged. It's easy for sales reps to overlook adding sandbox assets to a quote or order, so we now add derived assets automatically.

How: From Setup, find and select **Revenue Settings**. Then, enable the `Add Derived Pricing Assets to a Quote or Order` feature.

Effortlessly Build Quotes and Orders with Add Assets Action

Make it easy for sales reps to add existing assets to an initial sale quote by using the Add Assets action in the Quote Line Item and Order Line Item Transaction Line Editor experience. Fast and easy to use, this action helps your sales reps create accurate quotes. Sales reps can now streamline the quote creation process for existing customers with active contracts by adding assets to initial sale quotes. This action eliminates the need to delete or abandon the entire quote and start over if assets must be added.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps with the Price and Tax Calculation for Quoting and Manage Revenue Lifecycle Management permissions, and the Create Orders from Quotes permission set can use this feature.

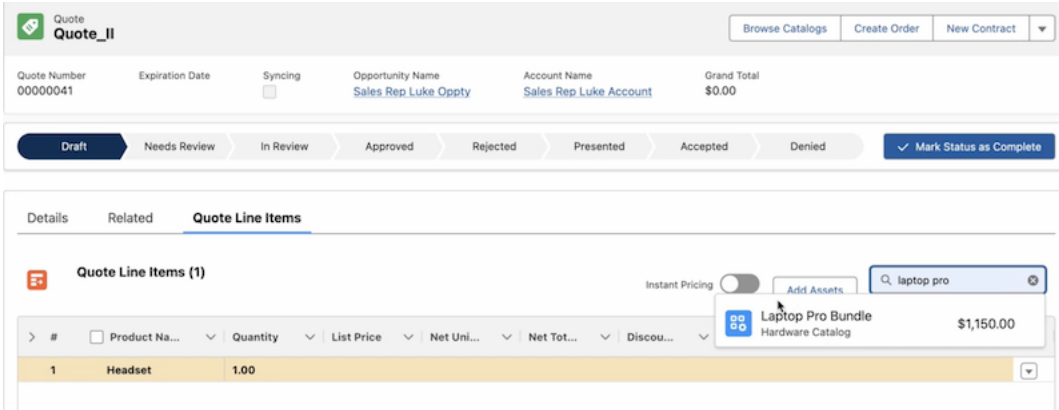
How: The Add Assets action appears in the Transaction Line Editor component automatically.

Fast-Track Adding Products to Transactions

Select and add products instantly to your sales transactions such as quotes from the Browse Catalogs page. The products that you add from Browse Catalogs page appear as unsaved line items on your transactions, and you must save them before making any changes to them. We call them transient lines. Previously, you could save the products directly from Browse Catalogs. However, you could not perform other tasks during the save process.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

How: On a sales transaction record such as a quote, open the Browse Catalogs page. Select some products that you want to add to your transaction and click **Add Items to Quote**. The added products appear as transient lines on your quote.



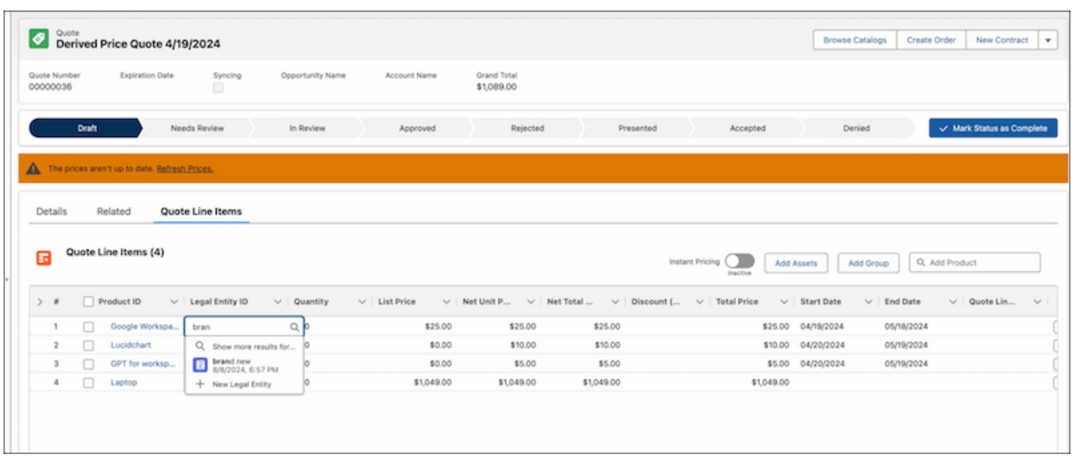
Configure Lookup Fields Efficiently in a Transaction

Search and add a lookup field record, such as a legal entity record, on quotes and orders directly from the Transaction Line Editor component. Create new records for missing lookup fields directly from the Transaction Line Editor. To edit existing lookup fields on a quote line item, click the value and open the lookup field record details page. With this streamlined process, save time and complete the transactions faster with fewer page redirects. Previously, you had to set up lookup fields for each quote line item in their respective record pages separately.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

How: On a sales transaction record page such as a quote, add a quote line item.

- To add or create a lookup field record, click the lookup field for a quote line item. Search and add an existing record or create a new record.
- To edit the details of an existing lookup field for a quote line item, click the value that you want to change. Edit the relevant details, and save your changes.



Renew Assets Early in Revenue Cloud

Renew customer assets before the end of the subscription period when customers update their quotes and orders to change their subscription plans. Use early renewals to renew a subscription before the subscription end date and apply new terms to the renewal subscription period. For example, renew assets early to consolidate orders and billing periods.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps with the Renew Assets and Sales Rep permission group.

How: Use the Managed Assets component in Account, Quote, or Orders to select the assets for early renewal. Click **Renew** and specify if the asset update is a regular renewal or an early renewal. In a regular renewal, the renewal start and end dates are automatically calculated based on the end date of the current subscription. In early renewals, you can specify the start and end dates.

Unlock Quoting Capabilities for Customer Communities

Extend quoting capabilities of Revenue Cloud for customer community users. With permission sets provided by Revenue Cloud, your customer community users can create quotes and convert them into orders. Additionally, add the Transaction Line Editor, Transaction Line Progress Indicator, and the Transaction Summary components on the quote page to help your customers browse and modify complex sales in a quick, seamless manner.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: To use this feature, customer community users need a Customer Community or a Customer Community Plus license.

How: Open the Experience Cloud site for customer users in Builder. From the Pages menu, create an object page. In the new object page, enter `Quote`, and then select **Quote**. Then, create and add your quote page to the canvas. If necessary, use the Components panel to add components to the quote page.

After you configure the Experience Cloud site, assign these permission sets to customer users.

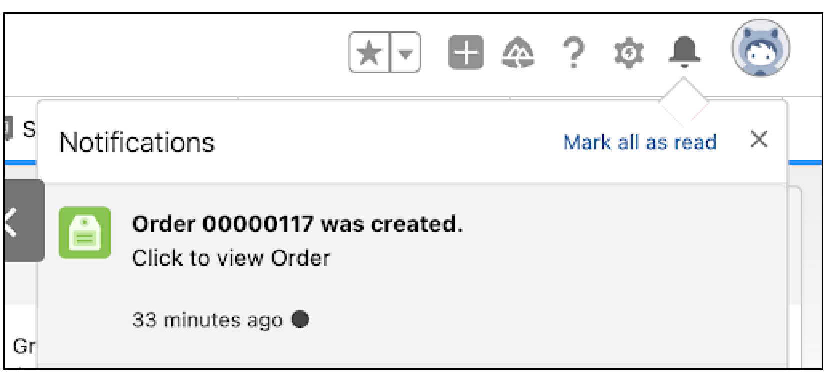
- Price and Tax Calculation on Quotes
- Create Orders from Quotes

Track Order Creation Efficiently with Timely Notifications

Enhance the efficiency of your sales reps with timely notifications for orders. When sales reps create an order from a quote, they receive a notification that confirms whether the order generation was successful. If successful, the notification directs them to their new order. In case of errors, the notification redirects them to the Revenue Transaction Error Log related list on the quote page, where they can find detailed information about the order creation failure.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

How: From the App Launcher, find and select **Quotes**. Open a quote record and select **Create Order**. Click the bell notification icon to check the result of your order creation.



Summarize Quotes with Einstein

Use Einstein to easily provide a digestible overview of a quote for approval. Sales Summaries uses your customer data in Salesforce to summarize records with key data points that help reps see the current state of a deal, customer, or prospect.

Who: This feature is available to users with the Sales Summaries User permission set.

Where: Einstein generative AI is available in Lightning Experience. This change applies to Lightning Experience in Unlimited, Enterprise, and Developer editions for Industries clouds where Revenue Cloud and Einstein for Sales add-on is enabled.

To purchase the Einstein for Sales add-on, contact your Salesforce account executive.

Why: With Summarize Quote, sales reps save time in handoffs and approvals for their quote, quickly generating a high-level overview of a quote to share with deal desk or sales leadership.

How: To use Sales Summaries, turn on Einstein generative AI in Setup. Then, go to the Einstein for Sales page, turn on Sales Summaries, and complete the setup steps.

Quote Summaries can be used directly within Einstein Copilot using the Summarization action. Alternatively, add the Einstein Summary component to the Quote page layout.

Generate Quote Emails with Einstein

Enables sales reps to draft emails with Einstein when sending quote proposals.

Who: To use Create Quote Email, 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.

Where: Einstein generative AI is available in Lightning Experience. This change applies to Lightning Experience in Unlimited, Enterprise, and Developer editions for Industries clouds where Revenue Cloud and Einstein for Sales add-on is enabled.

To purchase the Einstein for Sales add-on, contact your Salesforce account executive.

Why: Your reps can use a proposed quote to write an email to convince their customers to sign a deal. Einstein uses the information in the quote to encourage customers to accept and sign a quote.

How: To use Einstein with quotes, turn on Einstein generative AI in Setup. In Lightning Experience, Einstein Sales Emails is built directly into the email composer. In Salesforce Outlook or Gmail integrations, users can see Einstein generative AI in the email application pane.

Start creating an email. Click **Draft with Einstein** and choose an email type from the list. Review and edit the email, and then send it.

Accelerate Business Growth with Enhanced Support for Large Transactions (Pilot)

Large businesses often handle substantial sales volumes that require systems that manage these transactions efficiently. With performance-optimized support for large transactions, your sales reps can effortlessly process and fulfill the bulk needs of their customers, managing up to 1000 lines in a single transaction. Additionally, you can leverage existing Transaction Management features such as Browse Catalogs and Instant Pricing to optimize the creation of a large transaction.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Note: Large Quotes and Orders 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.

How: To get access to this pilot feature, contact your customer success representative or account executive.

From Setup, in the Quick Find box, enter `Revenue Settings`, and then select **Revenue Settings**. Turn On Large Quotes and Orders.

New and Changed Objects in Transaction Management

Access more data through these new objects and fields.

Specify the catalog and negotiated rates of a usage resource associated with a quote line item that’s used to charge overage consumption

Use the new QuoteLineRateCardEntry object.

Specify the catalog and negotiated rates of a usage resource associated with an order product that’s used to charge overage consumption

Use the new OrderItemRateCardEntry object.

Specify the date on which the resources associated with a quote line item are granted

Use the new `EffectiveGrantDate` field on the existing QuoteLineItem object.

Specify the date on which the resources associated with an order product are granted

Use the new `EffectiveGrantDate` field on the existing OrderItem object.

Specify the date on which the resources associated with an asset are granted

Use the new `EffectiveGrantDate` field on the existing AssetActionSource object.

Specify the group associated with the order product

Use the new `OrderItemGroupId` field on the existing OrderItem object.

Specify the negotiated rate card entries associated with an asset

Use the new AssetRateCardEntry object.

Specify the tier rate adjustments associated with an asset rate card entry

Use the new AssetRateAdjustment object.

Specify discounts applied to an asset

Use the new `Discount` and `DiscountAmount` fields on the existing AssetActionSource object.

Specify the legal entity associated with the asset action source transaction

Use the new `LegalEntityId` field on the existing AssetActionSource object.

Specify the ramp segment associated with the asset action source transaction

Use the new `SegmentIdentifier` field on the existing AssetActionSource object.

Specify the approval information for the record of a related object

Use the new `ApprovalSubmission` object.

Specify the status of a step in the approval process

Use the new `ApprovalWorkItem` object.

Specify the details of an approval submission

Use the new `ApprovalSubmissionDetail` object.

Specify the assignment details of a task that's submitted for approval

Use the new `ApprovalAssignment` object.

Specify the group for a quote line

Use the new `QuoteLineGroup` object.

Specify the ramp segment data associated with an asset state period

Use the new `RampIdentifer`, `SegmentIdentifier`, `SegmentName`, and `SegmentType` fields on the existing AssetStatePeriod object.

Connect REST APIs

Connect REST APIs for Transaction Management help customers, partners, and ISVs access data related to quote creation, order capture, and asset lifecycle.

IN THIS SECTION:

New Connect REST API Resources

Learn more about the resources available with Transaction Management.

Create a ramp deal for a customer on a product

Make a POST request to the `/connect/revenue-management/sales-transaction-contexts/`***`resourceId`***`/actions/ramp-deal-create` resource.

New request body: Create Ramp Deal Input

New response body: Ramp Deal Service

Modify a ramp deal

Make a POST request to the `/connect/revenue-management/sales-transaction-contexts/`***`resourceId`***`/actions/ramp-deal-update` resource.

New request body: Update Ramp Deal Input

New response body: Ramp Deal Service

View a ramp deal related to a quote line item or an order item

Make a GET request to the `/connect/revenue-management/sales-transaction-contexts/`***`resourceId`***`/actions/ramp-deal-view` resource.

New response body: Ramp Deal Service

Delete a ramp deal

Make a POST request to the `/connect/revenue-management/sales-transaction-contexts/`***`resourceId`***`/actions/ramp-deal-delete` resource.

New request body: Delete Ramp Deal Input

New response body: Ramp Deal Service

SEE ALSO:

Revenue Cloud Developer Guide: Resources

Changed Connect REST API Request Bodies

These request bodies have changes.

Place Quote (POST)

Place Quote Input

This request body has this new property.

- `catalogRatesPref`—Rate card entries defined in the catalog that must be fetched for quote line items with usage-based pricing during the quote creation process.

Place Order (POST)

Place Order Input

This request body has this new property.

- `catalogRatesPref`—Rate card entries defined in the catalog that must be fetched for order items with usage-based pricing during the order creation process.

Instant Pricing (POST), Place Quote (POST), and Place Order (POST)

Get Instant Pricing Input, Place Quote Input, and Place Order Input

These request bodies have updates to the record attributes. Using these updates, you can group quote line items or order items based on location, work types, or departments, if groups are enabled for your org. Groups provide a visualization of the products to view large quotes. To learn more about these updates, see Instant Pricing (POST), Place Quote (POST), and Place Order (POST).

SEE ALSO:

Revenue Cloud Developer Guide: Place Order (POST)

Revenue Cloud Developer Guide: Place Quote (POST)

CommerceOrders Namespace

The CommerceOrders namespace has this new enum.

New Enum

Specify whether the rate card entries defined in the catalog must be fetched for order items

Use the new `CatalogRatesPreferenceEnum` enum in the `PlaceOrderExecutor` class method.

SEE ALSO:

Revenue Cloud Developer Guide: CommerceOrders Namespace

PlaceQuote Namespace

The PlaceQuote namespace has this new enum.

New Enum

Specify whether the rate card entries defined in the catalog must be fetched for quote line items

Use the new `CatalogRatesPreferenceEnum` enum in the `PlaceQuoteRLMApexProcessor` class method.

SEE ALSO:

Revenue Cloud Developer Guide: PlaceQuote Namespace

Dynamic Revenue Orchestrator

Define how failed callouts are retried by specifying how many times a failed callout retries a connection. Use the enhanced performance and mapping interface for thorough error logging. Partially load decomposition plans by loading a plan in steps to quickly get to what you need. If a fulfillment step doesn't meet its conditions, that step is skipped. Your fulfillment designers can specify whether to skip only a step or an entire branch that relies on the step. Product classifications group a range of similar products, so designers can easily configure the decomposition. Get a robust search function and more information at a glance when you search or view information about a decomposition rule. View decomposition rules even if they don't enrich fulfillment line items.

IN THIS SECTION:

Interface and Performance Enhancements

Enhancements include such things as filtered search, improvements to the mapping interface, better and more thorough error logging, and more.

Where: These changes are available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

Manual Task Assignment Rules

Fulfillment designers can configure a task to be automatically assigned to the next user in line.

Where: This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

Partially Load Fulfillment Plans

Large fulfillment plans can take a long time to load. You can choose to load a plan in steps to get what you need more quickly. Initially, the plan loads steps in active states such as In Progress, Pending, or Failed. Once these are fully loaded, it loads steps in states like Completed or Skipped.

Where: This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

Skip a Fulfillment Branch

If fulfillment step conditions aren't met, then the step is skipped. Now, fulfillment designers can specify whether to skip only the step itself, or an entire branch that relies on that step.

Where: This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

Why: In some cases, it makes sense to skip a single step, but still execute all the following steps. For example, the order requires a phone, but no SIM card. DRO skips the step to pull a SIM card from the warehouse, but runs all the other steps.

In other cases, it makes sense to skip a whole branch of steps. For example, the customer doesn't require a physical shipment. DRO skips the step to get the physical address, and then skips every step that relies on having a physical address, like shipping the product.

Support for Decomposition by Product Classification

A fulfillment designer can take advantage of product classifications that cover a range of similar products. Rather than creating identical decomposition relationships and mappings for each product, the designer configures the decomposition for the classification, significantly streamlining their work.

Where: This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

Define How Failed Callouts are Retried

You can specify how many times a failed callout retries a connection and how long it waits before each retry. You can even stagger the time between retries, so that, for example, it retries right away, then again in five minutes, and again in 20 minutes.

Where: This feature is available in Lightning Experience in Developer, Enterprise, and Unlimited editions where Revenue Lifecycle Management is enabled.

Why: Callouts often fail because the system being called is down or busy. Retrying immediately, only to fail again, wastes resources. Fulfillment designers can instead schedule callouts to wait before retrying. For example, they can schedule a retry every five minutes, or stagger the retries so that each one waits longer than the one before it.

How: Enable fallout management in the Dynamic Revenue Orchestrator settings.

Enhance Your Search and View in the Decomposition Viewer

Get a robust search function and more information at a glance when you search or view information about a decomposition rule. Search an order line item with a partial or full name in the search field and get results that include all associated line items with names that match your search criteria. View decomposition rules even if they don't enrich fulfillment line items. In the Other Attributes & Fields section, view the fulfillment order line item's attributes and fields that aren't related to the listed decomposition rules.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions where Revenue Cloud is enabled.

Changed Objects in Dynamic Revenue Orchestrator

Do more with these changed Dynamic Revenue Orchestrator objects.

Define a step that uses rules to determines how to handle fallouts
: Use the new `FalloutQueueId` and `RetryIntervals` fields on the existing FulfillmentFalloutRule object.

Define rules for decomposition during product fulfillment
: Use the new `SourceProductClassificationId` field on the existing ProductFulfillmentDecompRule object.

Define a step that must be executed during fulfillment orchestration
: Use the new `AmendGroupId`, `CancelledGroupId`, `PointOfNoReturn`, and `TaskAllocationType` fields on the existing FulfillmentStepDefinition object.

Create a fulfillment step that executes during fulfillment of an order
: Use the new `CompensatedStepId`, `FalloutQueueId`, `FalloutQueueId`, `FlowDefinitionName`, `IsSkipBranch`, `NextEarliestRunTime`, and `PointOfNoReturn` fields on the existing FulfillmentStep object.

Define a set of steps to be created to fulfill the order
: Use the new `SourceType` field on the existing FulfillmentPlan object.

Define a relationship between a fulfillment order line and its decomposition source
: Use the new `SupplementalAction` field on the existing FulfillmentLineSourceRel object.

Invoice Management (Generally Available)

Monetize all the sales models of your business with Invoice Management. Bill in advance or in arrears to generate invoices before or after recurring products and services are delivered. Automate and scale invoice generation. Configure multiple legal and tax entities to best support your business operations and structure. Automate the conversion of negative invoice lines to credit memos and the application of credit to invoices.

IN THIS SECTION:

Simplify your Billing Configuration by Using Guided Setup

Follow simple, clear steps on the Billing Guided Setup for all the setup tasks that you must complete, such as assigning permissions, configuring billing and tax policies, and setting up invoice runs. This guided setup helps you sprint through your implementation while minimizing the need for you to leave the context of your Salesforce org, and reducing the risk of missing any steps.

Billing in Advance and Arrears

In addition to billing in advance, Invoice Management also supports billing in arrears so you can issue an invoice after recurring products and services are delivered.

Configure Multiple Legal Entities for a Seller

Ensure that your quotes and invoices show the correct tax and billing information by configuring multiple legal entities to support your geographically distributed business. As a seller with customers and segments of your business in different tax locations, you might use different legal entities that govern the appropriate tax treatments, billing treatments, and accounting periods. With Revenue Cloud, you can configure multiple legal entities to be applied on a per-line basis in your invoices.

Ensure Accurate Tax Calculation by Customizing Tax Addresses

Enhance customer satisfaction and comply with regional tax regulations through tailored tax handling based on customized tax addresses on invoices. Your customers benefit from the enhanced accuracy in their financial documentation.

Schedule Automatic Invoice Generation for Billing Schedules

Automate invoice generation with the Invoice Scheduler to enhance efficiency and reduce manual work. Filter billing schedules for invoicing by currency, charge types, and billing batch schedules. Tailor the frequency of invoice schedules to meet your business requirements. You can also make sure that monthly runs begin on a working day if the scheduled start date falls on holidays or weekends.

Streamline Financial Reporting with Accounting Periods

Create accounting periods for legal entities and associate billing transactions that occur during that period with legal entity accounting periods. Report anomalies in billing transactions before closing the accounting periods, so that accounting users can correct them. After closing the accounting periods, post the transactions to record-keeping systems for organized tracking and compliance. Reporting billing transactions helps maintain accurate business record-keeping systems that are used to prepare financial statements.

Automate Conversion of Negative Invoice Lines to Credit Memo Lines

Get rid of the hassle of manually converting negative invoice lines of one invoice at a time by automatically converting large volumes of negative invoice lines to posted credit memo lines. Automating this process helps reduce the risk of human error, save time, and boost productivity.

Issue Credits to Settle Balances of Invoices or Invoice Lines

Choose to settle the balances of invoice lines separately or invoice line amounts rolled-up to invoices by applying credit memo lines or credit memos. If you choose to settle invoice lines, you can granularly track the products and services that are part of the same invoice and were already issued credits. After credits are applied to invoices or invoice lines, the applied amounts and balance amounts are automatically updated.

Settle Invoices Faster by Auto-Applying Credit Balances

Save time and effort by automatically applying available credit memo balances to settle posted invoice balances. Eliminate the need to manually apply credit memos before generating posted invoices and share timely details about invoice balances with your customers.

Optimize User Experience for Partner Communities

Empower your partners and community users with a unified and intuitive interface to handle their billing activities and processes efficiently. Partners and community users can effortlessly access and manage billing details, view invoices, track credit memos, and understand billing schedules.

New Objects for Invoice Management

Do more with the new objects in Invoice Management.

New Platform Events for Invoice Management

Receive real-time notifications from Salesforce by subscribing to the channels of these new Billing platform events.

New Connect REST API Resources

Learn more about the resources available with Salesforce Billing.

New Metadata Types

Learn more about the new metadata types in Invoice Management.

New Invocable Actions

Use the new invocable actions in Invoice Management.

Define Criteria for Invoicing Products

Define billing policies, treatments, and treatment items to generate invoices that suit your sales models. Customize invoice generation with billing treatments and treatment items that define whether you want to bill in advance or in arrears, whether specific products are billed, and other criteria.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To create billing policies, billing treatments, and billing treatment items, you need the Billing Admin permission set.

SEE ALSO:

Salesforce Help: Criteria for Invoicing Products (can be outdated or unavailable during release preview)

Simplify your Billing Configuration by Using Guided Setup

Follow simple, clear steps on the Billing Guided Setup for all the setup tasks that you must complete, such as assigning permissions, configuring billing and tax policies, and setting up invoice runs. This guided setup helps you sprint through your implementation while minimizing the need for you to leave the context of your Salesforce org, and reducing the risk of missing any steps.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To access the Billing Guided Setup, you need the Billing Admin and Tax Admin permission sets.

Why: The Billing Guided Setup experience includes these assistants.

- **Billing Prerequisites:** Create billing users, assign necessary permissions, and set up billing rules for your products. This foundational step ensures that authorized personnel manage your billing operations with defined rules, enhancing security and accuracy in billing transactions.
- **Tax Configurations:** Configure a tax engine and tax policies to calculate accurate taxes and capture tax details on invoices.
- **Invoice Configurations:** Schedule invoice batch runs to generate invoices.

How: From Setup, in the Quick Find box, enter `Billing`, and then go to the Guided Setup section. Select a setup assistant to begin.

Billing in Advance and Arrears

In addition to billing in advance, Invoice Management also supports billing in arrears so you can issue an invoice after recurring products and services are delivered.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

How: On a Billing Treatment record, set the Billing Type to either **Advance** or **Arrears**.

Configure Multiple Legal Entities for a Seller

Ensure that your quotes and invoices show the correct tax and billing information by configuring multiple legal entities to support your geographically distributed business. As a seller with customers and segments of your business in different tax locations, you might use different legal entities that govern the appropriate tax treatments, billing treatments, and accounting periods. With Revenue Cloud, you can configure multiple legal entities to be applied on a per-line basis in your invoices.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To configure legal entities, you need the Billing Admin and Tax Admin permission sets.

Why: Accurately calculate taxes for products manufactured and fulfilled in multiple locations, and present a unified image of your business to customers.

How: Legal entities are configured from Setup. In the Quick Find box, enter `Billing`, and then go to the Guided Setup section.

Ensure Accurate Tax Calculation by Customizing Tax Addresses

Enhance customer satisfaction and comply with regional tax regulations through tailored tax handling based on customized tax addresses on invoices. Your customers benefit from the enhanced accuracy in their financial documentation.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To change the addresses of billing schedule groups, you need the Billing Admin permission set.

How: Change the billing and shipping addresses of billing schedule groups related to the products that you're billing. When invoice runs process the billing schedule groups, the invoice runs generate invoices with tax lines that show the changed addresses of the billing schedule groups.

To monitor and audit any modifications made to the Billing Schedule Group object's address fields, turn on field history tracking for those fields.

SEE ALSO:

Salesforce Help: Address Customization on Tax Invoice Lines (can be outdated or unavailable during release preview)

Schedule Automatic Invoice Generation for Billing Schedules

Automate invoice generation with the Invoice Scheduler to enhance efficiency and reduce manual work. Filter billing schedules for invoicing by currency, charge types, and billing batch schedules. Tailor the frequency of invoice schedules to meet your business requirements. You can also make sure that monthly runs begin on a working day if the scheduled start date falls on holidays or weekends.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To schedule invoice runs, you need either the Billing Admin or Billing Operations User permission set.

How: From the App Launcher, find and select **Billing Batch Scheduler**. To schedule invoice runs, click **New Invoice Scheduler** and provide the required details.

SEE ALSO:

Salesforce Help: Generate Invoices Automatically Based on Billing Batches (can be outdated or unavailable during release preview)

Streamline Financial Reporting with Accounting Periods

Create accounting periods for legal entities and associate billing transactions that occur during that period with legal entity accounting periods. Report anomalies in billing transactions before closing the accounting periods, so that accounting users can correct them. After closing the accounting periods, post the transactions to record-keeping systems for organized tracking and compliance. Reporting billing transactions helps maintain accurate business record-keeping systems that are used to prepare financial statements.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To create accounting periods and legal entity accounting periods, you need the Accounts Receivables Admin permission set. To close or reopen legal entity accounting periods, you need the Accounts Receivables Operations User permission set.

SEE ALSO:

Salesforce Help: Financial Reporting with Accounting Periods (can be outdated or unavailable during release preview)

Automate Conversion of Negative Invoice Lines to Credit Memo Lines

Get rid of the hassle of manually converting negative invoice lines of one invoice at a time by automatically converting large volumes of negative invoice lines to posted credit memo lines. Automating this process helps reduce the risk of human error, save time, and boost productivity.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To automate the conversion of negative invoice lines to credit memo lines, you need the Billing Admin permission set.

How: To turn on Convert Negative Invoice Lines to Credit Memo Lines, go to the new Billing Settings page in Setup.

SEE ALSO:

Salesforce Help: Convert Negative Invoice Lines to Credit Memo Lines (can be outdated or unavailable during release preview)

Issue Credits to Settle Balances of Invoices or Invoice Lines

Choose to settle the balances of invoice lines separately or invoice line amounts rolled-up to invoices by applying credit memo lines or credit memos. If you choose to settle invoice lines, you can granularly track the products and services that are part of the same invoice and were already issued credits. After credits are applied to invoices or invoice lines, the applied amounts and balance amounts are automatically updated.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To select whether you want to apply credit memos or credit memo lines to invoices or invoice lines, you need the Billing Admin permission set.

How: To select the credit application level, go to the new Billing Settings page in Setup.

SEE ALSO:

Salesforce Help: Apply Credits to Invoices or Invoice Lines (can be outdated or unavailable during release preview)

Settle Invoices Faster by Auto-Applying Credit Balances

Save time and effort by automatically applying available credit memo balances to settle posted invoice balances. Eliminate the need to manually apply credit memos before generating posted invoices and share timely details about invoice balances with your customers.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To turn on Apply Credits to Posted Invoices, you need the Billing Admin permission set.

How: To turn on Apply Credits to Posted Invoices, go to the new Billing Settings page in Setup.

SEE ALSO:

Salesforce Help: Automate Invoice Balance Settlement by Mass-Applying Credits (can be outdated or unavailable during release preview)

Optimize User Experience for Partner Communities

Empower your partners and community users with a unified and intuitive interface to handle their billing activities and processes efficiently. Partners and community users can effortlessly access and manage billing details, view invoices, track credit memos, and understand billing schedules.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To use this feature, partner users need a Partner Community, Partner Community Login, Channel Account, or a Gold Partner license.

SEE ALSO:

Salesforce Help: Billing Access for Partner Communities (can be outdated or unavailable during release preview)

New Objects for Invoice Management

Do more with the new objects in Invoice Management.

Get information about invoice batch runs that generate invoices for billing schedules
Use the new BillingBatchScheduler object.

Get billing information for invoice lines
Use the new BillingPeriodItem object.

Get information about rules that define how order items are billed
Use the new BillingPolicy object.

Get information about invoiced order items
Use the new BillingSchedule object.

Get information about billing schedules that are related to order items generated from an asset
Use the new BillingScheduleGroup object.

Get information about the relationship between billing schedule groups to support bundles where a billing schedule group has multiple child billing schedule groups
Use the new BsgRelationship object.

Get information about the set of rules that determine how an order item is billed
Use the new BillingTreatment object.

Get information about the distribution of an order item's total amount into billing schedules over the course of the order item's lifecycle

Use the new BillingTreatmentItem object.

Get information about the amount that's used to reduce the amount that a buyer owes a seller under the terms of an earlier invoice

Use the new CreditMemo object.

Get information about the buyer's address that's used to determine the tax amount to credit to the buyer when a credit memo is issued

Use the new CreditMemoAddressGroup object.

Get information about the application of a credit memo to an invoice

Use the new CreditMemoInvApplication object.

Get information about product, service, adjustment, or tax line items that are included in a credit memo

Use the new CreditMemoLine object.

Get information about the application of a credit memo line to an invoice line

Use the new CreditMemoLineInvLine object.

Get tax information of a credit memo line

Use the new CreditMemoLineTax object.

Get information about the batch job that posts all the draft invoices

Use the new InvBatchDraftToPostedRun object.

Get information about the total amount a buyer must pay for the provided products or services

Use the new Invoice object.

Get information about a buyer's address

Use the new InvoiceAddressGroup object.

Get information about the batch processing job that processes billing schedules that meet the specified criteria to generate invoices

Use the new InvoiceBatchRun object.

Get information about the specified criteria that billing schedules must meet to be processed by invoice batch runs

Use the new InvoiceBatchRunCriteria object.

Get information about the recovery procedure for an invoice batch run

Use the new InvoiceBatchRunRecovery object.

Get information about the amount that a buyer must pay for a product, service, or fee. Invoice lines are created based on the amount of an order line.

Use the new InvoiceLine object.

Get information about the relationship between invoice line items to support bundles where a parent invoice line has multiple child invoice lines

Use the new InvoiceLineRelationship object.

Get tax information of an invoice line

Use the new InvoiceLineTax object.

Get information about the structure of an organization

Use the new LegalEnty object.

Get information about the accounting periods of legal entities

Use the new LegalEntyAccountingPeriod object.

Get information about the agreement between a buyer and a seller about when payment is due for an invoice
Use the new PaymentTerm object.

Get information about a payment term's configuration
Use the new PaymentTermItem object.

Get information about the errors that occurred during the processing of a request
Use the new RevenueTransactionErrorLog object.

Get information about an instance of a tax engine provider and the merchant credentials for that specific instance
Use the new TaxEngine object.

Get information about a service that manages a tax engine
Use the new TaxEngineProvider object.

Get information about a group of tax treatments, where each treatment represents parameters to determine how a particular product is taxed for a transaction line item
Use the new TaxPolicy object.

Get information about tax calculation by external engines
Use the new TaxTreatment object.

SEE ALSO:

Revenue Cloud Developer Guide: Billing Standard Objects (can be outdated or unavailable during release preview)

New Platform Events for Invoice Management

Receive real-time notifications from Salesforce by subscribing to the channels of these new Billing platform events.

Notify subscribers when the process to create and apply a credit memo is complete
Subscribe to the new CreditInvoiceProcessedEvent platform event to receive notifications related to the process completion for the `/commerce/invoicing/invoices/`***`invoiceId`***`/actions/credit` request.

Notify subscribers when the process to create a credit memo is complete
Subscribe to the new CreditMemoProcessedEvent platform event to receive notifications related to the process completion for the `/commerce/invoicing/credit-memos` request.

Notify subscribers about the errors that occurred when creating or applying a credit memo
Subscribe to the CrMemoProcessErrDtlEvent platform event to receive notifications related to errors.

Notify subscribers about the errors that occurred when creating and applying a credit memo to an invoice
Subscribe to the new InvoiceErrorDetailEvent platform event to receive notifications related to the errors for the `/commerce/billing/invoices` request.

Notify subscribers when the process to create invoices from billing schedules is complete
Subscribe to the new InvoiceProcessedDetailEvent platform event.

Notify subscribers when the process to create and apply a credit memo to an invoice is complete
Subscribe to the new InvoiceProcessedEvent platform event to receive notifications related to the process completion for the `/commerce/billing/invoices` request.

Notify subscribers when a posted invoice is voided
Subscribe to the new NegInvcLineProcessedEvent platform event.

Notify subscribers when a negative invoice line is converted to a credit memo

Subscribe to the new VoidInvoiceProcessedEvent platform event.

SEE ALSO:

Revenue Cloud Developer Guide: Billing Platform Events (can be outdated or unavailable during release preview)

New Connect REST API Resources

Learn more about the resources available with Salesforce Billing.

Adjust or correct already issued invoices by applying an existing credit memo to an invoice

Make a POST request to the `/commerce/invoicing/credit-memos/`***`creditMemoId`***`/actions/apply` resource.

New request body: Credit Memo Apply Input

New response body: Credit Memo Apply List

Unapply a credit memo from an invoice and return the invoice and the credit memo to their pre-application states

Make a POST request to the `/commerce/invoicing/credit-memo-inv-applications/`***`creditMemoInvApplicationId`***`/actions/unapply` resource.

New request body: Credit Memo Unapply Input

New response body: Credit Memo Unapply

Adjust or correct already issued invoices by applying an existing credit memo line to an invoice line

Make a POST request to the `/commerce/invoicing/credit-memo-lines/`***`creditMemoLineId`***`/actions/apply` resource.

New request body: Credit Memo Line Apply Input

New response body: Credit Memo Line Applied

Unapply a credit memo line from an invoice line and return the invoice line and the credit memo line to their pre-application states

Make a POST request to the `/commerce/invoicing/credit-memo-line-invoice-line/`***`creditMemoLineInvoiceLineId`***`/actions/unapply` resource.

New request body: Credit Memo Line Unapply Input

New response body: Credit Memo Line Unapplied

Generate billing schedules by using context service

Make a POST request to the `/commerce/invoicing/billing-schedules/actions/create` resource.

New request body: Context-Aware Billing Schedule Input

New response body: Context-Aware Billing Schedule

Create an invoice from a billing schedule

Make a POST request to the `/commerce/invoicing/invoices/collection/actions/generate` resource.

New request body: Invoice Input

New response body: Revenue Async Response

Recover the invoice associated with the billing schedules marked in error

Make a POST request to the `/commerce/invoicing/billing-schedules/collection/actions/recover` resource.

New request body: Billing Schedule Recovery Input

New response body: Billing Schedule Recovery List

SEE ALSO:

Revenue Cloud Developer Guide: Billing Business APIs (can be outdated or unavailable during release preview)

New Metadata Types

Learn more about the new metadata types in Invoice Management.

Metadata Type

Manage the settings for Billing

Use the new BillingSettings metadata type.

Salesforce Flow

Apply a credit memo or credit memo line to an invoice or invoice line, respectively

Use the new `applyCredit` value in the existing `actionType` field, which is on the FlowActionCall subtype of the Flow metadata type.

Unapply a credit memo or credit memo line from an invoice or invoice line, respectively

Use the new `unapplyCredit` value in the existing `actionType` field, which is on the FlowActionCall subtype of the Flow metadata type.

SEE ALSO:

Revenue Cloud Developer Guide: Billing Metadata API Types (can be outdated or unavailable during release preview)

New Invocable Actions

Use the new invocable actions in Invoice Management.

Apply a credit memo or credit memo line to an invoice or invoice line, respectively

Use the new applyCredit action.

Unapply a credit memo or credit memo line from an invoice or invoice line, respectively

Use the new unapplyCredit action.

SEE ALSO:

Revenue Cloud Developer Guide: Billing Standard Invocable Actions (can be outdated or unavailable during release preview)

Salesforce Contracts

Salesforce Contracts has enhanced its contract management with new features for improved efficiency and accuracy. The internal review workflow is optimized for contract authors. By using the document comparison feature, authors can identify differences between two versions of a contract. Both contract authors and template designers can lock sections within documents to prevent unauthorized edits. Template designers now benefit from real-time document generation by using Single Point Requests (SPR). Additionally, the new file-based prompt APIs help contract admins minimize failures during the extraction of contract details from PDFs. They can refine instructions for both predefined and user-defined fields and test the extraction results before creating a contract record.

IN THIS SECTION:

Enhance Document Generation with Single Point Requests (SPR) and Omniscript

Generating documents in real time often has limits on file sizes and can cause delays and problems because of large volumes of data on client-side processes. The new docGenerationSample/CoreSingleDocxLWC Omniscript addresses these challenges by using Single Point Requests (SPR) functionality. With the Omniscript, you can create documents from Microsoft Word (DOCX) or PowerPoint (PPTX) templates.

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

Who: To access Omniscript, users need the DocGen Designer, DocGen Runtime Community User, DocGen Runtime User, DocGen User, Omnistudio Admin, or Omnistudio User permission set.

Control Edit Access to Protect Essential Contract Sections

Template designers and contract authors can lock sections when they're designing the template or aurthoring the contract. With the section lock feature, you can prevent unintended users from editing and deleting sections and their associated content. For example, in a product sales contract, you can lock the warranty section to ensure that the terms and conditions of the warranty remain unchanged. Locking makes sure that specific sections of your contract remain unchanged, even when multiple parties are involved in the drafting and redlining of the contract. The document generated from a template that has locked sections automatically inherits the lock at the document level.

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

Who: Users need the Microsoft 365 Word permission set to collaborate on internal contract reviews with multiple reviewers.

Define and Test Instructions for Better Extraction Results

With the integration of file-based prompt and prompt runtime APIs into Salesforce Contracts, you can define, test, and refine instructions for standard and custom entities. Add detailed descriptions and verify them during the design phase by using the entity extraction mapping framework for better LLM results. Upload PDF files to test extraction asynchronously. In addition, you can change the instructions for each field, test with a small document, and rewrite the instructions as needed without uploading the document again. Then, save results to extraction templates for runtime use. You can also preview files automatically before runtime to ensure a smoother and more reliable extraction process.

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

Who: To test instructions, users need the CLM Admin User and Context Service Admin, NLP Service, Scoring Framework Admin, Scoring Framework User, Prompt Template Manager, Prompt Template User, Contracts AI Clause Designer, and Contracts AI Runtime User permission sets.

Streamline Your Internal Review Processes with Automated Checkout

Refining the checkout process streamlines the internal review workflow by minimizing the steps required for the contract author to kickstart a review. When you initiate an internal review, the active contract document version is automatically checked out, and a new version is created with the status In Review. This new version then opens directly in the Microsoft 365 editor so that you can add reviewers and efficiently manage the review process with your internal team.

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

Who: Users need a Microsoft 365 Word permission set to collaborate on internal contract reviews with multiple reviewers.

Identify Differences Between Contract Versions

Contract users can effortlessly compare a contract's current version with any of the previous versions to identify differences introduced during redlining. This feature is available only for DOCX files. The compare feature highlights differences such as content modifications and table edits. After the preview is generated, you can review the differences. For larger documents, the preview generation can take longer, so you can download the comparison document for an offline review.

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

Who: Users need either the CLM Admin User or CLM Runtime User permission set to compare contract versions.

Salesforce Billing Managed Package

Leverage Salesforce Billing's usability improvements to easily post large number of invoices in batches without facing any errors.

IN THIS SECTION:

Post Invoices Seamlessly with Consecutive Batch Jobs

Enable the posting of one invoice at a time to successfully post large number of invoices for the same account. Process invoices consecutively to avoid locking the required accounts and in turn avoid the failure of posting invoices.

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Enable the posting of one invoice at a time to successfully post large number of invoices for the same account. Process invoices consecutively to avoid locking the required accounts and in turn avoid the failure of posting invoices.

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 Consecutive Post Invoice Batch Jobs.

SEE ALSO:

Salesforce Help: Invoice Package Settings (can be outdated or unavailable during release preview)

Sales

Boost your teams' results with new features across Sales Cloud. Nurture existing relationships and grow key accounts with Account Plans. Keep your pipeline healthy by using AI to help identify your next customer. Submit forecast numbers at a point in time. And create quota plans that incorporate stamped territory hierarchy, owner, and attribute data.

IN THIS SECTION:

Einstein for Sales

Check out the latest Einstein for Sales features and updates. Prepare for Einstein Activity Capture service account OAuth 2.0 retirement and Einstein Automated Contacts retirement. The Summarize Record standard action in Einstein Copilot replaces Sales Summaries (Beta).

Sales Fundamentals

See a complete view of your day with Seller Home in any app. Nurture existing relationships and grow key accounts with Account Plans. Review and update your settings to keep syncing leads from LinkedIn.

Sales Cloud Go

Explore Sales Cloud features that are available in your edition and turn on features with ease.

Einstein Conversation Insights

We're rolling out a new look for Einstein Conversation Insights (ECI). With the new Conversation Hub, the ECI landing page and other pages were redesigned. Sales managers and their teams can see useful metrics and find relevant conversations through a new-and-improved user interface. We also added visual and functional improvements to Sales Signals.

Sales Engagement

Find your next best customers with Prospecting Center. Cadence Builder 1.0 is being retired.

Revenue Intelligence

Discover new opportunities and improve sales performance with enhanced white space analysis. Sellers and sales leaders can now send emails to customers based on account risk factors within the Einstein Account Management app. If you organize your teams by territory, you can now control access to data based on the user's territory.

Einstein for Sales

Check out the latest Einstein for Sales features and updates. Prepare for Einstein Activity Capture service account OAuth 2.0 retirement and Einstein Automated Contacts retirement. The Summarize Record standard action in Einstein Copilot replaces Sales Summaries (Beta).

IN THIS SECTION:

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.

Sales Summaries Beta Program Is No Longer Available

As of Winter '25, the Summarize Record standard action in Einstein Copilot replaces Sales Summaries. To provide your sellers with AI-generated summaries of accounts, contacts, leads, and opportunities, we recommend that you set up Einstein Copilot and activate the Summarize Record Copilot action.

Einstein Activity Capture

Prepare for service account OAuth 2.0 retirement by upgrading to org-level OAuth 2.0 authentication. User Health Status has updated text for resyncing events and email for org-level OAuth 2.0 connections.

IN THIS SECTION:

Upgrade Your Service Account Connections to Org-Level OAuth 2.0 Authentication

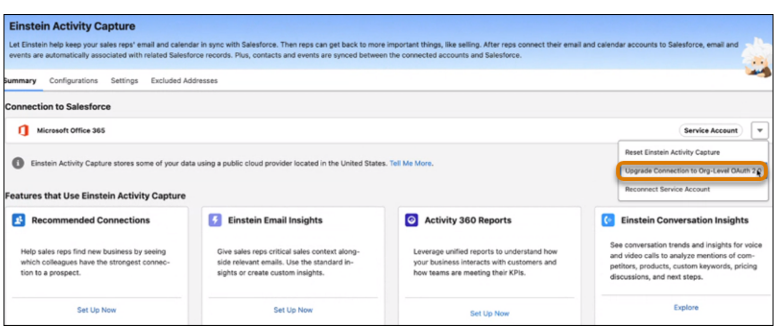
Microsoft is retiring the ApplicationImpersonation role in Exchange Online in February 2025. As a result, Salesforce is retiring service account OAuth 2.0 access to Microsoft Office 365 from Einstein Activity Capture. To make sure that Einstein Activity Capture continues working, upgrade to org-level OAuth 2.0 authentication.

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

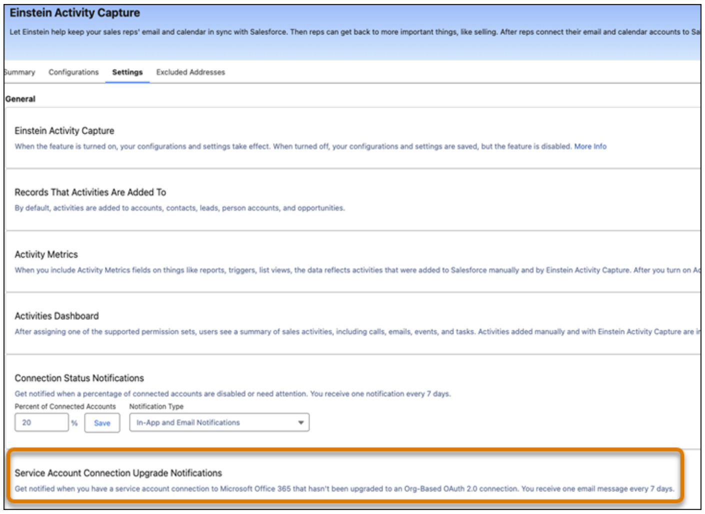
Why: Your Microsoft Office 365 connections that use service account OAuth2.0 authentication continue to work until February 2025. But if you haven't upgraded to org-level OAuth 2.0 by then, your Einstein Activity Capture connection stops working.

How: Upgrade to org-level OAuth 2.0 in Einstein Activity Capture settings in Setup. During the upgrade process, you're prompted to log in to your Office 365 tenant. Make sure you log in to the same tenant you used when creating the connection. If you don't, you have to reset your Einstein Activity Capture connection and start over.

After you upgrade, you can scope authentication to a specific set of users with Microsoft Exchange Role Based Access Control.



Until you upgrade your connection, all admins for your org receive a weekly email reminder. You can turn off the notification in Setup.



SEE ALSO:

Knowledge Article: EAC to MS Office 365: Service Account OAuth 2.0 Retirement

Microsoft Exchange Team Blog: Retirement of RBAC Application Impersonation in Exchange Online

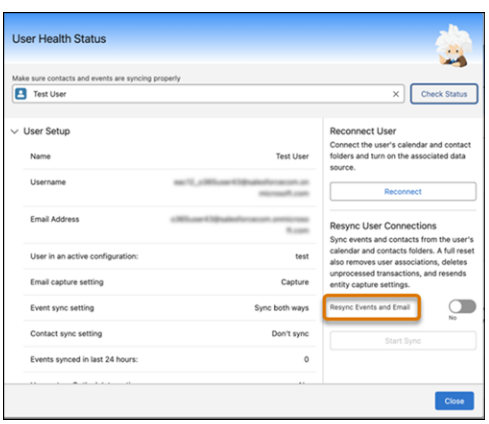
Salesforce Help: Use a Service Account to Connect Microsoft Office 365 and Einstein Activity Capture (can be outdated or unavailable during release preview)

Resync Events Renamed in User Health Status

For org-level OAuth 2.0 connections in Einstein Activity Capture, the resync option changed in User Health Status. Now, to accurately reflect what the option does, the option label is Resync Events and Email. Previously, it was Resync Events.

Where: This change applies to Lightning Experience in Performance and Unlimited editions, or through Einstein 1 Sales Edition, Inbox, Sales Engagement, or Revenue Intelligence.

How: From Setup, enter `Einstein Activity Capture` in the Quick Find box, and then select **Status & Metrics**.



SEE ALSO:

Salesforce Help: Check Connection Status and Metrics for Einstein Activity Capture Users (can be outdated or unavailable during release preview)

Einstein Copilot for Sales

Sales Copilot topics help sellers effectively handle deal closures, explore conversations, 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.

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:

Handle More Use Cases More Consistently with Copilot Topics

Salesforce Help: The Building Blocks of Einstein Copilot

Salesforce Help: Einstein Copilot for Sales Setup

Revamp Your Follow-Up Game in Less Time

Streamline your sales outreach efforts by adding prospects to cadences directly from Einstein Copilot. This enhancement reduces the time you spend on manual data entry, allowing you to focus on more strategic tasks. The Add Record to Cadence action, which is included in the Manage Deals topic, enables sellers to use Copilot to enroll prospects in structured follow-up sequences. Each step in a sequence has a defined channel, timing, and associated content.

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 and Sales Engagement User permission.

How: To get started with the Add Record to Cadence copilot action, turn on Einstein Generative AI in Setup. Then, turn on Einstein Copilot for Salesforce from the Einstein Copilot page in Setup. Add the Manage Deals topic from the asset library and assign the required user permissions

SEE ALSO:

Salesforce Help: Copilot Action: Add Record to Cadence

Salesforce Help: Einstein Copilot for Sales Setup

Salesforce Help: Set Up Einstein Copilot

Log Calls with Customers with Einstein Copilot

Improve your team's productivity by streamlining the manual entry of call data when sellers interact with customers. The Log a Call action, which is now included in the Manage Deals standard copilot topic, enables sales professionals to efficiently log calls with customers as tasks. Sellers can include additional information, such as the call's purpose and timing.

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: Users need the Use Einstein Copilot for Salesforce permission to access Einstein Copilot.

How: To get started with the Log a Call copilot action, turn on Einstein Generative AI in Setup. Next, turn on Einstein Copilot for Salesforce from the Einstein Copilot page in Setup. Add the Manage Deals topic from the asset library.

SEE ALSO:

Salesforce Help: Copilot Action: Log a Call

Salesforce Help: Einstein Copilot for Sales Setup

Salesforce Help: Set Up Einstein Copilot

Establish Action Items with Einstein

Craft tasks for follow-up or assignments to complete, helping sellers efficiently manage their work. The Create a To-Do action, which is included in the Manage Deals topic, enables sellers to establish to-do work items for themselves and their team members.

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: Users need the Use Einstein Copilot for Salesforce permission to access Copilot.

How: To get started with the Create a To-Do copilot action, turn on Einstein Generative AI in Setup. Next, turn on Einstein Copilot for Salesforce from the Einstein Copilot page in Setup. Add the Manage Deals topic from the asset library and assign the required user permissions.

SEE ALSO:

Salesforce Help: Copilot Action: Create a To-Do

Salesforce Help: Einstein Copilot for Sales Setup

Salesforce Help: Set Up Einstein Copilot

Organize and Quickly Find Records by Using Custom Labels with Einstein

Using Einstein, sales reps can easily create personal labels and apply them to records, which makes it simple to group, track, and quickly find what they need. Add labels to records based on common attributes to keep everything organized and efficient.

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.

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
- Action Cadence
- Call Template

- Campaign
- Case
- Contact
- Custom Object
- Email Template
- Flow Orchestration Work Item
- Lead
- Opportunity
- Task

Personal labels added to records are separate from Topics, which other users can see.

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. Add the Manage Deals topic from the asset library and assign the required user permissions.

SEE ALSO:

Salesforce Help: Copilot Action: Create a Label

Salesforce Help: Copilot Action: Label a Record

Salesforce Help: Einstein Copilot for Sales Setup

Salesforce Help: Set Up Einstein Copilot

Get Instant Access to Pricing Information

Let your sales reps expedite the sales process by providing quick access to product sale price information, leading to faster deal closures, minimized back-and-forth correspondence, and improved productivity. When sales users ask Einstein Copilot about the pricing information for a product, the Get Product Pricing copilot action fetches the list price information for that product, including relevant historical sale price data from previously won deals involving the same product. This action is included in the Close Deals standard copilot topic.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Einstein 1 Sales 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 Get Product Pricing user permission set. Users also need the Use Einstein Copilot for Salesforce permission to access Copilot.

How: To get started with the Get Product Pricing copilot action, turn on Einstein Generative AI in Setup. Next, turn on Einstein Copilot for Salesforce from the Einstein Copilot page in Setup. Add the Close Deals topic from the asset library and assign the required user permissions.

SEE ALSO:

Salesforce Help: Copilot Action: Get Product Pricing

Salesforce Help: Einstein Copilot for Sales Setup

Salesforce Help: Set Up Einstein Copilot

Focus on the Deals That Matter Most

With Prioritize Opportunities in Einstein Copilot, sales teams can focus more on selling and less on deciding which deals to pursue. When users ask Einstein to prioritize their opportunities, the Prioritize Opportunities copilot action in the Manage Deals standard copilot topic uses a Prioritize Opportunities prompt template to generate a formatted list of the most promising deals. Review the deals and the reasons why they're prioritized to determine where to spend your time and effort.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales add-on. Einstein generative AI is available in Lightning Experience. Setup for Einstein Copilot is available on the desktop site.

Who: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales add-on. Einstein generative AI is available in Lightning Experience. Setup for Einstein Copilot is available on the desktop site.

To purchase the Einstein for Sales add-on, contact your Salesforce account executive.

Who: This feature is available to users with the Use Einstein Copilot for Salesforce user permission and the Read on Opportunity object permission. Users also need the Execute Prompt Templates permission to run prompt templates

How: To use the Prioritize Opportunities action, turn on Einstein Generative AI in Setup. Click the name of your copilot, and then click **Open in Copilot Builder**. Add the Manage Deals topic from the asset library. Then click **Activate**. The Prioritize Opportunities action is added to the copilot automatically.

Discover Key Contacts, Their Roles in Influencing Deals, and the Deals They've Impacted

Using Einstein, sales reps can easily identify key contacts linked to an account or opportunity based on their roles or personas. They can see how significant these contacts are in influencing the opportunity or account status and understand the impact, on the outcome of a deal, initiative, or account. Additionally, sales reps can discover the list of opportunities or an account that a contact has impacted.

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 Review Buying Committee permission sets. Users also need the Use Einstein Copilot for Salesforce permission to access Copilot.

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. Add the Manage Deals topic from the asset library and assign the required user permissions.

SEE ALSO:

Salesforce Help: Copilot Action: Find Contact Interactions

Salesforce Help: Copilot Action: Identify Contact Role

Salesforce Help: Copilot Action: Identify Key Contacts

Salesforce Help: Einstein Copilot for Sales Setup

Salesforce Help: Set Up Einstein Copilot

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

Sales Summaries Beta Program Is No Longer Available

As of Winter '25, the Summarize Record standard action in Einstein Copilot replaces Sales Summaries. To provide your sellers with AI-generated summaries of accounts, contacts, leads, and opportunities, we recommend that you set up Einstein Copilot and activate the Summarize Record Copilot action.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales add-on. Einstein generative AI is available in Lightning Experience.

Who: Sales Summaries using the Summarize Record Copilot action is available to users with the Sales Summaries User permission set. Users also need the Use Einstein Copilot for Salesforce User permission set to access Copilot.

How: Remove the Create Summary button on the Account, Contact, Lead, and Opportunity page layouts.

SEE ALSO:

Salesforce Help: Set Up Einstein Copilot (can be outdated or unavailable during release preview)

Salesforce Help: Summarize Record Copilot Action (can be outdated or unavailable during release preview)

Salesforce Help: Customize Buttons on Page Layouts (can be outdated or unavailable during release preview)

Sales Fundamentals

See a complete view of your day with Seller Home in any app. Nurture existing relationships and grow key accounts with Account Plans. Review and update your settings to keep syncing leads from LinkedIn.

IN THIS SECTION:

Show Sales Reps Seller Home in More Places

Give sales users an overview of their opportunities, accounts, leads, and contacts, along with their day's agenda in any standard or custom Salesforce app. Apply the Seller Home template as the default home page for the app in Lightning App Builder. Sales team members can start their day with a complete view of their business. Previously, Seller Home was only available in a few standard apps.

Opportunities

Sales teams can assign opportunity splits and opportunity product splits to territories.

Accounts

Build relationships and focus on long-term development with Account Plans. Associate person accounts and contacts with other person accounts and contacts in a reporting hierarchy.

Leads

Review and update your settings to keep syncing leads from LinkedIn.

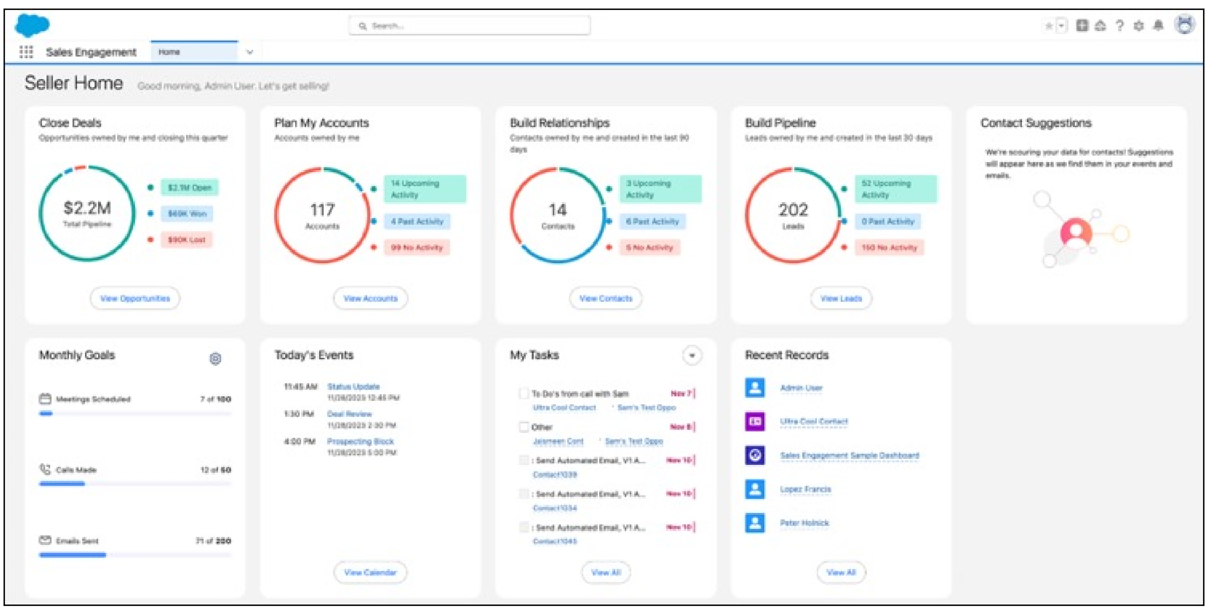
Show Sales Reps Seller Home in More Places

Give sales users an overview of their opportunities, accounts, leads, and contacts, along with their day's agenda in any standard or custom Salesforce app. Apply the Seller Home template as the default home page for the app in Lightning App Builder. Sales team members can start their day with a complete view of their business. Previously, Seller Home was only available in a few standard apps.

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

Why: With more useful information available at a glance, users can get oriented faster and choose what to do next. Seller Home includes:

- Account overview
- Best prospects
- Contact overview
- Contact suggestions—identified by Einstein from a user's emails and events
- Forecast commit
- Lead overview
- Opportunity overview
- Recent records
- Salesblazer articles
- To-do items
- Today's events
- Weekly or monthly goals



Opportunities

Sales teams can assign opportunity splits and opportunity product splits to territories.

IN THIS SECTION:

Increase Sales Team Collaboration by Assigning Opportunity Splits to Territories

To see how territories contribute to overall sales, sales teams can now assign opportunity splits and opportunity product splits to territories. Previously, splits could be associated only with the parent opportunity's territory. This change allows sales teams to get reports that show territories' contributions to closing deals using splits data. Teams can also forecast based on splits amounts across territories.

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

Why: Opportunity splits reports now include Split Territory and Split Territory Description fields. The Territory and Territory Description fields in specific reports are also renamed to Opportunity Territory and Opportunity Territory Description respectively. The changed field names clarify that the territory fields apply specifically to the opportunities.

How: To let your sales team assign territories to opportunity splits and opportunity product splits, add the Split Territory field to the opportunity split and opportunity product split multi-line page layouts.

Accounts

Build relationships and focus on long-term development with Account Plans. Associate person accounts and contacts with other person accounts and contacts in a reporting hierarchy.

IN THIS SECTION:

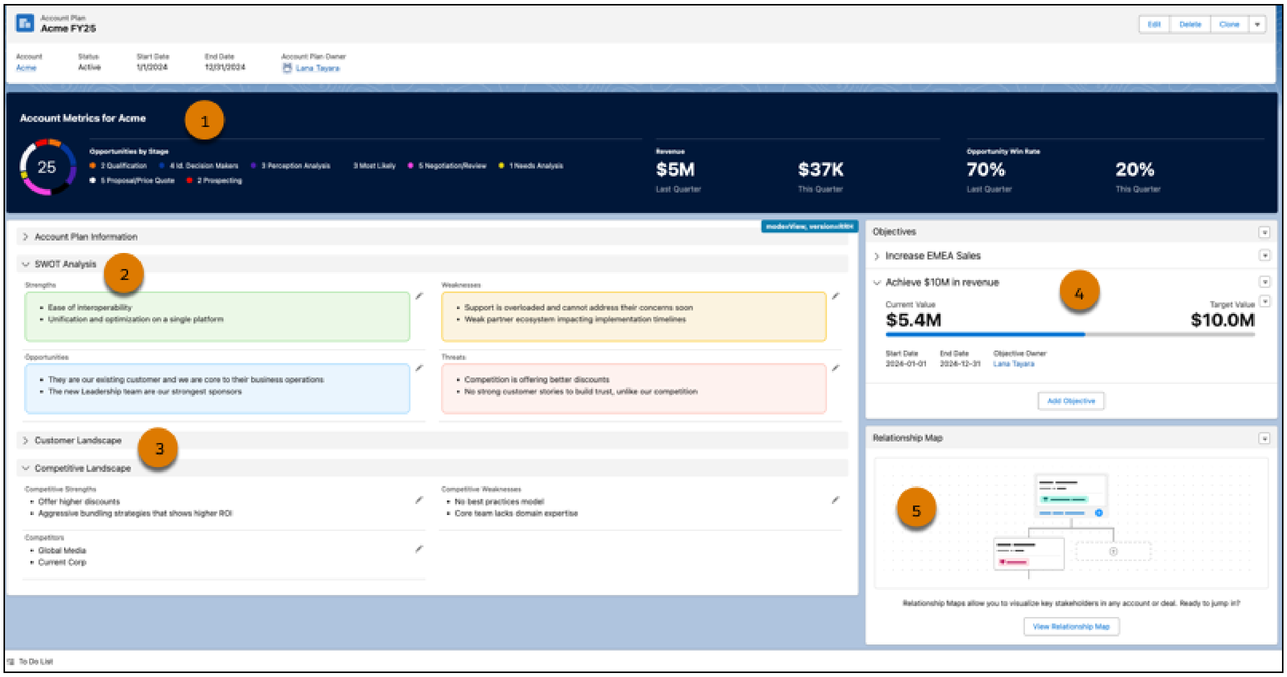
Optimize Your Strategic Planning with Account Plans

Nurture existing relationships and grow key accounts strategically with Account Plans. You can research and analyze accounts, set objectives with actionable metrics, and keep tabs on growth and development, all from one repository within Salesforce. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions and in Einstein 1 Sales Edition with Sales Cloud.

When: This feature is available in production on a rolling basis after the Winter '25 release is complete and available to all customers in mid- to late November 2024. The feature is accessible in sandboxes only after it's available in production. To see the feature in sandboxes, run the Match Production Licenses tool or request a refresh after the feature is available in production.

Why: To maximize revenue potential and invest in your customers' goals and challenges, track all your strategic planning with Account Plans.



View opportunity details in the dashboard (1); create a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis (2); capture the customer needs and market dynamics (3); and focus on clear, measurable objectives with metrics (4). To visualize key stakeholders, view the relationship map (5).

How: Go to the new Account Plans page in Setup and turn on Account Plans. Then, configure the Account Plans object in the Object Manager, add the Account Plans related list to the Account object, and optionally set up Relationship Maps.

SEE ALSO:

Salesforce Help: Push Updated Licenses to Sandbox Orgs (can be outdated or unavailable during release preview)

Salesforce Help: Buyer Relationship Map (can be outdated or unavailable during release preview)

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

Enhance Reporting Structure Visibility by Associating Person Accounts and Contacts with Each Other

Robust reporting structures clarify lines of responsibility, facilitate cross-functional collaboration, and streamline workflows and automated processes. Previously, when person accounts were enabled, only contacts could report to each other. Now, use the Reports To field on person account records to associate person accounts and contacts to other person accounts and contacts in a reporting structure. And, when at least one contact is included in the reporting chain, you see person accounts in the contact hierarchy chart.

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

How: Go to the Person Accounts page in Setup and turn on the Reports To field on Person Account. Then, add the Reports To field to your Person Account page layouts in the Object Manager.

SEE ALSO:

Salesforce Help: Enable Person Accounts (can be outdated or unavailable during release preview)

Salesforce Help: Considerations for Using Person Accounts (can be outdated or unavailable during release preview)

Salesforce Help: Display Contact Hierarchies (can be outdated or unavailable during release preview)

Leads

Review and update your settings to keep syncing leads from LinkedIn.

IN THIS SECTION:

If you're syncing leads from LinkedIn Lead Forms to Salesforce, you must manually disconnect your LinkedIn account, reconfigure the feature by enabling a new setting, and then reconnect your account. Otherwise, LinkedIn leads will stop syncing when LinkedIn retires their legacy Ads Lead Sync APIs on December 16, 2024. This update is available starting in Winter '25.

Review and Update Settings to Capture Leads from LinkedIn (Release Update)

If you're syncing leads from LinkedIn Lead Forms to Salesforce, you must manually disconnect your LinkedIn account, reconfigure the feature by enabling a new setting, and then reconnect your account. Otherwise, LinkedIn leads will stop syncing when LinkedIn retires their legacy Ads Lead Sync APIs on December 16, 2024. This update is available starting in Winter '25.

Where: This change applies to Lightning Experience in all editions with Sales Cloud except Pro Suite and Einstein 1 Sales Edition.

When: To continue syncing leads from LinkedIn, update your settings by December 16, 2024.

Why: LinkedIn updated the APIs used to capture lead data from LinkedIn Lead Gen forms and sync it to Salesforce with two-factor authentication. After you manually enable the Use LinkedIn Lead Sync APIs with Lead Forms setting and connect your LinkedIn account, your Salesforce org can continue to sync leads generated from LinkedIn Lead Gen forms.

How: To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Review and Update Settings to Capture Leads from LinkedIn, follow the testing and activation steps.

We recommend that you check that your LinkedIn administrator has two-factor authentication set up and can provide you with the verification code when you do the release update.

Sales Cloud Go

Explore Sales Cloud features that are available in your edition and turn on features with ease.

IN THIS SECTION:

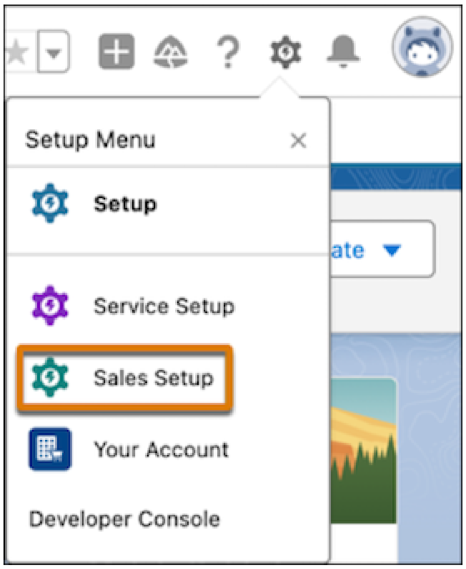
From one location in Setup, explore all Sales Cloud features available with the edition and licenses that you have, and turn on features with a click. Explore the capabilities of unused and new sales features and get links to supplemental resources. Get a summary of the steps for configuring each feature, with quick access to each feature's Setup page.

Simplify Discovery and Setup of Your Sales Cloud Features with Sales Cloud Go

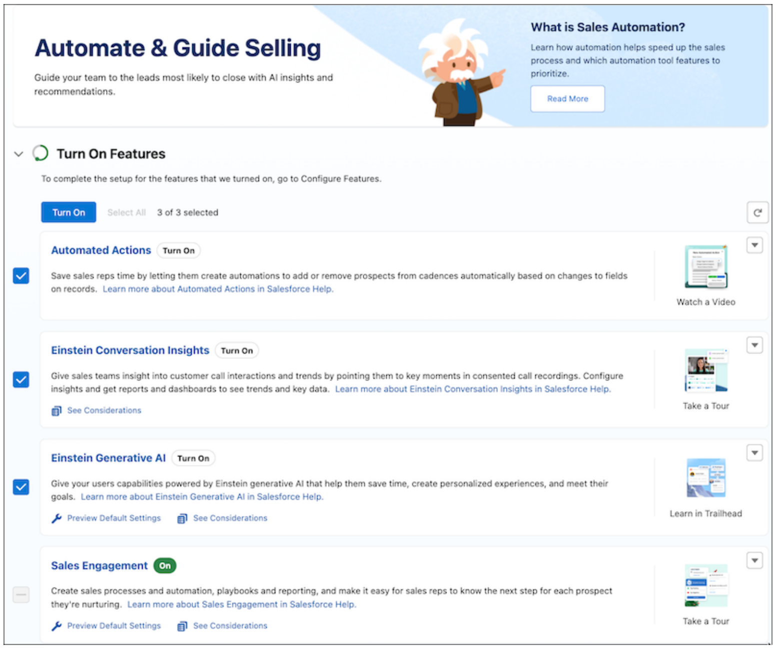
From one location in Setup, explore all Sales Cloud features available with the edition and licenses that you have, and turn on features with a click. Explore the capabilities of unused and new sales features and get links to supplemental resources. Get a summary of the steps for configuring each feature, with quick access to each feature's Setup page.

Where: This change applies to Lightning Experience in Pro Suite, Professional, Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition editions.

How: From the gear menu, select **Sales Setup**.



Choose a feature set and review the features that are turned on or that are available for you to turn on. Learn more about features in your edition by viewing screenshots, taking tours, watching videos, and reading Salesforce Help topics. We also provide recommended Salesblazer articles and Trailhead badges. Determine whether an available feature is a good fit for your company by sharing these resources with other stakeholders. And, if you've turned on the Your Account app, you can also purchase add-on licenses for some features directly from Sales Cloud Go.



SEE ALSO:

Salesforce Help: Sales Cloud Feature Discovery and Set Up With Sales Cloud Go (can be outdated or unavailable during release preview)

Einstein Conversation Insights

We're rolling out a new look for Einstein Conversation Insights (ECI). With the new Conversation Hub, the ECI landing page and other pages were redesigned. Sales managers and their teams can see useful metrics and find relevant conversations through a new-and-improved user interface. We also added visual and functional improvements to Sales Signals.

IN THIS SECTION:

Access All Your Conversation Data with Conversation Hub

Use Conversation Hub to get a comprehensive view of your sales teams' conversation data in a revamped user interface. The personalized landing page shows relevant metrics, recent conversations, and top signals if you're using Sales Signals. You can also filter for relevant conversations from a new Conversations tab.

Do More with Sales Signals

Sales managers and their teams can access more features from Sales Signals, including more relevant metrics, key themes, and featured mentions. The Signals page is revamped to match the updated ECI interface. Topic details pages also offer more metrics and relevant data.

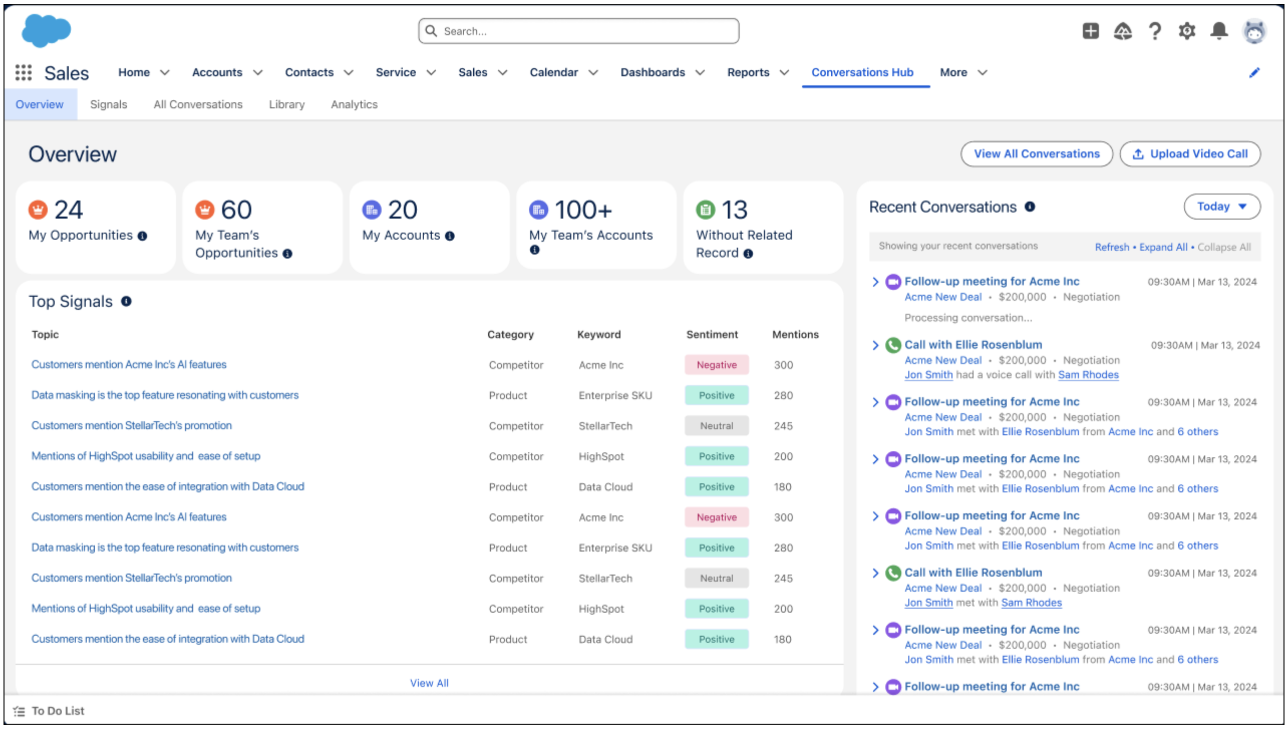
Access All Your Conversation Data with Conversation Hub

Use Conversation Hub to get a comprehensive view of your sales teams' conversation data in a revamped user interface. The personalized landing page shows relevant metrics, recent conversations, and top signals if you're using Sales Signals. You can also filter for relevant conversations from a new Conversations tab.

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 available to users with access to Einstein Conversation Insights.

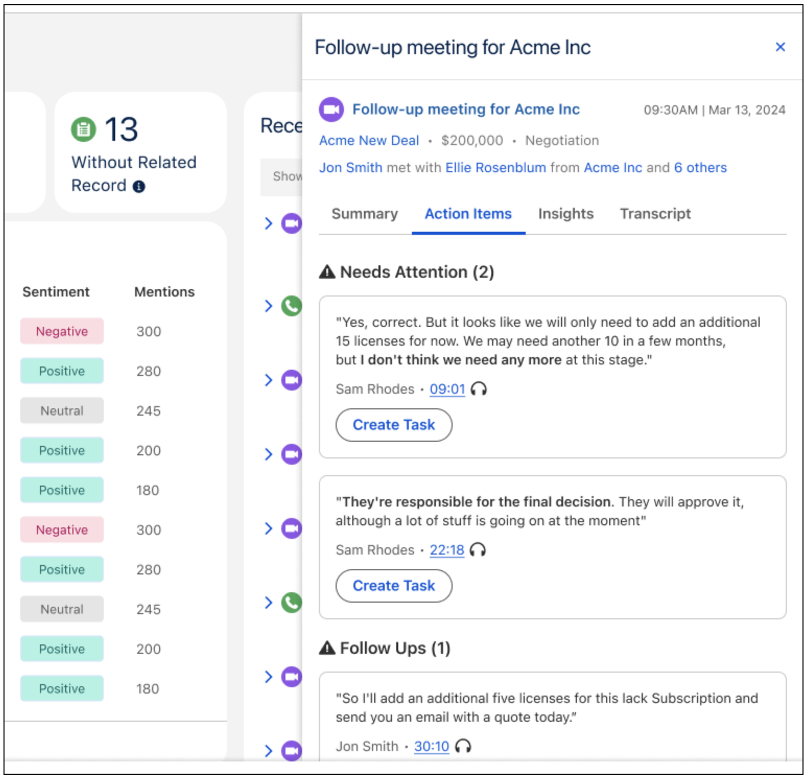
Why: Einstein Conversation Insights (ECI) users can access an updated user interface for their conversation data. First up is the Hub tab, the new home page for ECI.



Your Conversation Hub shows relevant metrics about the conversation data for sales managers and their teams. The metrics include conversations related to:

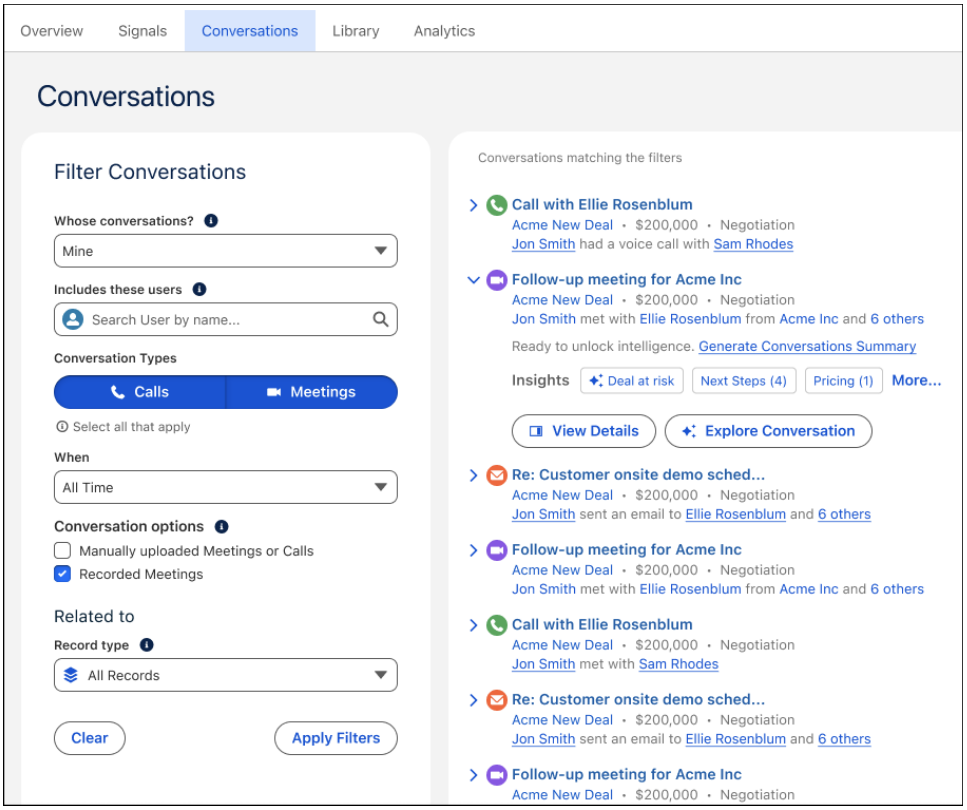
- My Opportunities
- My Team's Opportunities
- My Accounts
- Without Related Record

If you have Sales Signals enabled, a list of the top signals is shown. Users can also access a list of recent conversations on the right.



ECI users can access call details directly from the Hub tab, including transcripts, insights, action items, and call summaries, if your org is using the feature.

The Conversations tab allows users to filter and view relevant conversations. Sales users can filter by conversation owner, type, call date, related record, or other criteria.



Sales users can still access call collections and ECI dashboards from the Library and Analytics tabs, respectively.

Do More with Sales Signals

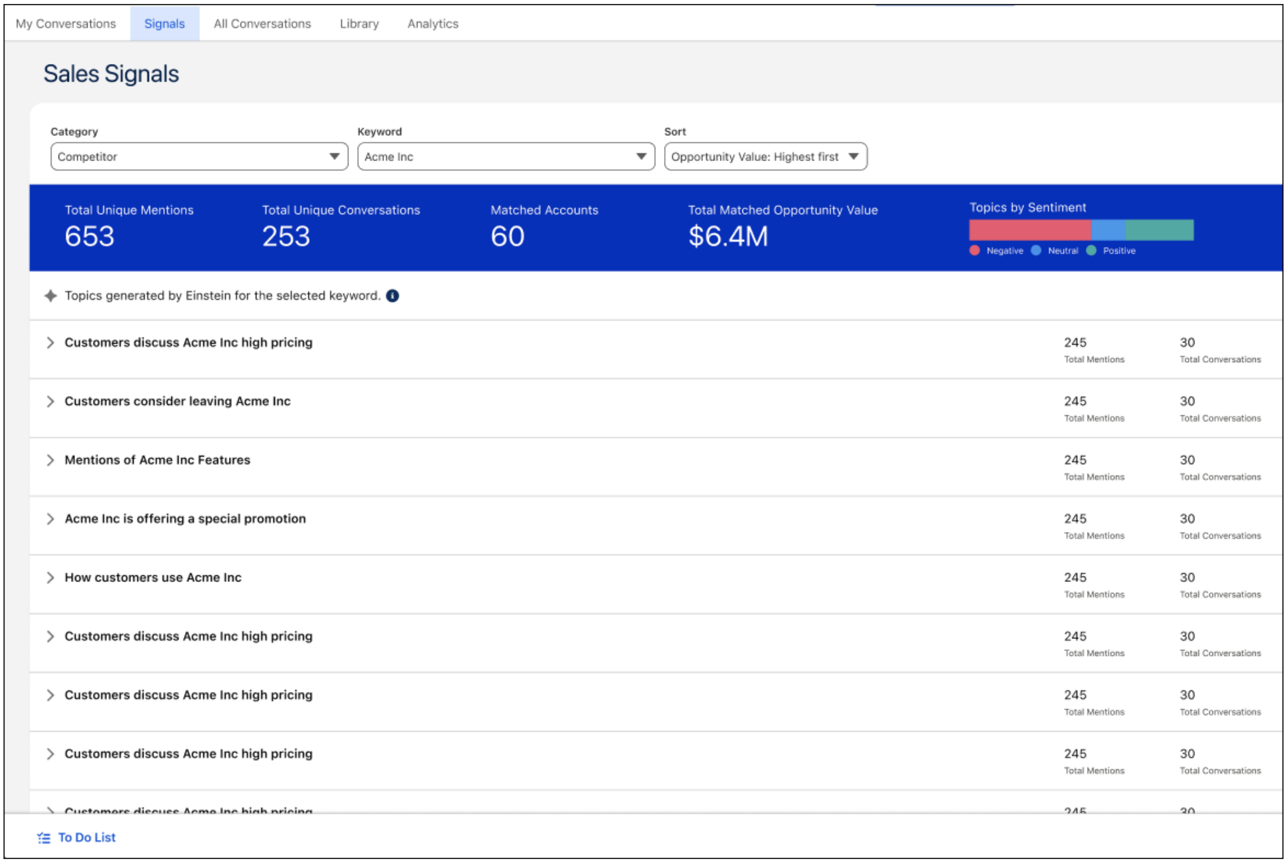
Sales managers and their teams can access more features from Sales Signals, including more relevant metrics, key themes, and featured mentions. The Signals page is revamped to match the updated ECI interface. Topic details pages also offer more metrics and relevant data.

Where: This feature requires Einstein Conversation Insights, Data Cloud, and Einstein for Sales, and is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

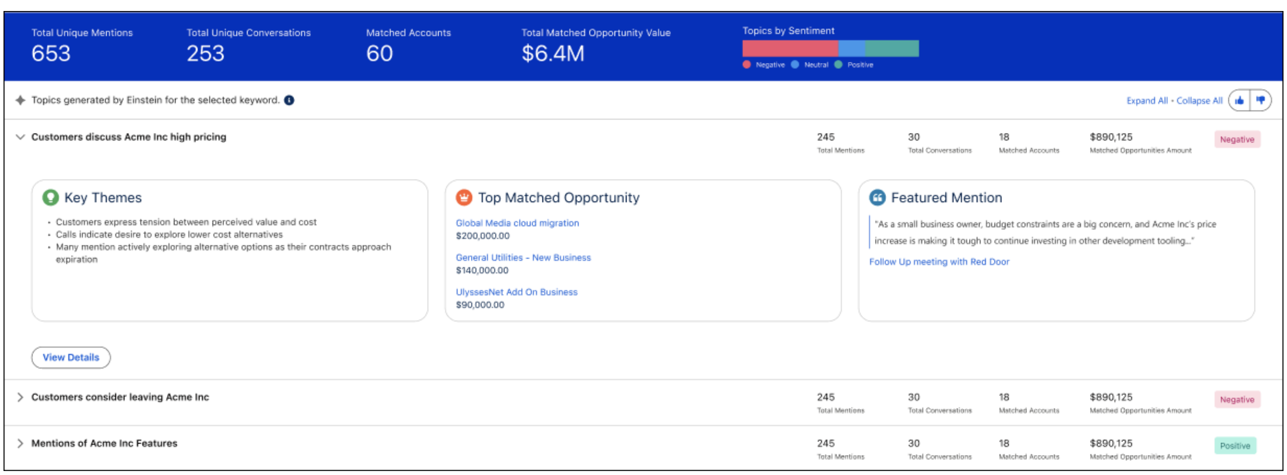
To purchase Einstein for Sales, contact your Salesforce account executive.

Who: This feature is available to users with access to Einstein Conversation Insights and the Sales Signals permission set in Salesforce orgs that have Einstein for Sales enabled.

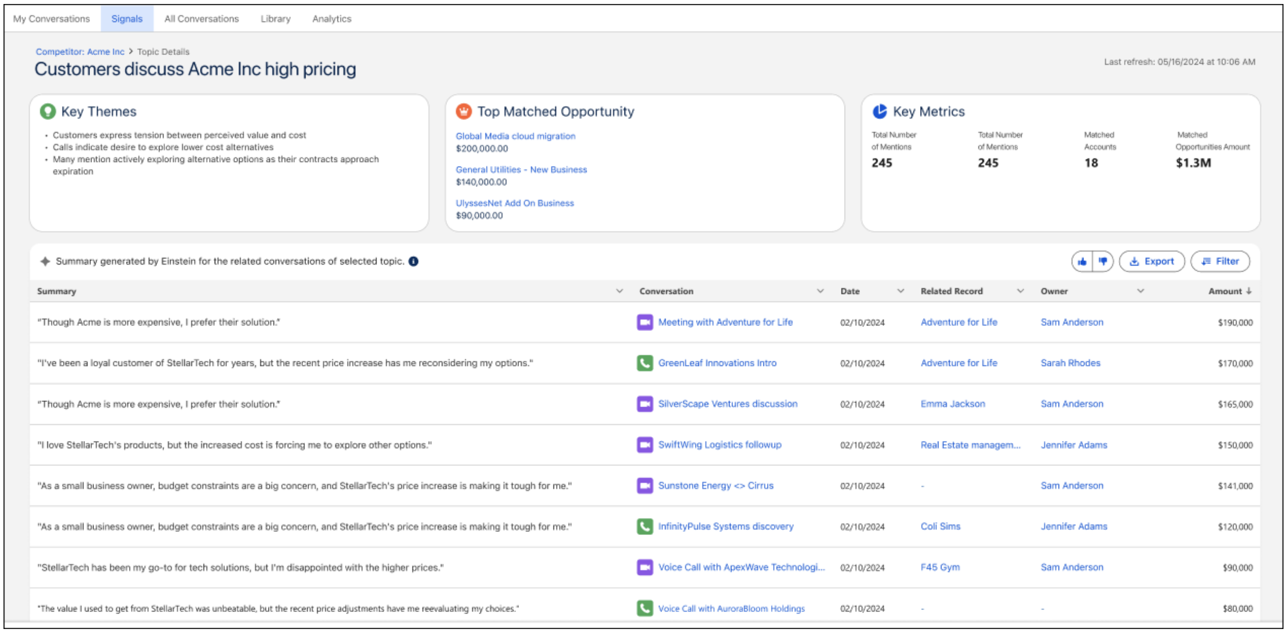
How: Sales Signals features an updated landing page with more metrics about the topics that are selected.



See information about topic mentions, related opportunity value, and topic sentiment. ECI users can also see high-level details about topics.



Users can also select topics to get additional details and information.



SEE ALSO:

Einstein Features

Sales Engagement

Find your next best customers with Prospecting Center. Cadence Builder 1.0 is being retired.

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:

[Change Einstein Activity Capture Permissions for Sales Engagement Basic Users (Release Update)]

In Spring ’25, the Sales Engagement Basic User permission set no longer includes access to Einstein Activity Capture. Previously, admins could grant users access to Einstein Activity Capture through the Use Einstein Activity Capture permission included in the Sales Engagement Basic User permission set.

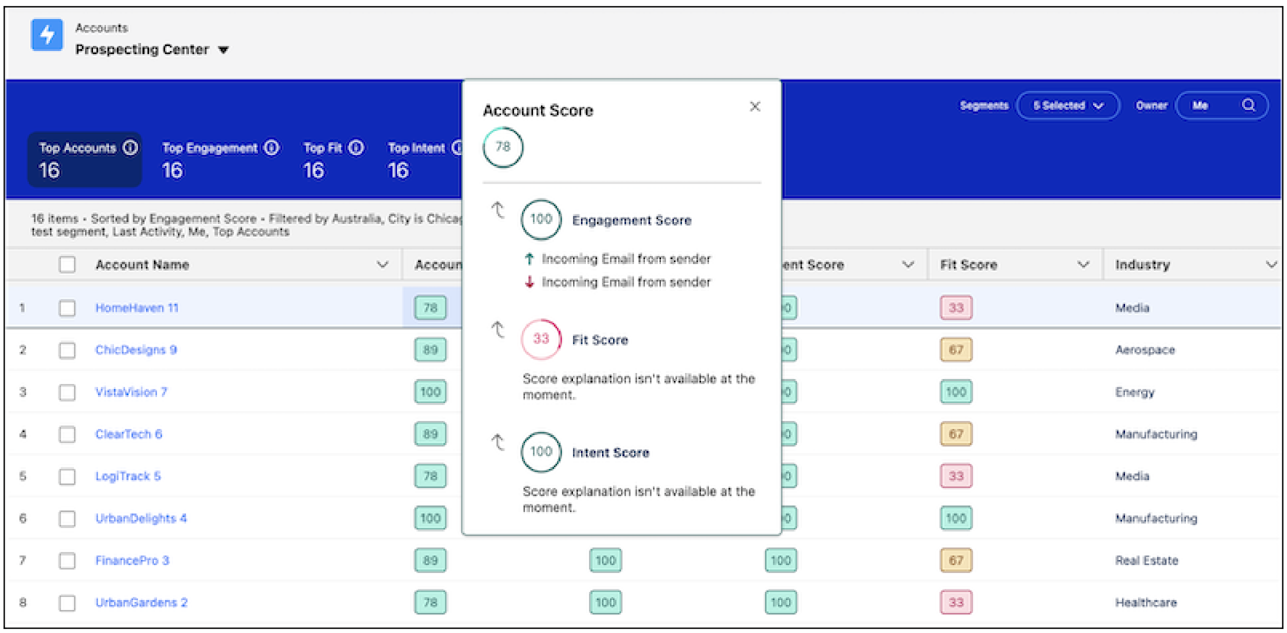
Find Your Next Customer with Prospecting Center, a new Data Cloud App

To build a healthy revenue pipeline, let Prospecting Center find your next customer by using trusted data and AI. Identify the accounts that are most likely to use the right buyer signals to engage. Use various external and internal signals to calculate Fit, Engagement, and Intent scores, all powered by Data Cloud. Sales reps get powerful insights on time with the Unified Prospecting Center view, so they can spend more time nurturing the prospect and less time navigating.

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

Who: This feature is available to Sales Cloud users who have Prospecting Center enabled.

How: Sales reps can create rules that calculate account scores, which help identify the next best customer. Use Account scores to contact the right prospects (leads and contacts) and close deals faster. Sales reps can also use segments to filter prospects based on their business preferences.



Cadence Builder Classic (1.0) 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 Cadence Builder Classic (1.0).

Where: This change applies to Lightning Experience in Enterprise, Performance, Einstein 1 Sales, 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 Spring '25, Salesforce will automatically migrate existing linear Cadence Builder Classic (1.0) cadences to the Cadence Builder 2.0 format. Once migrated, these linear cadences will continue to operate normally, but can only be edited in Cadence Builder 2.0.
- 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.

The Campaign Member Status Chart is Being Retired

The chart on the Campaign Members related list is being retired with the Winter '25 release. The chart shows a breakdown of the number of campaign members by member status. Campaign member status is still available on the Campaign Members list view.

Where: This change applies to Salesforce Professional, Enterprise, Performance, Unlimited, and Developer Editions.

SEE ALSO:

Salesforce Help: Work with Campaign Members (can be outdated or unavailable during release preview)

Quickly Identify Which Builder Created Each Cadence

Sales managers and reps can now easily see which Cadence Builder created a cadence and which engagement response model it uses. The new Version field on cadences appears on cadence records and list views.

Where: This change applies to Lightning Experience in Enterprise, Performance, Einstein 1 Sales, and Unlimited editions with Sales Cloud.

Change Einstein Activity Capture Permissions for Sales Engagement Basic Users (Release Update)

In Spring '25, the Sales Engagement Basic User permission set no longer includes access to Einstein Activity Capture. Previously, admins could grant users access to Einstein Activity Capture through the Use Einstein Activity Capture permission included in the Sales Engagement Basic User permission set.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

When: To let Sales Engagement Basic users continue using Einstein Activity Capture, update your permissions by January 1, 2025.

Why: Access to Einstein Activity Capture now requires the Standard Einstein Activity Capture permission set. The Use Einstein Activity Capture app permission will be removed from the Sales Engagement Basic User permission set and any permission sets cloned from it.

How: To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**.

Assign the Standard Einstein Activity Capture permission set to users who currently have access to Einstein Activity Capture through the Sales Engagement Basic User permission set or a clone.

We recommend performing bulk permission set assignments with the Permission Set Manager. For more information, see Manage Permission Set Assignments in Salesforce Help.

Revenue Intelligence

Discover new opportunities and improve sales performance with enhanced white space analysis. Sellers and sales leaders can now send emails to customers based on account risk factors within the Einstein Account Management app. If you organize your teams by territory, you can now control access to data based on the user's territory.

IN THIS SECTION:

Identify New Opportunities with Improved Einstein Account Management White Space Analysis

Better understand how your white space changes over time and against similar vendors. The Einstein Account Management white space is now organized by clusters and cohorts, and summaries are sorted by time dimensions and product performance.

Where: This change applies to Revenue Intelligence users in Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions in Sales Cloud.

Email Customers Regarding Risk Factors from Within Einstein Account Management

When risk thresholds are identified, you can now send an email in Einstein Account Management from the Account Risk Factors section. For example, you can open a mail field and send an email to an account with multiple open cases and low engagement.

Where: This change applies to Revenue Intelligence users in Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions in Sales Cloud.

Control Access to Data Based on Territory

If you manage your teams by territory, you can now manage access to data in dashboards using this same structure. To control data access, turn on the new territory-based security predicate in Setup. Previously, you could only reference fields on the user object in a security predicate.

Where: This change applies to Revenue Intelligence users in Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions in Sales Cloud.

Collaborative Forecasts

Submit forecast estimates for the forecast period at a point in time. Improve sales forecast accuracy with enhancements to manager judgment rollups and reports. Get a complete forecast picture with opportunity splits by territory forecasts. Identify what's in each forecast chart more easily with renamed forecast charts.

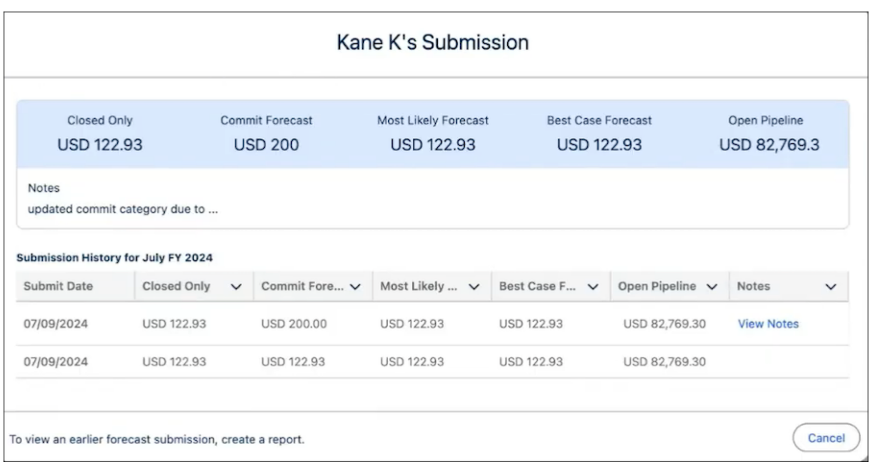
IN THIS SECTION:

Capture Forecasts at a Point in Time with Forecast Submissions

Forecast submissions are a sales rep's or sales manager's best estimate of the revenue or quantities that they expect to close during the forecast period. Typically required weekly, the submission takes a snapshot of the forecast at the time the submission is made. As management reviews forecast rollups, they can compare the current forecast against the submitted forecast numbers and quota and know that the forecast is up to date. Any differences better inform the forecast for the entire sales team and the business.

Where: This change applies to Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: Turn on Forecast Submissions on the Forecast Settings page in Setup. Then, sales reps and managers use the icons in the forecast summary to submit forecasts and to review their own past forecast submissions or their subordinates submissions . Forecast submissions are allowed only in forecast types that don't include product family or other forecast groups.



Forecast submissions are also available to include in reports by using the ForecastingSubmission object.

SEE ALSO:

Salesforce Help: Allow Point-in-Time Sales Forecasts in Collaborative Forecasts (can be outdated or unavailable during release preview)

Improve Sales Forecast Accuracy with Manager Judgment Enhancements

To guide more accurate forecast assessments, sales leaders now see Manager Judgment values rolled up for all forecast managers beneath them in the forecast hierarchy. Previously, judgment values rolled up only to the immediate manager in the hierarchy. Plus, judgment values are now available in reports and dashboards, allowing sales teams to reconcile forecasts against judgment amounts and to identify opportunities that are at risk.

Where: This change applies to Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: The rollup calculation change is applied automatically. No additional setup is required.

To report on forecasts with opportunities that have judgments, create a custom report type for Forecasting Items with Opportunities and Forecasting Source Record Judgments as the related objects.

Important: Including forecast judgments in reports works best if you apply judgments in either role-based forecast hierarchy or territory hierarchy forecast types, not both. If you use manager judgments in both role-based hierarchy and territory hierarchy forecast types, users other than Salesforce admins see judgments that were made in the role-based hierarchy only.

SEE ALSO:

Salesforce Help: Allow Forecast Adjustments and Manager Judgments in Collaborative Forecasts (can be outdated or unavailable during release preview)

Salesforce Help: Manager Judgments in Collaborative Forecasts (can be outdated or unavailable during release preview)

Get a Complete Forecast Picture with Opportunity Splits by Territory Forecasts

If your sales team is organized by territory and uses opportunity splits to sell as a team, now they can forecast on the appropriate split amounts for their territories. Forecasting on the opportunity split allows matrixed selling teams to work together to increase forecast accuracy. Previously, you could forecast on opportunity splits only for forecasts based on the user role hierarchy.

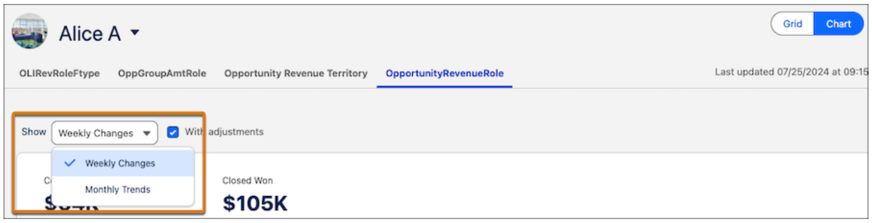
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions.

Identify What You See in Each Forecast Chart More Easily

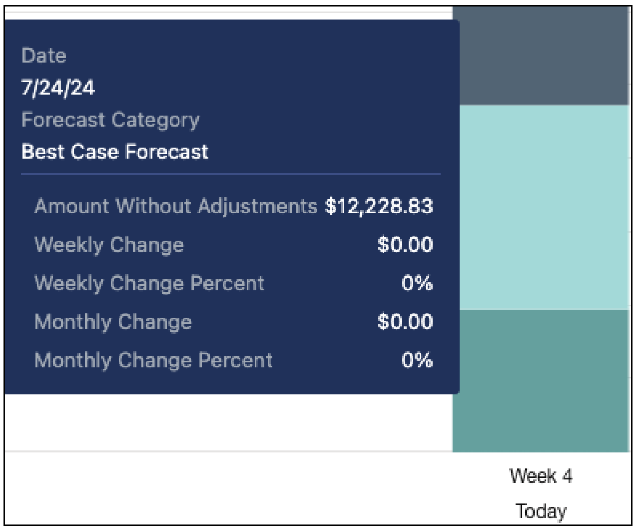
We renamed the charts on the forecasts page to better align with what the charts contain. We also updated the chart segment tooltip to reflect whether you selected to see totals in the chart with or without adjustments.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Sales Cloud.

How: To see changes in a forecast from week to week, see the Weekly Changes chart, which was previously named Forecast Changes. To find trends across forecast periods, see the Monthly Trends chart if your forecast periods are monthly, or the Quarterly Trends chart if your forecast periods are quarterly. The trends chart was previously named Historical Trends.



When hovering over a segment in the chart to see its details, the totals shown now reflect whether you're viewing charts with or without adjustments.



SEE ALSO:

Salesforce Help: Reviewing Week-to-Week Forecast Changes (can be outdated or unavailable during release preview)

Salesforce Help: Finding Trends Across Forecast Periods (can be outdated or unavailable during release preview)

Pipeline Inspection

Close Date Predictions, a feature of Einstein Deal Insights in Pipeline Inspection, is being retired as of Spring '25.

IN THIS SECTION:

Close Date Predictions Is Being Retired

Close Date Predictions, a feature of Einstein Deal Insights in Pipeline Inspection, is being retired as of Spring '25. The best replacement for Close Date Predictions is Einstein Opportunity Scoring, which gives robust predictions of an opportunity's likelihood of closing. You can continue using all other features of Einstein Deal Insights in Pipeline Inspection, such as insights from calls, emails, and service cases.

Close Date Predictions Is Being Retired

Close Date Predictions, a feature of Einstein Deal Insights in Pipeline Inspection, is being retired as of Spring '25. The best replacement for Close Date Predictions is Einstein Opportunity Scoring, which gives robust predictions of an opportunity's likelihood of closing. You can continue using all other features of Einstein Deal Insights in Pipeline Inspection, such as insights from calls, emails, and service cases.

Where: This change applies to all users of Pipeline Inspection. Pipeline Inspection is available in Lightning Experience with Sales Cloud in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Knowledge Article: Close Date Predictions Retirement

Sales Programs and Partner Tracks with Enablement

Drive business growth by scaling your company's investment in sales programs with more sophisticated, business-critical tools for developing confident and inspired sales reps and partners. Create sales programs in production quickly, and tap into more resources and workflows for testing and deploying programs. Provide timely, contextual feedback to sales reps, and build more personalized program experiences that align with your company's preferred systems and activities.

IN THIS SECTION:

Get Timely and Contextual Feedback on Your Terms

Einstein Coach is now available outside of a sales program. In a new tile in the Guidance Center, users can receive feedback on their sales pitches at their convenience and practice as many times as necessary until they feel confident about their pitch. Einstein Coach in the Guidance Center accesses product CRM Data, providing users with even more detailed, actionable, and personalized feedback.

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 is required.

Who: Enablement users with the Use Einstein Coach permission can access Einstein Coach directly in the Guidance Center or in a sales program. This permission is enabled by default in the Access Einstein Coach permission set.

How: The Guidance Center includes a new tile for Einstein Coach titled Perfect Your Sales Pitch with Einstein Coach. When users click **Get Feedback**, they're prompted to select a product to pitch and to upload their recorded sales pitch. After it's submitted, Einstein Coach generates feedback for that specific product pitch.

Publish and Share Enablement Programs Quickly with Managed Packages

Reduce the time required to bring sales programs to production by installing second-generation managed packages that include programs and all their dependencies, including measures and content. Contribute to the community of program experts by creating packages with programs that build competencies in critical sales operations and fulfill aggressive revenue outcomes.

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 in Enterprise, Performance, or Unlimited editions in Sales Cloud. For Partner Enablement programs in supported Experience Cloud sites, a supported Partner Relationship Management (PRM) add-on license is also required.

How: New components are available for Enablement programs, measures, and custom exercise types in second-generation managed packages. Corresponding standard objects and metadata types are available for retrieving data for programs and their dependencies when you're creating packages or deploying data with change sets. To include exercise content with packaged programs, the Enablement workspace in the Digital Experiences app also now supports metadata and packaging.

SEE ALSO:

Salesforce Help: Installing Enablement Programs from Managed Packages (can be outdated or unavailable during release preview)

Personalize Your Sales Programs with Your Company's Preferred Content Experience

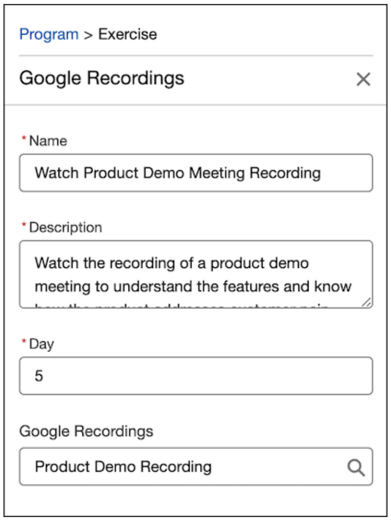
Provide a more streamlined connection between your company's preferred content management system and your sales programs experience. Manage the details of the experience by designing exercise types that reference content from your repository or a third-party repository. With custom exercise types, you can easily bring content from anywhere into your program. Previously, exercise types in Enablement programs supported content only from Salesforce resources, including Digital Experiences content, Trailhead, and assessment surveys. Your sales reps can view custom exercise content in the flow of a program without switching to a different page.

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 in Enterprise, Performance, or Unlimited editions in Sales Cloud.

Who:

- Users with Author Apex and View Setup and Configuration permissions can configure custom exercises by extending Apex classes.
- Users with the Modify Metadata Through Metadata API Functions permission can access and edit custom exercise metadata via Metadata API.
- Users with the Customize Application permission can create and edit Lightning Web Components (LWC) to render custom exercises in the Program Builder and Guidance Center.
- Users with View Setup and Configuration and Design and Deliver Enablement Programs permissions can view custom exercises in Program Builder and add them to Enablement programs.

How: Salesforce developers at your company configure the custom items for your Salesforce org by using Apex classes, custom objects, and custom fields on standard objects. With this change, the Learning Item object is now available in the Object Manager in Setup so developers can more easily add custom fields to this object as part of implementing custom exercises. Developers map a preferred repository to host content for the custom exercises and use Lightning Web Components to render the custom items in Program Builder and Guidance Center.



SEE ALSO:

Salesforce Help: Custom Exercise Types in Enablement Programs (can be outdated or unavailable during release preview)

Track Job-Related Activity for Enablement Measures More Effectively with Additional Filter Operators

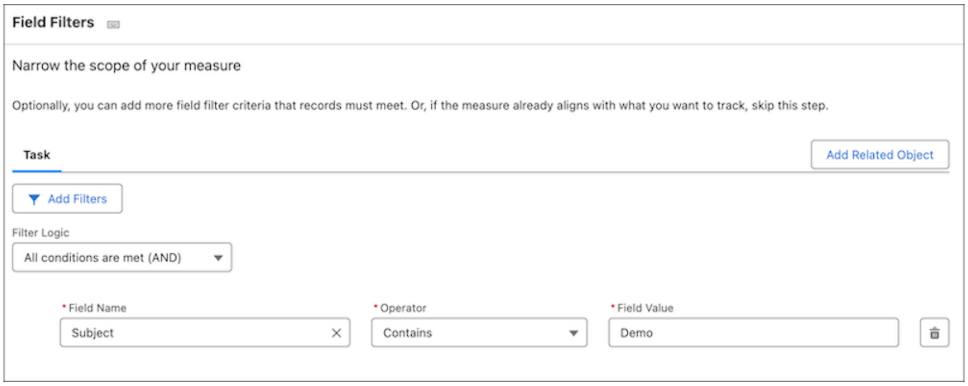
Create impactful, relevant Enablement measures for your sales programs quickly, with less customization and fewer headaches. Track job-related activities that align with your company's revenue outcomes with more default tools. With the new Contains and Does Not Contain operators, create measures that check for the presence or absence, respectively, of a specific value in a field. Previously, Enablement admins could create these kinds of measures only by tracking activity on custom objects or custom 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 in Enterprise, Performance, or Unlimited editions in Sales Cloud.

How: The new filter operators are available when you're creating an Enablement measure.

The Contains operator checks whether a specific value is present in the field and returns only records where the field contains that value.

The Does Not Contain operator checks whether a specific value isn't present in the field and returns only records where the field doesn't contain that value.



SEE ALSO:

Salesforce Help: Building Enablement Measures (can be outdated or unavailable during release preview)

Other Changes in Sales Programs, Partner Tracks, and In-App Guidance

Salesforce admins, Enablement teams, and content creators benefit from other enhancements throughout the program's workflow.

Where: These changes apply 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. Changes related to prompts in Lightning Experience also apply to Group, Essentials, and Professional editions.

Why: These changes are available.

- When you create a targeted prompt in Lightning Experience, you can no longer select a global action window as the target element. The existing targeted prompts that are created on global action windows appear as floating prompts.
- Starting Winter '25, new versions of Enablement prebuilt reports and dashboards are available in a release only if there are updates to the existing analytics. Summer '24 reports and dashboards remain the latest available version because there are no changes to the prebuilt analytics in Winter '25. Previously, new versions of the reports and dashboards were available each release even when the analytics didn't change.
- You can now expand and collapse the components panel and property editor in Program Builder. The expand and collapse buttons appear when you zoom in beyond 150% in Program Builder.
- The names of Enablement measures are now visible to users when they take a program and view the details of an outcome or milestone. Previously, a generic label was shown in place of specific measure names. Consider updating your measure names for more user-friendly terms, if necessary.

SEE ALSO:

Salesforce Help: Considerations for Creating In-App Guidance (can be outdated or unavailable during release preview)

Salesforce Help: Refresh the Enablement Reports and Dashboard (can be outdated or unavailable during release preview)

Salesforce Help: Enablement Reports and Report Types (can be outdated or unavailable during release preview)

Salesforce Help: Building Enablement Measures (can be outdated or unavailable during release preview)

Sales Performance Management

Provide company-approved data from disparate sources in one place so that your reps get added context when they sell to customers and address underserved markets with access to Data Cloud. And reveal sales opportunities on partner sites with Salesforce Maps. Plan quotas from territory alignments in Sales Planning segments. Start carving territories faster in a table view instead of on a map, and design territory strategies with live data in Territory Planning.

IN THIS SECTION:

Salesforce Maps

Give access to unified, approved data from disparate sources so that reps get added context when they sell to customers. Then reps can address underserved markets with access to Data Cloud. And reveal sales opportunities for partners on Experience Cloud sites.

IN THIS SECTION:

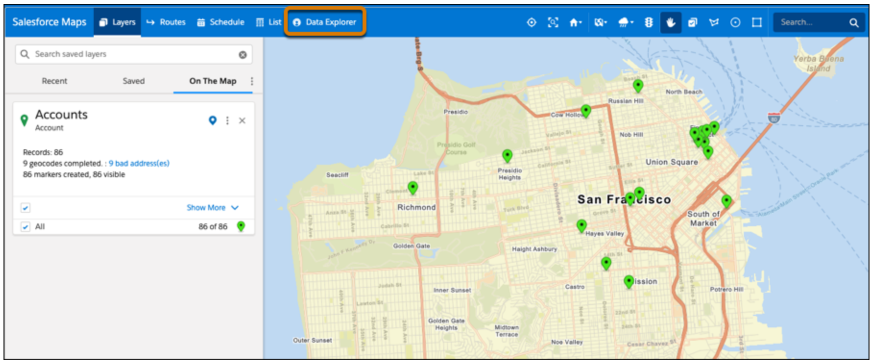
Gain Customer and Market Insight with Integrated Data from Disparate Sources

Unify company-approved sales data from all your sources so that reps get added context when they sell to customers and address market requirements with access to Data Cloud. Then your reps select from available data that's important for them to plot in Salesforce Maps.

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

When: Starting October 2024.

How: Ask your Salesforce account executive to enable your Data Cloud license for no additional cost. After you get access to it, you're ready to bring in data from your sources, create objects for that data, and map that data to Salesforce fields. The Data Explorer appears in Salesforce Maps. With it, your reps can view, filter, and sort the data so that it enhances their plotted sales data.



Your reps can edit their layers to include data that's available within Data Cloud. When your reps plot markers on the map, the marker popups show enhanced customer and market data in the related list.

SEE ALSO:

Salesforce Help: About Salesforce Data Cloud (can be outdated or unavailable during release preview)

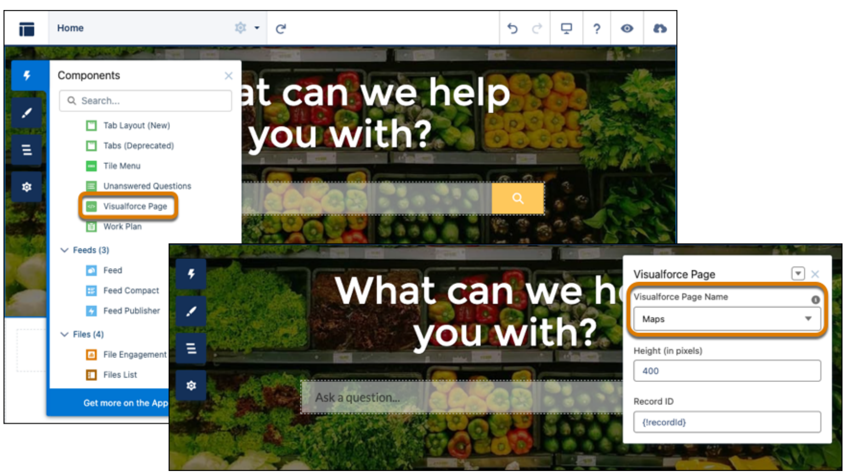
Embed Maps Within Your Branded Digital Experiences

Support your partners' selling efforts when you include Salesforce Maps in your Experience Cloud sites. The added context of embedded maps helps partners identify sales opportunities and generate routes to them from shared customer data.

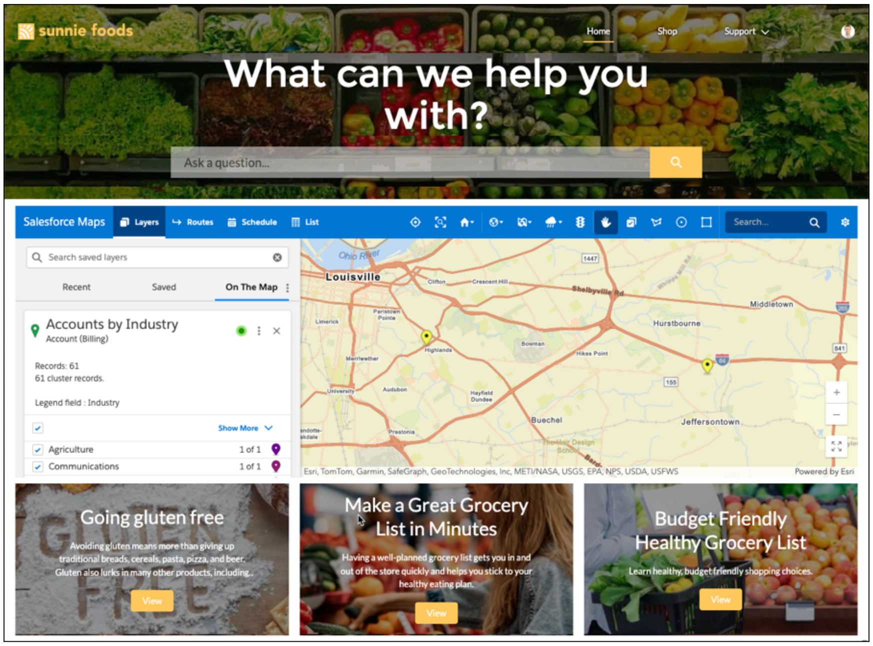
Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.

Why: Your partners can better plan selling strategies when they visualize insights from subscription-free data available through Esri ArcGIS Living Atlas of the World. And your partners' consumers can find your nearby locations and provide solutions that encourage self-service.

How: Drag a Visualforce page to the page layout of your Experience Builder site. Then select the **Maps** Visualforce page.



Preview your changes and then publish your site. Salesforce Maps appears embedded within your site.



SEE ALSO:

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

Salesforce Help: Visualforce Page Component (can be outdated or unavailable during release preview)

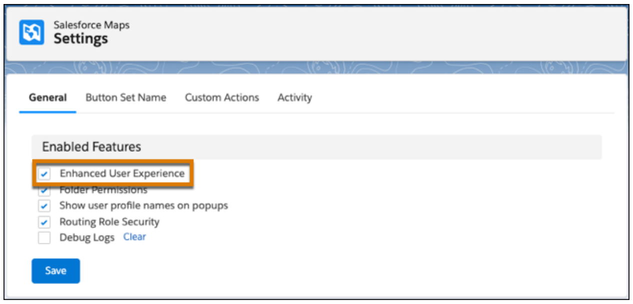
The Enhanced User Experience is now Enabled for All Users

Deliver dramatic performance improvements while plotting high-volume data including ArcGIS Online layers and complex shape layers with the new framework now enabled 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.

Why: With the enhanced user experience now enabled, your reps can plot high volumes of data including ArcGIS Online layers and complex shape layers in less time.

How: The enhanced user experience is now enabled for you and your users. But for a limited time, you can choose to disable it in Salesforce Maps Settings.



SEE ALSO:

Salesforce Help: Getting More from Salesforce Maps with the Enhanced User Experience (can be outdated or unavailable during release preview)

Sales Planning

Create quota plans from territory hierarchy, owner, and attribute data within sales plan segments. Design territories with the latest Salesforce data. And start carving territories faster in a table view instead of on a map.

IN THIS SECTION:

Plan Quotas from Territory Alignments

Create quota plans fast when you incorporate stamped territory hierarchy, owner, and attribute data from alignments that you create in Territory Planning. Analysts plan quotas from stamped alignments within Sales Planning segments.

Plan Territories with Live Data

Design territories by using only the latest Salesforce data in Territory Planning. Live data saves you the trouble of having to refresh datasets whenever you want your territory plans to reflect the latest updates to Salesforce records.

Structure Territories that Aren't Geographic

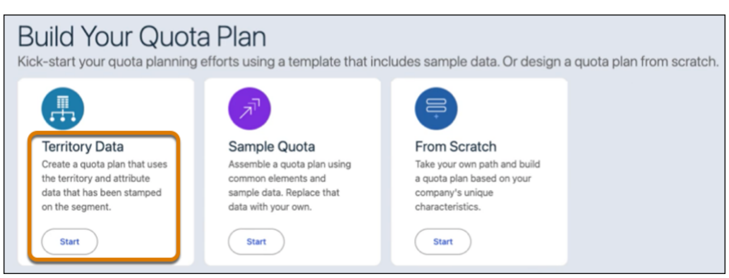
Carve territories faster in a table format instead of on a map with geographic data. Later, and if your teams rely on geographic boundaries, add the boundaries and continue carving on a map in Territory Planning.

Plan Quotas from Territory Alignments

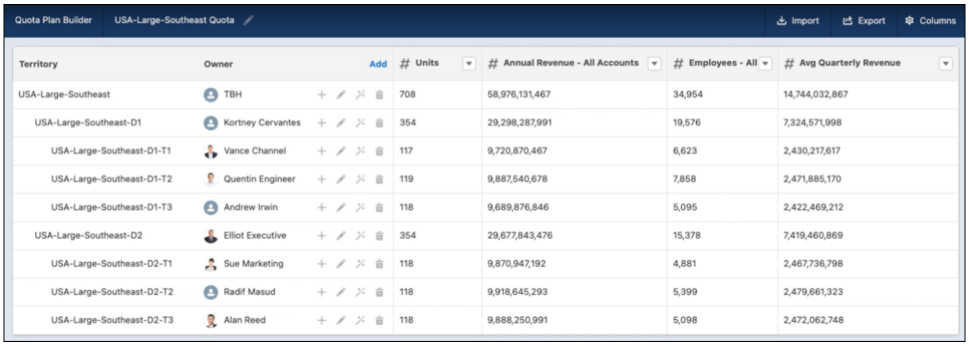
Create quota plans fast when you incorporate stamped territory hierarchy, owner, and attribute data from alignments that you create in Territory Planning. Analysts plan quotas from stamped alignments within Sales Planning segments.

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

How: After you create a territory alignment, stamp it with the attributes that you want to include in your quota plan, such as the number of accounts and annual revenue within each territory. Create a quota plan, and then build it from territory data.



The quota plan includes all the territories and attributes that you included in your territory stamp for the segment.



SEE ALSO:

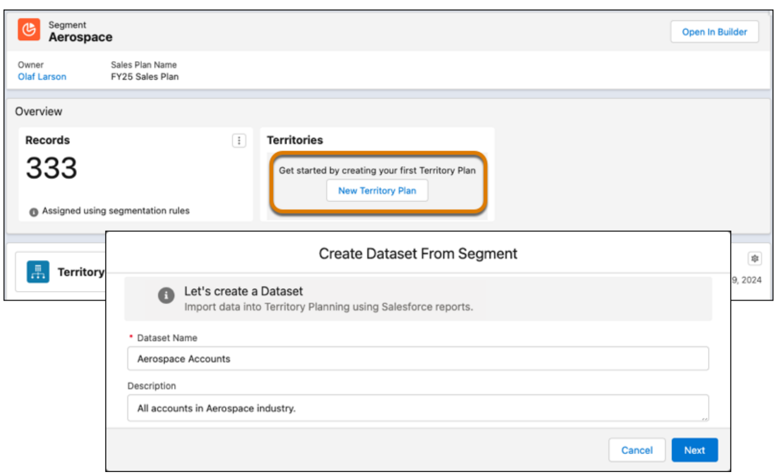
Salesforce Help: Plan Quotas from Territory Alignments (can be outdated or unavailable during release preview)

Plan Territories with Live Data

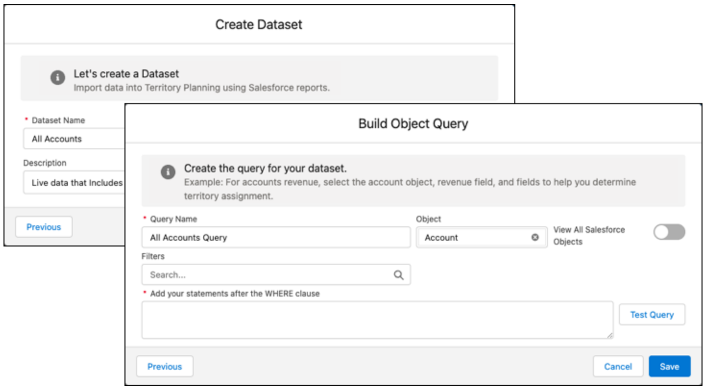
Design territories by using only the latest Salesforce data in Territory Planning. Live data saves you the trouble of having to refresh datasets whenever you want your territory plans to reflect the latest updates to Salesforce records.

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

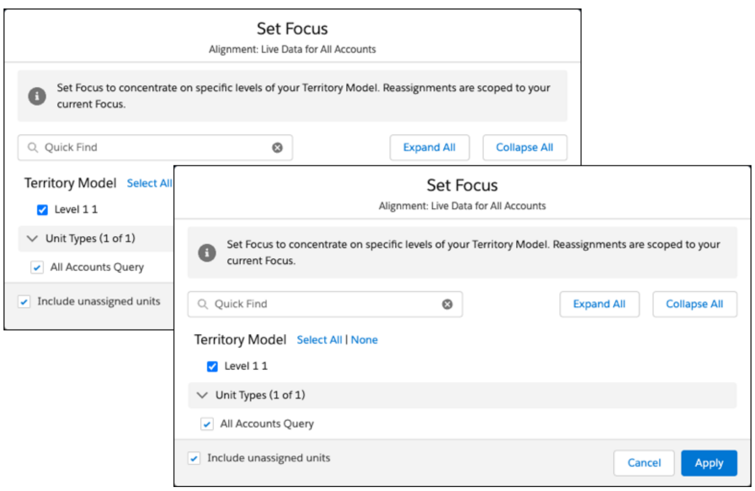
How: Carve territories from segments in Sales Planning. That way, you work with the latest data for records that meet the rules and criteria for those segments.



Or start carving directly in Territory Planning. When you create a dataset, select the option to plan territories with live data. Then specify the sources for your live data. For example, to add all accounts in Salesforce, build an object query for the Account object.



Select the data source, save your work, and then create an alignment.



Your territory plans reflect the latest updates to Salesforce records.

SEE ALSO:

Salesforce Help: Plan Territories from Segments (can be outdated or unavailable during release preview)

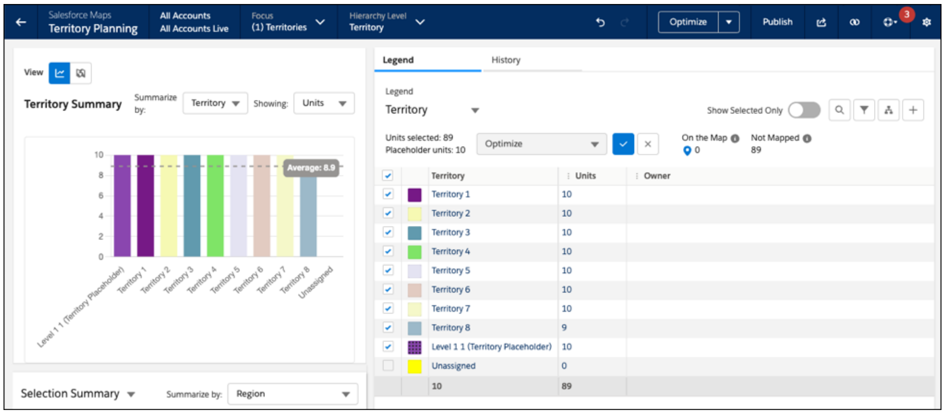
Salesforce Help: Creating Datasets (can be outdated or unavailable during release preview)

Structure Territories that Aren't Geographic

Carve territories faster in a table format instead of on a map with geographic data. Later, and if your teams rely on geographic boundaries, add the boundaries and continue carving on a map in Territory Planning.

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

How: Create a dataset that includes live data sources. Otherwise, datasets that include copied data sources require addresses and latitude and longitude coordinates. Create an alignment, and add your hierarchy structure. Then optimize territories based on your preferences for balance, continuity, and compactness.



SEE ALSO:

Salesforce Help: Structure Territories Without a Map (can be outdated or unavailable during release preview)

Email, Calendar, and Integrations

Salesforce for Outlook retires in December 2027.

IN THIS SECTION:

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.

Gmail Integration

Embed your Gmail integration in the Chrome side panel and take advantage of Einstein copilot.

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 Being Retired in December 2027

Full product retirement for Salesforce for Outlook is scheduled for December 2027. 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 retires, it no longer syncs contacts, events, or tasks. Admins and users also lose access to Salesforce for Outlook features, such as the side panel.

SEE ALSO:

Knowledge Article: Salesforce for Outlook Retirement

Salesforce Help: Move from Salesforce for Outlook to the Next-Generation Products (can be outdated or unavailable during release preview)

Trailblazer Community: Salesforce for Outlook Release Notes

Gmail Integration

Embed your Gmail integration in the Chrome side panel and take advantage of Einstein copilot.

IN THIS SECTION:

Increase Efficiency by Using the Gmail Integration in the Chrome Side Panel

The email functionality is the same, but other features in the Chrome side panel are now available while you use the Gmail integration. Changes include maintaining your user session, therefore reducing logouts. And the Chrome side panel is visible as you work in your email and calendar, and navigate from page to page in your browser.

Use Einstein Copilot with Your Gmail Integration

When your Gmail integration is in the Chrome side panel, you can use copilot and copilot actions while working on emails and events.

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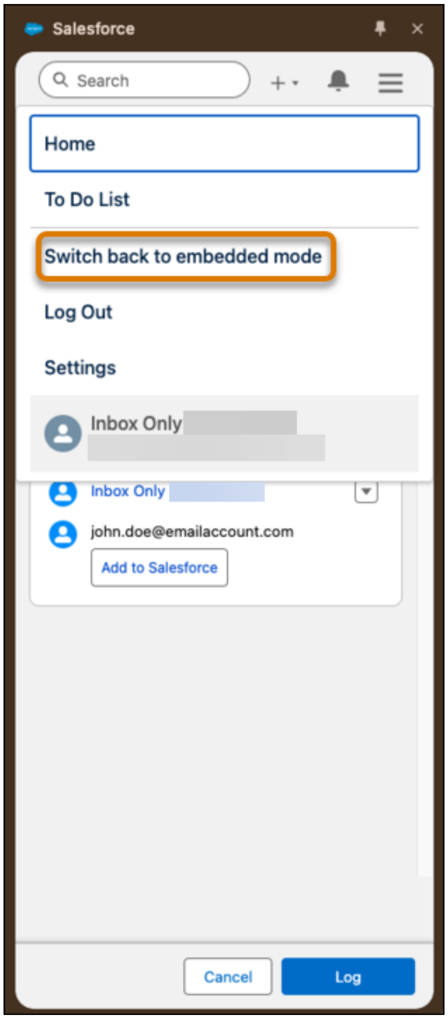
Where: This change applies to Lightning Experience Sales Cloud, Service Cloud, and Lightning Platform in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: All Gmail integration users can choose to work with their integration in the Chrome side panel. Open the integration and the onboarding process starts.

You can return to the old way of working with the Gmail integration. From the side panel navigation menu, select **Switch back to embedded mode**.



SEE ALSO:

Access Einstein Copilot From Your Gmail Integration

Salesforce Help: Set Up the Outlook and Gmail Integrations (can be outdated or unavailable during release preview)

Use Einstein Copilot with Your Gmail Integration

When your Gmail integration is in the Chrome side panel, you can use copilot and copilot actions while working on emails and events.

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

How: Change your Gmail integration to appear in the Chrome side panel. You're automatically asked if you want to try this new location when you open the Gmail integration.

To use copilot in the side panel, click **Einstein**.

Partner Relationship Management

Partner Connect, now generally available, helps vendors and partners reduce the manual work and lack of transparency that can develop when working deals that are shared across the partnership. Both companies can capitalize on shared business and engage their sales teams where they're already working.

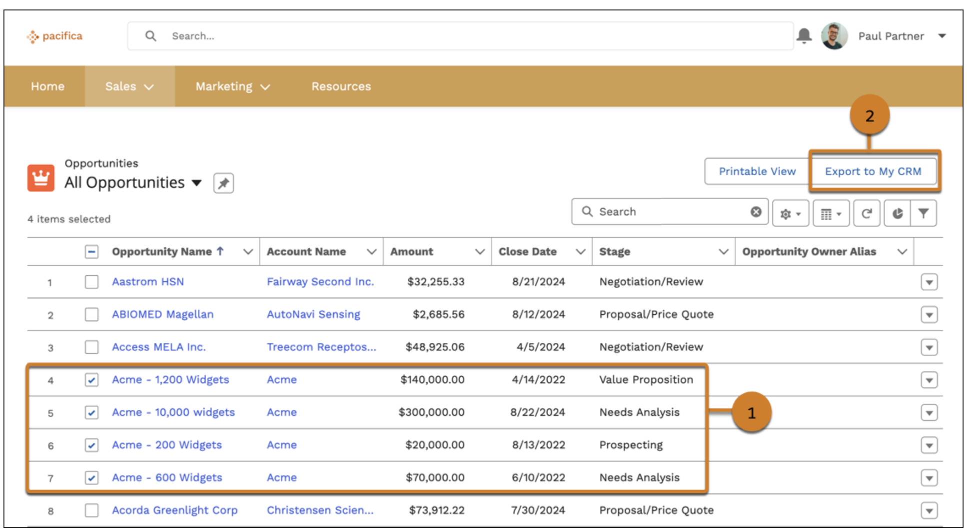
IN THIS SECTION:

Streamline Collaboration on Shared Deals with Trusted Partners

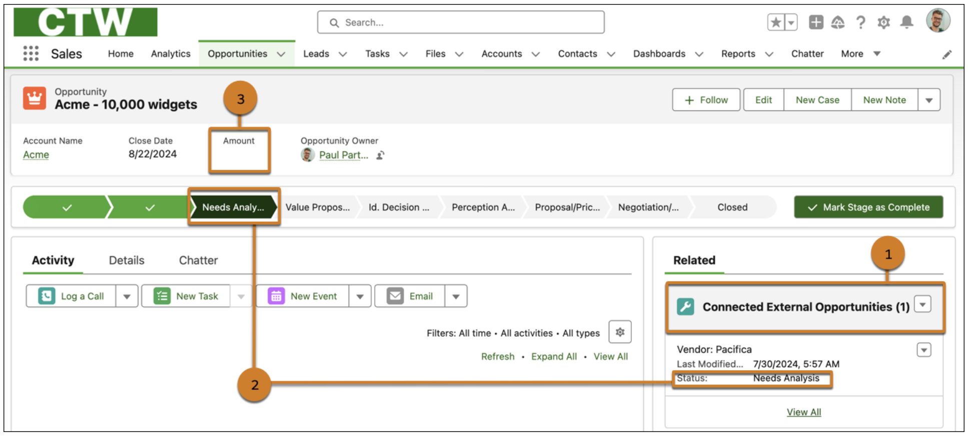
Partner Connect allows vendors and partners who work leads and opportunities together to see and track their progress while working from the comfort of their own Salesforce orgs. Previously, vendors and partners have struggled to coordinate shared business across Salesforce orgs. Sellers and channel managers were forced to manually reconcile shared data across the partnership. Now vendor and partner admins can work together to connect orgs and fine-tune what is automatically shared between them. As a result, both companies can be transparent about their mutual interests while maintaining data privacy where it's required.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Sales Cloud or Service Cloud. Vendors are required to purchase a PRM add-on license for the partner admin user and each partner user who vendors want to export records.

Why: Partner users can log in to their vendor's Experience Cloud partner site, peruse the leads or opportunities that the vendor has provided access to, and select records of interest (1). Then a partner can securely export selected records to the partner's own Salesforce org (2).



Now sales reps and leaders at both companies can track the same lead or opportunity independently, and set their own sales stages or deal sizes. And to provide vendors and partners with a glimpse of how their peer's version of the record is progressing, a read-only version of the other org's record can be stored locally (1). Only the fields that vendors and partners agree on integrating are shared, so companies choose to integrate only the data necessary for their business partnership to flourish. For example, the vendor and partner who shared this opportunity decided to integrate the fields that display their opportunity stages (2), but not the amounts of their opportunities (3).



For companies who nurture multiple vendor-partner relationships, each company can establish up to 50 vendor and 50 partner connections with unique orgs.

SEE ALSO:

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

Salesforce Help: Partner Connect Security and Design (can be outdated or unavailable during release preview)

Sales Cloud Everywhere

Copilot in Everywhere now intuitively selects the current record as you execute commands. Matching records is more precise in contextual insights. And you can use your Gmail integration in the Chrome side panel, along with Einstein copilot.

IN THIS SECTION:

Give Copilot Instructions That Default to the Current Record in Sales Cloud Everywhere

We made it easier to use copilot in Sales Cloud Everywhere while you're on the internet. When Salesforce finds an exact match for the company or person you're viewing on the web page, you can give copilot instructions about the current record. Copilot understands that the instructions are for the matching record, so including that information in the instructions isn't necessary.

Match Precision Improved in Contextual Insights

Get more confidence from improved matching logic when you're using contextual insights in Sales Cloud Everywhere. An exact match is defined as a case-sensitive combination of URL, first name, and last name. If no exact match is found, potential matches are based on substrings or case-insensitive words.

Speed Up Your Day with the Gmail Integration in the Chrome Side Panel

The email functionality is the same, but other features in the Chrome side panel are now available while you use the Gmail integration. Along with fewer logouts, the Chrome side panel is visible as you work in your email and calendar, and navigate in your browser

Access Einstein Copilot From Your Gmail Integration

When your Gmail integration is in the Chrome side panel, you can use copilot while working on emails and events. You have access to copilot actions, such as summarize record and draft an email. Copilot can also suggest relevant content and phrases and integrate personalized information into its recommendations.

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

SEE ALSO:

Salesforce Help: Follow Up on Companies and People of Interest in Sales Cloud Everywhere (can be outdated or unavailable during release preview)

Match Precision Improved in Contextual Insights

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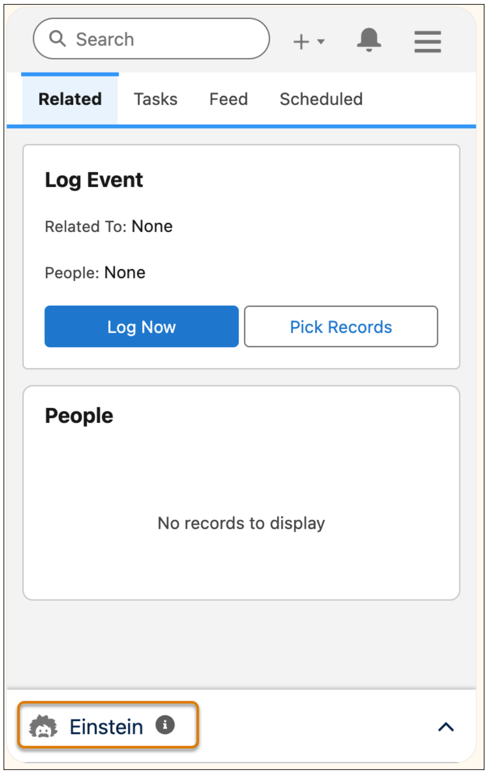
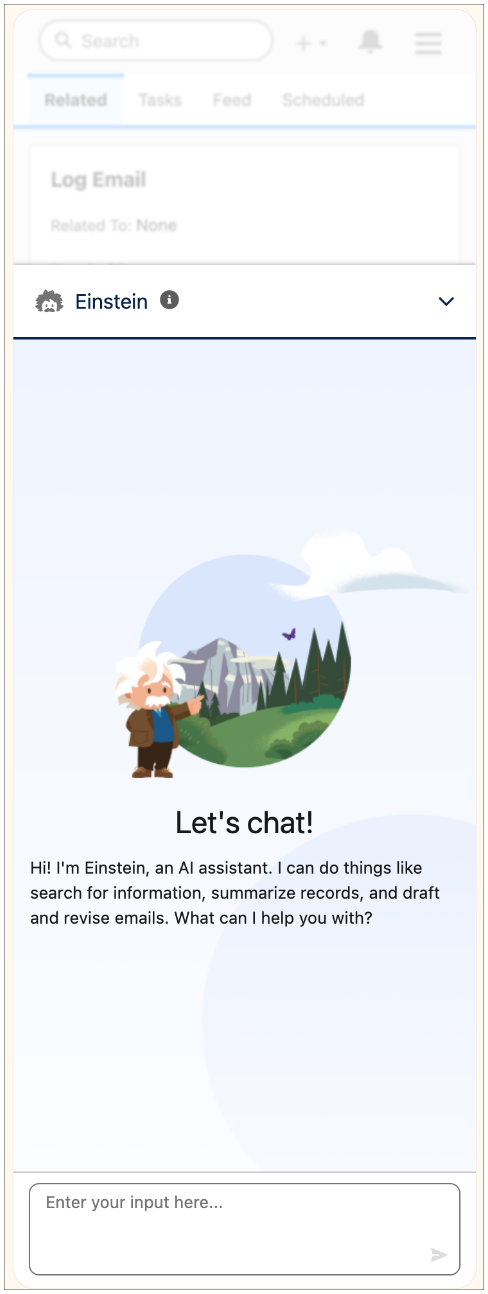
How: Change your Gmail integration to appear in the Chrome side panel. You're automatically asked if you want to try this new location when you open the Gmail integration.



Click **Einstein** to use copilot in the side panel.



Draft an email using copilot. When you send the email, your Gmail composer opens so you can make edits before it goes out.

SEE ALSO:

Increase Efficiency by Using the Gmail Integration in the Chrome Side Panel

Salesforce Help: Set Up the Outlook and Gmail Integrations (can be outdated or unavailable during release preview)

Sales Cloud on Mobile

Easily view and update your sales-related data up to date while you're away from your desktop.

IN THIS SECTION:

Close Deals Faster with a Seller-Focused Mobile App (Generally Available)

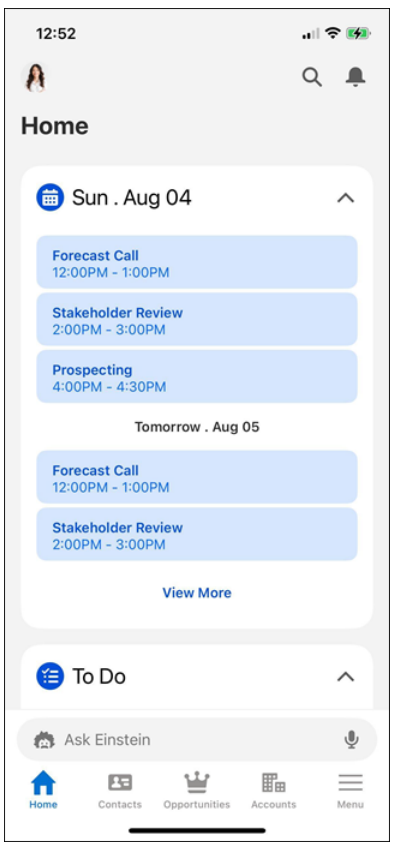
The Seller-Focused Mobile Experience app helps you easily view and update accounts, contacts, leads, and opportunities while on the go. Keep deals on track by quickly finding the information that you need, making calls, sending emails, and seeing and acting on upcoming tasks and events in the activity timeline. And let Einstein Copilot make all of that work even easier.

Where: The Seller-Focused Mobile Experience for Android and iOS is available on phones and tablets in all editions, except Database.com.

When: This app is available starting in October 2024.

Who: Einstein Copilot is available to users with the Use Einstein Copilot for Salesforce user permission.

Why: The Seller-Focused Mobile Experience gives you easy access to cards containing the Salesforce data that you need to prepare for meetings, make calls, and send emails. Get an at-a-glance view of your upcoming and overdue tasks and events. You can also view and update accounts, leads, opportunities, and contacts.



And never fly solo with Einstein Copilot right there to help. Tap on the Einstein button and, through voice or text input, ask Einstein Copilot to find and summarize records for you or even to generate emails.

Other Changes in the Sales Cloud

Anticipate other changes that can affect your sales teams.

IN THIS SECTION:

Enable New Order Save Behavior (Release Update)

When you update an order product, the New Order Save Behavior uses custom application logic to update the parent order. Custom application logic consists of validation rules, apex triggers and classes, workflow rules, and flows. You can choose to enable or disable this feature. However, we recommend that you enable it. Starting Winter '25, this feature is enabled by default for new customer orgs. Previously, users needed additional customizations to enforce custom applications on orders and order products. Also, 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.

How: This feature is enabled by default for new customers orgs, while existing admins can choose to enable or disable it. To review this update, from Setup, in the Quick Find Box, enter `Release Updates`, and then select **Release Updates**.

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 you enable the release update.

SEE ALSO:

Second-Generation Managed Packages Developer Guide: Test and Respond to the New Order Save Behavior

Salesforce CMS

Publish enhanced CMS content to more channels, including Aura sites. As you add these channels to your enhanced CMS workspace, remove old ones from the workspace, and delete unused channels from your org. Share and reuse content across your enhanced CMS workspaces with workspace sharing and content cloning.

IN THIS SECTION:

Scale Content Delivery for High Performance (Beta)

Orgs hosted on Hyperforce can use Dedicated Content Delivery (beta) to deliver content with high performance and low latency. This setting is on by default for all new public channels in an enhanced CMS workspace. You can enable this feature for existing public channels on Hyperforce.

Broaden Content Use and Reuse Possibilities in Enhanced CMS Workspaces

Save time and space when you share content across enhanced CMS workspaces and 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.

Skip the Alt Text for Decorative Images

To make it easier for visitors who use a screen reader or other assistive technology to use your site, designate an image, such as a background or border, as purely decorative. The assistive technology skips over a decorative image and avoids distracting your site visitors with unnecessary description. When the option is selected, the alt text field is cleared of any text and disabled.

Expand the Reach of Your Enhanced CMS Content

Publish content to Aura site channels from enhanced CMS workspaces with the new Use non-enhanced APIs setting. This setting is enabled by default for Aura site channels. Then use non-enhanced CMS Managed Content Resources to get these content types from enhanced CMS workspaces. And as of Winter '25, any new workspace that you create is enhanced by default.

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

Why: When the new channel setting, Use non-enhanced APIs, is enabled, you can continue using non-enhanced CMS Managed Content Resources with enhanced CMS workspaces without interrupting your current ways of working. When you enable this setting, Salesforce does the work of connecting these resources for you. If you're already using enhanced CMS APIs, it's not necessary to enable this setting. With these changes, you can accomplish your content tasks with enhanced CMS workspaces.

SEE ALSO:

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

Remove Channels from Enhanced CMS Workspaces and Delete Channels from Your Org

To better control where your enhanced CMS content is available, remove channels from enhanced CMS workspaces. When you remove a channel from a workspace, all the workspace's content is unpublished from the channel. If you have a channel that isn't connected to any CMS workspace, you can delete it from your org.

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

How: To remove a channel from an enhanced CMS workspace, go to the workspace's list of channels and click **Manage Channels**. To delete a channel, go to CMS Channels in the Digital Experiences App.

You can remove channels from only enhanced CMS workspaces. You can delete non-site channels that aren't associated with any CMS workspace.

SEE ALSO:

Salesforce Help: Add and Remove a Channel From a CMS Workspace (can be outdated or unavailable during release preview)

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

Scale Content Delivery for High Performance (Beta)

Orgs hosted on Hyperforce can use Dedicated Content Delivery (beta) to deliver content with high performance and low latency. This setting is on by default for all new public channels in an enhanced CMS workspace. You can enable this feature for existing public channels on Hyperforce.

Where: This change applies to enhanced CMS workspaces in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions hosted on Hyperforce.

Note: Dedicated Content Delivery 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.

How: To enable Dedicated Content Delivery (beta) for existing public channels on Hyperforce, edit the channel settings. When you enable this feature, newly published content is served through Hyperforce. Existing published content is served through Hyperforce the next time it's published.

SEE ALSO:

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

Broaden Content Use and Reuse Possibilities in Enhanced CMS Workspaces

Save time and space when you share content across enhanced CMS workspaces and 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.

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

How: To share content from a source workspace to a target workspace, open the enhanced CMS workspace. From the workspace settings menu, click and select **Workspace Sharing**. Move target workspaces from the Unshared column to the Shared column, and save your changes. After a content admin or manager configures the Workspace Settings to allow sharing, content authors can find that content in the Shared with Workspaces folder.

SEE ALSO:

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

Salesforce Help: Create and Clone Content in a CMS Workspace (can be outdated or unavailable during release preview)

Skip the Alt Text for Decorative Images

To make it easier for visitors who use a screen reader or other assistive technology to use your site, designate an image, such as a background or border, as purely decorative. The assistive technology skips over a decorative image and avoids distracting your site visitors with unnecessary description. When the option is selected, the alt text field is cleared of any text and disabled.

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

How: To prevent alt text from being passed on to aria labels, select the option **This image is purely decorative and needs no alt text** that's under the Alt Text field when you create or edit image content in an enhanced CMS workspace.

SEE ALSO:

Salesforce Help: Create and Clone Content in a CMS Workspace (can be outdated or unavailable during release preview)

Salesforce Flow

Compose intelligent workflows with Flow Builder and Flow Orchestration. Integrate across any system with MuleSoft Composer for Salesforce.

IN THIS SECTION:

Flow Builder

Trigger screen actions with a click of a button by using the Action Button component. Disable more screen components at run time. Build formulas by describing what you want to calculate and letting Einstein generative AI figure it out for you. View flow data directly on the Flow Builder canvas with on-canvas insights. Test and optimize customer journeys with the Path Experiment element. Expand your email reach up to 150 recipients and use CC, BCC options in Send Email Action. Test and troubleshoot your template-triggered prompt flows with the debug tool. Create personalized recommendations with Einstein Next Best Action and Experience Cloud.

IN THIS SECTION:

Flow Marketing Cloud Updates

View flow data directly on the Flow Builder canvas with on-canvas insights. Test and optimize customer journeys with the Path Experiment element. Create flows that are triggered by automation events such as SMS subscriptions. Associate a flow with a data graph.

Flow Actions

Expand your email reach up to 150 recipients and use CC, BCC options in Send Email Action.

Flow Testing and Debugging

When debugging, you can now view the maximum number of scheduled flows that your org can run per day. Test and troubleshoot your template-triggered prompt flows with the debug tool.

Flow Runtime

Versioned updates are available for flows and processes that are configured to run on API version 62.0.

Flow Extensions

Create personalized recommendations with Einstein Next Best Action and Experience Cloud.

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

Flow Builder Updates

Trigger screen actions with a click of a button by using the Action Button component, now generally available. Use the Repeater component to update existing record collections. Troubleshoot issues in a new errors and warnings pane. Build formulas by describing what you want to calculate and letting Einstein generative AI figure it out for you (beta). Create flows with Einstein, and edit and manage those flows in Flow Builder (beta). Launch another active prompt flow as a subflow within a prompt flow. Create or update records based on specific criteria in the Create Records element. Transform data into more types of target resources.

IN THIS SECTION:

User Experience Updates

Troubleshoot issues in a new errors and warnings pane. Use keyboard shortcuts to undo, redo, and save as. Search for child resources directly in the resource menu. Get guidance on how to make your flows more efficient with tips directly in Flow Builder.

Screen Flow Updates

Trigger screen actions with a click of a button by using the Action Button component, now generally available. Use the Repeater component to update existing record collections. Disable more screen components at run time. Select more choices in the Choice Lookup component. Let users make changes to collections of records. Identify custom components with labels or API names displayed directly on the component.

Get Help Creating Flow Formulas with Einstein (Beta)

Build flow formulas with ease by describing what you want to calculate and letting Einstein generative AI figure out the functions and operators for you. Formulas created by Einstein are available only in Flow Formula Builder. Generative AI can produce inaccurate or harmful responses, so it's important to test your formula for accuracy and safety before activating your flow.

Edit Your Einstein Instructions in Flow Builder (Beta)

Now, when creating flows with Einstein, you can easily edit your instructions in the Einstein window without leaving Flow Builder. This update simplifies the editing process, eliminating the need to copy your instructions and start over with a new flow. You can also switch between the original flow and new flows you create with edited instructions, making the entire process straightforward and user-friendly.

Launch Another Active Prompt Flow as a Subflow Within a Prompt Flow

You heard it right. The Subflow element is available for prompt flows. Now you can break your automation into building blocks and reduce the complexity of a prompt flow. To perform a common task, you can call another reusable prompt flow from within a prompt flow. Prompt flows can use the Subflow element to reference only other prompt flows.

Create or Update Records Efficiently with the Create Records Element

In Flow Builder, you can now use the Create Records element to create or update records based on whether a specified field value exists in the database. The Create Records element makes the process of saving records easier and faster, as you no longer check separately for existing records. By merging create and update into one element, you configure and maintain the flow more easily while reducing potential errors from separate operations.

Transform Data into More Target Resource Types

With the Transform element, you can now set the target resource to more data types, such as Text, Numbers, Currency, Boolean, Date, and Date/Time. Previously, the Transform element's target resource only supported complex data types, such as Record or Apex-defined.

User Experience Updates

Troubleshoot issues in a new errors and warnings pane. Use keyboard shortcuts to undo, redo, and save as. Search for child resources directly in the resource menu. Get guidance on how to make your flows more efficient with tips directly in Flow Builder.

IN THIS SECTION:

Troubleshoot Configuration Issues Systematically with the Errors and Warning Pane

Troubleshooting flow errors is easier than ever before. The new Errors and Warnings pane lists issues that prevent you from saving and activating your flow as you work in an easy to scan format. The pane includes links to the Flow Builder canvas that help you identify the source of issues. You can show or hide the new pane with the Show Error button, which includes a notification badge that displays the total number of issues to address.

Find Flow Child Resources More Easily

When referencing the child resource of an element in a flow, such as a screen component within a Screen element, now you can search for and select it directly in the updated resource menu. Previously, you had to first select the element of the child resource, and then select the child resource. This change applies to these child resources: Screen components, screen actions, Decision element outcomes, and Wait element configurations.

Create New Variable and Constant Flow Resources More Easily

Now it's easier to create new variable and constant flow resources with improved grouping and user-friendly labeling. Resource grouping is now enabled for Text, Number, Currency, Boolean, Date, and Date/Time data types. These improvements make it easier for you to more quickly discover the resources that you need.

Find Flow Resource Variables More Easily in Assignment and Create Records Elements

With this update, Flow Builder extends the enhanced resource-selection experience to Assignment and Create Records elements. Resources such as Actions, Screen components, and Variables are grouped so it's easier to find what you need.

Identify Inefficient Flow Designs with New Tips

New tips in Flow Builder help you identify designs that can slow down your flows and increase the risk of reaching Apex governor limits. These tips appear in the Flow Builder canvas and provide guidance on how to improve your flow. By addressing these suggestions, you can ensure that your flows are running efficiently and avoid potential performance issues.

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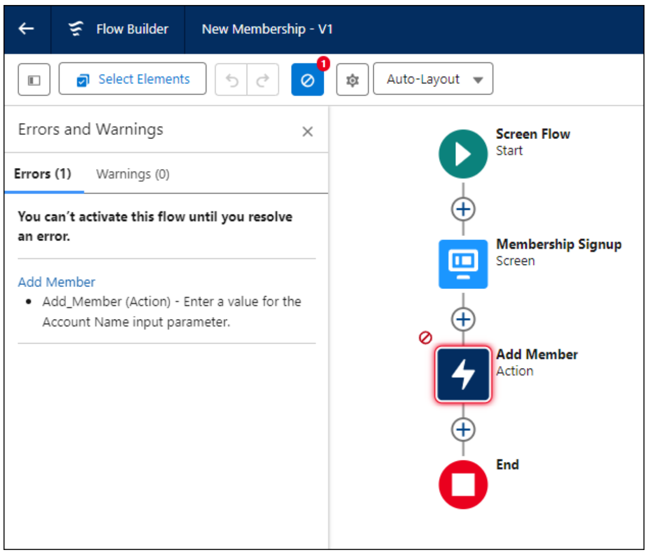
Troubleshooting flow errors is easier than ever before. The new Errors and Warnings pane lists issues that prevent you from saving and activating your flow as you work in an easy to scan format. The pane includes links to the Flow Builder canvas that help you identify the source of issues. You can show or hide the new pane with the Show Error button, which includes a notification badge that displays the total number of issues to address.

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

How: Create a flow, and click the **Show Error** icon in the button bar.

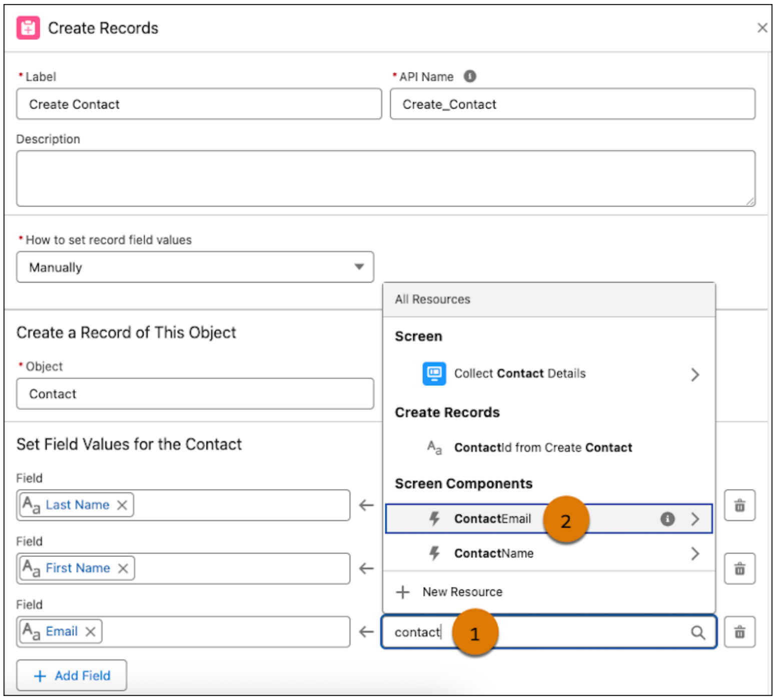


Find Flow Child Resources More Easily

When referencing the child resource of an element in a flow, such as a screen component within a Screen element, now you can search for and select it directly in the updated resource menu. Previously, you had to first select the element of the child resource, and then select the child resource. This change applies to these child resources: Screen components, screen actions, Decision element outcomes, and Wait element configurations.

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

How: For example, you have a screen flow that collects a first name, last name, and email, and then creates a contact with that information. In the Create Records element following the Screen element, when you set the email for the new contact, search for the name of your email screen component (1). Then select the screen component (2).



SEE ALSO:

Salesforce Help: Standard Flow Screen Components (can be outdated or unavailable during release preview)

Salesforce Help: Flow Screen Actions (can be outdated or unavailable during release preview)

Salesforce Help: Flow Element: Decision (can be outdated or unavailable during release preview)

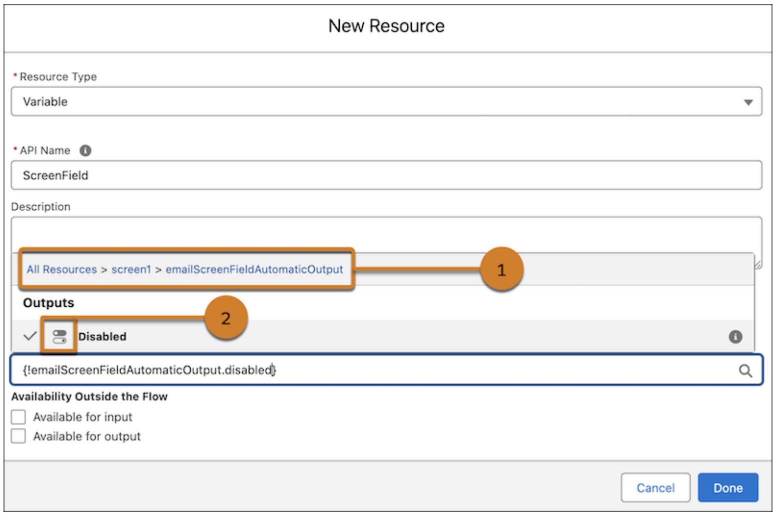
Salesforce Help: Flow Element: Wait for Conditions (can be outdated or unavailable during release preview)

Create New Variable and Constant Flow Resources More Easily

Now it's easier to create new variable and constant flow resources with improved grouping and user-friendly labeling. Resource grouping is now enabled for Text, Number, Currency, Boolean, Date, and Date/Time data types. 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 (not available in all orgs) in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

How: Open an existing or a new flow in Flow Builder and then click **New Resource** under the Manager panel. Select the resource type, **Variable** or **Constant**, and then the data type. Click in the Default Value field and enter a value or search for resources. The clickable breadcrumb path helps you identify where you are and navigate resource groups (1). You can recognize resource types quickly with more intuitive icons (2).



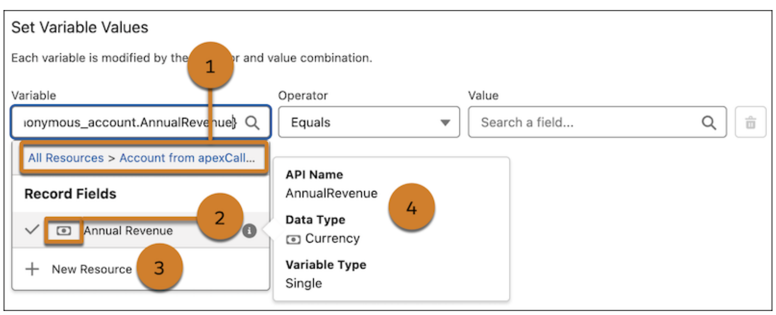
Find Flow Resource Variables More Easily in Assignment and Create Records Elements

With this update, Flow Builder extends the enhanced resource-selection experience to Assignment and Create Records elements. Resources such as Actions, Screen components, and Variables are grouped so it's easier to find what you need.

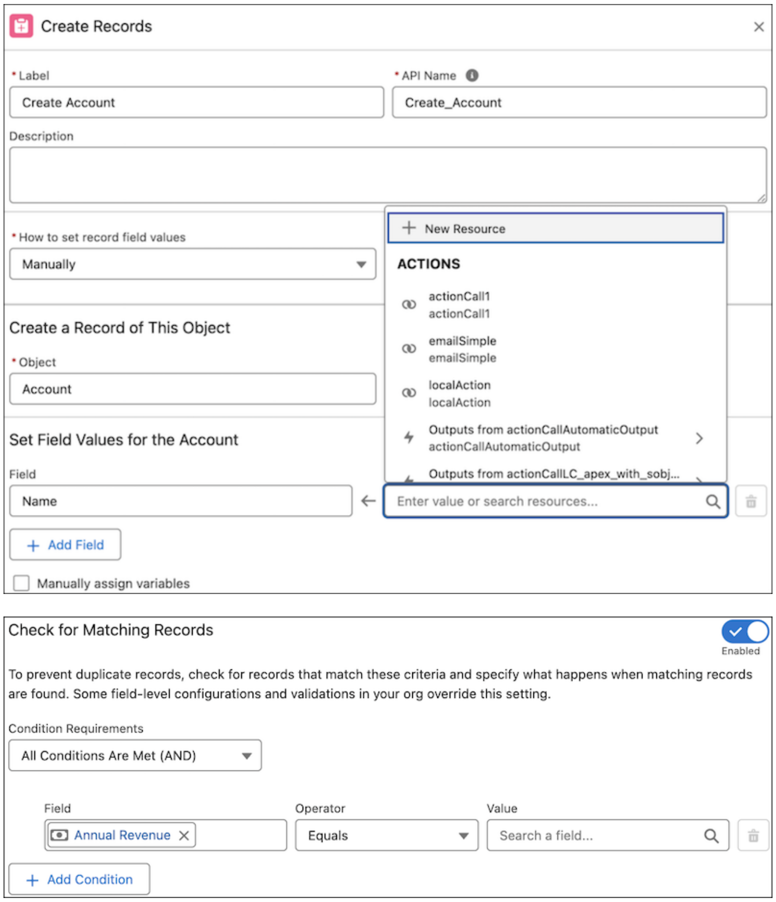
Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

How: Create or open a flow. Now add or edit an Assignment or a Create Records element.

For the Assignment element, click in the Set Variable Values field. The clickable breadcrumb path helps you identify where you are and navigate resource groups (1). Recognize resource types quickly with more intuitive icons (2). To create a resource quickly, click **New Resource** (3). To get helpful information about a resource, hover over the resource's info icon (4).



For the Create Records element, the fields and values of manually selected objects and matching records are grouped and have clearer labels. To quickly create a resource for values, click **New Resource**.

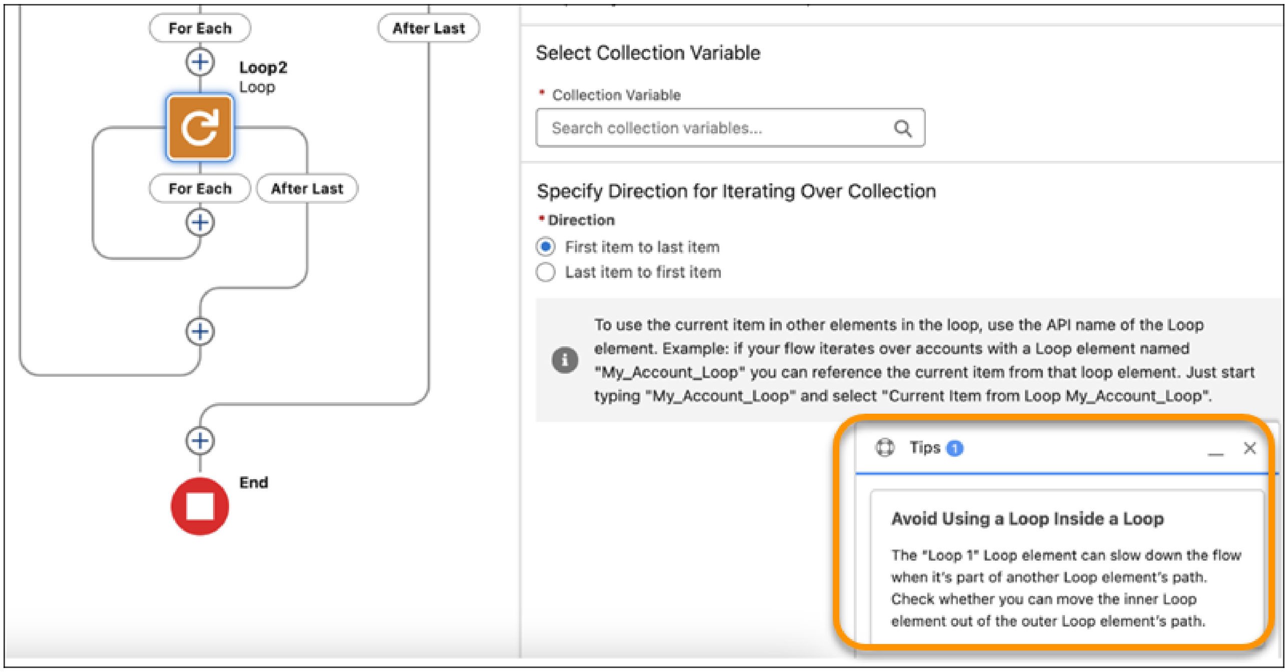


Identify Inefficient Flow Designs with New Tips

New tips in Flow Builder help you identify designs that can slow down your flows and increase the risk of reaching Apex governor limits. These tips appear in the Flow Builder canvas and provide guidance on how to improve your flow. By addressing these suggestions, you can ensure that your flows are running efficiently and avoid potential performance issues.

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

Why: These tips are especially useful for users who are new to building flows and aren't aware of common pitfalls.



With these tips, you can proactively optimize your flows and improve the overall user experience. Additionally, the tips help reduce the need for troubleshooting and debugging, saving you time and effort in the long run. Take advantage of these new tips to speed up your flows and achieve better results.

Screen Flow Updates

Trigger screen actions with a click of a button by using the Action Button component, now generally available. Use the Repeater component to update existing record collections. Disable more screen components at run time. Select more choices in the Choice Lookup component. Let users make changes to collections of records. Identify custom components with labels or API names displayed directly on the component.

IN THIS SECTION:

Select Multiple Choices with Choice Lookup Component

You can now configure the Choice Lookup component to accept either a single selection or multiple selections (up to 25), making it more flexible for your business processes. Previously, only the Lookup component supported selecting multiple options through a lookup field.

Recognize and Differentiate Between Custom Components Instantly in Screen Elements

Custom components now show labels or API names directly on the component in Flow Builder where you add the component to the Screen element, streamlining your workflow and reducing confusion. Previously, without a preview, understanding the role and function of each custom component was a guessing game, especially if you added the same component more than once.

Deselect Data Table Rows When in Single-Row Selection Mode

Running users can deselect a row in a Data Table component that's set to single-row selection mode, because we now use checkboxes instead of radio buttons to select or deselect rows. To return to the previous functionality and use radio buttons, in the row configuration section, select Require user to make a selection.

Provide a Better Screen Flow Experience with Action Buttons (Generally Available)

With the Action Button component, the running user can trigger a screen action with the click of a button on a screen. The screen action runs an active autolaunched flow, and the results of the autolaunched flow can be shown on the same screen as the button. This component means fewer screens so users can complete screen flows more quickly and with fewer mistakes. Previously, users clicked through multiple screens to get the same functionality. Now generally available, the Action Button component includes some improvements since the last release.

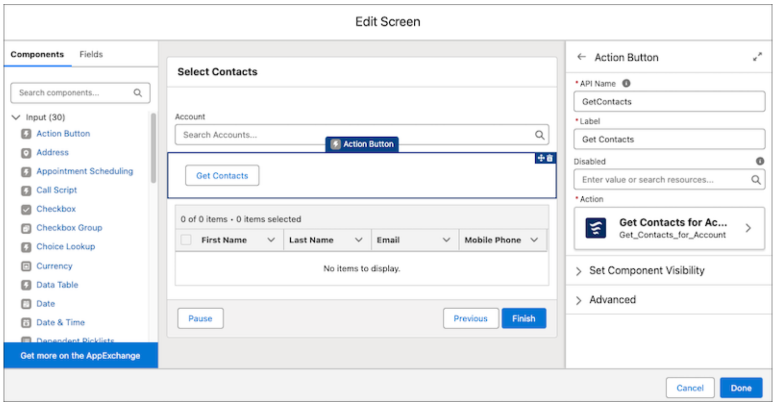
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

Why: The Action Button screen component has these new improvements:

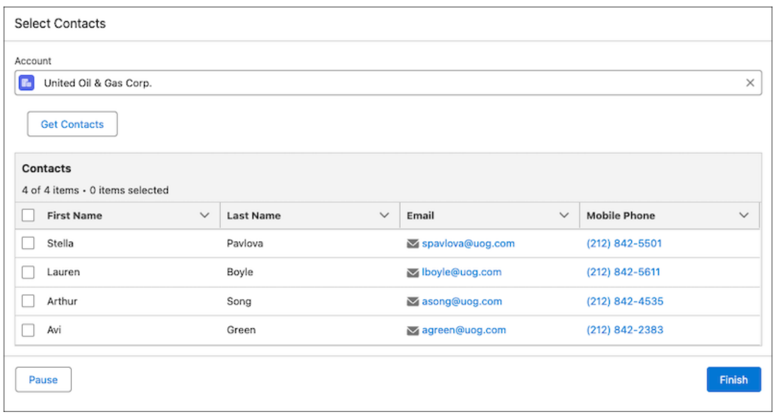
- Your screen flow users can see a new indicator in the action button to let them know that the screen action is running.
- If you update the input and output variables of the action's autolaunched flow, you can refresh your action's inputs and outputs without refreshing the browser and the flow.
- With the new In Progress screen action output, you can reference the in progress status of the screen action launched by the action button somewhere else in the flow. For example, you can disable another screen component on the same screen if the screen action is in progress. To use the In Progress output in an API version earlier than 62, open the screen that contains the action button component and resave the flow.
- If the autolaunched flow that launches from the action button is running in system context, you're notified so that you can take appropriate steps to secure your data.
- You can disable the action button based on criteria that you set using a resource with a Boolean value.
- Multiple accessibility updates improve the screen reader experience at design time and run time.

How: In Flow Builder, create and activate an autolaunched flow that retrieves data and saves that data in one or more output variables. Then, create a screen flow, add a Screen element to the flow, and include an Action Button component on the screen. Configure the Action Button component to launch the autolaunched flow that you previously created. Add another component to the screen that uses the output of the autolaunched flow. Save and run the flow.

For example, add a Screen element with a Lookup component that enables a user to search for and select an account record. Add an Action Button component to the screen that launches a flow that retrieves the contact records related to the selected account record. Add a Data Table component to the screen that uses the action button's output to populate the component with the related contacts.



At run time, the user gets a streamlined experience because they can select the account without going to another screen to select the contacts. Both actions are on one screen.



SEE ALSO:

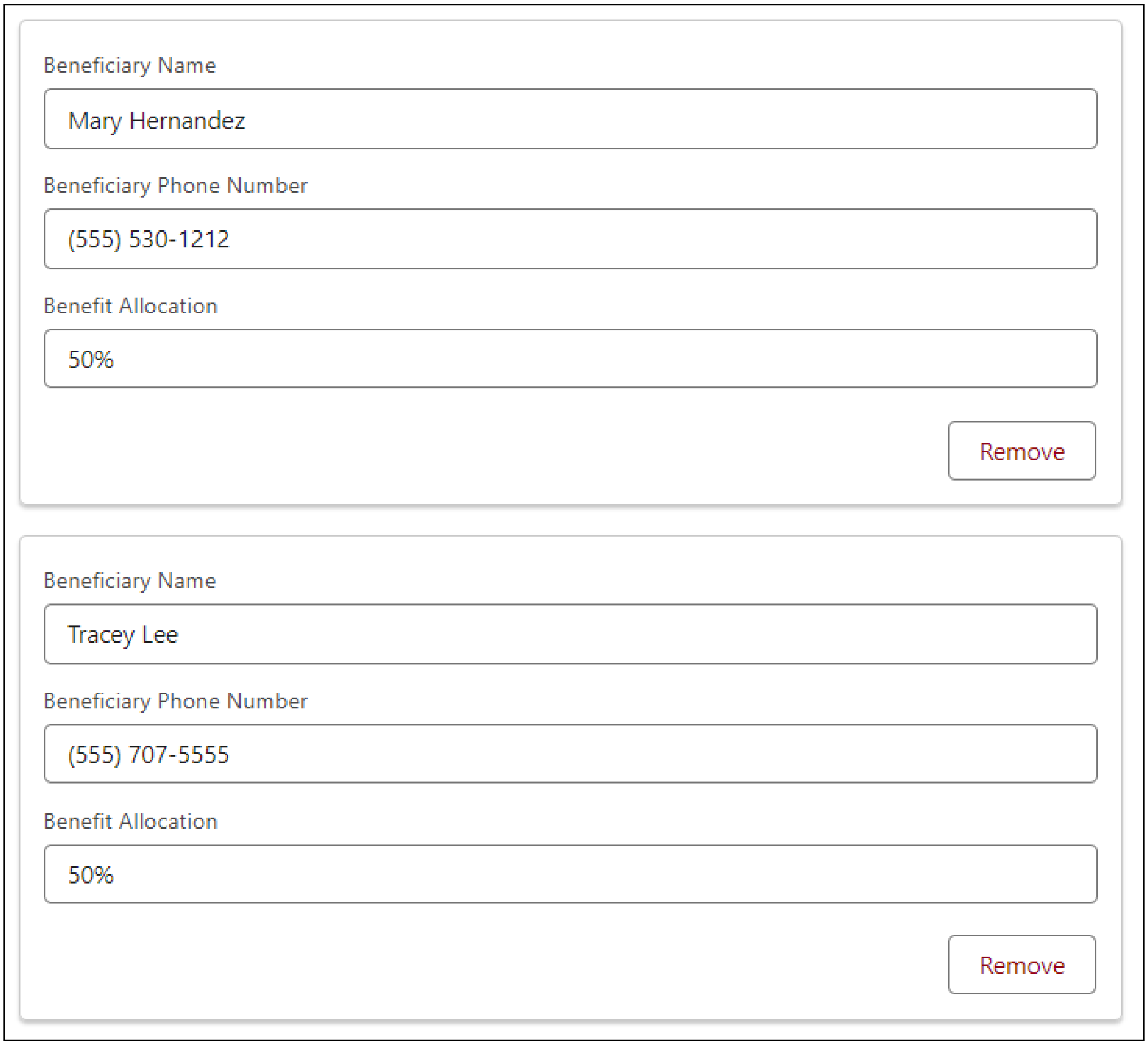
Salesforce Help: Flow Screen Input Component: Action Button (can be outdated or unavailable during release preview)

Collect User Input to Modify a List of Records from a Screen

You can now use the Repeater component to update existing record collections so it's easier for end users to change a collection of records in a screen flow. Previously, the Repeater component in the Screen element supported only creating records.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

How: Consider the example of changing the beneficiaries for an insurance policy. Because you don't know how many beneficiaries a policy contains, you add the Repeater component to display existing beneficiary information. By setting a data source for the Repeater component, you can enable users to easily adjust details for beneficiaries. At run time, each Repeater instance contains the details about each beneficiary already associated with the policy, including name, contact information, and benefit allocation.



Because you're now working with more than just information the end user adds, you can access multiple output collections from the Repeater component. Depending on the operations that the end user performed, you can process Added, All, Prepopulated, and Removed Items collections. For instance, to create beneficiaries that were added and update beneficiaries that were modified, reference the All Items output collection, and then use the new update existing records option in the Create Records element to save all the changes.

With new display options, you can also decide whether screen flow end users can add new items or remove prepopulated items in your Repeater instance. End users can remove items that they added manually.

SEE ALSO:

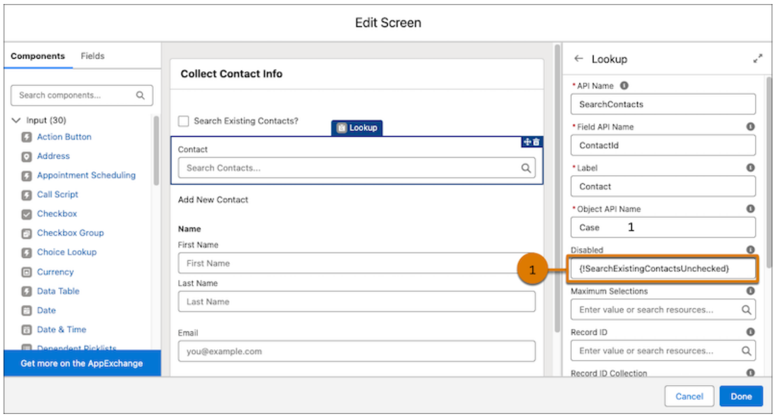
Salesforce Help: Modify Records from User Input in Screens (can be outdated or unavailable during release preview)

Disable More Screen Component Fields at Run Time

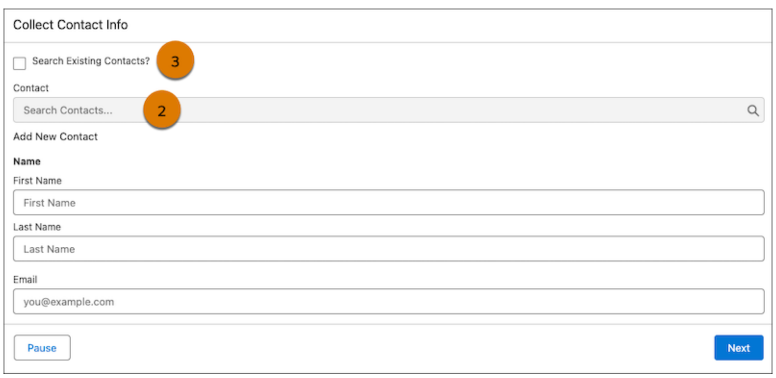
Now you can disable fields on the Action Button, Dependent Picklist, Lookup, Phone, and Slider screen components by using the component's Disabled attribute. When the Disabled attribute is set to true, screen flow users can't focus on or modify any fields in the component. A gray background appears on the component's input fields to give users a visual cue.

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: Add an Action Button, Dependent Picklist, Lookup, Phone, or Slider screen component to a Screen element in a flow. Set the Disabled attribute to a resource with a Boolean value. For example, you have a Screen element with a Lookup component that looks for contacts. You want the Lookup component accessible only if the running user wants to search for existing contacts. You set the Lookup component's Disabled attribute to a Formula resource that evaluates to `true` when a checkbox called Search Existing Contacts? is unchecked (1).



When the screen flow runs, the Contact Lookup component field is disabled (2) because the Search Existing Contacts? checkbox (3) is unchecked.



When the Search Existing Contacts? checkbox is checked (4), the Contact Lookup component field is no longer disabled (5).

SEE ALSO:

Salesforce Help: Flow Screen Input Component: Action Button (can be outdated or unavailable during release preview)

Salesforce Help: Flow Screen Input Component: Dependent Picklists (can be outdated or unavailable during release preview)

Salesforce Help: Flow Screen Input Component: Lookup (can be outdated or unavailable during release preview)

Salesforce Help: Flow Screen Input Component: Phone (can be outdated or unavailable during release preview)

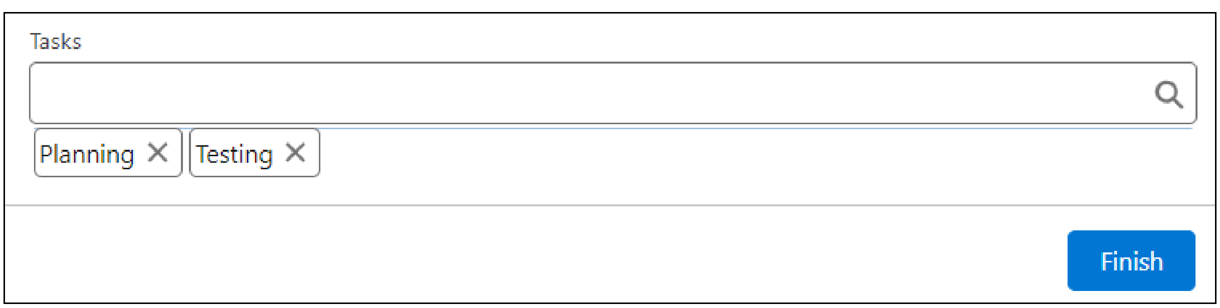
Salesforce Help: Flow Screen Input Component: Slider (can be outdated or unavailable during release preview)

Select Multiple Choices with Choice Lookup Component

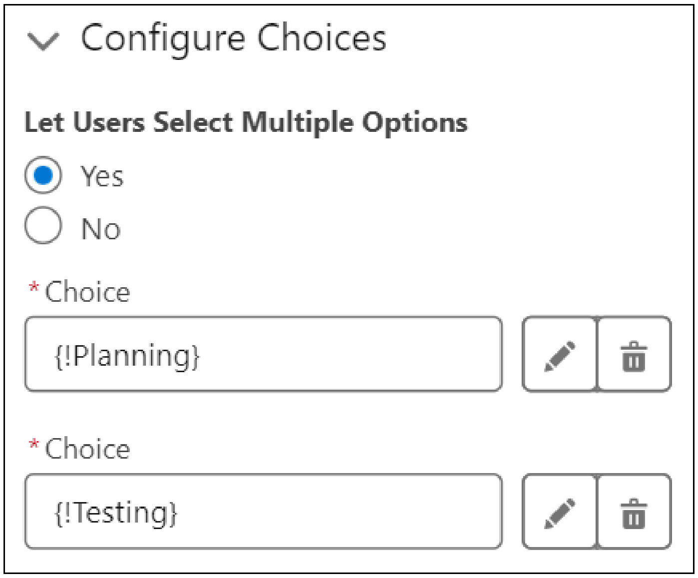
You can now configure the Choice Lookup component to accept either a single selection or multiple selections (up to 25), making it more flexible for your business processes. Previously, only the Lookup component supported selecting multiple options through a lookup field.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

Why: Consider a screen flow that project managers use to assign multiple tasks to various team members. You can configure the Choice Lookup component so that managers can select multiple tasks up to 25 selections. Previously, the Choice Lookup component supported only a single selection at a time.



How: From the Screen element in Flow Builder, add the Choice Lookup component. For Let Users Select Multiple Options, select **Yes**. Then, add the relevant choice resources.



SEE ALSO:

Salesforce Help: Flow Screen Input Component: Choice Lookup (can be outdated or unavailable during release preview)

Recognize and Differentiate Between Custom Components Instantly in Screen Elements

Custom components now show labels or API names directly on the component in Flow Builder where you add the component to the Screen element, streamlining your workflow and reducing confusion. Previously, without a preview, understanding the role and function of each custom component was a guessing game, especially if you added the same component more than once.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Imagine you're reviewing a flow with multiple custom long-text components that are used to process support tickets. Previously, it wasn't easy to determine which component captures the issue description and which one captures the reproduction steps. Now you can see the role and function of each component at a glance, enhancing accuracy and efficiency.

Having this visual cue makes so many tasks easier, whether you're configuring a complex process or training new team members. The preview of component API names or labels not only aids in faster onboarding of new users but also makes Flow Builder more intuitive and less error-prone.

Deselect Data Table Rows When in Single-Row Selection Mode

Running users can deselect a row in a Data Table component that's set to single-row selection mode, because we now use checkboxes instead of radio buttons to select or deselect rows. To return to the previous functionality and use radio buttons, in the row configuration section, select Require user to make a selection.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's not supported in Classic runtime for flows.

Get Help Creating Flow Formulas with Einstein (Beta)

Build flow formulas with ease by describing what you want to calculate and letting Einstein generative AI figure out the functions and operators for you. Formulas created by Einstein are available only in Flow Formula Builder. Generative AI can produce inaccurate or harmful responses, so it's important to test your formula for accuracy and safety before activating your flow.

Where: This change applies to Lightning Experience in:

- All Einstein 1 editions
- Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein for Platform add-on

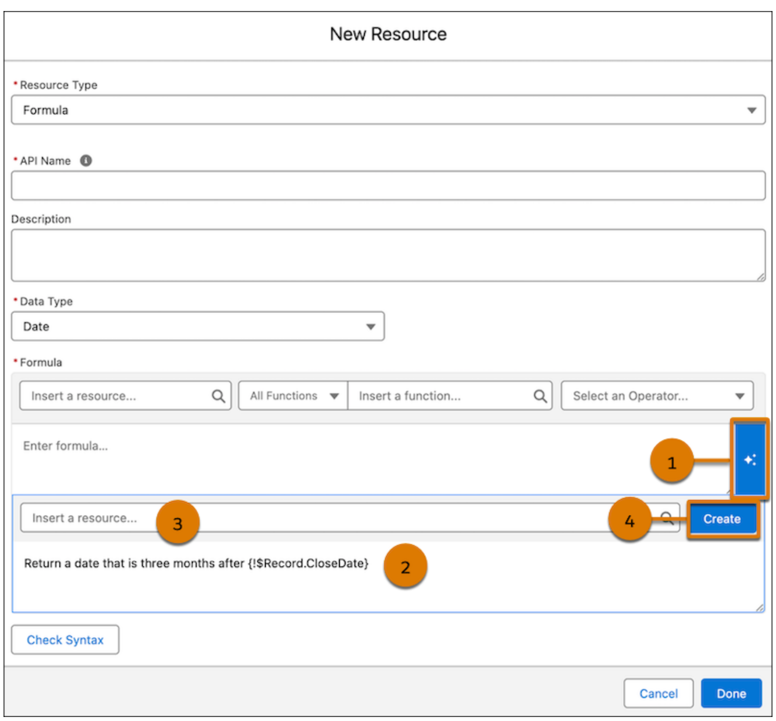
Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, Einstein for Platform, or Einstein for Service add-ons, contact your Salesforce account executive.

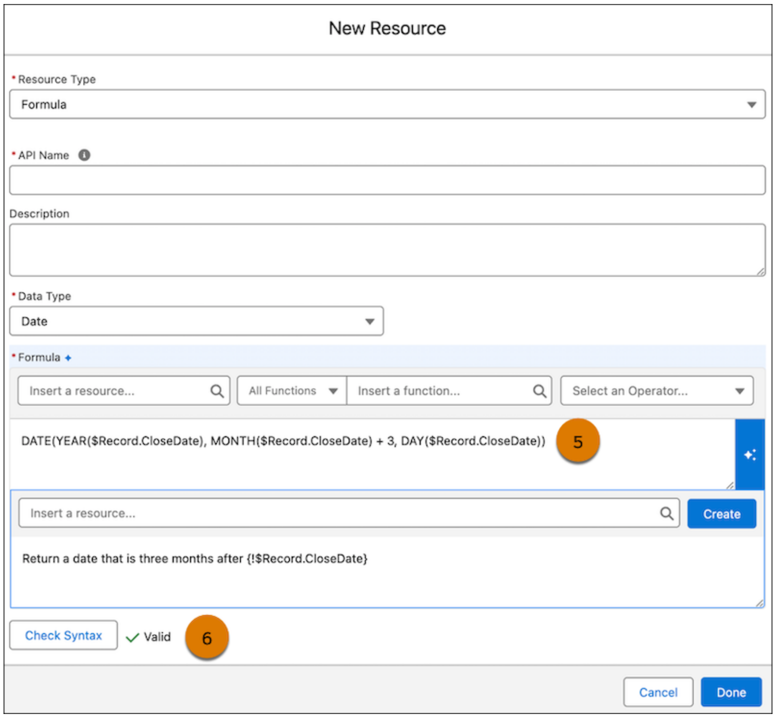
Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Turn on Einstein generative AI in Setup. Then, in Setup, find and select **Process Automation Settings**, and enable formulas created by Einstein.

To create formulas with Einstein, open a Formula resource or an element with Formula Builder. Open the Einstein section and click the Einstein button (1). Describe the formula you want Einstein to create (2). When adding resources to your formula description, use the resource menu (3) to select them instead of manually writing them in. Click **Create** (4).



After Einstein creates the formula (5), check its syntax to make sure it's set up correctly (6) and test your formula for accuracy and safety before activating the flow.



SEE ALSO:

Salesforce Help: Creating Flow Formulas with Einstein (Beta) (can be outdated or unavailable during release preview)

Edit Your Einstein Instructions in Flow Builder (Beta)

Now, when creating flows with Einstein, you can easily edit your instructions in the Einstein window without leaving Flow Builder. This update simplifies the editing process, eliminating the need to copy your instructions and start over with a new flow. You can also switch between the original flow and new flows you create with edited instructions, making the entire process straightforward and user-friendly.

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To purchase Einstein for Sales, Einstein for Platform, or Einstein for Service add-ons, contact your Salesforce account executive.

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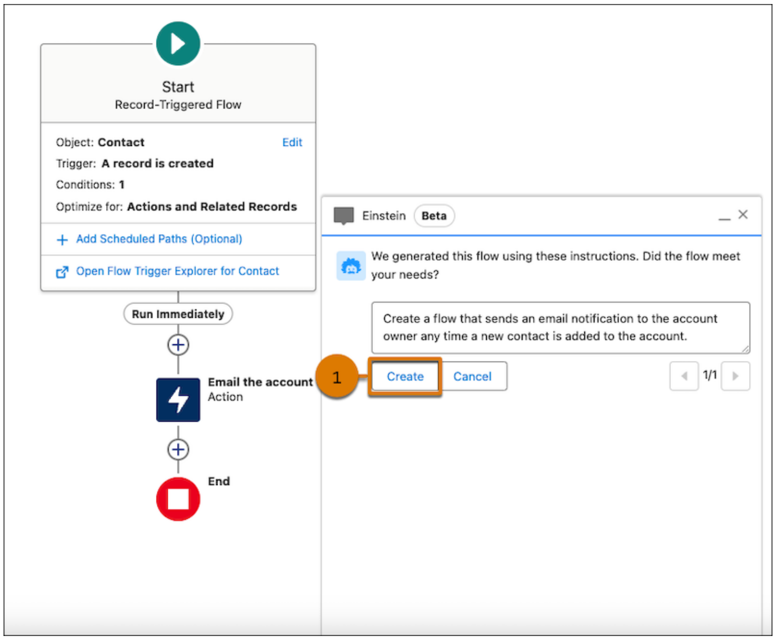
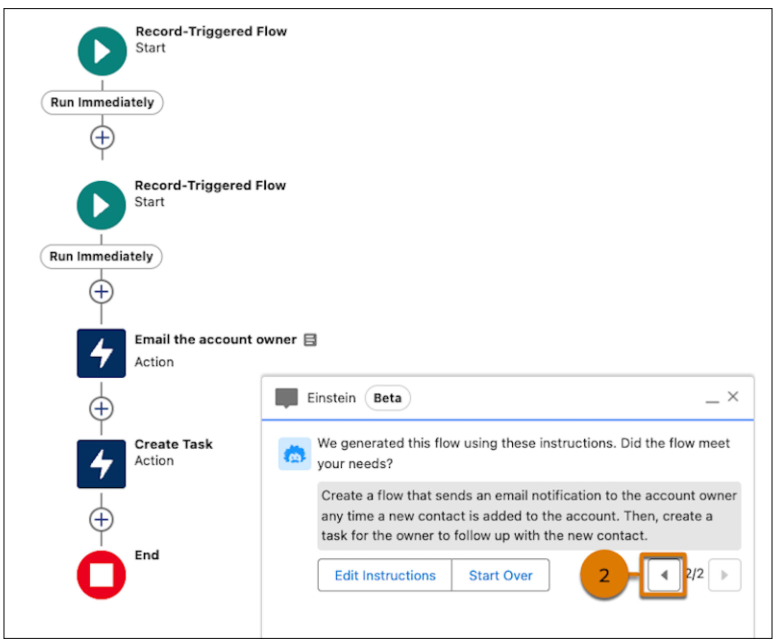
How: Turn on Einstein generative AI in Setup. Then, in Setup, find and select **Einstein for Flow (Beta)**, and activate it.

To edit your Einstein instructions, create a draft flow with Einstein. In the Einstein window in Flow Builder, edit the instructions and click **Create** (1).



A flow is created with your edited instructions. To switch between the original flow and the flows created with edited instructions, click the arrows (2).



SEE ALSO:

Salesforce Help: Let Einstein Help You Build Flows (Beta) (can be outdated or unavailable during release preview)

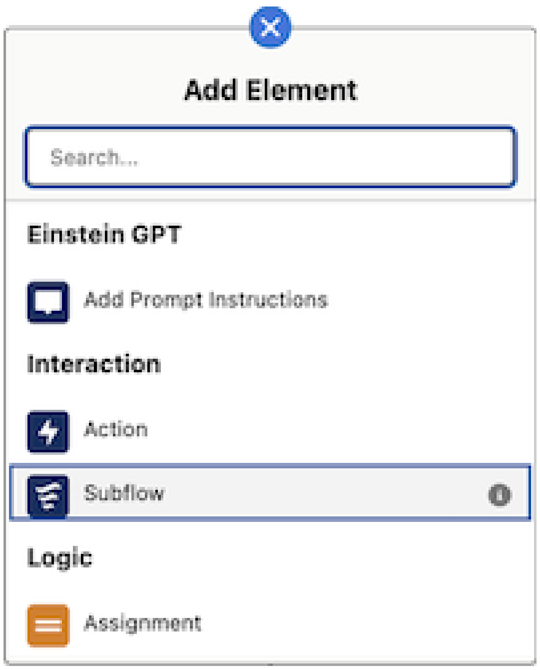
Video: Get to Know Einstein for Flow (Beta)

Launch Another Active Prompt Flow as a Subflow Within a Prompt Flow

You heard it right. The Subflow element is available for prompt flows. Now you can break your automation into building blocks and reduce the complexity of a prompt flow. To perform a common task, you can call another reusable prompt flow from within a prompt flow. Prompt flows can use the Subflow element to reference only other prompt flows.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

How: Create a template-triggered prompt flow. Select a prompt template type that triggers the flow and set the input data type. Add the Subflow element to the canvas. Search for and select the prompt flow to be referenced. Use values from the parent flow to set the inputs for the referenced prompt flow.



To use the outputs of the referenced flow later in the flow, either reference the output of the Subflow element or store them as manually assigned variables.

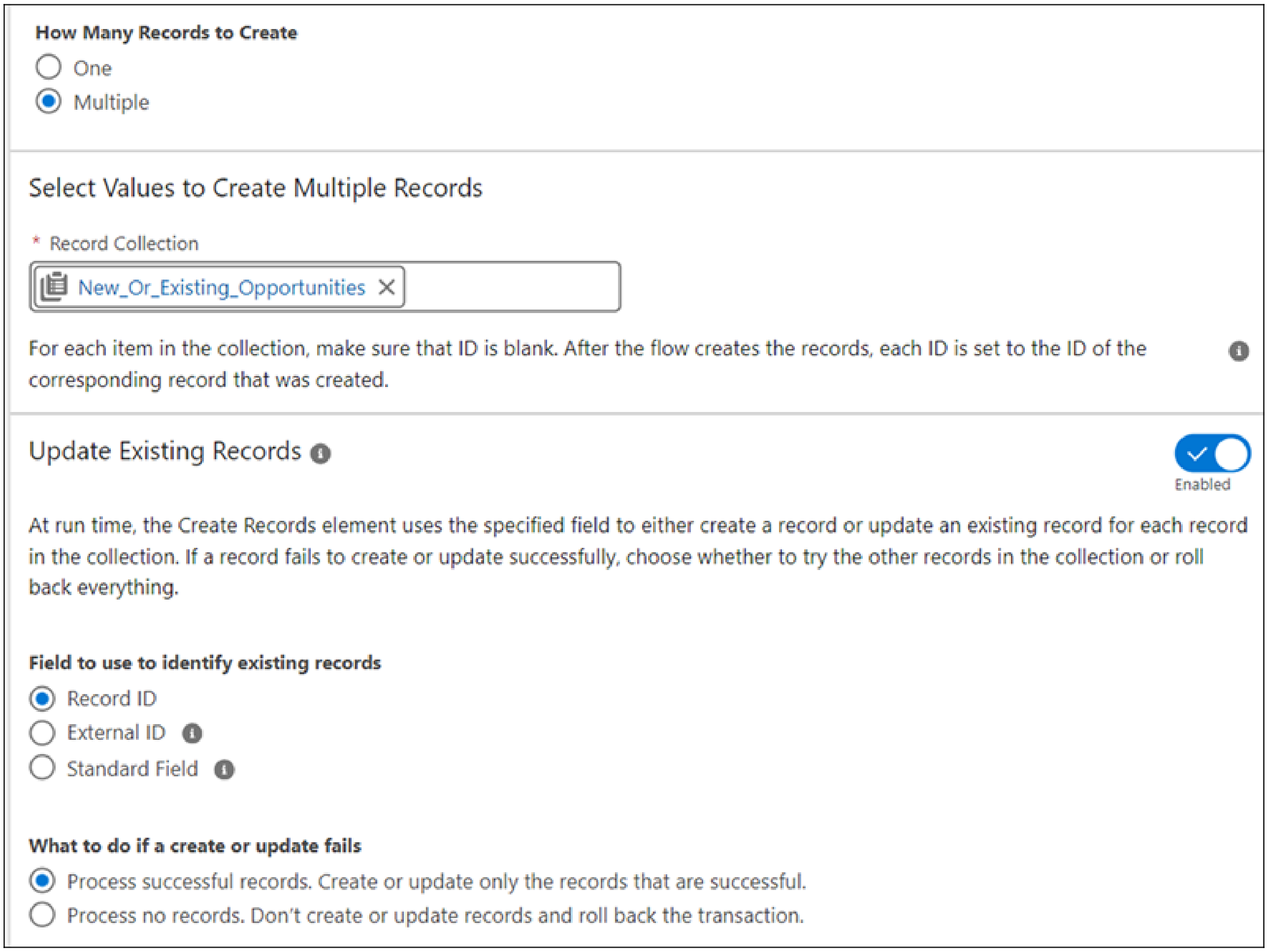
Create or Update Records Efficiently with the Create Records Element

In Flow Builder, you can now use the Create Records element to create or update records based on whether a specified field value exists in the database. The Create Records element makes the process of saving records easier and faster, as you no longer check separately for existing records. By merging create and update into one element, you configure and maintain the flow more easily while reducing potential errors from separate operations.

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

How: Imagine a sales manager who manages potential sales deals that are frequently updated with new information. For instance, a sales team receives periodic updates about client budgets and timelines that are reflected in Salesforce. The team can use the Create Records element to automatically decide whether to create a record or update an existing one.

From Flow Builder, add the Create Records element. For How Many Records to Create, click **Multiple** and select a record collection. Enable **Update Existing Records**. Then select the remaining options for identifying existing records and for processing the remaining records in case a record fails.



SEE ALSO:

Salesforce Help: Flow Element: Create Records (can be outdated or unavailable during release preview)

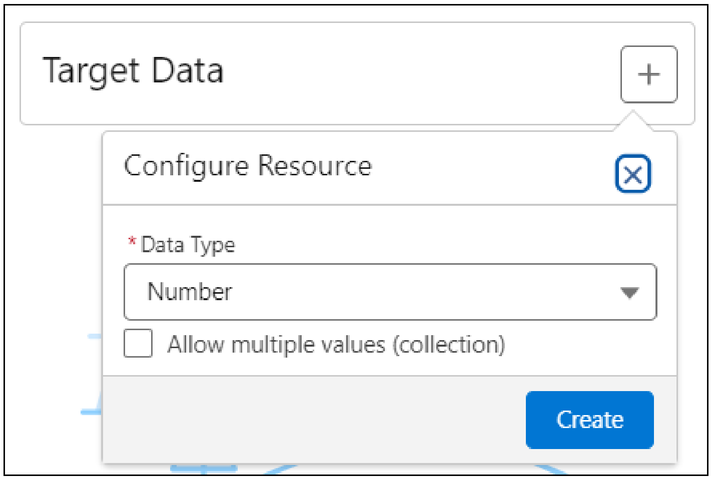
Transform Data into More Target Resource Types

With the Transform element, you can now set the target resource to more data types, such as Text, Numbers, Currency, Boolean, Date, and Date/Time. Previously, the Transform element's target resource only supported complex data types, such as Record or Apex-defined.

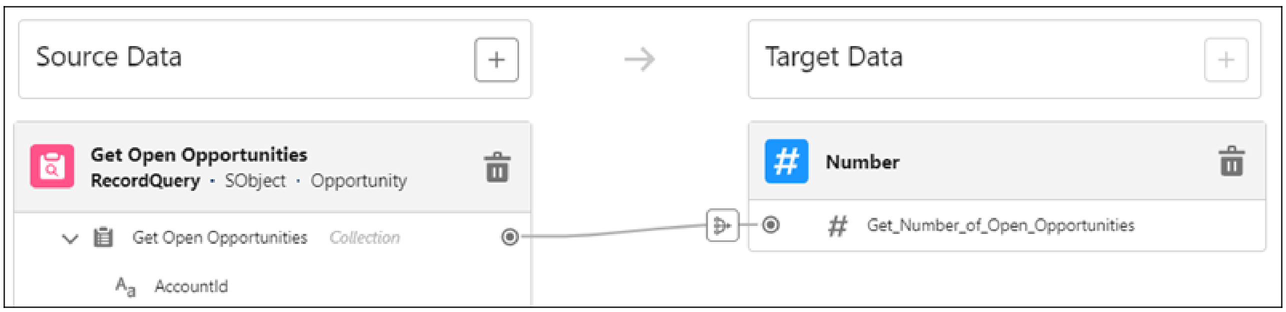
Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, Performance, and Developer editions.

How: Modify small or large datasets in a way that's easier to work with. For example, a sales manager wants to quickly see the total value of all open opportunities to forecast revenue. By using Flow Builder, you create a flow that retrieves the opportunities. The flow then stores the aggregated sum of the value of each of the opportunities in a number variable that you can reference later in the flow.

The flow executes the Get Records element to retrieve a collection of all open opportunities. Next, the Transform element's Source Data references the opportunity collection. The Transform element's resource for Target Data stores the transformed value as a Number data type.



The Transform element calculates the number of open opportunities and stores the target output in a number variable.



SEE ALSO:

Salesforce Help: Transform Data in a Flow (can be outdated or unavailable during release preview)

Flow Marketing Cloud Updates

View flow data directly on the Flow Builder canvas with on-canvas insights. Test and optimize customer journeys with the Path Experiment element. Create flows that are triggered by automation events such as SMS subscriptions. Associate a flow with a data graph.

IN THIS SECTION:

Visualize Flow Data with On-Canvas Insights

You can now view your flow's analytics right from the canvas. For example, you can view data on how many times a specific element ran, its average duration to execute, and how many errors it encountered. You can also access reports and create dashboards about an element's execution history. With on-canvas insights, you can make better informed decisions and optimize your flow within the context of the flow itself.

Test and Optimize Engagement with Path Experiments

In segment-triggered flows, with the new Path Experiment element you can randomly assign up to 10 paths to individuals going through your flow. For example, if you want to experiment with two different subscription renewal campaigns, you can create a path for each campaign, specify what percentage of your audience you want to send to each path. The Path Experiment element then automatically sends your audience down either path based on that percentage.

Automate Your Responses to Common Customer Actions with Out-of-the-Box Automation Event-Triggered Flows

Streamline your workflow for responding to common business events with automation event-triggered flows. Set up an automation that fires each time a customer submits a form on your website, subscribes to your emails, or subscribes to your SMS messages. For example, automatically send a welcome email with a discount code when a customer subscribes to your newsletter. For each out-of-the-box scenario, you can configure the automation that makes the most sense for your business in minutes. The automation event-triggered flow for form submissions replaces form-triggered flows.

Preserve References to Data Graph Values in Campaign Flows

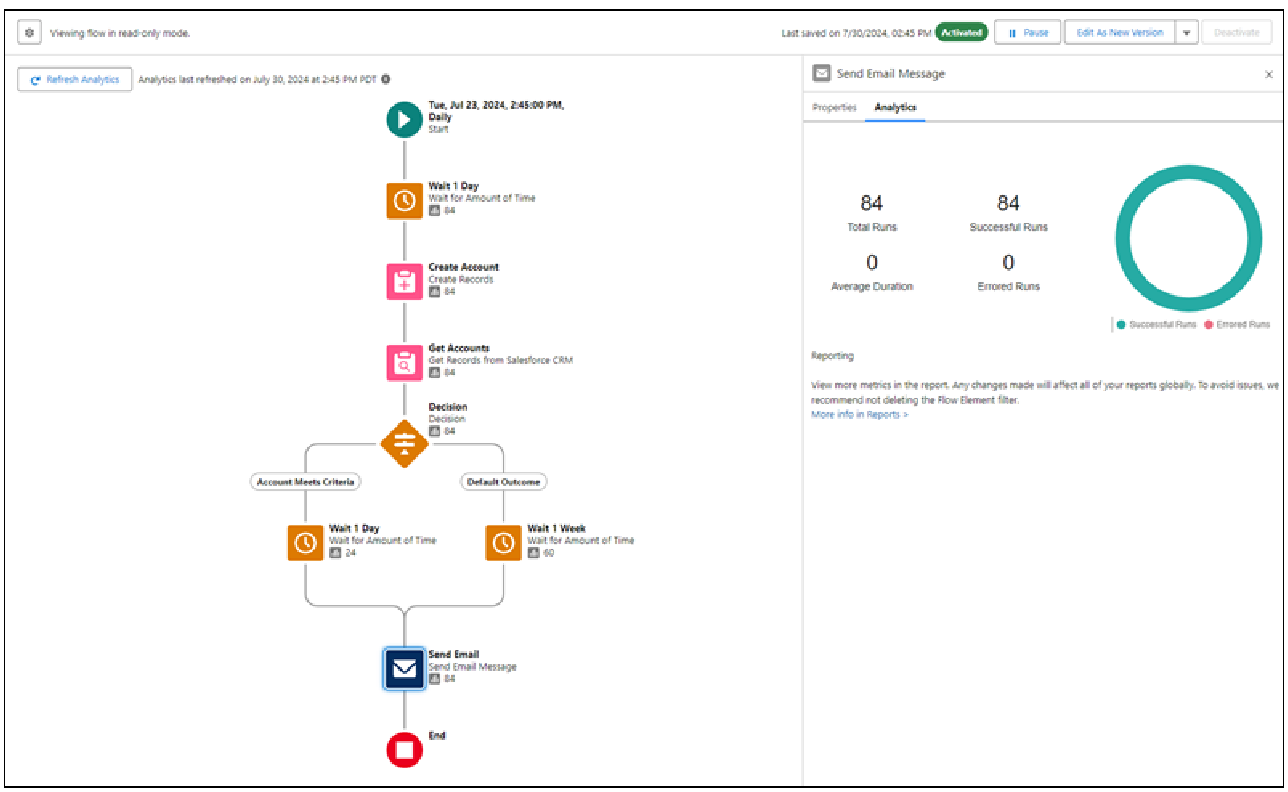
Associate a segment-triggered flow with a data graph to preserve any references to the data graph. When you create or edit a flow, Flow Builder stores the values of the data graph that you associate with the flow. If you change the data graph elsewhere in your org, Flow Builder maintains the stored values. Changing the default data graph for your org or updating a data graph referenced in Flow Builder won't break your flows.

Visualize Flow Data with On-Canvas Insights

You can now view your flow's analytics right from the canvas. For example, you can view data on how many times a specific element ran, its average duration to execute, and how many errors it encountered. You can also access reports and create dashboards about an element's execution history. With on-canvas insights, you can make better informed decisions and optimize your flow within the context of the flow itself.

Where: This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Advanced edition.

How: For Data Cloud-triggered, segment-triggered, and form-triggered flows, element run data shows directly on the flow canvas. To view more detailed analytics, open a specific element and then click on the Analytics tab in the element's panel. There, you can see how many times an element was run, how many times it succeeded, how many times it errored, and its average duration.



From the analytics tab, click **More info in Reports** to access more detailed reports on the element's run data. For certain elements, like Send Email actions, a successful run means only that the element ran successfully. A successful run doesn't necessarily indicate that the email was sent or delivered. To see more details about the results of a Send Email action or other type of message engagement, create a Data Cloud report using one of the Message Engagement DMOs, filtered by the flow element ID.

Note: To access reports, install the Flow Reports Analytics Package in Marketing Cloud Setup. On-canvas insights aren't available for form-triggered flows that were created prior to Winter '25.

On-canvas insights are available only when viewing the flow in read-only mode. Active and previously run flows open in read-only mode by default. To edit the flow and exit read-only mode, click **Edit as New Version** in the button bar or **Save as New Flow** in the dropdown.

SEE ALSO:

Salesforce Help: View On-Canvas Insights and Flow Reports (can be outdated or unavailable during release preview)

Salesforce Help: Data Cloud Reports and Dashboards (can be outdated or unavailable during release preview)

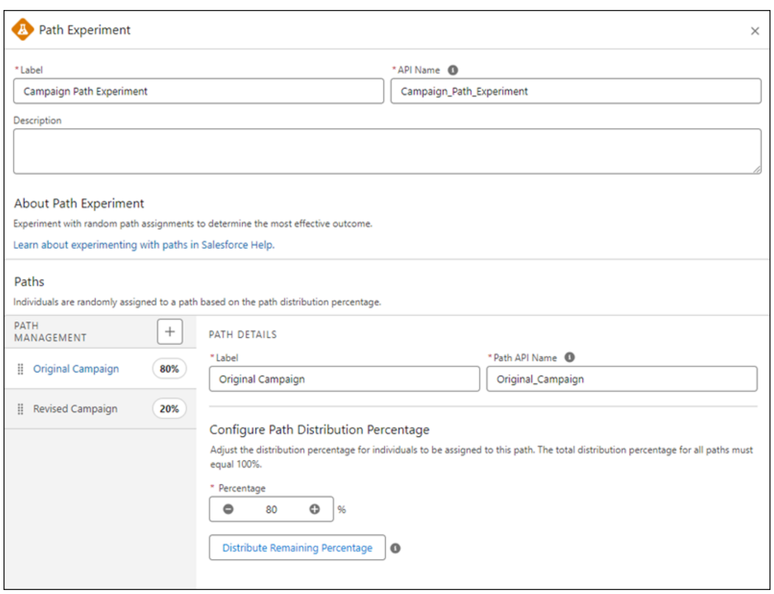
Test and Optimize Engagement with Path Experiments

In segment-triggered flows, with the new Path Experiment element you can randomly assign up to 10 paths to individuals going through your flow. For example, if you want to experiment with two different subscription renewal campaigns, you can create a path for each campaign, specify what percentage of your audience you want to send to each path. The Path Experiment element then automatically sends your audience down either path based on that percentage.

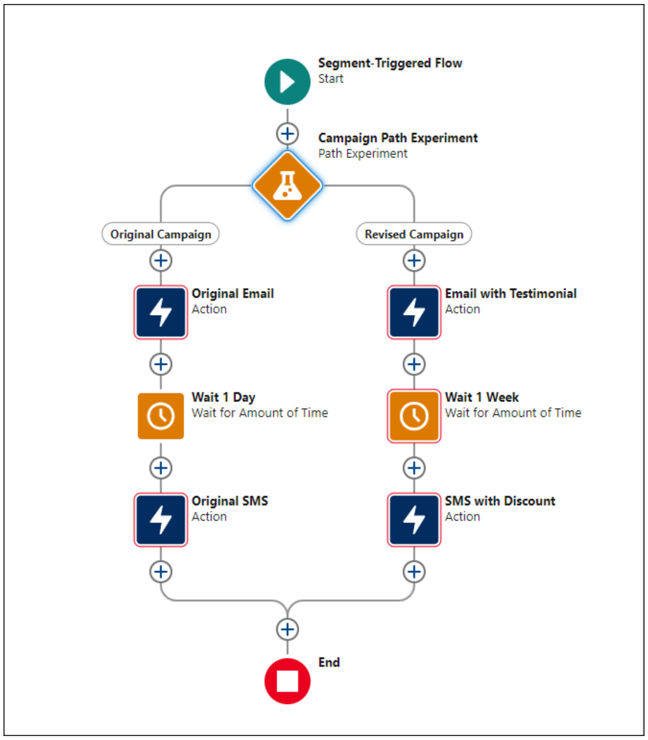
Where: This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Advanced edition.

Why: With the Path Experiment element, marketers can test different messing delivery, cadence, copy, and channel combinations, all in a single flow.

How: In Flow Builder, add the Path Experiment element to the canvas. In the Path Management section, you can add paths, remove paths, and assign the percentage of individuals to send down that path.



In this renewal campaign example, 80% of the audience is sent down the Original path, which sends an email asking users to renew. The path then waits 1 day and then sends a follow up SMS. Twenty percent of the audience is sent down the Revised path, which sends an email that includes a testimonial. The path waits 1 week before sending an SMS with a discount code.



SEE ALSO:

Salesforce Help: Flow Element: Path Experiment (can be outdated or unavailable during release preview)

Salesforce Help: Data Cloud Reports and Dashboards (can be outdated or unavailable during release preview)

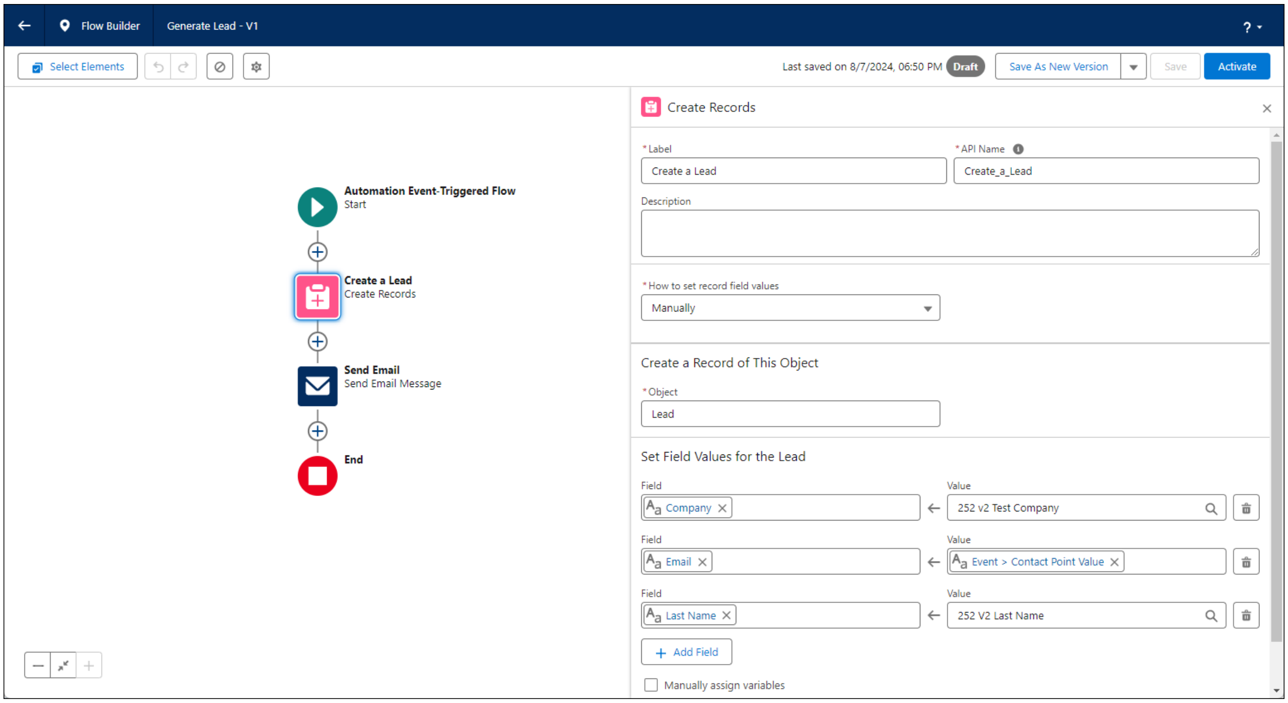
Automate Your Responses to Common Customer Actions with Out-of-the-Box Automation Event-Triggered Flows

Streamline your workflow for responding to common business events with automation event-triggered flows. Set up an automation that fires each time a customer submits a form on your website, subscribes to your emails, or subscribes to your SMS messages. For example, automatically send a welcome email with a discount code when a customer subscribes to your newsletter. For each out-of-the-box scenario, you can configure the automation that makes the most sense for your business in minutes. The automation event-triggered flow for form submissions replaces form-triggered flows.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth edition. Form submission automation-event triggered flows are also available in Lightning Experience for Salesforce Starter edition.

Who: To create automation event-triggered flows, users need the Manage Flows or Create or Modify Automation Event-Triggered Flows permissions.

How: From the Flows or Campaigns tab, create an automation event-triggered flow. In the Start node, select an Event from the Event Library such as Email Subscription. Configure the event. Save and run the flow. You can reference the event outputs such as the concent status in the new $Event flow variable.



Preserve References to Data Graph Values in Campaign Flows

Associate a segment-triggered flow with a data graph to preserve any references to the data graph. When you create or edit a flow, Flow Builder stores the values of the data graph that you associate with the flow. If you change the data graph elsewhere in your org, Flow Builder maintains the stored values. Changing the default data graph for your org or updating a data graph referenced in Flow Builder won't break your flows.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth edition.

Why: You can reference data graph attributes such as segment membership and calculated insights to personalize your flows without worrying about breaking your flows when the data graph changes.

How: In Flow Builder, create a segment-triggered flow. In the Set flow details window, select a data graph to associate with the flow.

Flow Actions

Expand your email reach up to 150 recipients and use CC, BCC options in Send Email Action.

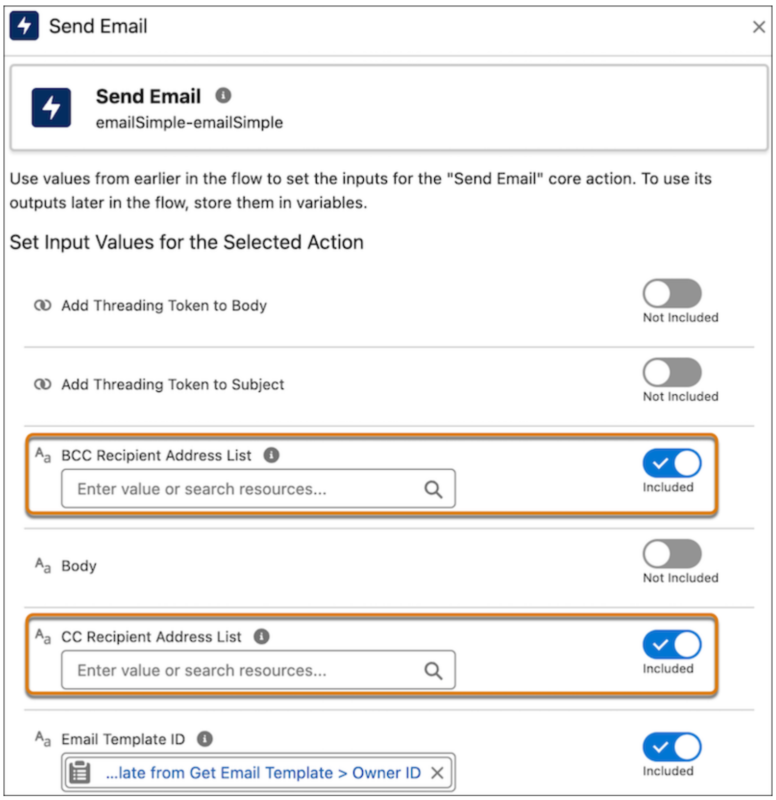
IN THIS SECTION:

Expand Your Email Reach by Using CC and BCC Options in Send Email Action

The maximum total number of recipient email addresses is increased from 5 to 150. You can now add CC and BCC recipients to emails by using the Send Email Action in Flow Builder. Any address entered in the CC field receives a copy of the email, and those in the BCC field also receive a copy, but their email addresses are hidden from all recipients.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: In Flow Builder, in the element menu, search for Send Email, and then select **Send Email**. When you set input values, turn on **BCC Recipient Address List** and **CC Recipient Address List**. If you want to add recipients' email addresses, enter them as a comma-delimited list or use a merge field that returns text in this format.



SEE ALSO:

Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)

Flow Testing and Debugging

When debugging, you can now view the maximum number of scheduled flows that your org can run per day. Test and troubleshoot your template-triggered prompt flows with the debug tool.

IN THIS SECTION:

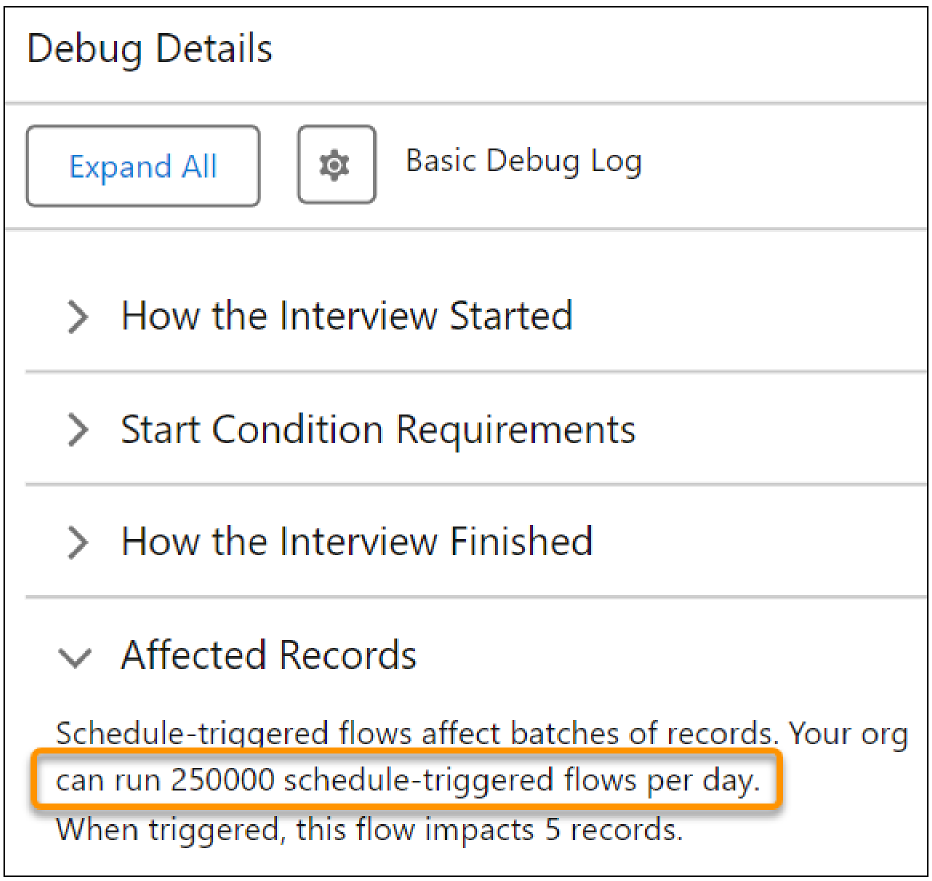
Test and Troubleshoot Your Template-Triggered Prompt Flows with the Debug Tool
Now you can test your flow's behavior and troubleshoot issues with the template-triggered prompt flow debug tool in Flow Builder. When you click Debug on a template-triggered prompt flow, you can provide input values for the flow to test for specific conditions.

See Scheduled Flows Limit in Debug Details

Now, you can view the maximum number of scheduled flows that your org can run daily, helping you stay under the limits. Previously, the panel showed only the ID of the record on which the debug operation ran and the number of records impacted. This additional information helps you plan and execute more efficiently, avoiding the frustration of halted flows.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

Why: Understanding your daily limits upfront supports better resource management and operational planning. For instance, if you're managing end-of-month reporting flows, you can adjust schedules to stay within limits, ensuring smooth and uninterrupted flows. Seeing the scheduled flows limit can be transformative for large organizations where flow limits can quickly become a bottleneck.



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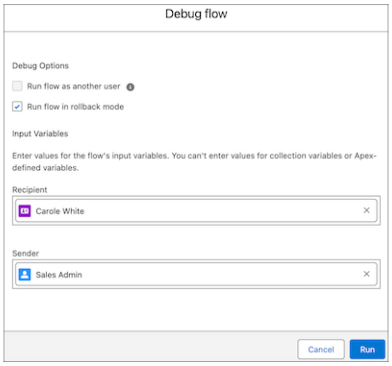
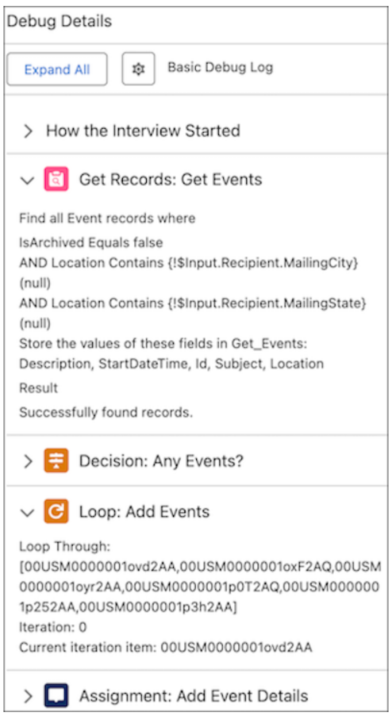
Now you can test your flow's behavior and troubleshoot issues with the template-triggered prompt flow debug tool in Flow Builder. When you click Debug on a template-triggered prompt flow, you can provide input values for the flow to test for specific conditions.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

How: Open a template-triggered prompt flow in Flow Builder and then click **Debug**. Set the debug options and input variables, and then click **Run**.





SEE ALSO:

Salesforce Help: Debug a Flow in Flow Builder (can be outdated or unavailable during release preview)

Flow Runtime

Versioned updates are available for flows and processes that are configured to run on API version 62.0.

IN THIS SECTION:

Flow and Process Run-Time Changes in API Version 62.0

These updates affect only flows and processes that are configured to run on API version 62.0 or later.

Flow and Process Run-Time Changes in API Version 62.0

These updates affect only flows and processes that are configured to run on API version 62.0 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.

Enforce Sharing Rules when Apex Launches a Flow

This versioned update enforces sharing rules when an Apex class that's declared using the with sharing keyword launches an autolaunched flow that runs in the default context. To enforce sharing, the Apex class must be declared using the with sharing keyword.

Previously, the flow ran in system context without sharing even when an Apex class was declared using the with sharing keyword launched the flow.

With this versioned update, 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.

This versioned update restricts data access 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.

Flow Extensions

Create personalized recommendations with Einstein Next Best Action and Experience Cloud.

IN THIS SECTION:

Use Einstein Next Best Action to build AI-powered insights for a wide array of use cases. You can use point-and-click and programmatic functionality to build applications that predict anything surfaced through Salesforce. In Experience Cloud sites, you can add the Einstein Next Best Action component in your Experience Cloud page to set up data that uses flows, strategies, and the Recommendation object to create personalized offers and actions for your users using business logic and predictive models to refine those recommendations.

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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.

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

IN THIS SECTION:

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 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.

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.

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 Winter '25.

Enforce Sharing Rules When Apex Launches a Flow (Release Update)

This update was canceled. Enforce sharing rules when an Apex class that's declared by using the with sharing keyword launches an autolaunched flow that runs in the default context. To enforce the sharing rules, run the flow or Apex on API version 62.0 or later.

When: This update was canceled and no longer appears in the Release Update page in Setup.

SEE ALSO:

Release Updates

Flow and Process Run-Time Changes in API Version 62.0

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

After Prevent Guest User from Editing or Deleting Approval Requests is enabled, guest users can approve or reject an approval request. Guest users are no longer able to edit, reassign, or delete approval requests. This update was first available in Winter '23 and enforcement was scheduled for Summer '23. We then postponed the enforcement date to Spring '24 and postponed again to Winter '25.

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

When: Salesforce enforces this update in Winter '25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: To apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Prevent Guest User from Editing or Deleting Approval Requests, follow the testing and activation steps.

SEE ALSO:

Release Updates

Restrict User Access to Run Flows (Release Update)

With this update enabled, Salesforce restricts a user's ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites org permission, which gave all users in the org access to run any flow. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows. This update was first made available in Winter '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement date to Winter '26.

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 '26. 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 permission set. 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 Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce is scheduled to re-enforce this update in Winter '25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: This update resolves an issue where flows don't respect the public access modifiers for legacy Apex actions. The issue affects only legacy Apex actions that reference Apex classes installed from managed packages.

Legacy Apex actions were formerly known as Apex plug-ins. When you define an Apex class that implements the `Process.Plugin` interface in your org, it's available in Flow Builder as a legacy Apex action.

Note: For new Apex integrations, we recommend using the `InvocableMethod` annotation instead of the `Process.Plugin` interface. This update doesn't affect invocable Apex methods.

With this update enabled:

- Flows fail when they execute public legacy Apex actions.

- Public legacy Apex actions aren't available in Flow Builder.
- Global legacy Apex actions with public `describe` or `invoke`methods 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 that 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, these action types don't support partial save functionality.

- Cancel Fulfillment Order
- Cancellation Orders
- Capture Funds
- Content Workspaces
- Create Fulfillment Order
- Create Invoice from Fulfillment Order
- Create Service Report
- External Services
- Generate Work Orders
- Invocable Apex
- Skills-based Routing
- Submit Digital Form Response

Partial save can cause an external callout to occur multiple times, and external callouts can't be rolled back. Repeated external callouts can occur only when a flow is launched from a process or invoked from REST API and that flow makes multiple attempts to execute the action that's making the external callouts.

Because partial save can make multiple attempts to execute an action, the transaction can take longer than expected. This can cause your org to reach some limits sooner than expected.

How:

From Setup, enter `Critical Updates` in the Quick Find box, and select **Critical Updates**. For Enable Partial Save for Invocable Actions, click **Activate**.

Review any API integrations that use invocable actions to ensure they properly accommodate partial-save behavior.

SEE ALSO:

Release Updates

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.

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.

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 Winter '25.

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

When: Salesforce enforces this update in Winter '25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

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.

Flow Orchestration

View orchestration details in the Automation Lightning app. Manage steps in an orchestration stage. Customize the Flow Orchestration Work Guide component.

IN THIS SECTION:

Customize the Flow Orchestration Work Guide Component

Control how the Flow Orchestration Work Guide component appears to users with assigned work. You can configure the component to work differently on each record page that you add it to. The changes that you make don't affect how the component looks in Lightning App Builder. Provide your title for the component, and set a default sort order for orchestration work items. You can set the visibility of the orchestration run name, orchestration stage name, and orchestration step name for all orchestration work items displayed in the component. You can also hide the component for assigned users who have no work items.

Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

View Orchestration Details in the Automation Lightning App

You can see all your orchestrations and manage their associated orchestration runs from the new Orchestrations tab in the Automation Lightning app. To see associated orchestration runs, select the Runs tab. To see details about an orchestration run, select it in the Orchestration Runs list view. View a selected orchestration run's stages, steps, and log items, and manage in-progress, suspended, or failed orchestration runs. Previously, you viewed orchestrations and managed orchestration runs from Setup.

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

How: To view the Automation Lightning app, in Setup, under Process Automation Settings, select **Enable the Automation Lightning App**.

Assign the new View Orchestration in Automation App user permission to users who need view-only access to orchestrations in the Automation Lightning app. Or assign the new Orchestration Process Manager permission set.

Assign either the Manage Orchestration Runs or the Manage Orchestration Runs and Work Items user permission and the View Orchestration in Automation App user permission to users who manage orchestration runs.

Manage Steps in an Orchestration Stage

Want to reuse a step in a stage or view the steps in a stage in a different order? You can copy a step and paste it into the same stage or another stage within the orchestration. To rearrange a step, drag the step within the stage. Dragging steps within a stage changes their order of appearance, but it doesn't affect the order that the steps run in. Also, are you tired of opening a step's Properties panel to view its description? If a step has a description, hover over the description icon to see it without editing the step.

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

SEE ALSO:

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

Customize the Flow Orchestration Work Guide Component

Control how the Flow Orchestration Work Guide component appears to users with assigned work. You can configure the component to work differently on each record page that you add it to. The changes that you make don't affect how the component looks in Lightning App Builder. Provide your title for the component, and set a default sort order for orchestration work items. You can set the visibility of the orchestration run name, orchestration stage name, and orchestration step name for all orchestration work items displayed in the component. You can also hide the component for assigned users who have no work items.

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

Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

Where: These changes apply to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Easier Access to Debugging a Failed Orchestration

Your orchestration run failed within the past 14 days. If you have the Manage Orchestration Runs or Manage Orchestration Runs and Work permission, debug it from the Orchestration Run list view.

Orchestration Run Log Object

Want to add custom fields to the Orchestration Run Log object? View and customize the Orchestration Log object in Object Manager.

Updates to Orchestration Resource Pickers

When selecting step resources for conditions in an orchestration, select a stage to access its step resources. Or search for any orchestration resource and select it directly in the updated resource menu.

Updated Orchestration Packaging Error Messages

Having trouble understanding what went wrong when you tried to package an orchestration or install a packaged orchestration? More detailed error messages can help you troubleshoot issues more easily.

New Quick Menu on Orchestration Run Details Page

Manage an orchestration run from its Details page. Cancel, debug, or suspend an orchestration run. Cancel, debug, or resume a suspended orchestration run. Debug or resume an orchestration run that failed within the prior 14 days due to a step error.

New Debug Error Message

We added a debug message for when a background step is set to run as a specified user and that user doesn't have access to run the step's associated flow.

Completed By Field in the Orchestration Run Log

When someone manually publishes a flow orchestration event it can cause an orchestration step to be completed. When it does, the Completed By field of the associated orchestration run log record is now set to the user who manually published the event.

Flows Called by Orchestrations Can Update Orchestration Records

All flows called by an orchestration step can update orchestration run, orchestration stage run, orchestration step run, orchestration work item, and orchestration run log records.

Updates to Automation Credit Usage

We recommend that you use Apex tests to identify issues with orchestrations before you introduce them in production. Now it doesn't cost automation credits to run Apex test-triggered orchestrations.

MuleSoft Composer for Salesforce

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.

Salesforce for Slack Integrations

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

See the release notes for the latest updates: Salesforce for Slack Integrations Release Notes.

Security, Identity, and Privacy

Migrate your local connected apps to local external client apps. Monitor vital data from custom objects by creating custom metrics. Legacy My Domain URLs are no longer redirected in most non-production orgs. And Salesforce now supports TLS 1.3 for outbound HTTPS callouts from the Salesforce Platform.

IN THIS SECTION:

Salesforce Backup

You can now choose specific versions of files from a backup and restore them with the Salesforce Backup managed package.

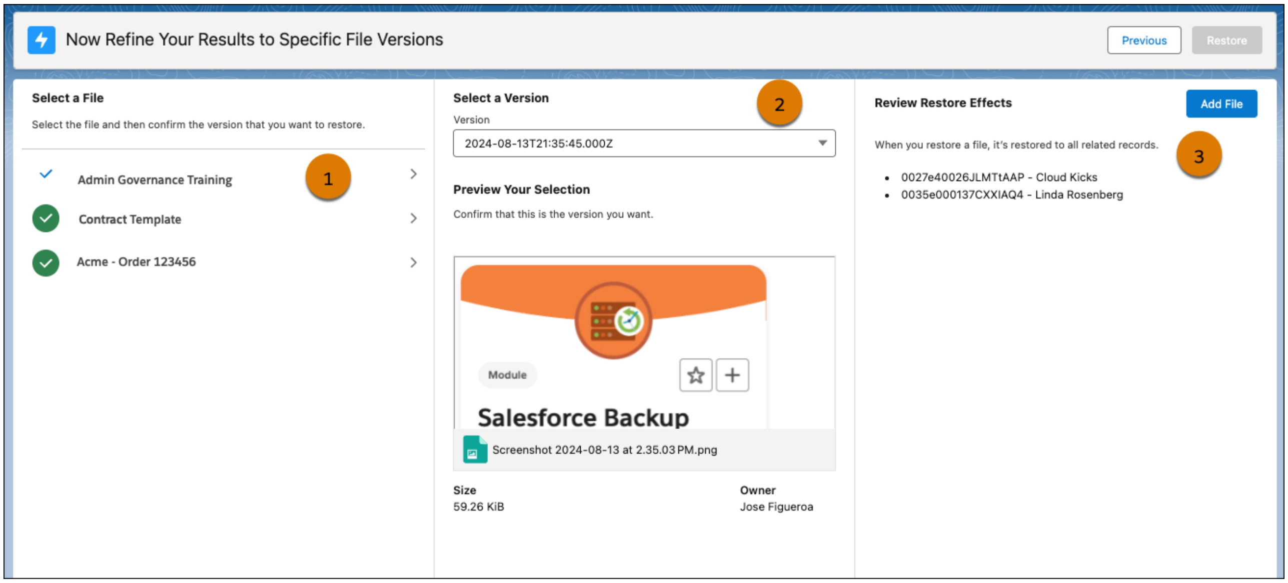
IN THIS SECTION:

Restore Files from a Backup

You can now restore files without manually exporting and then importing them. In version 2.25 or later of the Salesforce Backup managed package, restore files directly from backups without leaving the app. Just like restoring records, set your filters to quickly focus on the right batch of files. And when backups contain multiple versions of a file, you can select a specific version to restore.

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

How: On the Restore & Export tab, in the Data Category field, select **Restore Files**. Use filters to narrow your search for the files in your back-ups and select the specific files that you want to restore. For each of your chosen files (1), select the version you want to add to your job (2). Files are restored on all records related to that file. You can review the list of each file's related records before you start your restore job (3).



SEE ALSO:

Salesforce Help: Restore Data from a Backup (can be outdated or unavailable during release preview)

Domains

Update references to your previous non-enhanced My Domain URLs, which are no longer redirected in most non-production orgs. And find solutions to common custom domain issues without leaving Setup.

IN THIS SECTION:

Update References to Your Previous Salesforce Domains

Prevent disruption for customers and end users who access your orgs created in June 2022 or earlier. Enhanced domains changed the URLs that Salesforce served for those orgs. In Winter '25, some of those legacy URLs are no longer redirected in most non-production orgs. To identify requests to the impacted URLs, use My Domain redirection logging. Then update references to those legacy URLs in Salesforce, such as references in email templates or knowledge articles, and outside Salesforce, such as references in third-party integrations and links on a website.

Disable Redirections for Legacy Hostnames

After you update references to your legacy Salesforce domains in production, disable redirections for the related hostnames by disabling the new My Domain setting, Redirect legacy (non-enhanced) My Domain hostnames. This setting isn't available in non-production orgs except demo orgs. Previously, to disable redirections for legacy hostnames, you disabled redirections for all previous My Domain hostnames.

Get Help with Custom Domains Directly in Setup

To help you troubleshoot common custom domain issues, now you can find solutions on the Domain Detail page of a custom domain. Browse or search for information on custom domain setup, maintenance tasks, and common configuration issues without leaving Setup. Each result provides high-level guidance with links to Salesforce Help for additional details and instructions.

Update References to Your Previous Salesforce Domains

Prevent disruption for customers and end users who access your orgs created in June 2022 or earlier. Enhanced domains changed the URLs that Salesforce served for those orgs. In Winter '25, some of those legacy URLs are no longer redirected in most non-production orgs. To identify requests to the impacted URLs, use My Domain redirection logging. Then update references to those legacy URLs in Salesforce, such as references in email templates or knowledge articles, and outside Salesforce, such as references in third-party integrations and links on a website.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: Redirections for the legacy URLs stop in Winter '25 in sandboxes, Developer Edition orgs, patch orgs, scratch orgs, and Trailhead Playgrounds.

In production orgs and demo orgs, redirections for the legacy URLs stop in Spring '25.

SEE ALSO:

Salesforce Help: Prepare for the End of Redirections for Non-Enhanced Domains (can be outdated or unavailable during release preview)

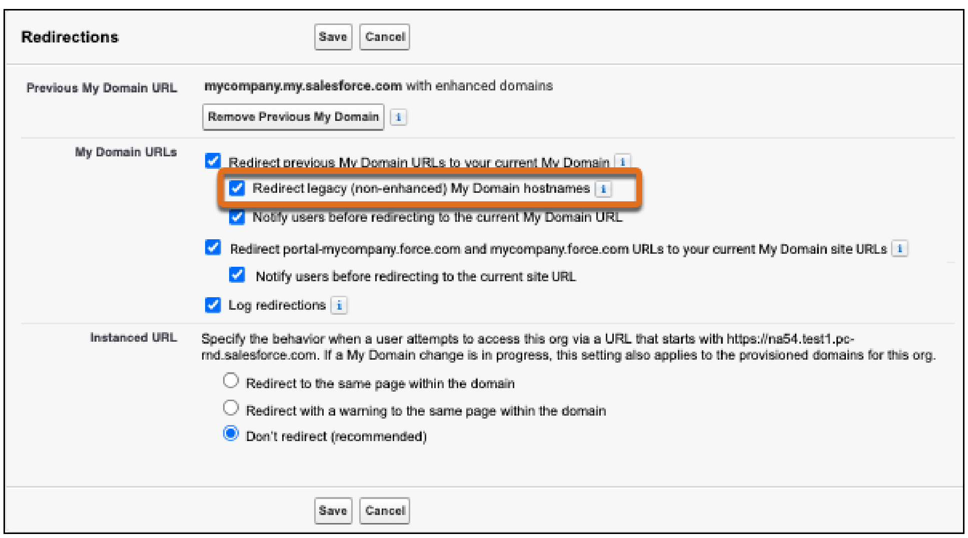
Identify Blocked Redirections for Legacy Hostnames

Disable Redirections for Legacy Hostnames

After you update references to your legacy Salesforce domains in production, disable redirections for the related hostnames by disabling the new My Domain setting, Redirect legacy (non-enhanced) My Domain hostnames. This setting isn't available in non-production orgs except demo orgs. Previously, to disable redirections for legacy hostnames, you disabled redirections for all previous My Domain hostnames.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: From Setup, in the Quick Find box, enter `My Domain`, and then select **My Domain**. In the Redirections section, click **Edit**. Then disable **Redirect legacy (non-enhanced) My Domain hostnames and save your changes**.



When previous My Domain URLs are redirected in a qualifying org, this setting is enabled by default.

SEE ALSO:

Salesforce Help: Prepare for the End of Redirections for Non-Enhanced Domains (can be outdated or unavailable during release preview)

Salesforce Help: Manage My Domain Redirections (can be outdated or unavailable during release preview)

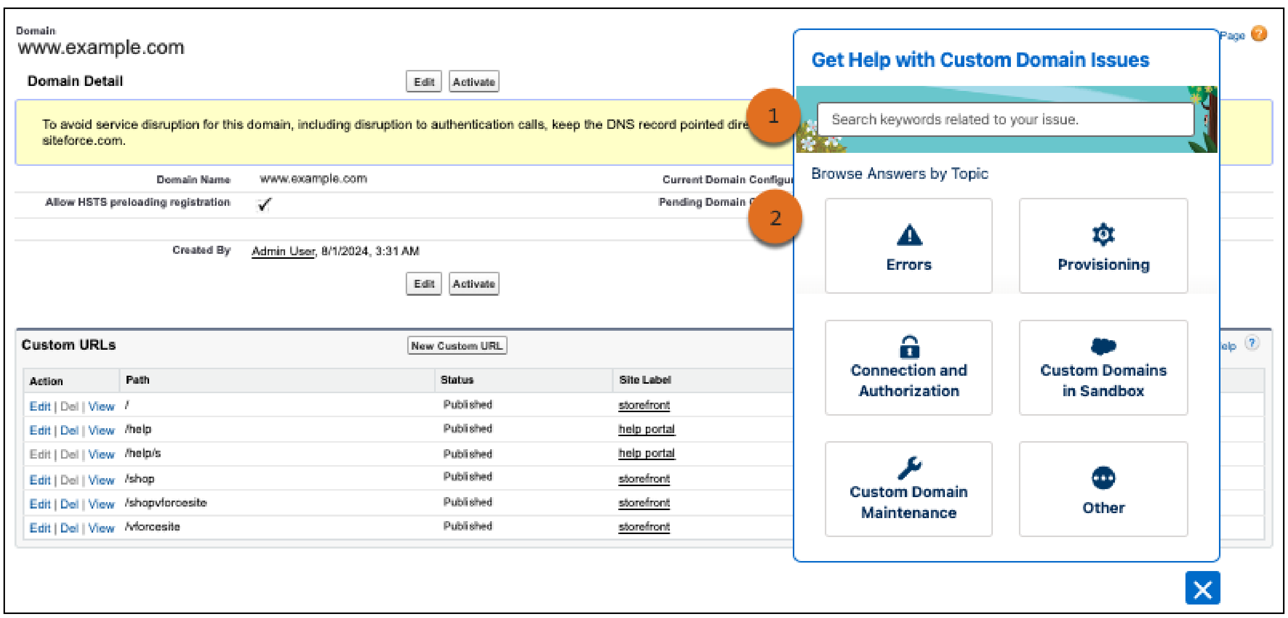
Update References to Your Previous Salesforce Domains

Get Help with Custom Domains Directly in Setup

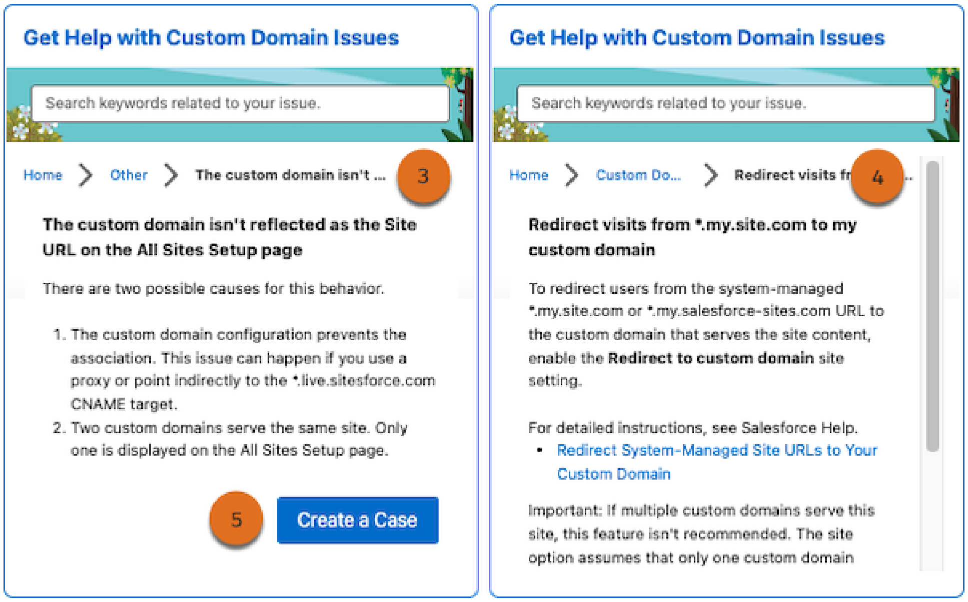
To help you troubleshoot common custom domain issues, now you can find solutions on the Domain Detail page of a custom domain. Browse or search for information on custom domain setup, maintenance tasks, and common configuration issues without leaving Setup. Each result provides high-level guidance with links to Salesforce Help for additional details and instructions.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, and Unlimited editions. Custom domains are also available in Professional Edition with Marketing Cloud Account Engagement (Pardot).

How: From Setup, in the Quick Find box, enter `Domains`, and then select **Domains**. Click the domain name of a custom domain. Then, on the Domain Detail page, click **Get Help with Custom Domain Issues**. In the resulting window, you can search by keyword (1) or browse by category (2).



Here are examples of an answer to a common issue (3) and instructions on how to set up a feature (4).



If you still need help after you review a result, click **Create a Case** (5) to contact Salesforce Customer Support.

SEE ALSO:

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

Identity and Access Management

Migrate your local connected apps to local external client apps. View OAuth activity and revoke access with the External Client Apps OAuth Usage page. Create an Apex handler to customize identity verification experiences for external users. Configure token exchange handlers in Setup. And decide which identifier to use for log in with headless passwordless login.

IN THIS SECTION:

The Multi-Factor Authentication Assistant in Setup Is No Longer Needed and Discontinued

As previously communicated, the contractual requirement to use multi-factor authentication (MFA) for Salesforce products is in full effect as of February 1, 2022. To help customers satisfy this requirement, MFA is now automatically enabled in new and existing production orgs. As a result of these changes, the Multi-Factor Authentication Assistant—a tool that was provided to help admins implement and deploy MFA—has served its purpose and is no longer available. In its place, check out the new MFA learning map in Salesforce Help for step-by-step guidance on supporting MFA for your users.

Migrate to a Local External Client App from Your Local Connected App

Safeguard your org from security risks by migrating your local connected apps to local external client apps. External client apps offer many of the same features as connected apps but with full metadata compliance. The automated migration process creates an external client app that takes the place of your existing connected app. After migration, connected apps remain as a read-only version in App Manager.

Manage OAuth Usage for External Client Apps

View all external client apps with active access or refresh tokens for your org. Revoke individual tokens, all tokens for a user of a specific external client app, or all tokens of a specific external client app.

Create an External Client App from App Manager

When you begin creating a connected app in App Manager, you have the option to create an external client app instead. External client apps offer a more secure way to connect third-party applications with your Salesforce data. They're designed for second-generation (2GP) packaging and source-driven development, making them easier to manage and distribute.

Assign and Package OAuth Custom Scopes for External Client Apps

Add custom scopes to your local external client apps through polices or settings. Custom scopes are packageable with external client apps, so developers can set custom scopes as package defaults to be distributed.

Configure the Start URL for External Client Apps

Admins can set the start URL where the user is directed after they log in for an external client app. The Polices tab includes an OAuth-specific start URL field and a custom start URL field. Some OAuth flows require that an external client app includes a start URL. External client apps must include a start URL before they show up in the App Manager.

Show an External Client App in App Launcher

Add your external client app to App Launcher by marking it as visible in the App Menu page in Setup.

Delivered Idea: Customize User Experience and Functionality for Authentication Providers

For more flexibility with single sign-on (SSO) flows, add functionality to authentication providers by creating your own URL parameter allowlist. For example, to dynamically pass user language preferences from an Experience Cloud site login page to a provider's login page, use the `ui_locales` parameter. When you initialize the authentication provider by invoking one of its client configuration URLs, such as the SSO initialization URL, dynamically add this parameter to the client configuration URL at runtime. Salesforce's authentication provider framework generates an authorization URL where the user is redirected to log in to the provider. The parameter gets forwarded to the provider as part of the authorization URL so that the provider knows the user's language preference. We delivered this feature thanks to your ideas on IdeaExchange.

Customize SMS One-Time Password Delivery for Experience Cloud Sites (Generally Available)

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. This feature, now generally available, includes some performance enhancements and bug fixes since the last release.

Forced Login Is Permanently Disabled

For improved security, 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 breaks implementations and third-party integrations that use forced login via a URL, as well as direct login (autologin) links. To avoid service disruptions, update integrations that use forced login.

Forgot Password Invalid Username Error Message Was Changed

To improve the forgot password experience, we changed the error message that's displayed when you or your users enter an invalid username. The new message clarifies that a user's Salesforce username is in an email address format but isn't required to be a functioning email address. Previously, the message implied that a user's username is the same as their email address, which is true for some users but not for all. For orgs, this change applies to the forgot password experience for `login.salesforce.com` and My Domain login pages. For Experience Cloud sites, this change applies to the Default and Experience Builder pages for Forgot Password.

Make the Most of Enhancements for the Headless Registration Flow

The headless registration flow has some updates that you don't want to miss. You can now set up the flow by using the external client apps framework, a new and improved generation of connected apps. To make it easier to develop a headless registration Apex handler, we updated the autogenerated handler with methods for handling contacts and accounts.

Get More Flexibility with Headless Identity Flows

Say goodbye to access token limitations for headless identity flows. For flows where you require an access token in your initial request to Salesforce headless identity endpoints, you can now send a JSON Web Token (JWT)-based access token in the Authorization header. Previously, Salesforce accepted only opaque tokens.

Be an Early Adopter of a Headless Identity Draft Standard

There are some exciting new developments in the OAuth 2.0 world, and with Salesforce headless identity, you can stay at the forefront of industry changes. Set up headless username-password login, passwordless login, and registration flows that conform to the OAuth 2.0 for First-Party Applications draft standard.

Revoke Individual JWT-Based Access Tokens

For more precise control over who can access Salesforce data, revoke JSON Web Token (JWT)-based access tokens for an individual user. Previously, the only option was to revoke all tokens in your org simultaneously—a last-resort security measure that ended all related user sessions. Now you can manage security while minimizing the impact to your users. This feature is supported for guest user and named user JWT-based access tokens.

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. We enforced it for sandboxes in Summer '24, but we postponed the enforcement date for production instances to Spring '25.

Manage Token Exchange Handlers with Ease

No more wrestling with metadata development tools just to set up an OAuth token exchange handler. With a new, user-friendly UI, configuring token exchange handlers is easier than ever. From the Token Exchange Handlers page in Setup, enable apps to use with your handler, manage your enabled apps, and edit your handler and app settings.

Give Users More Ways to Log In

Get creative with headless passwordless login. With headless user discovery, develop a way for your users to log in with any identifier that you want. For example, when users come to a shopping app, prompt them to log in with their order number. Salesforce finds the user associated with the order number and sends a one-time password (OTP) to their verified email address or phone number.

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.

API Error Response for Refresh Token Flow Was Changed

To accurately reflect the error that occurs when an app tries to send simultaneous, identical token requests during the refresh token flow, we updated the API error response. Previously, this error was accurately described in the Login History with the Status **Failed: Token request is already being processed**, but the API error response didn't match. Instead, it indicated that the error was due to an expired authorization code. Now, the error is consistent with the Login History.

Verify SAML Integrations (Release Update)

Salesforce is upgrading its SAML framework as part of regular ongoing maintenance. This maintenance update improves Salesforce's security posture, and as a result, improves your security posture. This update can impact integrations that use SAML, including single sign-on (SSO) and single logout. This update is visible starting in Winter '25, and Salesforce enforces this update in Spring '25. To avoid potential service interruptions, test your SAML integrations as soon as Spring '25 sandboxes become available.

Salesforce Authenticator Users Are Automatically Guided to a Workaround if Push Notifications Time Out

If users have trouble getting push notifications when using Salesforce Authenticator to verify their identity, it's easier than ever to get back on track. If a user can't approve a request sent via a push notification within 30 seconds, we now automatically prompt them to enter a six-digit time-based one-time passcode (TOTP) that's provided in the Salesforce Authenticator app. Previously, if the request timed out after 90 seconds, users received a timeout error with no clear instructions for a workaround.

The Multi-Factor Authentication Assistant in Setup Is No Longer Needed and Discontinued

As previously communicated, the contractual requirement to use multi-factor authentication (MFA) for Salesforce products is in full effect as of February 1, 2022. To help customers satisfy this requirement, MFA is now automatically enabled in new and existing production orgs. As a result of these changes, the Multi-Factor Authentication Assistant—a tool that was provided to help admins implement and deploy MFA—has served its purpose and is no longer available. In its place, check out the new MFA learning map in Salesforce Help for step-by-step guidance on supporting MFA for your users.

Where: This change applies to Lightning Experience.

How: See the Multi-Factor Authentication learning map in Salesforce Help to explore your options for managing MFA verification methods and helping users if they experience MFA access issues. The learning map is available starting September 6, 2024.

Migrate to a Local External Client App from Your Local Connected App

Safeguard your org from security risks by migrating your local connected apps to local external client apps. External client apps offer many of the same features as connected apps but with full metadata compliance. The automated migration process creates an external client app that takes the place of your existing connected app. After migration, connected apps remain as a read-only version in App Manager.

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

How: From the App Manager in Setup, open the connected app and click **Migrate to External Client App**. The automated process creates an external client app.

SEE ALSO:

Salesforce Help: Connected App to External Client App Migration (can be outdated or unavailable during release preview)

Manage OAuth Usage for External Client Apps

View all external client apps with active access or refresh tokens for your org. Revoke individual tokens, all tokens for a user of a specific external client app, or all tokens of a specific external client app.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: External client apps are turned off by default. To enable external client apps in your org, from Setup, in the Quick Find box, enter `External Client Apps`, and then select **Settings**. Select **Opt in to External Client Apps**.

To manage OAuth usage, in Setup, open the External Client App Usage page. Revoke individual tokens in the table or revoke multiple tokens at the same time by using bulk revoke. To revoke tokens for a specific user of a particular external client app, open the External Client App Usage by User page.

SEE ALSO:

Salesforce Help: Manage Current OAuth External Client App Usage (can be outdated or unavailable during release preview)

Create an External Client App from App Manager

When you begin creating a connected app in App Manager, you have the option to create an external client app instead. External client apps offer a more secure way to connect third-party applications with your Salesforce data. They're designed for second-generation (2GP) packaging and source-driven development, making them easier to manage and distribute.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: When you click **New Connected App** in App Manager, a window opens with options to either continue creating a connected app or open the External Client App manager and create an external client app.

SEE ALSO:

Salesforce Help: Configure Basic Connected App Settings (can be outdated or unavailable during release preview)

Assign and Package OAuth Custom Scopes for External Client Apps

Add custom scopes to your local external client apps through polices or settings. Custom scopes are packageable with external client apps, so developers can set custom scopes as package defaults to be distributed.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Add custom scopes to external client apps as settings or policies in the External Client App Manager. To package custom scopes for use with an external client app, package the custom scopes in a separate second-generation managed package and install that package on the subscriber org before installing the external client app.

SEE ALSO:

Salesforce Help: Custom Scopes for External Client Apps (can be outdated or unavailable during release preview)

Configure the Start URL for External Client Apps

Admins can set the start URL where the user is directed after they log in for an external client app. The Polices tab includes an OAuth-specific start URL field and a custom start URL field. Some OAuth flows require that an external client app includes a start URL. External client apps must include a start URL before they show up in the App Manager.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Show an External Client App in App Launcher

Add your external client app to App Launcher by marking it as visible in the App Menu page in Setup.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: To make an external client app visible in App Launcher, find the app in App Menu and select **Visible in App Launcher**.

Only external client apps configured with a start URL can be made visible in App Launcher. If the app doesn't have a start URL, a developer can specify a start URL in the app's Settings tab or an admin can specify a start URL in the app's Polices tab.

Customize User Experience and Functionality for Authentication Providers

For more flexibility with single sign-on (SSO) flows, add functionality to authentication providers by creating your own URL parameter allowlist. For example, to dynamically pass user language preferences from an Experience Cloud site login page to a provider's login page, use the `ui_locales` parameter. When you initialize the authentication provider by invoking one of its client configuration URLs, such as the SSO initialization URL, dynamically add this parameter to the client configuration URL at runtime. Salesforce's authentication provider framework generates an authorization URL where the user is redirected to log in to the provider. The parameter gets forwarded to the provider as part of the authorization URL so that the provider knows the user's language preference. We delivered this feature thanks to your ideas on IdeaExchange.

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

Why: With this feature, you can dynamically specify authentication provider parameters at runtime, which can significantly simplify your SSO architecture. For example, imagine that you host a site on Experience Cloud. Users go to your Experience Cloud site and select their language preference, and then are redirected to your login page where you display an option to log in with Google. You can control the language for your login page, but passing the user's language on to Google is more complicated. Previously, the only way to specify the display language for the provider was to configure a different authentication provider for each language and statically specify the user's locale. When you want to support more than a few languages, this architecture can get messy, with too many authentication providers and overcomplicated logic.

But with this feature, you can configure just one authentication provider and add a locale parameter to your authentication provider allowlist. When the user chooses their language, Salesforce forwards the parameter value to the authentication provider URL so that it can then be passed to Google.

How: Use your metadata development tool of choice, such as Salesforce CLI, to create an AuthProvParamFwdAllowlist metadata type that stores the URL parameter you want to add. Each instance of AuthProvParamFwdAllowlist stores one allowlisted parameter. If your SSO flow passes any allowlisted parameters to Salesforce, Salesforce automatically forwards the parameters to your authentication provider's client configuration URLs.

SEE ALSO:

Salesforce Help: Dynamically Add Functionality to an Authentication Provider (can be outdated or unavailable during release preview)

IdeaExchange: The ability to forward URL params into Auth providers

Customize SMS One-Time Password Delivery for Experience Cloud Sites (Generally Available)

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. This feature, now generally available, includes some performance enhancements and bug fixes since the last release.

Where: These changes apply to LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

Who: 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 headless 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 get access to this feature, contact Salesforce Customer Support. Enabling this feature affects all Experience Cloud sites. To avoid disruptions, create an Apex handler for all sites.

SEE ALSO:

Salesforce Help: Customize One-Time Password Delivery for Experience Cloud Identity Verification (can be outdated or unavailable during release preview)

Apex Reference Guide: CustomOneTimePasswordDeliveryHandler Interface (can be outdated or unavailable during release preview)

Forced Login Is Permanently Disabled

For improved security, 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 breaks implementations and third-party integrations that use 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 and Salesforce Classic in all editions.

Why: In Spring '22, we enforced a release update that disabled forced login, 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, 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, users are using forced login.

Note: The HTTP method also displays GET for password resets. To confirm that the entry doesn't reflect a password reset, check the Login Subtype.

If you find users who are using forced login, notify them of the upcoming change. Migrate any integrations that use forced login to external client apps or connected apps.

Forgot Password Invalid Username Error Message Was Changed

To improve the forgot password experience, we changed the error message that's displayed when you or your users enter an invalid username. The new message clarifies that a user's Salesforce username is in an email address format but isn't required to be a functioning email address. Previously, the message implied that a user's username is the same as their email address, which is true for some users but not for all. For orgs, this change applies to the forgot password experience for `login.salesforce.com` and My Domain login pages. For Experience Cloud sites, this change applies to the Default and Experience Builder pages for Forgot Password.

Where: For Salesforce orgs, this change applies to Lightning Experience and Salesforce Classic in all editions. For Experience Cloud sites, this change applies to LWR and Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: If users can't remember their password, they can click a forgot password link on the login page. Salesforce then prompts the user to enter their username. If the user enters an invalid username, they see an error message. Previously, the error message stated: "We can't find a username that matches what you entered. Verify that your username is an email address (for example, username@company.com)." With this change, the error message now states: "Enter a valid username. Your username is in the format of an email address, such as username@company.com."

SEE ALSO:

Salesforce Help: Reset Your Forgotten Password (can be outdated or unavailable during release preview)

Salesforce Help: Customize Your Forgot Password and Reset Password Pages (can be outdated or unavailable during release preview)

Make the Most of Enhancements for the Headless Registration Flow

The headless registration flow has some updates that you don't want to miss. You can now set up the flow by using the external client apps framework, a new and improved generation of connected apps. To make it easier to develop a headless registration Apex handler, we updated the autogenerated handler with methods for handling contacts and accounts.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Unlimited, and Developer editions.

Why: Unlike the connected apps framework, the external client apps framework is compatible with second-generation packaging (2GP) and is fully metadata-exposed. Previously, the external client apps framework supported all headless identity flows except headless registration. Now external client apps are fully caught up with connected apps for headless identity features.

SEE ALSO:

Salesforce Help: Configure an External Client App for the Authorization Code and Credentials Flow (can be outdated or unavailable during release preview)

Salesforce Help: Headless Registration Flow for Public Clients (can be outdated or unavailable during release preview)

Salesforce Help: Headless Registration Flow for Private Clients (can be outdated or unavailable during release preview)

Apex Reference Guide: HeadlessSelfRegistrationHandler Interface (can be outdated or unavailable during release preview)

Get More Flexibility with Headless Identity Flows

Say goodbye to access token limitations for headless identity flows. For flows where you require an access token in your initial request to Salesforce headless identity endpoints, you can now send a JSON Web Token (JWT)-based access token in the Authorization header. Previously, Salesforce accepted only opaque tokens.

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

Why: JWT-based access tokens and opaque access tokens have different functionality and limitations. If JWT-based access tokens are a better fit for your use case, you can now use them consistently throughout all of your headless identity integrations.

How: Use any supported OAuth 2.0 flow to get a JWT-based access token. When you configure your headless identity security settings on the Experience Cloud Login & Registration page, opt to require authentication. In your initial request to the Salesforce headless endpoint you want to access, include the JWT-based access token `Authorization: Bearer` header.

SEE ALSO:

Salesforce Help: JWT-Based Access Tokens (can be outdated or unavailable during release preview)

Salesforce Help: Headless Identity for Customers and Partners (can be outdated or unavailable during release preview)

Be an Early Adopter of a Headless Identity Draft Standard

There are some exciting new developments in the OAuth 2.0 world, and with Salesforce headless identity, you can stay at the forefront of industry changes. Set up headless username-password login, passwordless login, and registration flows that conform to the OAuth 2.0 for First-Party Applications draft standard.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Unlimited, and Developer editions.

Why: When we released Headless Identity APIs, there was no proposed standard for headless app authorization, so we gave you proprietary flows built on top of OAuth. But the headless identity landscape is changing fast. With new support for the OAuth 2.0 authorization challenge endpoint, keep up with a draft standard for first-party app development.

Note: OAuth 2.0 for First-Party Applications is still in a draft state. For more information, see OAuth 2.0 for First-Party Applications.

SEE ALSO:

Salesforce Help: Headless Identity for Customers and Partners (can be outdated or unavailable during release preview)

Revoke Individual JWT-Based Access Tokens

For more precise control over who can access Salesforce data, revoke JSON Web Token (JWT)-based access tokens for an individual user. Previously, the only option was to revoke all tokens in your org simultaneously—a last-resort security measure that ended all related user sessions. Now you can manage security while minimizing the impact to your users. This feature is supported for guest user and named user JWT-based access tokens.

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

How: To revoke JWT-based access tokens using the OAuth revocation endpoint, use a POST request to send the token to the `/services/oauth2/revoke` endpoint on your My Domain or Experience Cloud site.

To revoke tokens using Apex, use the `revokeToken` method in the Auth.OauthToken class.

SEE ALSO:

Salesforce Help: Revoke OAuth Tokens Programmatically (can be outdated or unavailable during release preview)

Apex Reference Guide: OauthToken Class (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. We enforced it for sandboxes in Summer '24, but we postponed the enforcement date for production instances to Spring '25.

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 that 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.

Manage Token Exchange Handlers with Ease

No more wrestling with metadata development tools just to set up an OAuth token exchange handler. With a new, user-friendly UI, configuring token exchange handlers is easier than ever. From the Token Exchange Handlers page in Setup, enable apps to use with your handler, manage your enabled apps, and edit your handler and app settings.

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

How: From the Token Exchange Handlers page in Setup, create a handler and define its basic settings. After you create the handler, view and edit its details and enable connected apps and external client apps to use with the handler.

SEE ALSO:

Salesforce Help: Define a Token Exchange Handler (can be outdated or unavailable during release preview)

Salesforce Help: Enable Apps for a Token Exchange Handler (can be outdated or unavailable during release preview)

Salesforce Help: Edit or Delete a Token Exchange Handler (can be outdated or unavailable during release preview)

Give Users More Ways to Log In

Get creative with headless passwordless login. With headless user discovery, develop a way for your users to log in with any identifier that you want. For example, when users come to a shopping app, prompt them to log in with their order number. Salesforce finds the user associated with the order number and sends a one-time password (OTP) to their verified email address or phone number.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Unlimited, and Developer editions.

How: Develop an Apex handler that implements the `Auth.HeadlessUserDiscoveryHandler` class and customize it to look up users based on the identifier that you want to use. Add the handler to the Login & Registration page for your Experience Cloud site. Set up the headless passwordless login flow. During the flow, when you call Headless Passwordless Login API, send your user identifier of choice in the `login_hint` parameter. Your Apex handler finds the user based on the `login_hint` and returns their user ID. Salesforce then sends an OTP to the verified email address or phone number associated with the user ID.

SEE ALSO:

Salesforce Help: Configure Experience Cloud Settings for Headless Passwordless Login (can be outdated or unavailable during release preview)

Salesforce Help: Headless Passwordless Login Flow for Public Clients (can be outdated or unavailable during release preview)

Salesforce Help: Headless Passwordless Login Flow for Private Clients (can be outdated or unavailable during release preview)

Apex Reference Guide: HeadlessUserDiscoveryHandler Interface (can be outdated or unavailable during release preview)

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.

API Error Response for Refresh Token Flow Was Changed

To accurately reflect the error that occurs when an app tries to send simultaneous, identical token requests during the refresh token flow, we updated the API error response. Previously, this error was accurately described in the Login History with the Status **Failed: Token request is already being processed**, but the API error response didn't match. Instead, it indicated that the error was due to an expired authorization code. Now, the error is consistent with the Login History.

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

How: As announced in this Summer '24 release note, Salesforce blocks simultaneous refresh token requests that contain the same refresh token.

Before this fix, if you made simultaneous calls with the same refresh token, the token endpoint returned this inaccurate error response.

```
HTTP/1.1 400 Bad Request
Content-Type: application/json
Cache-Control: no-store
{
  "error":"invalid_grant",
  "error_description":"expired authorization code"
}
```

Now, it returns this error response.

```
HTTP/1.1 400 Bad Request
Content-Type: application/json
Cache-Control: no-store
{
  "error":"invalid_grant",
  "error_description":"token request is already being processed"
}
```

Verify SAML Integrations (Release Update)

Salesforce is upgrading its SAML framework as part of regular ongoing maintenance. This maintenance update improves Salesforce's security posture, and as a result, improves your security posture. This update can impact integrations that use SAML, including single sign-on (SSO) and single logout. This update is visible starting in Winter '25, and Salesforce enforces this update in Spring '25. To avoid potential service interruptions, test your SAML integrations as soon as Spring '25 sandboxes become available.

Where: This change applies to Lightning Experience and Salesforce Classic 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, locate your instance, and then click the maintenance tab.

Why: As part of ongoing maintenance, Salesforce is upgrading its SAML framework in Spring '25. Although we don't expect much production impact, to minimize the risk of production outages, we recommend that you test your SAML integrations as soon as Spring '25 sandboxes become available.

How: To understand how enforcement of the SAML upgrade impacts you, assess your orgs and Experience Cloud sites to see where you use SAML, including:

- SAML SSO where users log in to Salesforce via a third-party identity provider, such as Okta
- SAML SSO where users log in to a third-party app via Salesforce. These configurations use connected apps.
- SAML SSO between Salesforce orgs or Experience Cloud sites
- All SAML single logout configurations

So that you can copy and test your integrations in a sandbox, gather information about how you use SAML in production. When Spring '25 sandboxes become available, set up a Spring '25 sandbox with the same SAML integrations that you use in production. Test your integrations thoroughly. If you have any issues, contact Salesforce Customer Support.

To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Verify SAML Integrations, follow the testing and activation steps.

Salesforce Authenticator Users Are Automatically Guided to a Workaround if Push Notifications Time Out

If users have trouble getting push notifications when using Salesforce Authenticator to verify their identity, it's easier than ever to get back on track. If a user can't approve a request sent via a push notification within 30 seconds, we now automatically prompt them to enter a six-digit time-based one-time passcode (TOTP) that's provided in the Salesforce Authenticator app. Previously, if the request timed out after 90 seconds, users received a timeout error with no clear instructions for a workaround.

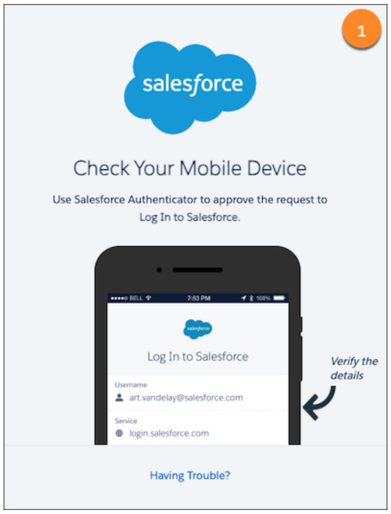
Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

Why: If push notifications from Salesforce Authenticator aren't working, TOTP codes are the next best way for a user to verify their identity.

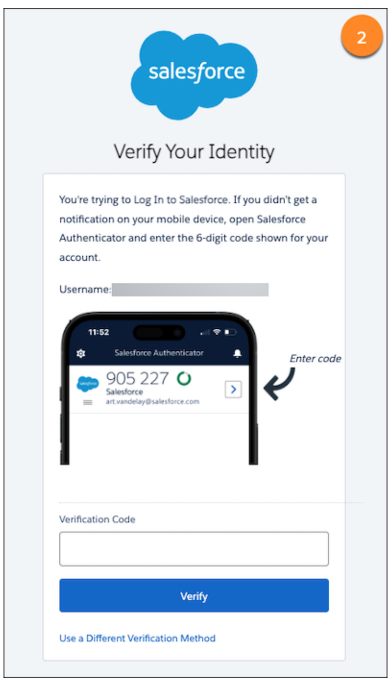
Previously, we guided users to a screen to enter a TOTP only if they clicked **Having Trouble?** in Salesforce. If they didn't click this link or take any other action within 90 seconds of when they initiated login, they received a timeout error.

Now, if the user isn't able to verify their identity using a push notification within 30 seconds, we automatically guide them to the option to enter a TOTP. This change makes it easier for users to understand how and when to use TOTPs so that they can access their accounts faster.

How: For identity verification use cases such as multi-factor authentication (MFA), users can verify their identity by approving verification requests sent via push notifications from Salesforce Authenticator. When a user does something that requires identity verification, such as logging in with MFA, Salesforce prompts them to check their mobile device for a push notification (1).



If the user doesn't receive the push notification, or receives it and doesn't approve it in time, Salesforce automatically prompts them to enter a verification code instead (2). To complete identity verification, users can open Salesforce Authenticator, find the six-digit TOTP code for their account, and enter it in Salesforce.



Note: This change applies only to users who are using Salesforce Authenticator to access Salesforce.com accounts and who have push notifications enabled on their mobile device.

SEE ALSO:

Use Salesforce Authenticator TOTP Codes If You're Offline or Push Notifications Are Unavailable

Manage Push Notifications for Salesforce Authenticator

Privacy Center

New features help you validate privacy policies and target the data in your org more accurately. Data retention is enabled across different regions on a rolling basis.

IN THIS SECTION:

Avoid Accidental Data Impact by Previewing Data Management Policies

Generate and acknowledge previews for Data Management Policies before executing them in your org. Previews estimate the number of records and files that a policy affects, providing a quantitative snapshot of its impact on your data. This feature helps you evaluate your policy configuration and avoid accidental data loss or modification.

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

How: By default, you're now required to generate and acknowledge a preview whenever you create a Data Management Policy or update its object configuration. You can publish the policy only after you acknowledge the preview. Admins can make preview acknowledgments optional by turning on the **Bypass previewing for Data Management Policies** setting. From Setup, go to the Data Management Policy settings page.

After you create or update a Data Management Policy, click **Generate Preview**. When the preview job is finished, view the metrics on the Previews tab. If you're satisfied with the expected results, click **Acknowledge**, and then publish the policy.

Preview metrics include:

- The total number of affected records
- The total number of deleted files and attachments
- The number of affected records on each object

Note that during policy execution, some records can be excluded from processing due to errors or validation issues. Policy previews don't account for these exclusions.

SEE ALSO:

Salesforce Help: Preview a Data Management Policy (can be outdated or unavailable during release preview)

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.

Records that you retain can sometimes have associated files or attachments. With file and attachment retention (pilot), you can include any associated files with the retained records. To opt in to this pilot feature, contact your account executive.

Note: File and attachment retention 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.

SEE ALSO:

Salesforce Help: Retain Records on an Object (can be outdated or unavailable during release preview)

Policy Validation Improvements in Privacy Center

To help you resolve validation issues with privacy policies, we added and revised several error messages. These messages can appear when you try to save or publish a policy, or when you load the policy details page.

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

How: You're notified when these validation issues occur.

- A Data Management or Right to Be Forgotten (RTBF) Policy references an object or field that's missing from the org.
- A Data Management or RTBF Policy doesn't have any objects configured.

- An RTBF Policy has multiple top-level objects.

SEE ALSO:

Salesforce Help: How to Configure Data Management Policies (can be outdated or unavailable during release preview)

Salesforce Help: Create Right to Be Forgotten Policies (can be outdated or unavailable during release preview)

Named Credentials

Permission updates make it easier to authorize your users to make authenticated callouts with named credentials.

IN THIS SECTION:

It's easier than ever to configure permissions for named credentials so that your users can make authenticated callouts to external systems. Previously, after you enabled external credential principal access, you also assigned object permissions for User External Credentials manually on each permission set or profile. Now, most standard permission sets and profiles have access to the User External Credentials object by default. For the guest user profile, and for existing custom permission sets and profiles, you must still grant access to the User External Credentials object manually.

Control Who Can Perform Authenticated Callouts with Ease

It's easier than ever to configure permissions for named credentials so that your users can make authenticated callouts to external systems. Previously, after you enabled external credential principal access, you also assigned object permissions for User External Credentials manually on each permission set or profile. Now, most standard permission sets and profiles have access to the User External Credentials object by default. For the guest user profile, and for existing custom permission sets and profiles, you must still grant access to the User External Credentials object manually.

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

SEE ALSO:

Salesforce Help: Enable User External Credentials (can be outdated or unavailable during release preview)

Salesforce Shield

Save time setting up Shield Platform Encryption by generating your first probabilistic and deterministic tenant secrets on the Encryption Settings page. Use Transaction Security policies for the LoginAsEvent type and to block or receive notifications about users who log in as another user.

IN THIS SECTION:

Use Transaction Security policies for the Real-Time Event Monitoring LoginAsEvent event type to block or receive notifications about users who log in as another user. Capture detailed network performance metrics with the new UI Telemetry Timing events. Identify blocked redirections for legacy hostnames. Monitor when permissions are updated in profiles and permission sets by using the new Permission Update event type.

Shield Platform Encryption

Exercise more control over the keys that encrypt your Data Cloud data by generating and managing a Data Cloud root key in Salesforce. Save time by generating your first probabilistic and deterministic tenant secrets directly from the Encryption Settings page. For compliant data sharing, encrypt sensitive and personally identifiable information (PII) data in the Comments field on participant records.

Event Monitoring

Use Transaction Security policies for the Real-Time Event Monitoring LoginAsEvent event type to block or receive notifications about users who log in as another user. Capture detailed network performance metrics with the new UI Telemetry Timing events. Identify blocked redirections for legacy hostnames. Monitor when permissions are updated in profiles and permission sets by using the new Permission Update event type.

IN THIS SECTION:

Generate Test Events for Threat Detection (Beta)

Easily manage your integrations with the Threat Detection application by testing any Threat Detection implementation with the all new Test Threat Detection Events (beta) feature.

Get Notified When a User Logs In as Someone Else with Transaction Security

Bolster your security posture by receiving alerts and blocking potentially malicious LoginAsEvent activities with a Transaction Security policy.

Import Real-Time Event Monitoring Event Data Into Data Cloud (Pilot)

Easily analyze Real-Time Event Monitoring data with the Salesforce analytics tool of your choice by importing the data into Data Cloud using the Platform Events connector pilot.

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 Blocked Redirections for Legacy Hostnames

Your previous non-enhanced My Domain URLs are no longer redirected in Winter '25 for most non-production orgs and in Spring '25 for production and demo orgs. To identify calls to the impacted URLs, use the `REDIRECT_REASON` field on the Hostname Redirects event type. Look for this new value: `Redirection was blocked because redirections for the legacy SOURCE_HOSTNAME are no longer supported.`

Get Information About Permission Changes

Use the new Permission Update event type in the EventLogFile object to monitor when object, field, and user permissions and other access settings are updated in profiles and permission sets. For example, if the Read permission for the Asset object is added to one of your permission sets, these details are logged for your review. The event type also tracks if you clone profiles or change whether session activation is required in a permission set or permission set group.

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.

Generate Test Events for Threat Detection (Beta)

Easily manage your integrations with the Threat Detection application by testing any Threat Detection implementation with the all new Test Threat Detection Events (beta) feature.

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 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.

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`. Opt in to this feature by enabling the **Test Threat Detection Events (Beta)** setting.

Get Notified When a User Logs In as Someone Else with Transaction Security

Bolster your security posture by receiving alerts and blocking potentially malicious LoginAsEvent activities with a Transaction Security policy.

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: You can create a new Transaction Security policy based on LoginAsEvent using Condition Builder or Apex.

Import Real-Time Event Monitoring Event Data Into Data Cloud (Pilot)

Easily analyze Real-Time Event Monitoring data with the Salesforce analytics tool of your choice by importing the data into Data Cloud using the Platform Events connector pilot.

Where: This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Event Monitoring is enabled.

Note: This feature 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.

Who: The event data that's available to import with this connector is only available to customers who have purchased the Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

Why: This connector is a scalable and customizable way to analyze Real-Time Event Monitoring data with Tableau, Reports & Dashboards or CRM Analytics.

How: To turn on this feature, contact Salesforce Customer Support to enable the **CdpConnectorsPilot** permission. After the permission is enabled, from **Other Connectors** in Setup, click **New**. Then select **Platform Events (Pilot)**, click **Next**, and fill out the name field in the window. The events that are available to import include ListViewEventStream, FileEvent, ApiEventStream, LoginEventStream, and ReportEventStream.

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 Blocked Redirections for Legacy Hostnames

Your previous non-enhanced My Domain URLs are no longer redirected in Winter '25 for most non-production orgs and in Spring '25 for production and demo orgs. To identify calls to the impacted URLs, use the `REDIRECT_REASON` field on the Hostname Redirects event type. Look for this new value: `Redirection was blocked because redirections for the legacy SOURCE_HOSTNAME are no longer supported.`

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions. The `HostnameRedirects` event is available in the API but not in the Event Monitoring Analytics app.

Who: This event is free for all customers with a 24-hour data retention period.

SEE ALSO:

Update References to Your Previous Salesforce Domains

Object Reference for the Salesforce Platform: Hostname Redirects Event Type

Salesforce Help: Log My Domain Hostname Redirections (can be outdated or unavailable during release preview)

Get Information About Permission Changes

Use the new Permission Update event type in the EventLogFile object to monitor when object, field, and user permissions and other access settings are updated in profiles and permission sets. For example, if the Read permission for the Asset object is added to one of your permission sets, these details are logged for your review. The event type also tracks if you clone profiles or change whether session activation is required in a permission set or permission set group.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions. This event is available in the API but not in the Event Monitoring Analytics app.

Who: This change is available to customers who purchase Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

Object Reference for the Salesforce Platform: Permission Update Event Type (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Your Users' Object, User, and Field Permissions (can be outdated or unavailable during release preview)

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.

Who: This change is available to US 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. For troubleshooting and support, refer to the Trailblazer Community.

Shield Platform Encryption

Exercise more control over the keys that encrypt your Data Cloud data by generating and managing a Data Cloud root key in Salesforce. Save time by generating your first probabilistic and deterministic tenant secrets directly from the Encryption Settings page. For compliant data sharing, encrypt sensitive and personally identifiable information (PII) data in the Comments field on participant records.

IN THIS SECTION:

Manage Encryption Keys for Data Cloud

Working with data at scale is a big job that can come with extra compliance and regulatory requirements. Now you can control the keys that encrypt your data at rest in Data Cloud with a single manageable root key. With Platform Encryption for Data Cloud, simply turn on key management for Data Cloud, and Salesforce generates a root key for you. It secures the data encryption key that's used for encrypt and decrypt operations. You can rotate your root key and view root key details for easy auditing.

Set Up Shield Platform Encryption with Fewer Clicks

Manage more of the basic encryption setup tasks with less back-and-forth between Setup pages. New Shield Platform Encryption customers can now generate an initial probabilistic tenant secret and deterministic tenant secret on the Encryption Settings page. We generate your key for you, which you can immediately apply to files, attachments, and other data. When you're done configuring your settings, go straight to the Encrypt Standard Fields page to apply those tenant secrets to individual fields. Previously, you switched between three Setup pages to generate your first tenant secrets and start using them to encrypt data.

Encrypt the Comments Field on New Participant Objects for Compliant Data Sharing in Public Sector Solutions

The Comments field on the participant records for compliant data sharing can contain sensitive or personally identifiable information (PII). To add an extra layer of security, you can encrypt the Comments field on these new participant objects: Application Form Evaluation Participant, Case Proceeding Participant, Complaint Participant, and Recruitment Requisition Participant.

Manage Encryption Keys for Data Cloud

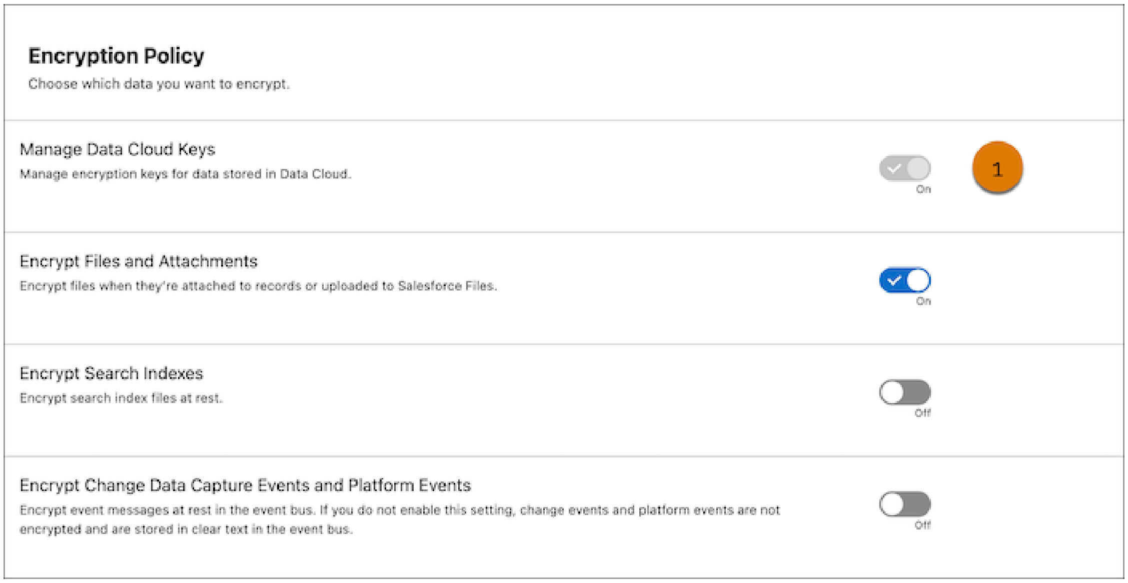
Working with data at scale is a big job that can come with extra compliance and regulatory requirements. Now you can control the keys that encrypt your data at rest in Data Cloud with a single manageable root key. With Platform Encryption for Data Cloud, simply turn on key management for Data Cloud, and Salesforce generates a root key for you. It secures the data encryption key that's used for encrypt and decrypt operations. You can rotate your root key and view root key details for easy auditing.

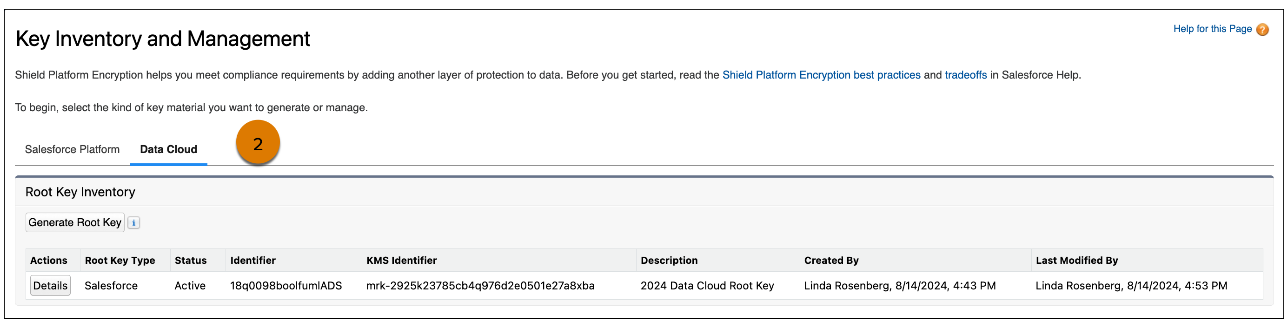
Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, and Unlimited editions.

When: Platform Encryption for Data Cloud is available in September 2024.

Who: This change is available to customers who purchase Shield Platform Encryption and Platform Encryption for Data Cloud add-on subscriptions. Platform Encryption for Data Cloud doesn't support Government Cloud.

How: To provision Platform Encryption for Data Cloud, contact your account executive. Then, in Setup, on the Encryption Settings page, turn on **Manage Data Cloud Keys** (1). Salesforce generates a root key for you. When it's ready, you can see it on the Key Management page under the Data Cloud tab (2). Your root key and the data encryption key that it controls encrypt new data in Data Cloud. Salesforce also starts applying your first Data Cloud keys to your existing Data Cloud data.





To see a list of relevant auditing information, such as when the key was created and by whom, click **Details**. You can edit your root key's description for easy auditing. To rotate your root key, on the Key Management page, click **Generate Root Key**. The new root key becomes your active key. Older versions of your root keys are archived and continue to decrypt data encrypted with that version of the key. New and updated Data Cloud data is encrypted with your new active key.

Set Up Shield Platform Encryption with Fewer Clicks

Manage more of the basic encryption setup tasks with less back-and-forth between Setup pages. New Shield Platform Encryption customers can now generate an initial probabilistic tenant secret and deterministic tenant secret on the Encryption Settings page. We generate your key for you, which you can immediately apply to files, attachments, and other data. When you're done configuring your settings, go straight to the Encrypt Standard Fields page to apply those tenant secrets to individual fields. Previously, you switched between three Setup pages to generate your first tenant secrets and start using them to encrypt data.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

How: On the Encryption Settings page in Setup, in the Encryption Policy section, turn on **Generate Initial Probabilistic Tenant Secret**. Salesforce generates your first tenant secret for you, and more settings become available on the Encryption Settings page. For example, you can encrypt files and attachments, field history and feed tracking values, or custom fields in managed packages with your probabilistic tenant secret without leaving the Encryption Settings page.

Deterministic encryption also becomes available after you have a probabilistic tenant secret. On the Encryption Settings page, turn on **Generate Initial Deterministic Tenant Secret**. To apply both of your new tenant secrets to individual fields, click **Select Fields**. Click **Edit** and apply the probabilistic, case-sensitive, or case-insensitive encryption schemes to fields of your choice.

SEE ALSO:

Salesforce Help: Generate a Tenant Secret with Salesforce (can be outdated or unavailable during release preview)

Encrypt the Comments Field on New Participant Objects for Compliant Data Sharing in Public Sector Solutions

The Comments field on the participant records for compliant data sharing can contain sensitive or personally identifiable information (PII). To add an extra layer of security, you can encrypt the Comments field on these new participant objects: Application Form Evaluation Participant, Case Proceeding Participant, Complaint Participant, and Recruitment Requisition Participant.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Who: This change is available to customers who purchase 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 on any of the new Participant objects. 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)

Security Center

Monitor vital data from custom objects to bolster your organization's security posture by creating your own custom metrics. Ensure comprehensive insight into all your rollout activities with additional user permission metrics. Quickly access the status of connected tenants within the parent org from your dashboard page.

IN THIS SECTION:

Create Custom Metrics in Security Center (Generally Available)

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.

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.

Monitor Additional User Permissions

Ensure comprehensive insight into all your rollout activities with additional user permission metrics including Retain Field History, View Real-time Event Monitoring Data, View Threat Detection Events, Access Event Monitoring Analytics Templates & Apps, Monitor Login History, Freeze Users, and Export Reports.

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

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

Why: Security Center user permission metrics bolster your security posture by providing a consolidated view of users assigned to specific permissions and notify you of when these assignments change.

How: Monitor user permission metrics from your Security Center landscape via the User category in Security Overview.

View Fields That Are Encrypted Under Your Shield Platform Encryption Policy

With the Field Level Encryption metric, easily 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.

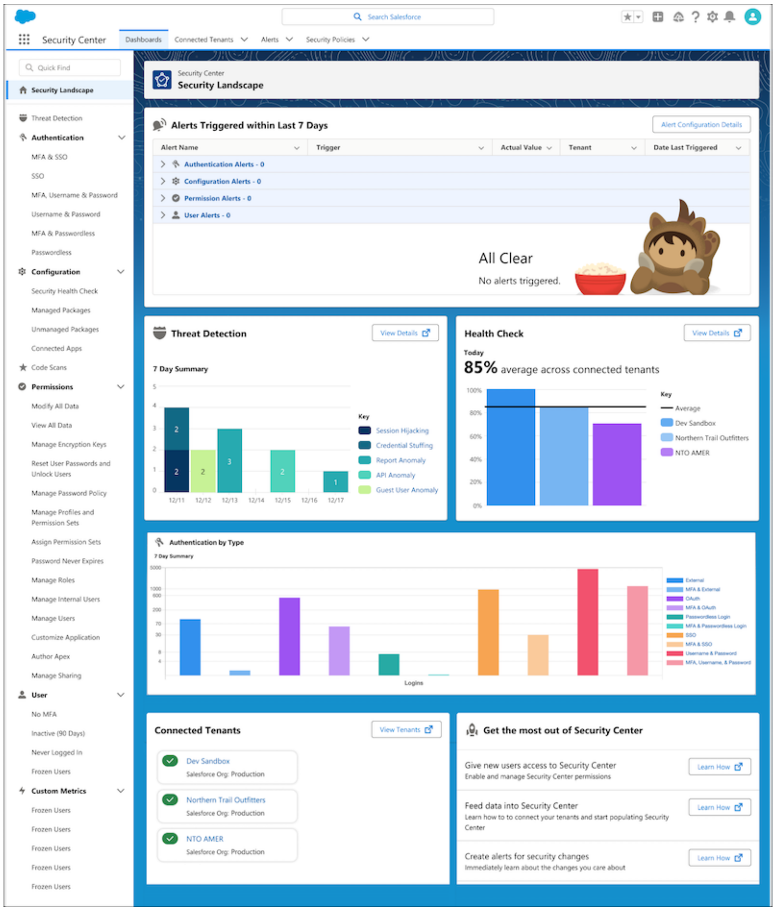
How: Monitor this Encryption Policy metric from your Security Center dashboard via the Configuration category in Security Landscape.

View Pertinent Data with an Enhanced Security Center Dashboard Page

Quickly view relevant data, including the status of your connected tenants, with 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.



IN THIS SECTION:

[Check the Status of Your Connected Tenants From the Dashboard Page]
Evaluate your security posture by conveniently viewing the status of all connected tenants within a parent org right from your Security Center dashboard.

Check the Status of Your Connected Tenants From the Dashboard Page

Evaluate your security posture by conveniently viewing the status of all connected tenants within a parent org right from your Security Center dashboard.

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

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

Other Security Changes

Salesforce now supports TLS 1.3 for outbound HTTPS callouts from the Salesforce Platform. New Hyperforce orgs use Salesforce Edge Network by default. And we canceled the Adopt Content Security Policy (CSP) Directives release update.

IN THIS SECTION:

Delivered Idea: Improve Data Transmission Speed and Security with TLS 1.3

To help you adopt the latest standard, Salesforce now supports Transport Layer Security (TLS) 1.3 for outbound HTTPS callouts from the Salesforce Platform. TLS 1.3 improves security with stronger encryption methods. This version also reduces the time it takes to establish secure connections with a simplified handshake process. This change has no impact on existing callouts that require TLS 1.2. We delivered this feature thanks to your ideas on IdeaExchange.

New Hyperforce Orgs Use Salesforce Edge Network

Starting October 4, 2024, new Hyperforce orgs use Salesforce Edge Network by default for a better network experience including improved download times for users around the globe. To opt your org out of Salesforce Edge Network, contact Salesforce Customer Support.

Adopt Updated CSP Directives (Release Update)

This update is canceled. Salesforce isn't enforcing the Adopt updated CSP directives setting at this time. However, to help protect your org from cross-site scripting and other code-injection attacks, we continue to encourage you to enable that setting now. To help you adopt this change, Salesforce plans to improve the reporting on restricted frames, images, and fonts in a future release. When that reporting is available, Salesforce plans to introduce a new release update to enforce the setting.

Security Was Tightened for the retUrl Parameter for My Domain Redirects

To improve security, if you add the `retUrl` parameter to a My Domain URL, Salesforce redirects the browser only to the `retUrl` and blocks any further redirects. Previously, if the `retUrl` parameter itself redirected to other URLs, the browser was redirected again.

Improve Data Transmission Speed and Security with TLS 1.3

To help you adopt the latest standard, Salesforce now supports Transport Layer Security (TLS) 1.3 for outbound HTTPS callouts from the Salesforce Platform. TLS 1.3 improves security with stronger encryption methods. This version also reduces the time it takes to establish secure connections with a simplified handshake process. This change has no impact on existing callouts that require TLS 1.2. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience, Salesforce Classic (not available in all orgs), and all versions of the mobile app in all editions.

How: We recommend that you test this change in a sandbox before you update production. To use TLS 1.3 for an HTTPS callout, work with the receiving endpoint owner to enable TLS 1.3 on the endpoint. Optionally, after the callout successfully uses TLS 1.3, work with the owner to disable TLS 1.2 on the receiving endpoint.

SEE ALSO:

IdeaExchange: Enable TLS 1.3 support for Outbound HTTPS Callouts

New Hyperforce Orgs Use Salesforce Edge Network

Starting October 4, 2024, new Hyperforce orgs use Salesforce Edge Network by default for a better network experience including improved download times for users around the globe. To opt your org out of Salesforce Edge Network, contact Salesforce Customer Support.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Knowledge Article: Introducing Hyperforce - General Information & FAQ

Knowledge Article: Enable Salesforce Edge Network for Your Domain

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

This update is canceled. Salesforce isn't enforcing the Adopt updated CSP directives setting at this time. However, to help protect your org from cross-site scripting and other code-injection attacks, we continue to encourage you to enable that setting now. To help you adopt this change, Salesforce plans to improve the reporting on restricted frames, images, and fonts in a future release. When that reporting is available, Salesforce plans to introduce a new release update to enforce the setting.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Developer, and Unlimited editions.

When: This update is canceled and no longer appears in the Release Update page in Setup.

SEE ALSO:

Salesforce Help: Protect Your Org with Updated CSP Directives (can be outdated or unavailable during release preview)

Release Updates

Security Was Tightened for the `retUrl` Parameter for My Domain Redirects

To improve security, if you add the `retUrl` parameter to a My Domain URL, Salesforce redirects the browser only to the `retUrl` and blocks any further redirects. Previously, if the `retUrl` parameter itself redirected to other URLs, the browser was redirected again.

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

Service

Explore the latest advancements in AI and customer service technology with Salesforce's new offerings. These include the generally available Einstein Data Library for grounding generative AI responses, the beta version of Einstein Case Management for real-time insights, and enhanced messaging capabilities across various platforms. Additionally, new tools like Employee Service streamline HR processes, while features like post-chat surveys and Einstein Copilot enhance feedback collection and supervisor efficiency. These innovations help optimize data integration and analysis, ensuring a unified view across all engagement channels.

IN THIS SECTION:

Discover Even More Service Capabilities with My Service Journey (Beta)

Quickly see how to take your Service Cloud implementation from good to great. Explore different Service areas, like the Help Site or Agent Console, and filter capabilities based on your business goals, edition, what's new, whether it's an Einstein feature, and more.

Einstein for Service

Streamline service with AI. Customize the Record Summary prompt template for Work Summaries in Copilot and from the field recommendations component (pilot), draft Case Summaries (pilot), revise fields on your Knowledge articles with predefined styles (beta), and, get article recommendations or build conversation mining reports on more channels.

Service Intelligence

See real-time customer service insights with Einstein Case Management (beta). Measure agent performance with target SLA times on Omni-Channel queues.

Channels

Check out our new messaging types, including enhanced LINE Messaging, Bring Your Own Channel for Contact Center as a Service (CCaaS), and Unified Messaging for SMS. Use the Messaging for In-App and Web API (Generally Available) to programmatically manage conversations. Use enhanced Messaging or Messaging for In-App and Web in the sales process with improvements to agent-initiated outbound messaging.

Knowledge

Integrate all your knowledge with Data Cloud for better generative AI. Connect Unified Knowledge to more third-party knowledge bases.

Entitlements and Milestones

Empower your service agents to stay on top of their jobs and boost overall service operations. By automating standard milestone actions through flows and using remaining milestone time to prioritize cases, your agents can work more efficiently and effectively.

Employee Service

Employee Service is a new solution that is geared toward streamlining the human resource (HR) service processes for businesses. In this release, we're introducing the Employee Hub and HR Service Workspace features.

Routing

Eligible Salesforce orgs are automatically upgraded to Enhanced Omni-Channel. Support customers while on the go with Omni-Channel for mobile.

Feedback Management

Collect timely feedback and gain comprehensive insights with unique post-chat survey invitations.

Discover Even More Service Capabilities with My Service Journey (Beta)

Quickly see how to take your Service Cloud implementation from good to great. Explore different Service areas, like the Help Site or Agent Console, and filter capabilities based on your business goals, edition, what's new, whether it's an Einstein feature, and more.

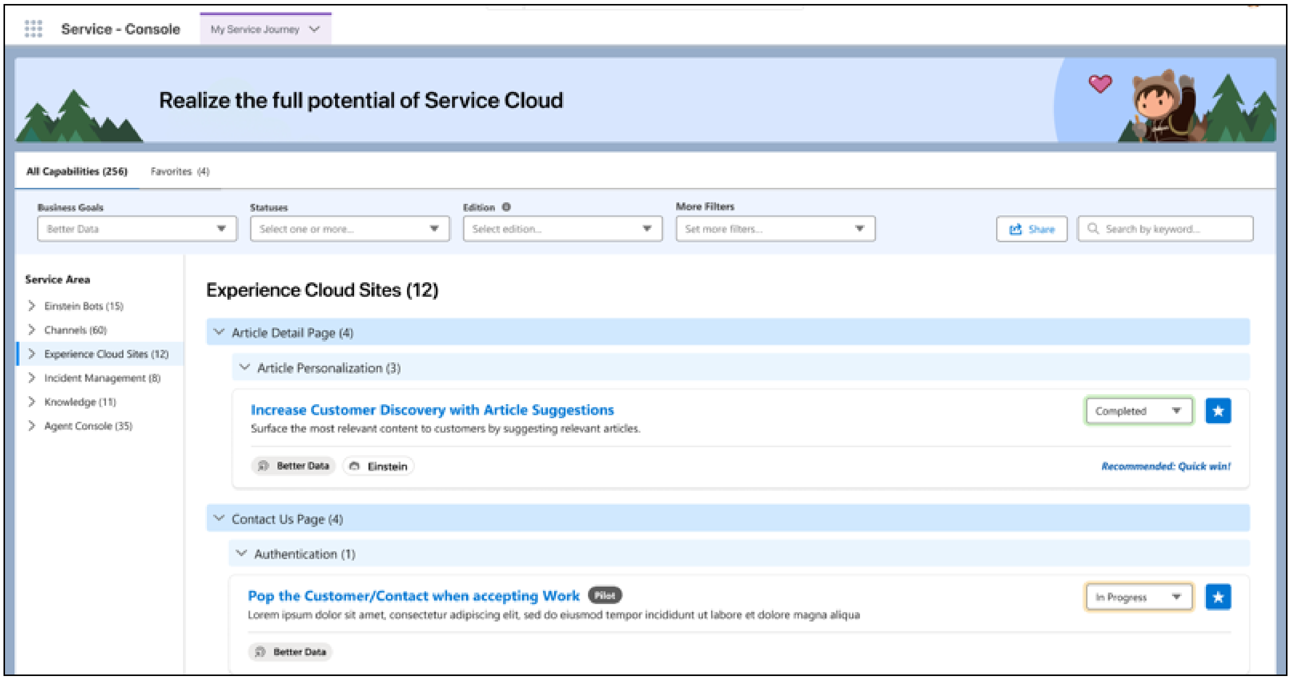
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions.

Note: My Service Journey is a pilot or beta service that's 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.

Why: Learn more about the service features available to you. With this beta release of My Service Journey:

- View your org's capabilities and identify upgrades to use specific features.
- Preview and review capabilities without leaving the Capability Navigator.
- Watch videos directly in capabilities to see them in action alongside descriptive details.

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.



Einstein for Service

Streamline service with AI. Customize the Record Summary prompt template for Work Summaries in Copilot and from the field recommendations component (pilot), draft Case Summaries (pilot), revise fields on your Knowledge articles with predefined styles (beta), and, get article recommendations or build conversation mining reports on more channels.

IN THIS SECTION:

Einstein Article Recommendations

Get article recommendations on voice and enhanced messaging channels (pilot)

IN THIS SECTION:

Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations (Pilot)

Reduce handle time and improve customer satisfaction by providing agents with recommended articles with Einstein Article Recommendations for Conversations.

Where: This change applies to Lightning Experience in the Unlimited edition with the Einstein for Service add-on. Available in Voice, Messaging for in-App and Web, enhanced Facebook Messenger, and enhanced WhatsApp channels.

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.

During real-time conversations, Einstein recommends relevant articles directly to agents in the Voice Call or Messaging Session record page. By default, recommendations are given whenever relevant throughout each conversation. To provide article recommendations only when agents are ready to leverage them, go to the Einstein Article Recommendations setup page and select the option to provide article recommendations only on-demand.

SEE ALSO:

Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations for Messaging (Pilot)

Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations for Voice (Pilot)

Einstein Conversation Mining

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining.

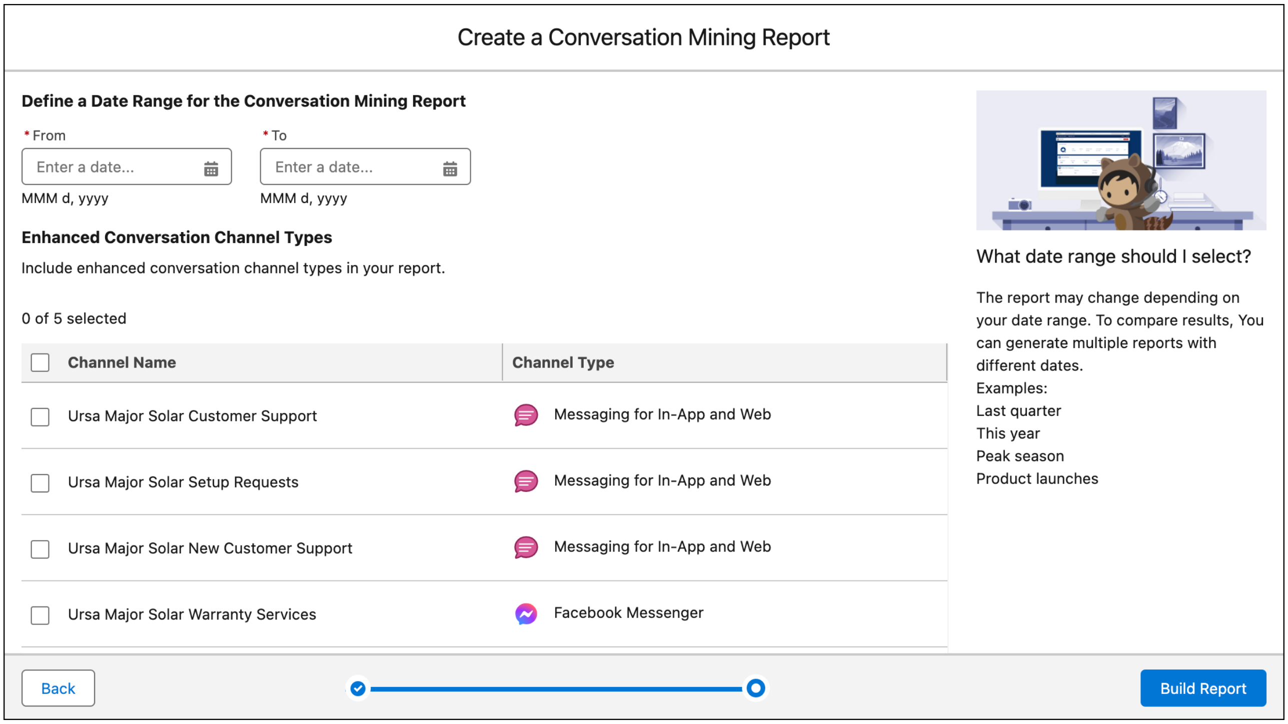
IN THIS SECTION:

Gather More Service Support Insights with Additional Channels in Einstein Conversation Mining

Create reports with our newly supported channels, which include third-party messaging apps such as WhatsApp, Facebook Messenger, and Apple Messages for Business.

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

How: Go to Einstein Conversation Mining in Setup. When you create a report, select **Enhanced Conversations** for the channel, and then select from a list of supported channels.



SEE ALSO:

Salesforce Help: Build an Einstein Conversation Mining Report (can be outdated or unavailable during release preview)

Einstein Knowledge Creation

Revise fields on your Knowledge articles using Knowledge Edits with Einstein generative AI (beta).

IN THIS SECTION:

Get Quick Revisions on Knowledge Article Fields with Einstein Knowledge Edits (Beta)

Revise fields on your Knowledge articles using Einstein generative AI with predefined styles. Predefined styles can improve the grammar, conciseness, or readability of your articles. You can also customize revision styles through Prompt Builder when you edit or create a prompt with the Knowledge Field Update type. Specify what information Einstein includes, how to format article information or adjust the voice and tone to fit your business needs.

Get Quick Revisions on Knowledge Article Fields with Einstein Knowledge Edits (Beta)

Revise fields on your Knowledge articles using Einstein generative AI with predefined styles. Predefined styles can improve the grammar, conciseness, or readability of your articles. You can also customize revision styles through Prompt Builder when you edit or create a prompt with the Knowledge Field Update type. Specify what information Einstein includes, how to format article information or adjust the voice and tone to fit your business needs.

Where: This change applies to Unlimited and Enterprise editions with the Einstein for Service add-on. Einstein for Service is available in Lightning Experience.

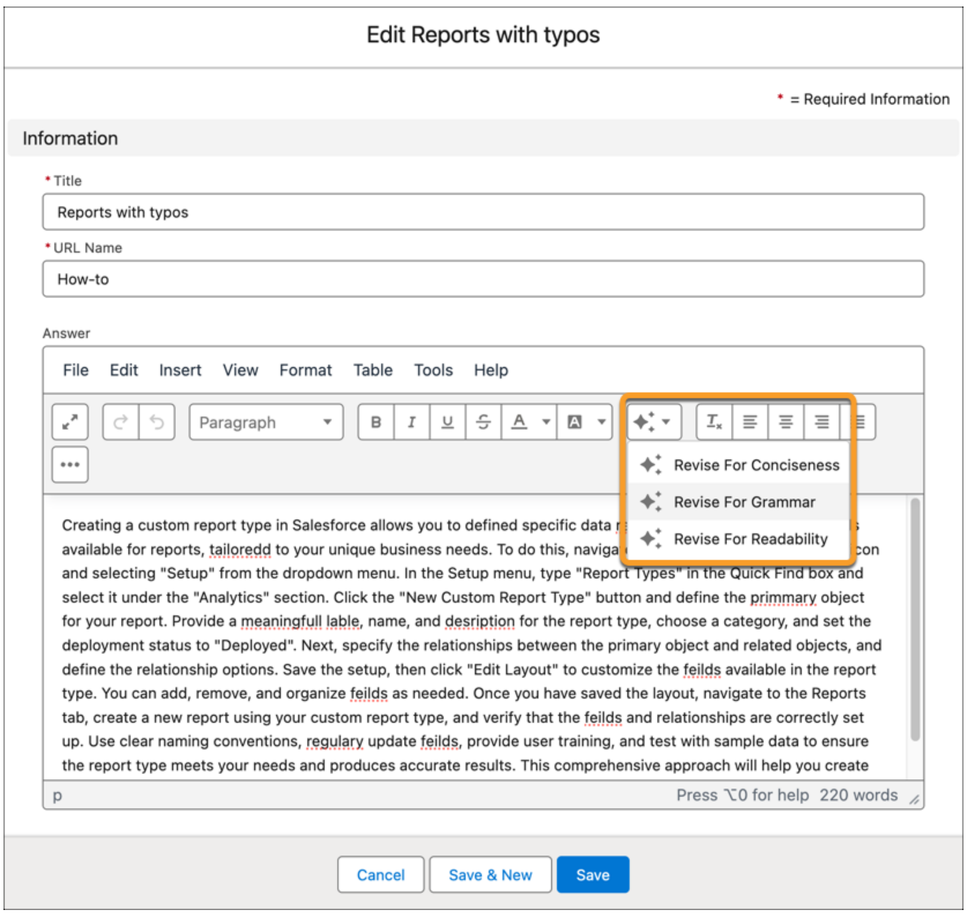
Einstein Knowledge Edits is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Who: To use Knowledge Edits, you must have Einstein Generative AI enabled, Salesforce Knowledge enabled and set up in Lightning Experience, Knowledge Creation enabled and set up, and, to customize Einstein's revisions, you must have Prompt Builder enabled.

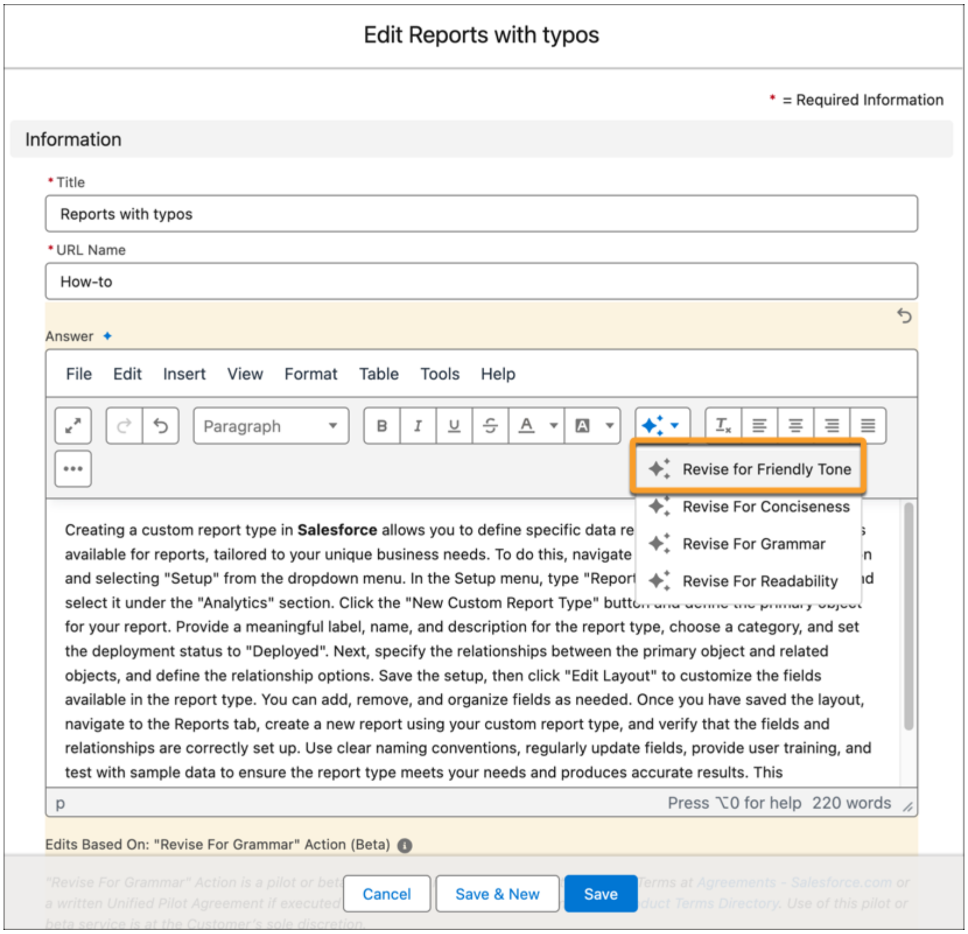
To use Knowledge Edits, agents must have the Prompt Template User and the Einstein Knowledge Creation permission sets.

How: For the Knowledge article that you want to revise, from the quick action menu select **Edit**. From the toolbar, click **Revise with Einstein**. From the dropdown menu, you can choose:

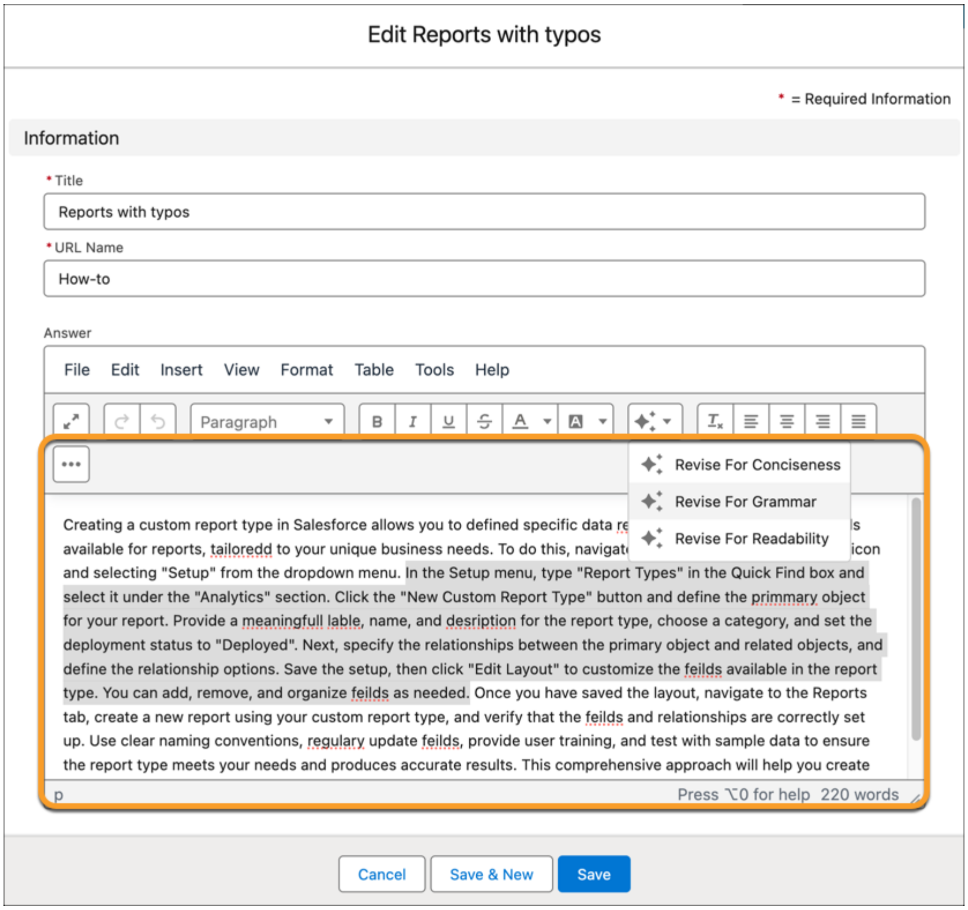
- Revise for Conciseness - simplifies the language by removing filler words and qualifiers, and repetitive information.
- Revise for Grammar - corrects all typos, grammatical mistakes, spelling errors, and misplaced punctuation.
- Revise for Readability - uses clear and simple language, converts passive voice to active voice, removes redundancies, reformats appropriate information with bullet points or lists, and rearranges text for better flow.



Any custom templates also appear in the dropdown options.



To revise specific parts of the text, highlight the text and click Revise with Einstein.



SEE ALSO:

[Einstein Features]

Salesforce Help: Einstein Knowledge Creation

Salesforce Help: Prompt Builder

Einstein Work Summaries

Customize the Record Summary prompt template for Work Summaries in Copilot or from the Einstein field recommendations component (pilot), and get a quick overview of a Case with Einstein Case Summaries (pilot).

IN THIS SECTION:

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.

Get a Quick Overview of a Case and Ongoing Developments with Case Summaries (Pilot)

Quickly catch-up on cases with AI-generated case summaries. Using Einstein Case Summaries, agents can see the case progression including conversations, updates, and escalations—all from the Case Feed or Case Comments.

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.

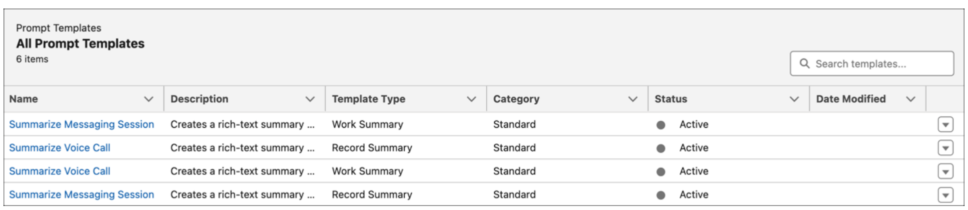
To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

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
Search templates...

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

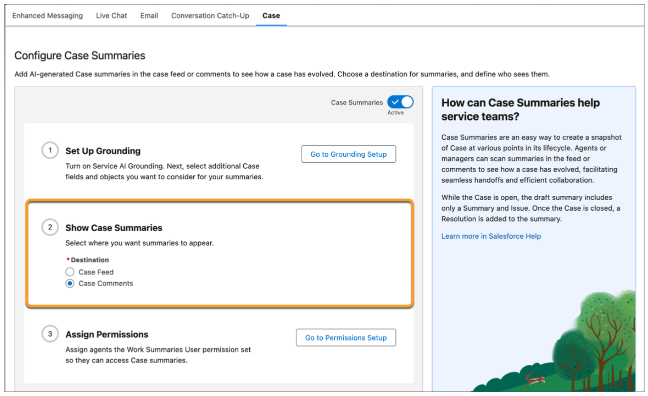
Get a Quick Overview of a Case and Ongoing Developments with Case Summaries (Pilot)

Quickly catch-up on cases with AI-generated case summaries. Using Einstein Case Summaries, agents can see the case progression including conversations, updates, and escalations—all from the Case Feed or Case Comments.

Where: Einstein Case Summaries is available in Lightning Experience in Enterprise, Unlimited and Einstein 1 editions with the Einstein for Service add-on and the Einstein for Service: Case Summaries (Pilot) org perm.

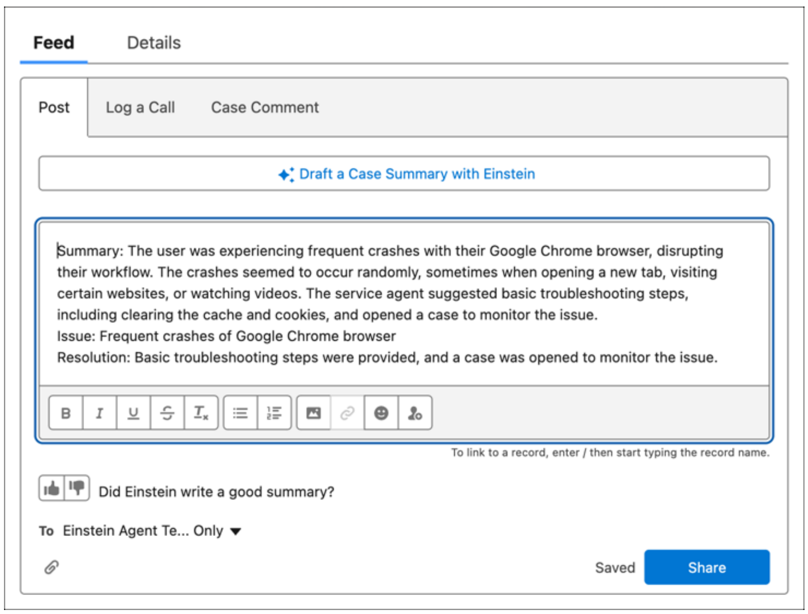
Note: Case Summaries is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

How: To get started with Case Summaries, set up Service AI Grounding with Cases. Next, select a destination for summaries on the case page.



When you select Case Comments, agents can draft summaries from the Case Comment tab in the Feed. When you select Case Feed, agents can draft summaries from the Post tab in the Feed.

To use Case Summaries, select Draft a Case Summary with Einstein.



Einstein drafts the case summary, which agents can review, edit, and save.

SEE ALSO:

Einstein Generative AI

Service Intelligence

See real-time customer service insights with Einstein Case Management (beta). Measure agent performance with target SLA times on Omni-Channel queues.

IN THIS SECTION:

Get Faster Insights with Einstein Case Management (Beta)

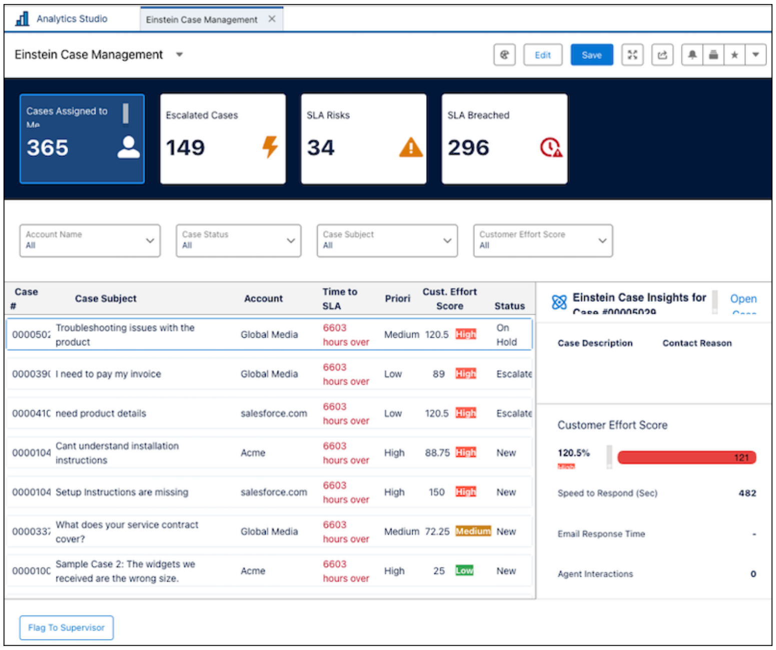
Improve customer service with near real-time insights that help agents quickly identify and prioritize cases based on urgency, status, customer effort score, and service level agreement (SLA) targets. Einstein Case Management dashboards show minutes-latency metrics that help your team deliver more informed, personalized service. Plus, with the new Flag to Supervisor flow, agents can instantly alert supervisors about case developments.

Where: This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

Note: Einstein Case Management is a pilot or beta service that's 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.

Who: To use the Einstein Case Management dashboard, you need the Service Intelligence User permission set. To manage the Einstein Case Management dashboard, you need the Service Intelligence App Admin permission set.

How: From Service Intelligence dashboards, click the Open Analytics Studio icon, and in Analytics Home, search for Einstein Case Management. From Service Intelligence Setup, install the Flag to Supervisor flow so agents can immediately notify supervisors of case updates.



SEE ALSO:

Salesforce Help: Service Intelligence Dashboards (can be outdated or unavailable during release preview)

Salesforce Help: Service Intelligence Einstein Case Management Dashboard (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Install Service Intelligence (can be outdated or unavailable during release preview)

Monitor Agent Performance Against Target Service Level Agreement (SLA) Times

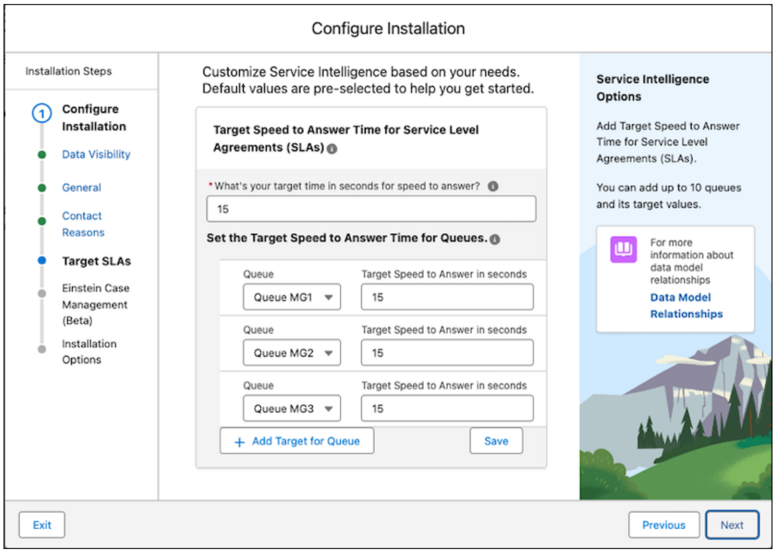
Set a default SLA for all Omni-Channel routing queues and customize times for up to ten specific queues. View SLA metrics directly on Omni-Channel dashboards to pinpoint areas for improvement.

Where: This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

Who: To view SLA metrics on Service Intelligence dashboards, you need the Service Intelligence User permission set. To manage SLA targets, you need the Service Intelligence App Admin permission set.

Why: Track SLA calculations on the Service Level and % SLA Adherence by Queue fields on Omni-Channel dashboards, and on the % Work Item SLA Adherence by Agent field on Agent Performance dashboards.

How: In Service Intelligence Setup, configure your target SLA times in the Install Service Intelligence step of the wizard.



SEE ALSO:

Salesforce Help: Service Intelligence Setup (can be outdated or unavailable during release preview)

Salesforce Help: Install Service Intelligence (can be outdated or unavailable during release preview)

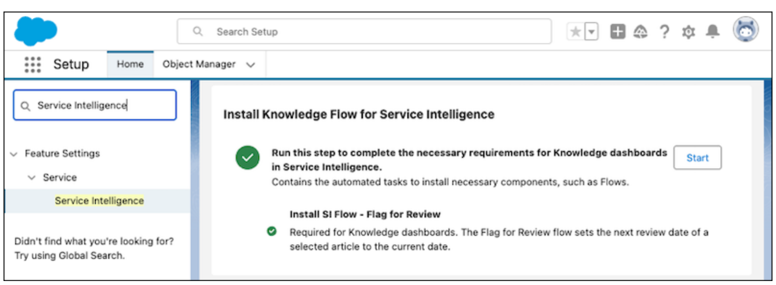
Automate Knowledge Reviews with Salesforce Flows

Install the Flag for Review flow to help managers quickly set the review date on articles to the current date and publish articles directly from Knowledge Performance dashboards.

Where: This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

Who: To use the Flag for Review flow, you need the Service Intelligence User permission set. To manage the Flag for Review flow, you need the Service Intelligence App Admin permission set.

How: In Service Intelligence Setup, install the required Flag for Review Flow for Knowledge dashboards. This flow only appears when both Lightning Knowledge and Service Intelligence are set up.



SEE ALSO:

Salesforce Help: Service Intelligence Setup (can be outdated or unavailable during release preview)

Salesforce Help: Install the Knowledge Flow for Service Intelligence (can be outdated or unavailable during release preview)

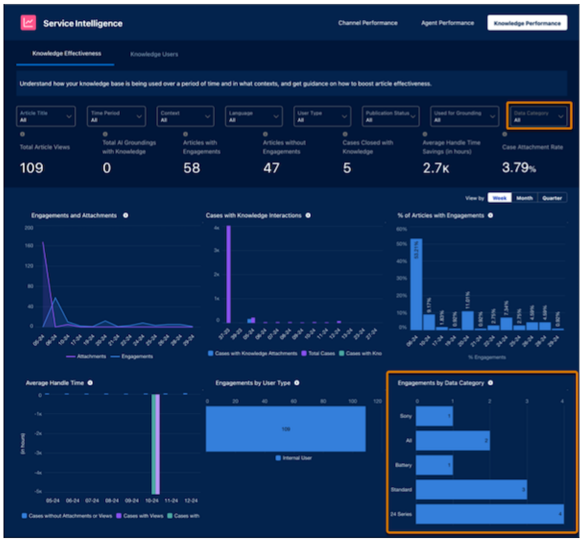
Gain Deeper Insights into Knowledge Performance with Data Categories

Evaluate article effectiveness and ensure compliance with a comprehensive view of your Knowledge categories.

Where: This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

Who: To use the Knowledge Performance dashboard, you need the Service Intelligence User permission set. To manage the Knowledge Performance dashboard, you need the Service Intelligence App Admin permission set.

How: To see data category metrics, click Knowledge Performance dashboards.



SEE ALSO:

Salesforce Help: Service Intelligence Knowledge Articles Dashboard (can be outdated or unavailable during release preview)

Channels

Check out our new messaging types, including enhanced LINE Messaging, Bring Your Own Channel for Contact Center as a Service (CCaaS), and Unified Messaging for SMS. Use the Messaging for In-App and Web API (Generally Available) to programmatically manage conversations. Use enhanced Messaging or Messaging for In-App and Web in the sales process with improvements to agent-initiated outbound messaging.

IN THIS SECTION:

Voice

Empower agents to resolve customer issues faster with Einstein Article Recommendations for voice. Assist agents and optimize business processes based on the sentiment and intent of real-time conversations. Integrate voice and messaging in your contact center with Bring Your Own Contact Center as a Service (CCaaS).

Social Media

Social Customer Service Starter Pack is retiring.

Chat

Chat is in maintenance-only mode. Embedded Flows and Embedded Appointment Management are scheduled for retirement in June 2025.

Channel Tools

Improve the Messaging for Web experience in Channel Menu by adding User Verification.

Email

Send emails in a snap with the Service Email Assistant, stay organized by moving emails to another case, and enjoy Einstein Work Summaries for Email in more languages.

IN THIS SECTION:

Draft Personalized Service Emails with Einstein

With the Service Email Assistant, Einstein uses case data to draft personalized emails to customers. Agents can use preset email prompt instructions or enjoy custom email instructions created by their Salesforce admins. Agents just choose a template and let Einstein craft a response.

Move Emails Easily to the Relevant Case

Let agents reassign emails from one case to another with Email-to-Case. Keep emails correctly sorted when a customer replies to a thread with information about a different case.

Use Einstein Work Summaries for Email in Five More Languages

Use Einstein Work Summaries for Email in French, German, Italian, Japanese, and Spanish, in addition to English. Einstein detects the case language and drafts summaries accordingly. If Einstein can't detect the language, summaries are drafted in the user locale's language.

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 and has no scheduled enforcement date.

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 and has no scheduled enforcement date.

Draft Personalized Service Emails with Einstein

With the Service Email Assistant, Einstein uses case data to draft personalized emails to customers. Agents can use preset email prompt instructions or enjoy custom email instructions created by their Salesforce admins. Agents just choose a template and let Einstein craft a response.

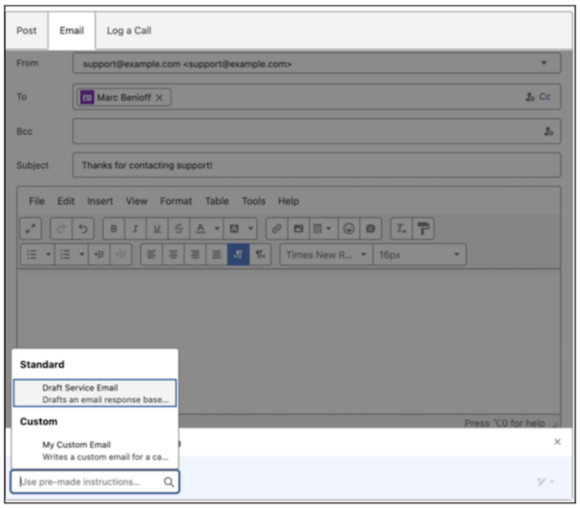
Where: This change applies to Einstein 1 Service Edition. The Einstein for Service Add-on can also be purchased for the Enterprise and Unlimited editions.

Who: To create and manage prompt instructions, you must have the Prompt Template Manager permission. To use the feature without managing prompts, agents must have the Prompt Template User permission set. The Einstein Service Email Assistant User permission set is required for all users. You must also have the Lightning email composer enabled.

How: Go to the Permission Sets page in Setup and assign the required user permissions.

A standard prompt template is already provided, and you can personalize it or create a custom template in Prompt Builder.

To use the feature, agents open the composer, enter a recipient, and click Draft with Einstein. Agents choose the preset prompt instructions, or custom ones created by admins.



Make sure to review the email before sending it.

SEE ALSO:

Salesforce Help: Draft Personalized Emails with Service Email Assistant

Move Emails Easily to the Relevant Case

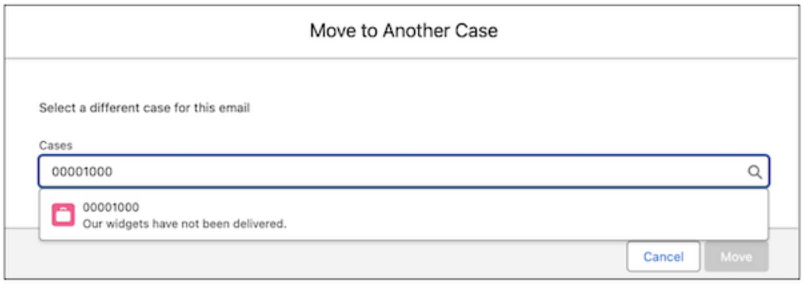
Let agents reassign emails from one case to another with Email-to-Case. Keep emails correctly sorted when a customer replies to a thread with information about a different case.

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

Who: To use this feature, you must have Lightning email threading enabled.

How: Go to the Email-to-Case Settings page in Setup, click **Edit**, and select **Let Agents Move Emails**. Save your changes.

After this setting is enabled, agents click the dropdown menu at the top right corner of an email feed item, click **Move to Another Case**, enter the case number of the target case, and click **Move** to reassign the email to the target case.



SEE ALSO:

Knowledge Article: Disable Ref ID and Switch to Lightning Threading

Salesforce Help: Move Emails to a Different Case

Use Einstein Work Summaries for Email in Five More Languages

Use Einstein Work Summaries for Email in French, German, Italian, Japanese, and Spanish, in addition to English. Einstein detects the case language and drafts summaries accordingly. If Einstein can't detect the language, summaries are drafted in the user locale's language.

Where: This change applies to Einstein 1 Service Edition, and Enterprise or Unlimited Editions with the Einstein for Service Add-on. Einstein for Service is available in Lightning Experience. Setup for Einstein for Service is available in Lightning Experience.

To purchase the Einstein for Service add-on, contact your Salesforce account executive.

When: These additional languages were first made available in Summer '24.

SEE ALSO:

Salesforce Help: Show Work Summaries for Email

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 and has no scheduled enforcement date.

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

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 legacy Email-to-Case composer is currently in maintenance mode, and new features and bug fixes will be added only to the new Lightning editor. To ensure the best experience for your customers, please test this update in your sandbox and then enable it.

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, enable it on the Release Updates page in Setup after testing it in your sandbox. After the release update is enabled, users see similar functionality when they compose and edit emails.

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 and has no scheduled enforcement date.

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

Why: Ref ID is currently in maintenance mode. New features and bug fixes will be added only to the new Lightning threading. To ensure the best experience for your customers, we recommend enabling this release update, after testing it in your sandbox.

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.

If you're a Salesforce admin for a Salesforce org that still uses Ref ID, you now see a banner reminding you to transition to Lightning threading by the enforcement date.

Learn more about the best practices for enabling this release update.

SEE ALSO:

Release Updates

Knowledge Article: Disable Ref ID and Switch to Lightning Threading

Messaging

Reach more customers with a range of new channels types, including enhanced LINE Messaging, Bring Your Own Channel for Contact Center as a Service (CCaaS), and Unified Messaging for SMS. Use the Messaging for In-App and Web API to programmatically manage conversations.

IN THIS SECTION:

The Messaging for In-App and Web API Is Generally Available

Deliver a highly customized mobile app or website messaging experience for your agents and customers by using the Messaging for In-App and Web API to programmatically manage conversations. Create conversations that store messaging sessions, generate access tokens, and send messages and files. Take it a step further by configuring server-sent events.

Messaging in the Salesforce Mobile App is Generally Available

Let agents message on the go with messaging in the Salesforce Mobile App. While messaging in the Salesforce app was in beta in Summer '24, it's now generally available. To send and receive messages in the Salesforce app, agents need the new Message on Mobile user permission in addition to the existing Messaging User permission set license.

Monitor Workflow Health and Customize Messaging for In-App and Web with Standard Client Events

To monitor the success of your Messaging for In-App and Web deployment or to build a site that responds to your deployment, track standard client events. We created standard client events to achieve feature parity with our legacy chat product.

Identify Top Conversation Drivers with Einstein Conversation Mining in Messaging for In-App and Web

Einstein Conversation Mining is now available in Messaging for In-App and Web. Einstein uses machine learning to review conversation data and extract the contact reason.

Transfer Messaging Sessions and Send Messaging Components in Messaging for Mobile

Improve agent productivity with two new messaging actions in the Salesforce mobile app. From the Enhanced Conversation component, agents can now send messaging components and transfer a messaging session to another agent, bot, or queue.

Use Messaging for In-App and Web in Developer Edition

To continue expanding its flexibility and availability, Messaging for In-App and Web is now supported in Developer Edition. Previously, you needed Unlimited Edition or Enterprise Edition to use this messaging type.

Send End User Information to an Auto-Response Messaging Component URL More Easily

You can now configure API parameters directly from the Auto-Response API. This makes it easier to send helpful client-side information, such as an end user's language or location, to a placeholder in your URL configuration. From there, you can use the information to personalize the end user experience, such as showing them a URL in their preferred language. Previously, you created a web page parameter in the Messaging Component Builder for your auto-response component and then used the API to override that web page parameter.

Show Customers a Longer Typing Indicator in Messaging for In-App and Web

Customers now see a typing indicator for up to 2 minutes if that's how long it takes for the agent to respond. Previously, the typing indicator disappeared within 5 seconds, so if the agent was still typing after that, the end user didn't know it.

Read Conversations More Easily with the Resized Chat Bubble and Avatar in Messaging for In-App and Web

You asked, we listened. The chat bubble in the end user's messaging conversation window is resized to improve readability and make better use of the space. Specifically, the chat bubble now takes up 85% of the usable space in the messaging conversation window, up from 65%. To center the user's focus on the larger chat bubble, the agent, bot, or end user avatar is slightly smaller.

Configure Routing More Easily in Enhanced Messaging

We made some minor changes to help you configure routing when you're setting up and activating an enhanced Messaging channel.

Activate, Deactivate, and Refresh Enhanced Messaging Channels

To ensure that a Messaging channel doesn't go live until you're ready, we added activate, deactivate, and refresh actions to more enhanced Messaging channels. After you create and customize a channel, activate it to start the flow of messaging traffic. To pause channel traffic in Salesforce, deactivate it. And, refresh your connection to the third-party messaging app if you experience message failures. Previously, these actions existed only in enhanced WhatsApp.

Improvements to the Send Message Action

When using the Send Message global action to start messaging sessions with customers, agents can now troubleshoot more easily with new error messages and a loading indicator. In the Send Message composer, agents can insert quick text, attach files, and record voice messages, and view a user's messaging history with your business. Agents can also start an SMS conversation with a lead, contact, or person account even if the customer doesn't yet have a messaging user record.

Troubleshoot Faster with Translated Error Messages

We love informative error messages (who doesn't?), so we made some improvements. All messaging errors associated with a Salesforce error code now appear in your Salesforce org's default language. Previously, they were shown in English. We also added 12 new error messages, each with its own error code, to help agents and Salesforce admins troubleshoot issues that crop up during messaging sessions. These errors appear in the Service Console.

Delete Messaging Users Without Opening a Support Case

We made it easier for you to delete messaging users. Previously, if a messaging user had open conversations, you had to contact Salesforce Customer Support to close the conversations before you could delete the messaging user. Now, when you try to delete a user, we automatically close the conversations for you.

Track Your KPIs with More Messaging Session Metrics

To give you greater insight into messaging activity in your enhanced channels, we added an object called MessagingSessionMetrics that tracks agent and end user response time.

Send Post-Chat Surveys More Easily in Messaging for In-App and Web

We made it easier to send a Salesforce Feedback Management survey at the end of a Messaging for In-App and Web session. Previously, you had to add multiple web page parameters when creating an auto-response to send your survey, and it wasn't possible to automatically associate a survey response with a customer.

Set App-Specific Consent Levels in Unified Messaging

Set different required consent levels for each application within a unified Messaging channel. For example, in a unified WhatsApp channel used for both service and marketing, change the consent requirements of your marketing interactions to require an explicit opt-in or double opt-in. Previously, consent requirements were set at the unified channel level.

Send Subscription Content with the Send Conversation Messages Invocable Action

The Send Conversation Messages invocable action, which is used to send automated outbound messages, can now also be used for communication subscriptions in unified Messaging channels. If you're already using this action in a flow or REST API code, no updates are needed.

Use Status-Based Capacity with Messaging (Generally Available)

Measure agent capacity more accurately with status-based capacity. 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. Status-based capacity was in beta in Summer '24 and is now generally available.

Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations for Messaging (Pilot)

Reduce handle time and improve customer satisfaction by providing agents with relevant articles in real time during conversations.

Assist Agents and Optimize Business Processes Based on the Sentiment and Intent of Real-Time Messages (Pilot)

Trigger background processes or recommend the next best action more accurately and intelligently by using generative AI to classify the sentiment and intent of conversations.

Bring Your Own Channel

Connect your preferred Messaging provider or Contact Center as a Service (CCaaS) provider to Salesforce with Bring Your Own Channel and Bring Your Own Channel for CCaaaS.

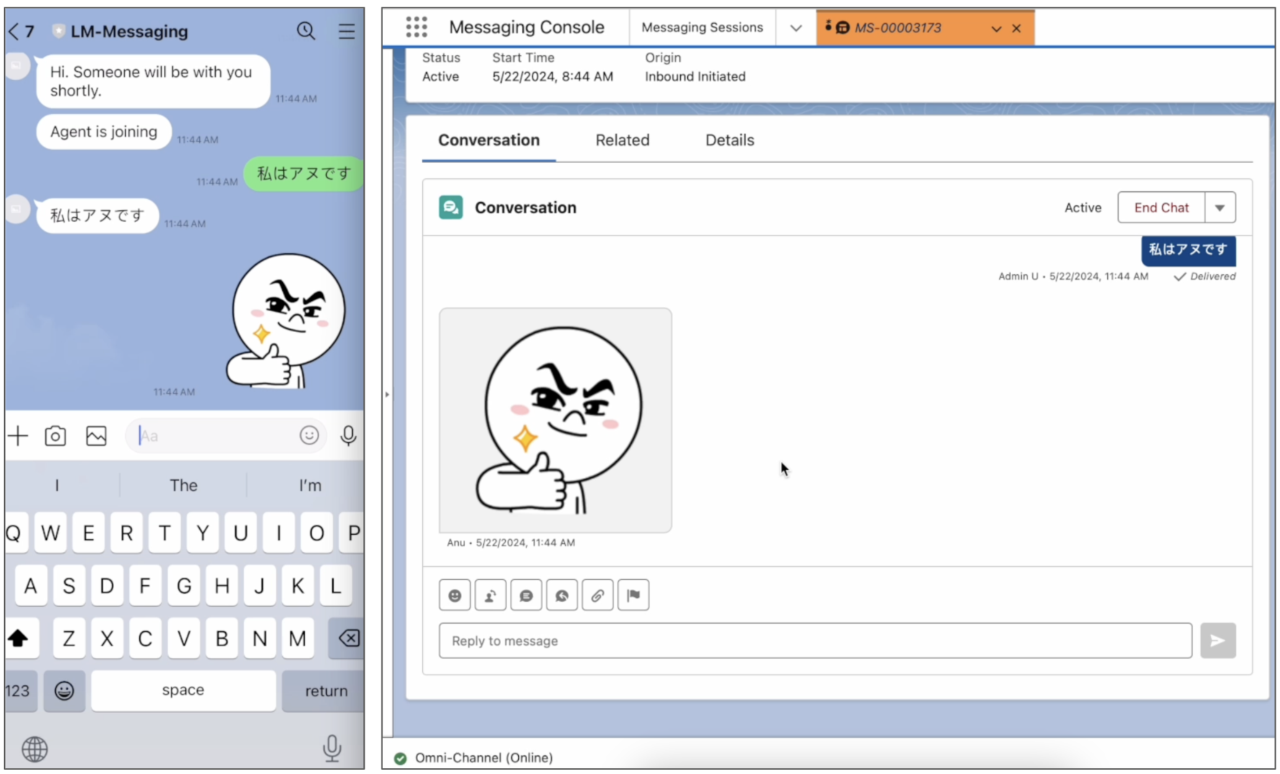
Help Customers in a LINE Messaging Channel

Reach more customers with an enhanced Messaging channel that's connected to the LINE messaging app, widely used in Japan. With a LINE channel, your support team can now address LINE messages directly from the Service Console.

Where: This change applies to enhanced LINE channels. View required editions.

Why: An enhanced LINE channel gives agents and customers a rich customer service experience.

- When a customer sends your business a message in LINE, Omni-Channel routes the message to a bot or agent in Omni-Channel according to your routing logic.
- Agents can send and receive images, emoji, links, videos, and questions with clickable options.
- Salesforce admins can easily move LINE channels between Salesforce orgs, such as from a sandbox to production.



How: To help your customers over LINE, you need a LINE Official Account. You must also add yourself as a provider in the LINE Official Account Manager. Then, go to the Messaging Settings page in Salesforce Setup and create a LINE channel. For steps, see Salesforce Help.

Note: LINE channels don't currently support automated outbound messaging. You also can't send or receive GIFs, PDFs, or other documents due to limitations in the LINE app.

SEE ALSO:

Salesforce Help: Create a LINE Messaging Channel in Service Cloud (can be outdated or unavailable during release preview)

Salesforce Help: Considerations for LINE in Service Cloud (can be outdated or unavailable during release preview)

Salesforce Help: Compare Messaging Channel Capabilities in Service Cloud (can be outdated or unavailable during release preview)

Manage Marketing and Service Interactions Together with Unified Messaging for SMS

Give context to agents and continuity to customers with Unified Messaging, where marketing and service interactions occur in one SMS channel linked to a single phone number. Previously, you needed separate phone numbers for marketing and service.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Marketing Cloud Engagement and Service Cloud Digital Engagement add-ons. View required editions.

How: To get started with Unified Messaging, contact your Salesforce account executive. Set up and manage Unified Messaging SMS channels on the SMS Codes page in Setup, under SMS.

Important: Currently, you can't upgrade a Service Cloud SMS channel or Marketing Cloud SMS channel to a Unified Messaging channel. When you set up a Unified Messaging SMS channel, use a new phone number.

SEE ALSO:

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

Salesforce Help: Set Up an SMS Unified Messaging Channel (can be outdated or unavailable during release preview)

The Messaging for In-App and Web API Is Generally Available

Deliver a highly customized mobile app or website messaging experience for your agents and customers by using the Messaging for In-App and Web API to programmatically manage conversations. Create conversations that store messaging sessions, generate access tokens, and send messages and files. Take it a step further by configuring server-sent events.

Where: This change applies to Messaging for In-App and Web. View required editions.

How: Set up Messaging for In-App and Web with a custom client deployment, and then configure the Messaging for In-App and Web API.

SEE ALSO:

Salesforce Help: Configure a Custom Client Deployment for Messaging for In-App and Web (can be outdated or unavailable during release preview)

Developer Documentation: Messaging for In-App and Web API (can be outdated or unavailable during release preview)

Messaging in the Salesforce Mobile App is Generally Available

Let agents message on the go with messaging in the Salesforce Mobile App. While messaging in the Salesforce app was in beta in Summer '24, it's now generally available. To send and receive messages in the Salesforce app, agents need the new Message on Mobile user permission in addition to the existing Messaging User permission set license.

Where: This change applies to all enhanced messaging channels and Messaging for In-App and Web. View required editions.

SEE ALSO:

Salesforce Release Notes: Messaging in the Salesforce Mobile App is Now Generally Available (can be outdated or unavailable during release preview)

Monitor Workflow Health and Customize Messaging for In-App and Web with Standard Client Events

To monitor the success of your Messaging for In-App and Web deployment or to build a site that responds to your deployment, track standard client events. We created standard client events to achieve feature parity with our legacy chat product.

Where: This change applies to Messaging for In-App and Web. View required editions.

How: Use `window.addEventListener` to register a handler for a standard client event.

Identify Top Conversation Drivers with Einstein Conversation Mining in Messaging for In-App and Web

Einstein Conversation Mining is now available in Messaging for In-App and Web. Einstein uses machine learning to review conversation data and extract the contact reason.

Where: This change applies to Messaging for In-App and Web. View required editions.

SEE ALSO:

Salesforce Release Notes: Gather More Service Support Insights with Additional Channels in Einstein Conversation Mining (can be outdated or unavailable during release preview)

Transfer Messaging Sessions and Send Messaging Components in Messaging for Mobile

Improve agent productivity with two new messaging actions in the Salesforce mobile app. From the Enhanced Conversation component, agents can now send messaging components and transfer a messaging session to another agent, bot, or queue.

Where: This change applies to enhanced Messaging channels and Messaging for In-App and Web. View required editions.

SEE ALSO:

Salesforce Help: Send Messaging Components and Transfer Messaging Sessions with Messaging for Mobile (can be outdated or unavailable during release preview)

Use Messaging for In-App and Web in Developer Edition

To continue expanding its flexibility and availability, Messaging for In-App and Web is now supported in Developer Edition. Previously, you needed Unlimited Edition or Enterprise Edition to use this messaging type.

Where: This change applies to Messaging for In-App and Web. View required editions.

Send End User Information to an Auto-Response Messaging Component URL More Easily

You can now configure API parameters directly from the Auto-Response API. This makes it easier to send helpful client-side information, such as an end user's language or location, to a placeholder in your URL configuration. From there, you can use the information to personalize the end user experience, such as showing them a URL in their preferred language. Previously, you created a web page parameter in the Messaging Component Builder for your auto-response component and then used the API to override that web page parameter.

Where: This change applies to Messaging for Web. View required editions.

SEE ALSO:

Salesforce Help: Personalize the URL for your Auto-Response Component

Developer Documentation: Auto-Responses in Messaging for Web

Show Customers a Longer Typing Indicator in Messaging for In-App and Web

Customers now see a typing indicator for up to 2 minutes if that's how long it takes for the agent to respond. Previously, the typing indicator disappeared within 5 seconds, so if the agent was still typing after that, the end user didn't know it.

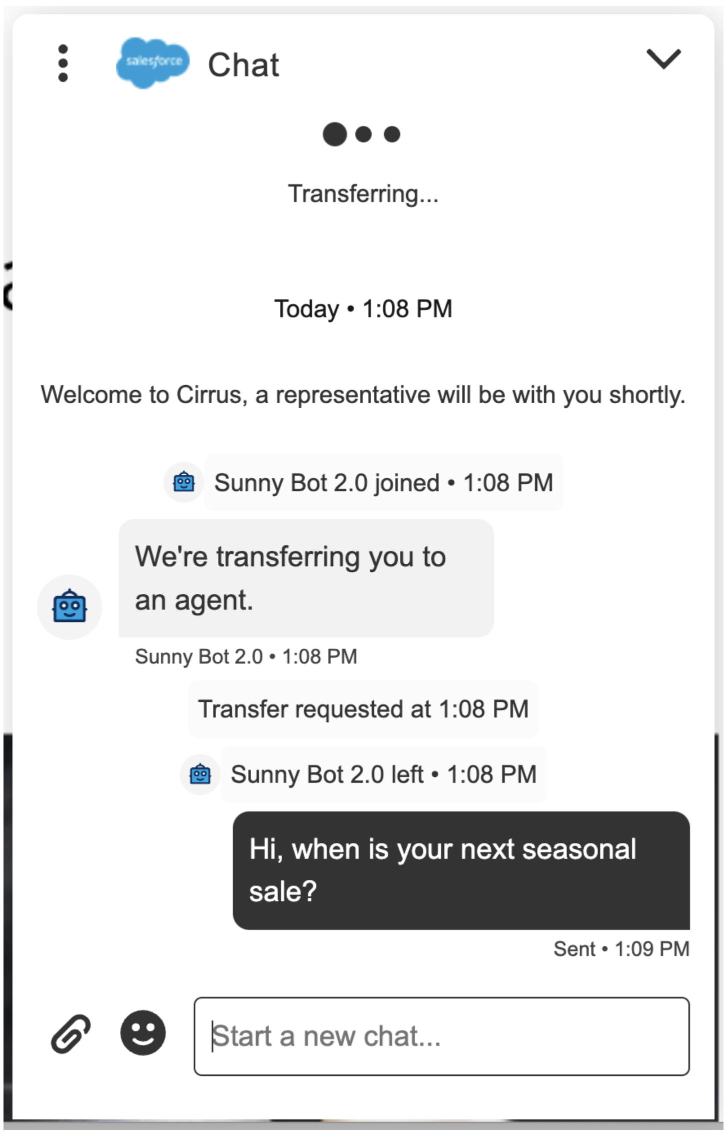
Where: This change applies to Messaging for In-App and Web. View required editions.

Read Conversations More Easily with the Resized Chat Bubble and Avatar in Messaging for In-App and Web

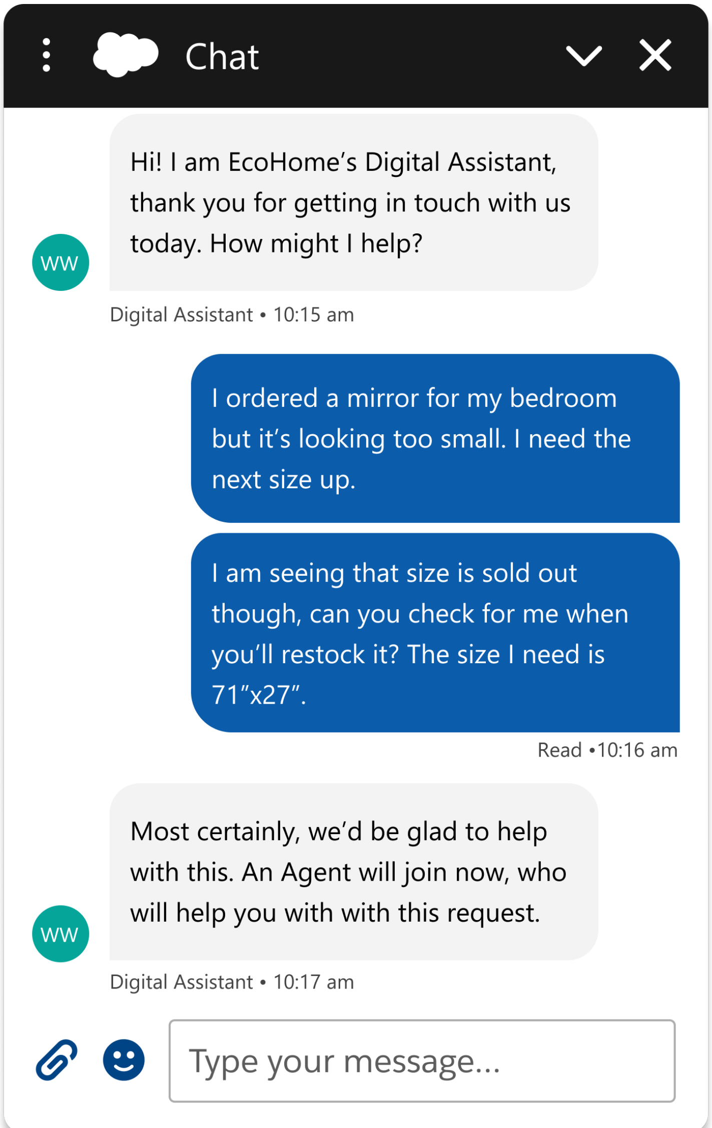
You asked, we listened. The chat bubble in the end user's messaging conversation window is resized to improve readability and make better use of the space. Specifically, the chat bubble now takes up 85% of the usable space in the messaging conversation window, up from 65%. To center the user's focus on the larger chat bubble, the agent, bot, or end user avatar is slightly smaller.

Where: This change applies to Messaging for In-App and Web. View required editions.

Earlier:



Now:

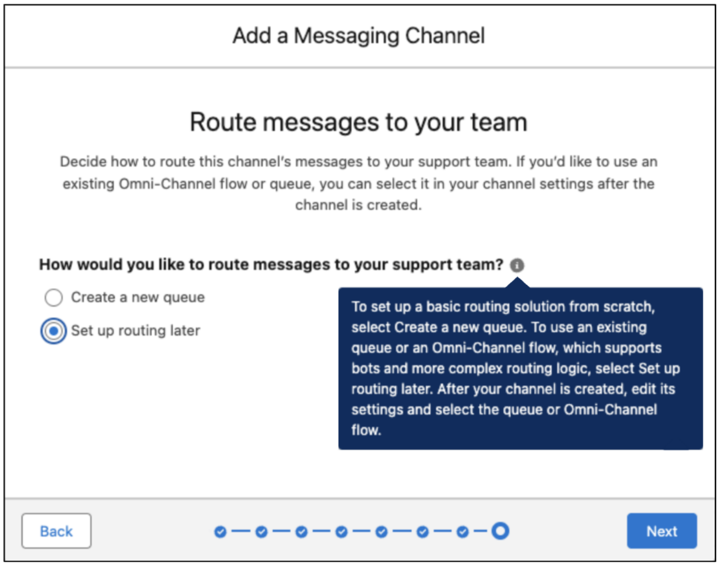


Configure Routing More Easily in Enhanced Messaging

We made some minor changes to help you configure routing when you're setting up and activating an enhanced Messaging channel.

Where: This change applies to enhanced Messaging channels. View required editions.

Why: When you're creating a messaging channel and we prompt you to select a routing method, you now get more guidance to help you make the right decision.



Previously, this step showed two options: **Create a new queue and routing configuration** and **Stop the setup flow and manually connect to a queue or Omni-Channel Flow**. It also didn't include any extra guidance.

And if you try to activate an enhanced channel before configuring your routing settings, we now show a message explaining how to fix the issue.

SEE ALSO:

Salesforce Help: Set Up Routing for Messaging Channels in Service Cloud (can be outdated or unavailable during release preview)

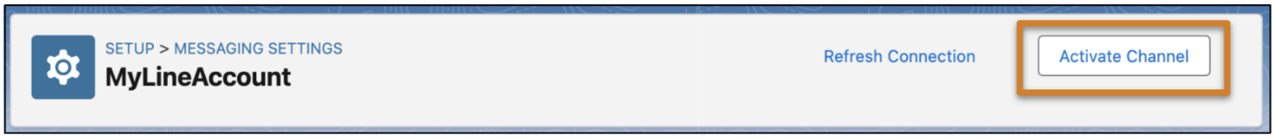
Activate, Deactivate, and Refresh Enhanced Messaging Channels

To ensure that a Messaging channel doesn't go live until you're ready, we added activate, deactivate, and refresh actions to more enhanced Messaging channels. After you create and customize a channel, activate it to start the flow of messaging traffic. To pause channel traffic in Salesforce, deactivate it. And, refresh your connection to the third-party messaging app if you experience message failures. Previously, these actions existed only in enhanced WhatsApp.

Where: This change applies to enhanced Apple Messages for Business, enhanced Facebook Messenger, enhanced LINE, and enhanced WhatsApp channels. View required editions.

How: From Setup, go to the Messaging Settings page and click a channel name. At the top of the page, you can:

- Click **Activate Channel** to start receiving and sending messages in the channel in Salesforce.
- Click **Deactivate Channel** to pause messaging traffic in the channel.
- Click **Refresh Connection** to restore the connection to Apple Messages, Facebook Messenger, LINE, or WhatsApp.



SEE ALSO:

Salesforce Help: Activating and Deactivating Messaging Channels in Service Cloud (can be outdated or unavailable during release preview)

Salesforce Help: Enhanced Messaging Channel Activation Checklist (can be outdated or unavailable during release preview)

Improvements to the Send Message Action

When using the Send Message global action to start messaging sessions with customers, agents can now troubleshoot more easily with new error messages and a loading indicator. In the Send Message composer, agents can insert quick text, attach files, and record voice messages, and view a user's messaging history with your business. Agents can also start an SMS conversation with a lead, contact, or person account even if the customer doesn't yet have a messaging user record.

IN THIS SECTION:

View History and More in the Send Message Composer

The Send Message global action, which agents use to start a messaging session with an end user, now shows the user's messaging history. Agents now have context when they reach out to an end user. The composer also now includes the quick text, file attachment, and voice message actions.

Troubleshoot Agent-Initiated Messaging with New Error Messages

Agent-initiated messaging is easier for agents to navigate thanks to new error messages that address common scenarios. We also added a loading message when a sent message is in progress.

Start the Conversation in Enhanced SMS Channels

We made it easier for agents to start a messaging session with a customer in enhanced SMS channels. If you don't have a messaging user record for the customer in the channel, we now create one for you as long as the end user consented to receive SMS messages. Previously, you manually created the record before trying to send the message.

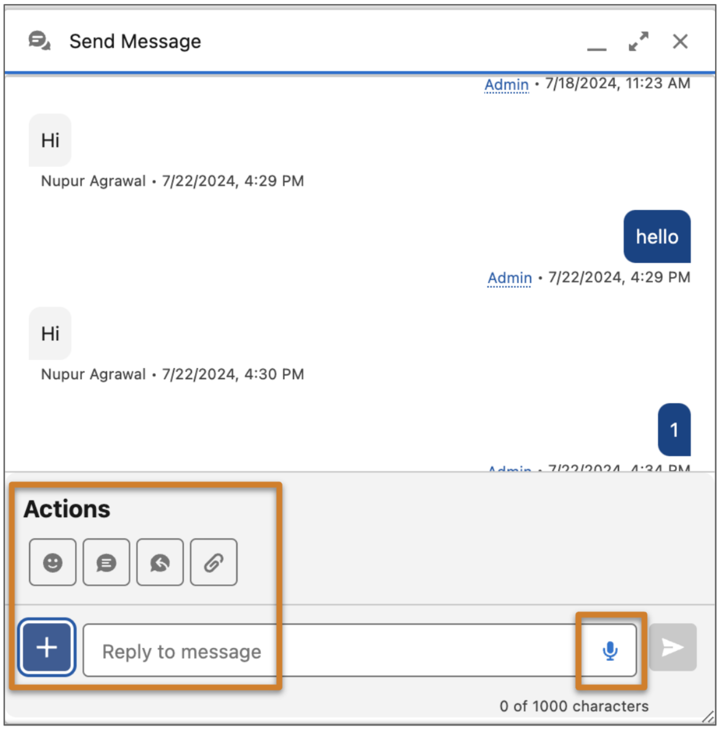
View History and More in the Send Message Composer

The Send Message global action, which agents use to start a messaging session with an end user, now shows the user's messaging history. Agents now have context when they reach out to an end user. The composer also now includes the quick text, file attachment, and voice message actions.

Where: This change applies to enhanced Messaging channels and Messaging for In-App. View required editions.

How: From any page in Salesforce, select the Send Message action from the global action menu.

- When you select a recipient, you can see any past messages exchanged with the recipient in that channel.
- Click the plus icon to view actions you can take: insert emoji, insert quick text, send a messaging component, and attach a file. Previously, only the messaging component and emoji actions were available.
- Click the microphone to record and send a voice message.



SEE ALSO:

Salesforce Help: Start a Messaging Session with a Customer (can be outdated or unavailable during release preview)

Troubleshoot Agent-Initiated Messaging with New Error Messages

Agent-initiated messaging is easier for agents to navigate thanks to new error messages that address common scenarios. We also added a loading message when a sent message is in progress.

Where: These changes apply to enhanced Messaging channels and Messaging for In-App. View required editions.

Why: New error messages appear when:

- We can't find the end user because they aren't connected to an enhanced Messaging or Messaging for In-App channel.
- We can't send your message.
- The end user is engaged in a different messaging session and can't receive a new one.
- You're attempting to send a message outside of the service window for Facebook Messenger or WhatsApp.

Start the Conversation in Enhanced SMS Channels

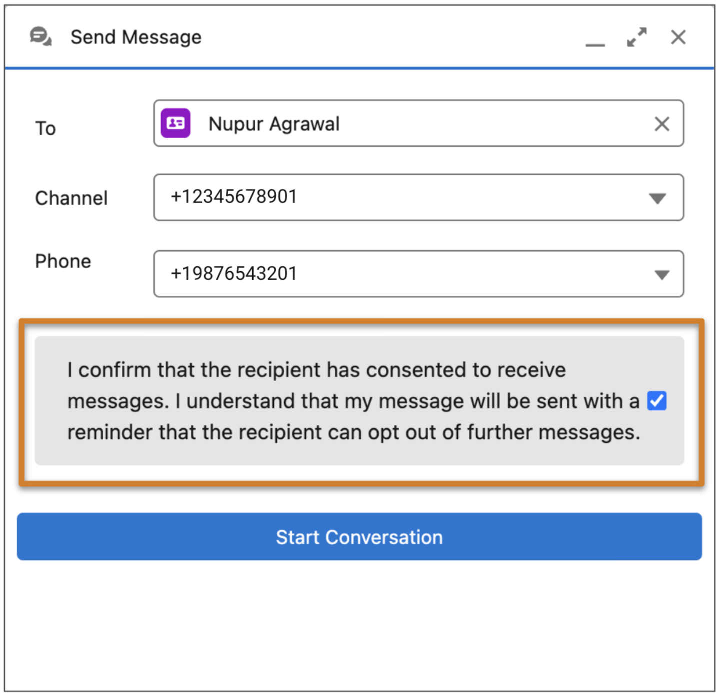
We made it easier for agents to start a messaging session with a customer in enhanced SMS channels. If you don't have a messaging user record for the customer in the channel, we now create one for you as long as the end user consented to receive SMS messages. Previously, you manually created the record before trying to send the message.

Where: This change applies to enhanced SMS channels. View required editions.

Why: To initiate a messaging session in an enhanced SMS channel, you need a messaging user record for the person who you want to contact. That record links the channel to the end user and includes their contact information and opt-in status.

How: To send a message to a customer in an enhanced SMS channel, agents can select **Send Message** from the global action menu on any page in Salesforce. After selecting the contact, lead, or account they want to message, the agent enters and sends their message.

A messaging user is created for the recipient, and the message is sent to the associated phone number along with a reminder that they can opt out of further messages.



To initiate enhanced SMS messaging sessions with user who don't yet have a messaging user record, agents need the Send Initial Message to Individual user permission.

SEE ALSO:

Salesforce Help: Start a Messaging Session with a Customer (can be outdated or unavailable during release preview)

Salesforce Help: Troubleshooting the Send Message Action in Messaging (can be outdated or unavailable during release preview)

Troubleshoot Faster with Translated Error Messages

We love informative error messages (who doesn't?), so we made some improvements. All messaging errors associated with a Salesforce error code now appear in your Salesforce org's default language. Previously, they were shown in English. We also added 12 new error messages, each with its own error code, to help agents and Salesforce admins troubleshoot issues that crop up during messaging sessions. These errors appear in the Service Console.

Where: This change applies to enhanced Messaging channels. View required editions.

Why: The new error messages cover a variety of situations, including problems with the content of a message, the recipient's contact information, or message templates.

SEE ALSO:

Salesforce Help: Messaging Error Codes in Service Cloud (can be outdated or unavailable during release preview)

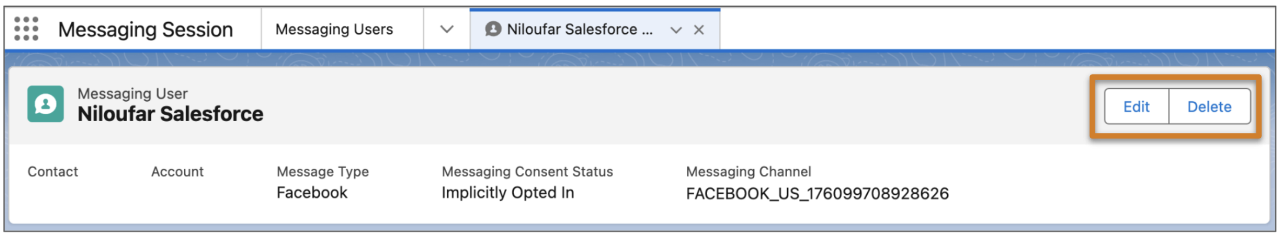
Delete Messaging Users Without Opening a Support Case

We made it easier for you to delete messaging users. Previously, if a messaging user had open conversations, you had to contact Salesforce Customer Support to close the conversations before you could delete the messaging user. Now, when you try to delete a user, we automatically close the conversations for you.

Where: This change applies to enhanced Messaging channels and Messaging for In-App and Web. View required editions.

Why: For compliance reasons, Salesforce admins can delete a customer's personal identifiable information (PII) from enhanced Messaging channels and Messaging for In-App and Web channels. The PII is removed when their messaging user records and all associated conversations are deleted.

How: On a messaging user record, select **Delete**. If the user still has open conversations, we show a message letting you know that it takes about 10 minutes to close them. After 10 minutes, check back and select **Delete** again.



SEE ALSO:

Salesforce Help: Protect Customer Data and Privacy in Service Cloud Messaging (can be outdated or unavailable during release preview)

Salesforce Help: Delete Messaging Customer Data (can be outdated or unavailable during release preview)

Track Your KPIs with More Messaging Session Metrics

To give you greater insight into messaging activity in your enhanced channels, we added an object called MessagingSessionMetrics that tracks agent and end user response time.

Where: This change applies to enhanced Messaging channels and Messaging for In-App and Web. View required editions.

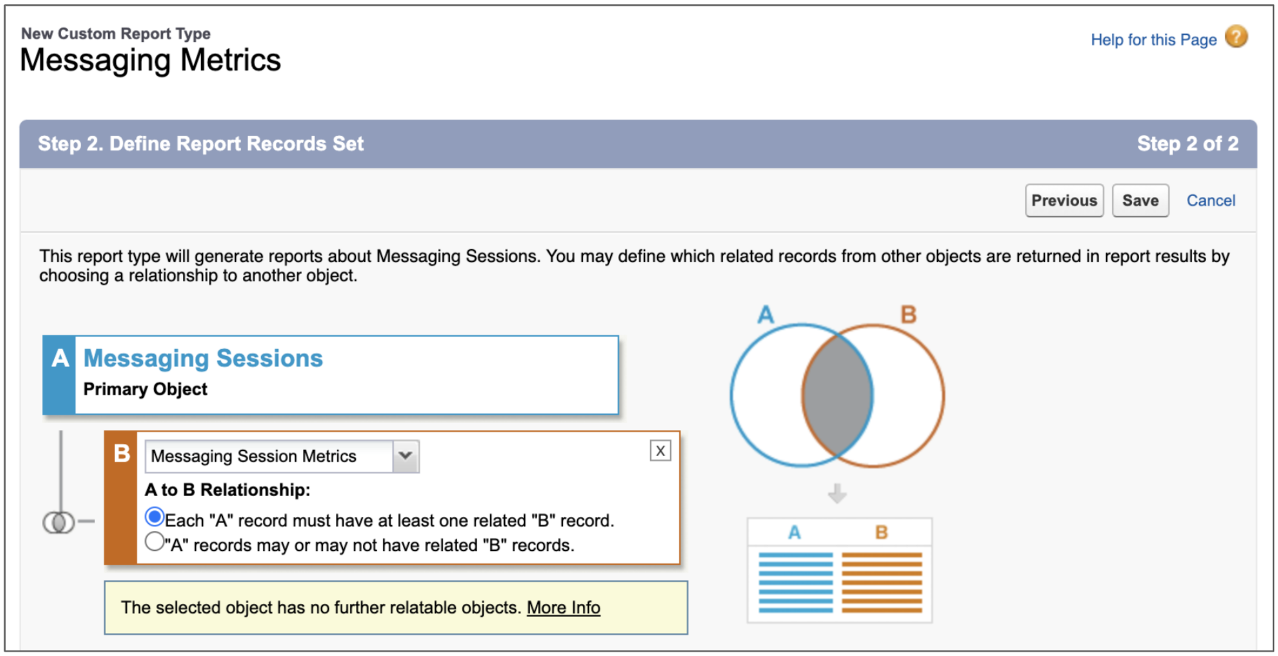
When: These changes take effect in October 2024.

How: To track KPIs, create a custom report type with Messaging Session as the primary object and MessagingSessionMetrics as the secondary object.

Six MessagingSessionMetrics records are generated whenever a messaging session ends in an enhanced Messaging channel or Messaging for In-App and Web channel. The records track, respectively:

- Average end user response time
- Average agent response time
- Maximum end user response time
- Maximum agent response time
- Agent message count (also tracked on the MessagingSession record)
- End user message count (also tracked on the MessagingSession record)

The AgentMessageCount and EndUserMessageCount fields on MessagingSession are also now populated for enhanced channels. Previously, they were populated only for standard channels.



SEE ALSO:

Salesforce Help: Report on Messaging Activity in Service Cloud (can be outdated or unavailable during release preview)

Developer Guide: MessagingSession

Developer Guide: MessagingSessionMetrics

Send Post-Chat Surveys More Easily in Messaging for In-App and Web

We made it easier to send a Salesforce Feedback Management survey at the end of a Messaging for In-App and Web session. Previously, you had to add multiple web page parameters when creating an auto-response to send your survey, and it wasn't possible to automatically associate a survey response with a customer.

Where: This change applies to Messaging for In-App and Web. View required editions.

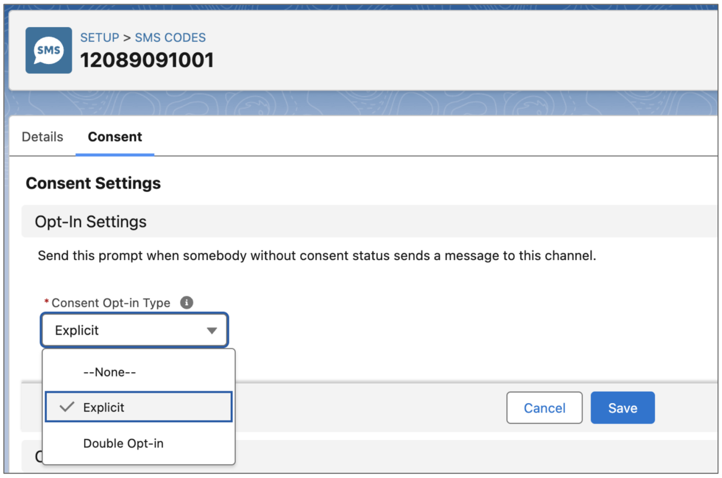
How: See Set Up Post-Chat Surveys for Messaging for In-App and Web (may be outdated or unavailable during release preview).

Set App-Specific Consent Levels in Unified Messaging

Set different required consent levels for each application within a unified Messaging channel. For example, in a unified WhatsApp channel used for both service and marketing, change the consent requirements of your marketing interactions to require an explicit opt-in or double opt-in. Previously, consent requirements were set at the unified channel level.

Where: This change applies to unified WhatsApp and unified SMS channels. View required editions.

How: To manage the consent settings for marketing interactions in a unified channel, go to Setup. Search for Unified Messaging, and then select the **SMS Codes** page for SMS or the **Your Numbers** page for WhatsApp. Click a phone number, click the **Consent** tab, and optionally change the required consent level for marketing messages sent from that number.



The required consent level for service messages in unified channels is Implicit Opt-In, and can't be changed.

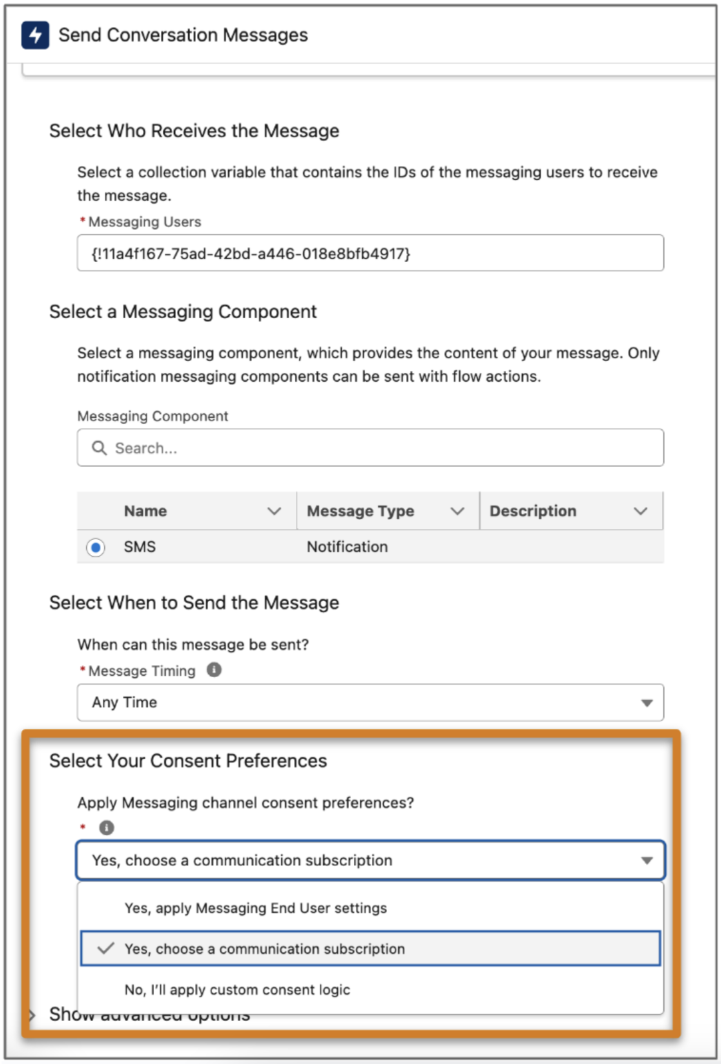
Send Subscription Content with the Send Conversation Messages Invocable Action

The Send Conversation Messages invocable action, which is used to send automated outbound messages, can now also be used for communication subscriptions in unified Messaging channels. If you're already using this action in a flow or REST API code, no updates are needed.

Where: This change applies to unified WhatsApp and unified SMS channels. View required editions.

How: Add the Send Conversation Messages action to a flow. In the Select Your Consent Preferences section, select one of the three options.

- To respect the consent preferences of the messaging end users identified as recipients, select **Yes, apply Messaging End User settings**.
- To apply custom consent logic elsewhere in the flow, select **No, I'll apply custom consent logic**.
- To send the message only to messaging end users who have opted into a particular subscription, select **Yes, choose a communication subscription** and in the subsequent field, enter a flow variable that provides the subscription ID. The subscription must be tied to the channel that you're sending the message on. This option is visible only if you have a unified channel that supports marketing interactions.



SEE ALSO:

Actions Developer Guide: Send Conversation Messages Actions (can be outdated or unavailable during release preview)

Salesforce Help: Flow Core Actions: Send Conversation Messages (can be outdated or unavailable during release preview)

Salesforce Help: Send Automated Messages in Enhanced Messaging Channels (can be outdated or unavailable during release preview)

Use Status-Based Capacity with Messaging (Generally Available)

Measure agent capacity more accurately with status-based capacity. 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. Status-based capacity was in beta in Summer '24 and is now generally available.

Where: This change applies to Messaging for In-App and Web and enhanced Messaging channels including Bring Your Own Channel and Bring Your Own Channel for CCaaS. View required editions.

Who: 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.
- Agents can receive work within the Salesforce Mobile App if status-based capacity is enabled for a service channel.

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:

Pause Messaging Sessions with Omni-Channel Status-Based Capacity (Generally Available)

Salesforce Help: Set Up Routing for Messaging Channels in Service Cloud (can be outdated or unavailable during release preview)

Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations for Messaging (Pilot)

Reduce handle time and improve customer satisfaction by providing agents with relevant articles in real time during conversations.

Where: This change applies to Messaging for In-App and Web, enhanced Facebook Messenger, and enhanced WhatsApp channels.

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.

SEE ALSO:

Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations (Pilot)

Assist Agents and Optimize Business Processes Based on the Sentiment and Intent of Real-Time Messages (Pilot)

Trigger background processes or recommend the next best action more accurately and intelligently by using generative AI to classify the sentiment and intent of conversations.

Where: This change applies to Messaging for In-App and Web, enhanced Facebook Messenger, and enhanced WhatsApp channels.

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.

SEE ALSO:

Assist Agents and Optimize Business Processes Based on the Sentiment and Intent of Real-Time Conversations (Pilot)

Bring Your Own Channel

Connect your preferred Messaging provider or Contact Center as a Service (CCaaS) provider to Salesforce with Bring Your Own Channel and Bring Your Own Channel for CCaaaS.

IN THIS SECTION:

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 generally available as of June 2024, was previously called Partner Messaging.

Bring Your Own Channel for Contact Center as a Service (CCaaS)

Connect your preferred contact center vendor to Salesforce with Bring Your Own Channel for CCaaS. Set up and maintain a partner contact center with integrated messaging and voice capabilities, add a Messaging channel to a partner telephony contact center, or create a messaging-only partner contact center. Use features from your Contact Center as a Service (CCaaS) provider, such as their third-party bots, while giving agents and supervisors a consistent experience within Salesforce.

Track Developer Updates with the Interaction Service API Developer Guide and API Release Notes

Keep up with the latest and greatest additions to Interaction Service API with our new developer guide. Build your partner integration for Bring Your Own Channel or Bring Your Own Channel for Contact Center as a Service (CCaaS). Get started with setup and authentication information, and then check out reference content, example payloads, and error messages. The developer guide covers inbound message interaction requests and outbound message custom events. The Interaction Service Release Notes page highlights updates to Interaction Service API.

Enrich Customer Conversations with More Messaging Component Formats

Elevate customer interactions with additional messaging component formats in Bring Your Own Channel and Bring Your Own Channel for CCaaS Messaging channels. Newly supported formats include quick replies, buttons, list selectors, forms, time selectors, and carousels.

Find Out When Your Outbound Messages Are Delivered and Read

Track the status of outbound messages in Bring Your Own Channel and Bring Your Own Channel for CCaaS Messaging channels that use delivery acknowledgments and read receipts. During Messaging sessions, agents see whether customers have received and read the messages they sent.

Enhance Operational Efficiency by Syncing Messaging Queues with a CCaaS Partner System

Streamline your workflows by using Salesforce to create combined Messaging and Voice queues or Messaging-only queues for external routing. Then, map these queues to a Contact Center as a Service (CCaaS) partner system and process the routing there. Previously you could only map Voice queues to a partner telephony system. Synchronizing these queues and capacity between Salesforce and CCaaS partner systems allows for seamless telephony and messaging interactions within the same contact center.

Control Your Setup with Your Own Custom OAuth Connected App

Take more control of the security setup for your Bring Your Own Channel or Bring Your Own Channel for CCaaS integration by creating and using your own custom OAuth app. This connected app allows you to integrate a third-party Messaging channel with Salesforce by using Salesforce Interaction Service API. Instead of providing a custom app for you, certain Messaging or CCaaS partners expect you to manage this aspect of setup yourself.

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 generally available as of June 2024, 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 AppExchange 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 (can be outdated or unavailable during release preview)

Salesforce Developer Guide: Bring Your Own Channel (can be outdated or unavailable during release preview)

Bring Your Own Channel for Contact Center as a Service (CCaaS)

Connect your preferred contact center vendor to Salesforce with Bring Your Own Channel for CCaaS. Set up and maintain a partner contact center with integrated messaging and voice capabilities, add a Messaging channel to a partner telephony contact center, or create a messaging-only partner contact center. Use features from your Contact Center as a Service (CCaaS) provider, such as their third-party bots, while giving agents and supervisors a consistent experience within Salesforce.

Where: This feature is available in Enterprise, Unlimited, and Developer editions for Service Cloud or Sales Cloud with the Digital Engagement add-on license. To add Voice channels in addition to Messaging, a Service Cloud Voice with Partner Telephony license is required.

How: Download a managed package from AppExchange for your preferred CCaaS vendor. In Setup, go to Messaging Settings, and add a Bring Your Own Channel for CCaaS Messaging channel to a partner contact center. To add a Voice channel, from Setup, go to Partner Telephony Contact Centers, select New, and follow the steps to use a preexisting contact center.

SEE ALSO:

Expand Your Contact Center Capabilities with Integrated Voice and Messaging

Salesforce Help: Bring Your Own Channel for CCaaS (can be outdated or unavailable during release preview)

Salesforce Developer Guide: Bring Your Own Channel for CCaaS (can be outdated or unavailable during release preview)

Track Developer Updates with the Interaction Service API Developer Guide and API Release Notes

Keep up with the latest and greatest additions to Interaction Service API with our new developer guide. Build your partner integration for Bring Your Own Channel or Bring Your Own Channel for Contact Center as a Service (CCaaS). Get started with setup and authentication information, and then check out reference content, example payloads, and error messages. The developer guide covers inbound message interaction requests and outbound message custom events. The Interaction Service Release Notes page highlights updates to Interaction Service API.

SEE ALSO:

Salesforce Developer Guide: Interaction Service API (coming soon)

Salesforce Developer Guide: Bring Your Own Channel (can be outdated or unavailable during release preview)

Salesforce Developer Guide: Bring Your Own Channel for CCaaS (can be outdated or unavailable during release preview)

Enrich Customer Conversations with More Messaging Component Formats

Elevate customer interactions with additional messaging component formats in Bring Your Own Channel and Bring Your Own Channel for CCaaS Messaging channels. Newly supported formats include quick replies, buttons, list selectors, forms, time selectors, and carousels.

Where: This change applies to Bring Your Own Channel and Bring Your Own Channel for CCaaS. View required editions.

SEE ALSO:

Salesforce Help: Interactive Messaging Components (can be outdated or unavailable during release preview)

Find Out When Your Outbound Messages Are Delivered and Read

Track the status of outbound messages in Bring Your Own Channel and Bring Your Own Channel for CCaaS Messaging channels that use delivery acknowledgments and read receipts. During Messaging sessions, agents see whether customers have received and read the messages they sent.

Where: This change applies to Bring Your Own Channel and Bring Your Own Channel for CCaaS. View required editions.

Enhance Operational Efficiency by Syncing Messaging Queues with a CCaaS Partner System

Streamline your workflows by using Salesforce to create combined Messaging and Voice queues or Messaging-only queues for external routing. Then, map these queues to a Contact Center as a Service (CCaaS) partner system and process the routing there. Previously you could only map Voice queues to a partner telephony system. Synchronizing these queues and capacity between Salesforce and CCaaS partner systems allows for seamless telephony and messaging interactions within the same contact center.

Where: This change applies to Bring Your Own Channel for CCaaS. View required editions.

SEE ALSO:

Sync Queues for More Channel Types to Partner Systems

Control Your Setup with Your Own Custom OAuth Connected App

Take more control of the security setup for your Bring Your Own Channel or Bring Your Own Channel for CCaaS integration by creating and using your own custom OAuth app. This connected app allows you to integrate a third-party Messaging channel with Salesforce by using Salesforce Interaction Service API. Instead of providing a custom app for you, certain Messaging or CCaaS partners expect you to manage this aspect of setup yourself.

Where: This change applies to Bring Your Own Channel and Bring Your Own Channel for CCaaS. View required editions

How: From App Manager, create a connected app and enable OAuth Settings for the API integration. After creating a Messaging channel, update the Conversation Channel Definition to use the name of the connected app you created.

SEE ALSO:

Salesforce Help: Set Up and Configure Your Own OAuth Connected App (can be outdated or unavailable during release preview)

Salesforce Help: Configure Basic Connected App Settings (can be outdated or unavailable during release preview)

Salesforce Help: Enable OAuth Settings for API Integration (can be outdated or unavailable during release preview)

Voice

Empower agents to resolve customer issues faster with Einstein Article Recommendations for voice. Assist agents and optimize business processes based on the sentiment and intent of real-time conversations. Integrate voice and messaging in your contact center with Bring Your Own Contact Center as a Service (CCaaS).

IN THIS SECTION:

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 first made available in Summer '24.

Display Call Controls Only in Active Omni-Channel Sessions

Avoid Confusion when Opening Omni-Channel in another tab or browser. Because agents can only be logged in to one Omni-Channel session at a time, logging in to a session in another tab or browser requires ending any active calls. To make this behavior more intuitive, inactive sessions no longer display call controls.

Perform Enhanced Call Type Analyses Using Call Subtypes

Know whether your inbound, transfer, and callback calls are phone or Voice over Internet Protocol (VoIP) calls. When creating the VoiceCall record, use the callSubtype parameter to specify the network or protocol over which the voice call is made.

Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations for Voice (Pilot)

Reduce handle time and improve customer satisfaction by providing agents with relevant articles in real time during calls.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models.

Service Cloud Voice with Amazon Connect	Service Cloud Voice with Partner Telephony from Amazon Connect	Service Cloud Voice with Partner Telephony
✔	✔	✔

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

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

SEE ALSO:

Empower Agents to Resolve Customer Issues Faster with Einstein Article Recommendations (Pilot)

Assist Agents and Optimize Business Processes Based on the Sentiment and Intent of Real-Time Conversations (Pilot)

Trigger background processes or recommend the Next Best Action more accurately and intelligently by using generative AI to classify the sentiment and intent of conversations. From the Conversation Intelligence Rules setup page, create a new rule, then set Einstein Conversation Intelligence Signals as a Signal Source and use "Intent," "Customer Sentiment," or "Agent Sentiment" as the Signal Type that defines when to take conditional actions.

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.

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.

SEE ALSO:

Assist Agents and Optimize Business Processes Based on the Sentiment and Intent of Real-Time Messages (Pilot)

Expand Your Contact Center Capabilities with Integrated Voice and Messaging

Extend your Service Cloud Voice with Partner Telephony setup to provide agents with integrated voice and messaging capabilities. With Bring Your Own Contact Center as a Service (CCaaS), use your favorite voice and messaging features from your preferred CCaaS provider while giving agents and supervisors a consistent experience within Salesforce.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this telephony model.

Service Cloud Voice with Amazon Connect	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 add Messaging to a contact center, the Digital Engagement add-on license is required.

How: Update your managed package in AppExchange to one that includes both Voice and Messaging support from a CCaaS provider, or install a managed package from a CCaaS provider that supports Messaging. To add a Messaging channel to your partner telephony contact center, from Setup, go to Messaging Settings. Select New Channel and follow the steps to add a Bring Your Own Channel for CCaaS messaging channel to a preexisting contact center.

SEE ALSO:

Bring Your Own Channel for Contact Center as a Service (CCaaS)

Salesforce Help: Add Messaging to a Partner Telephony Contact Center (can be outdated or unavailable during release preview)

Troubleshoot Errors and Retry Provisioning Contact Centers with Detailed Error Messages

Error messages with more details are now available to help you troubleshoot issues. You can fix issues based on the error messages and retry provisioning contact centers without having to contact Salesforce Customer Support.

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.

Generate the Telephony Usage Report for Billing Details (Beta)

The consolidated telephony usage report provides more granular telephony usage details for the Amazon Connect phone numbers. The report correlates the usage patterns for billing parameters such as telephony minutes and number of calls per day for Amazon Connect phone numbers.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this telephony model.

Service Cloud Voice with Amazon Connect	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.

Note: This feature 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.

How: To enable this feature, contact your Salesforce account executive. Then click Generate Telephony Usage Report on the Amazon Contact Centers page to generate the report.

SEE ALSO:

Salesforce Help: Telephony Usage Report (Beta) (can be outdated or unavailable during release preview)

Sync Phone Numbers Automatically for Disaster Recovery

Automatic syncing of phone numbers between primary and secondary contact centers is now possible with Default Traffic Distribution Group (Default TDG) from Amazon, if you've opted for and enabled disaster recovery or Amazon Connect Global Resiliency.

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: Disaster Recovery for Service Cloud Voice (can be outdated or unavailable during release preview)

Get the Latest Enhancements for Your Amazon Connect Contact Center

Take advantage of the Service Cloud Voice enhancements and bug fixes for your Amazon Connect contact center. Winter '25 includes Contact Center version 16.0. To test the updates before they go live in production, deploy them to your sandbox.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models.

Service Cloud Voice with Amazon Connect	Service Cloud Voice with Partner Telephony from Amazon Connect	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:

Knowledge Article: Service Cloud Voice Contact Center Updates (can be outdated or unavailable during release preview)

Customize the Partner Telephony Contact Center Setup Experience with Partner Icons

To help you quickly identify and select preferred telephony and Contact Center as a Service (CCaaS) vendors, use custom icons. Telephony and CCaaS partners upload a custom icon and bundle it with their managed package. After you install the package, the icon is available to select during the partner telephony contact center setup flow.

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: Partners upload an SVG file of the custom icon as a static resource and then set the customIconId field on the ConversationVendorInfo object to the name of the static resource file.

SEE ALSO:

Service Cloud Voice for Partner Telephony Developer Guide: Create a Salesforce DX Project (can be outdated or unavailable during release preview)

Enhance Operational Efficiency by Syncing Combined Messaging and Messaging Queues with a CCaaS Partner System

Streamline your workflow by using Salesforce to create combined Voice and Messaging queues for external routing. Then map these queues to a Contact Center as a Service (CCaaS) partner system to control the routing there. Synchronizing these queues and capacity between Salesforce and CCaaS partner systems allows for seamless telephony and messaging interactions within the same contact center.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this telephony model.

Service Cloud Voice with Amazon Connect	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:

Sync Queues for More Channel Types to Partner Systems

Customize How Call Information Is Organized with Sales Engagement

Customize how call information is organized to best meet the needs of your agents. Voice call records can now be opened in distinct workspace tabs rather than subtabs of related workspace tabs. This feature is enabled from the Contact Center Setup page in orgs with Sales Engagement contact centers.

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: Organize Voice Call Information into Separate Workspace Tabs (can be outdated or unavailable during release preview)

Salesforce Help: Salesforce Console in Lightning Experience (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 was first made available in Spring '24.

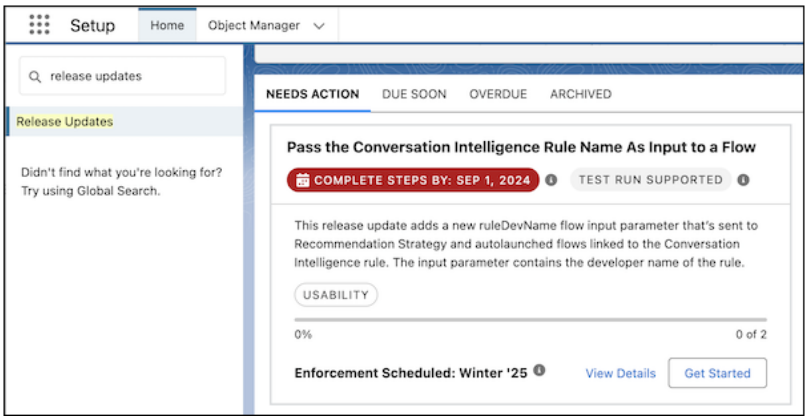
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models.

Service Cloud Voice with Amazon Connect	Service Cloud Voice with Partner Telephony from Amazon Connect	Service Cloud Voice with Partner Telephony
✓	✓	✓

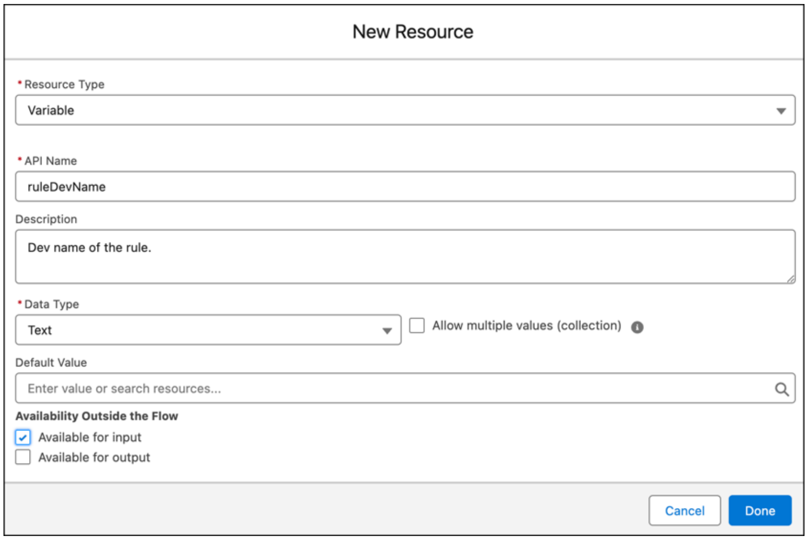
All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

When: Salesforce enforces this update in 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.



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)

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 first made available in Summer '24.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models.

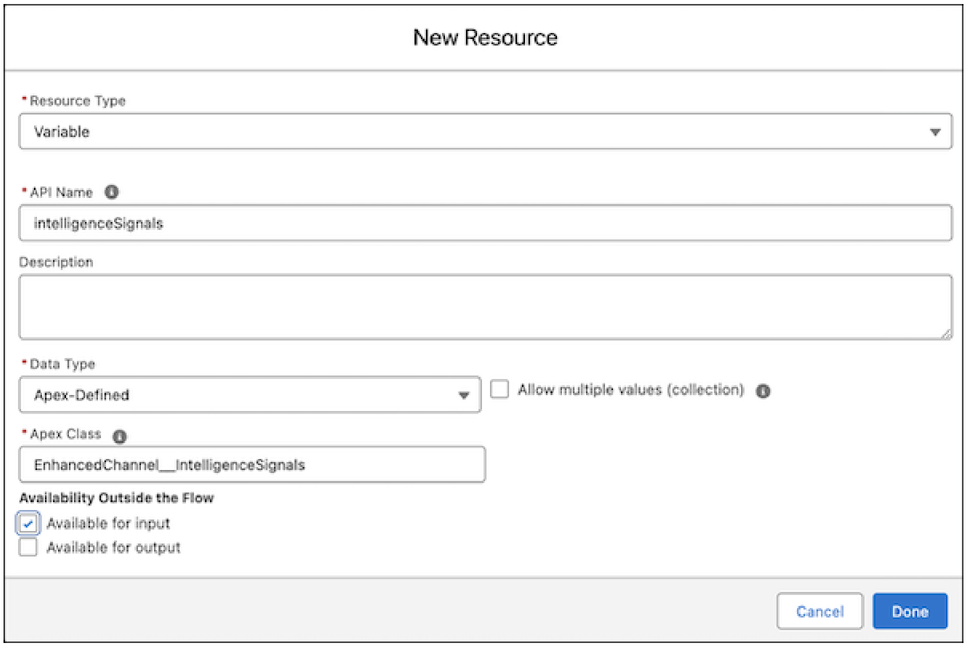
Service Cloud Voice with Amazon Connect	Service Cloud Voice with Partner Telephony from Amazon Connect	Service Cloud Voice with Partner Telephony
✔	✔	✔

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.



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)

Display Call Controls Only in Active Omni-Channel Sessions

Avoid Confusion when Opening Omni-Channel in another tab or browser. Because agents can only be logged in to one Omni-Channel session at a time, logging in to a session in another tab or browser requires ending any active calls. To make this behavior more intuitive, inactive sessions no longer display call controls.

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: Enable and Configure Omni-Channel (can be outdated or unavailable during release preview)

Perform Enhanced Call Type Analyses Using Call Subtypes

Know whether your inbound, transfer, and callback calls are phone or Voice over Internet Protocol (VoIP) calls. When creating the VoiceCall record, use the callSubtype parameter to specify the network or protocol over which the voice call is made.

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.

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 (can be outdated or unavailable during release preview)

Chat

Chat is in maintenance-only mode. Embedded Flows and Embedded Appointment Management are scheduled for retirement in June 2025.

IN THIS SECTION:

Embedded Appointment Management Is Being Retired
Embedded Appointment Management is scheduled for retirement on June 17, 2025. You can continue using it until then. After the retirement, transition to Field Service to embed appointment management on your website.

Embedded Flows Is Being Retired
Embedded Flows is scheduled for retirement on June 17, 2025. You can continue using it until then. After the retirement, use an Experience Cloud site to embed flows to web pages.

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.

Embedded Appointment Management Is Being Retired

Embedded Appointment Management is scheduled for retirement on June 17, 2025. You can continue using it until then. After the retirement, transition to Field Service to embed appointment management on your website.

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

How: As of June 17, 2025, embedded appointment management will be removed from all Service Cloud editions and licenses. Transition to Field Service to avoid interruptions.

Embedded Flows Is Being Retired

Embedded Flows is scheduled for retirement on June 17, 2025. You can continue using it until then. After the retirement, use an Experience Cloud site to embed flows to web pages.

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

How: As of June 17, 2025, embedded flows will be removed from all Service Cloud editions and licenses. Transition to Experience Builder to embed flows to web pages.

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

Improve the Messaging for Web experience in Channel Menu by adding User Verification.

IN THIS SECTION:

Authenticate Messaging for Web in Channel Menu with User Verification

User Verification now works on Messaging for Web in a Channel Menu. Previously, User Verification stopped working when a Messaging for Web deployment was added to Channel Menu.

Authenticate Messaging for Web in Channel Menu with User Verification

User Verification now works on Messaging for Web in a Channel Menu. Previously, User Verification stopped working when a Messaging for Web deployment was added to Channel Menu.

Where: This change applies to Messaging for Web. View required editions.

How: Add User Verification to your Messaging for Web deployment, then add your deployment to a Channel Menu.

SEE ALSO:

Salesforce Help: Add a Channel Menu to Your Site (can be outdated or unavailable during release preview)

Knowledge

Integrate all your knowledge with Data Cloud for better generative AI. Connect Unified Knowledge to more third-party knowledge bases.

IN THIS SECTION:

Integrate Knowledge and Unified Knowledge with Data Cloud

Combine your first and third-party knowledge in Data Cloud to improve generative AI features for Einstein for Service. With the upcoming switch to Data Cloud grounding, use the latest Retrieval-Augmented Generation (RAG) updates for higher-quality replies and answers. Previously, articles were limited to 131,000 characters in rich text fields, but Data Cloud increases this limit to 100 MB. Articles exceeding 25 MB aren't indexed for search. This integration prepares Knowledge and Zoomin connectors for future enhancements.

Connect Unified Knowledge to More Systems

Enhance your Unified Knowledge integration with three new connectors: Github, ServiceNow, and Madcap Flare. Unify your company's knowledge across every agent and customer search experience and ground generative AI features for Einstein for Service.

Get More Done in the Lightning Article Editor

With the improved Lightning Article Editor, write knowledge articles more efficiently. Take advantage of the streamlined features to create top-notch content.

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, Classic Knowledge is no longer available.

Integrate Knowledge and Unified Knowledge with Data Cloud

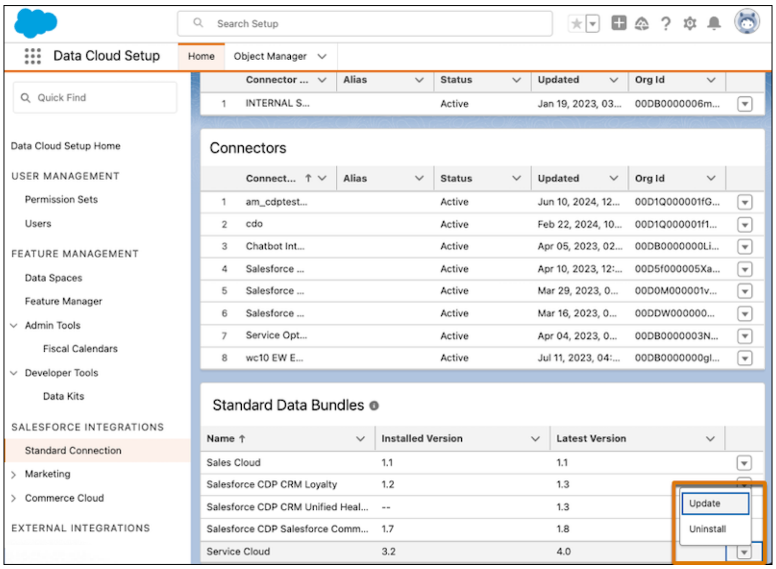
Combine your first and third-party knowledge in Data Cloud to improve generative AI features for Einstein for Service. With the upcoming switch to Data Cloud grounding, use the latest Retrieval-Augmented Generation (RAG) updates for higher-quality replies and answers. Previously, articles were limited to 131,000 characters in rich text fields, but Data Cloud increases this limit to 100 MB. Articles exceeding 25 MB aren't indexed for search. This integration prepares Knowledge and Zoomin connectors for future enhancements.

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: With the Knowledge Article DMO, you can access your Knowledge base on Data Cloud. Data Cloud's infrastructure supports the size and scaling that enterprise customers need, such as a future where transactional knowledge, like Slack posts, are integrated alongside curated articles.

Who: This change applies to all Knowledge and Unified Knowledge customers who purchase Data Cloud consumption credits.

How: In Data Cloud Setup, click Salesforce CRM and choose Standard Data Bundles. Select Service Cloud and either **Install** or **Update** the latest version of the Service data kit.



SEE ALSO:

Salesforce Help: Unify Knowledge form Various Sources (can be outdated or unavailable during release preview)

Salesforce Help: Install Standard Data Bundles Powered by Data Kits (can be outdated or unavailable during release preview)

Salesforce Help: Unified Knowledge Considerations (can be outdated or unavailable during release preview)

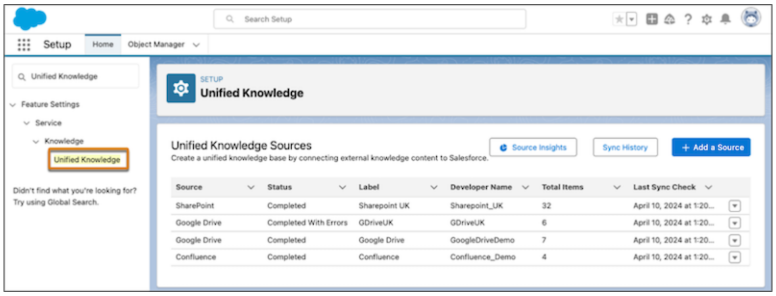
Salesforce Help: Unified Knowledge Limitations (can be outdated or unavailable during release preview)

Connect Unified Knowledge to More Systems

Enhance your Unified Knowledge integration with three new connectors: Github, ServiceNow, and Madcap Flare. Unify your company's knowledge across every agent and customer search experience and ground generative AI features for Einstein for Service.

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.

How: Before you add a connector, review any connector requirements in Zoomin documentation. Then in Setup, enter `Unified Knowledge` in the Quick Find box and click **Unified Knowledge**. Click **Add a Source** and choose a connector.



SEE ALSO:

Salesforce Help: Unify Knowledge form Various Sources (can be outdated or unavailable during release preview)

Salesforce Help: Zoomin Connector Preparation (can be outdated or unavailable during release preview)

Zoomin Documentation: Unified Knowledge for Salesforce (can be outdated or unavailable during release preview)

Get More Done in the Lightning Article Editor

With the improved Lightning Article Editor, write knowledge articles more efficiently. Take advantage of the streamlined features to create top-notch content.

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

Why: To help you write Knowledge articles more efficiently, we added several key updates.

Here are the general improvements:

- In the source code editor, you can now switch from light mode to dark mode (and vice versa) without losing any newly added source code.
- When you add header content to the accordion summary field, the content is properly displayed in the summary of the accordion instead of the body. Previously, the header content appeared in the body.
- Alerts and warning messages are now localized.
- Latin symbols under Special Characters are now localized correctly. Previously, Latin symbols with identical names showed the same value in lowercase. For example, "A grave" was shown as "a grave".
- System Font is set as the default font stack on the font family toolbar.
- You can add keyboard shortcut information in the tooltip for a custom toolbar button.
- The browser's native context menu for spell-checking now presents suggestions as expected instead of a small white line appearing on right-click.
- You can now apply text directionality to an entire accordion component in the editor. Previously, directionality was applied only to the summary.
- We improved the image-inserting behavior to correctly show images imported from external URLs.
- When you upload images, the original file names for the uploaded images are retained. Previously, uploaded images didn't retain their original file names.
- You can now apply border colors to a table without overriding its border styles.
- When you set the border width to 0px, the table border attribute is also set to 0, removing the border-width styles from all table cells.
- When you edit a table, redundant height and width will no longer be automatically added to all the cells of the table.
- You can now adjust the height of individual table rows without affecting the height of other cells in the table.

- You can now create an empty block to add content before or after the accordion by pressing the Up and Down arrow keys on your keyboard.

Here are the accessibility-related improvements:

- In a source code editor, to jump to a specific line while using a screen reader, press Command+G on Mac or Ctrl+G on Windows. The screen reader shows the line number and reads it aloud.
- The screen reader now reads aloud the color of the selected text.
- We improved accessibility for interactive elements with a custom tooltip. These tooltips appear with mouse hovers and keyboard focus, so all users have access to essential information about interactive elements.
- You can now easily navigate through search results with the addition of Previous and Next buttons on the UI.

How: To enable the Lightning Article Editor and Article Personalization for Knowledge, go to Release Updates in Setup, find the update, and get started.

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.

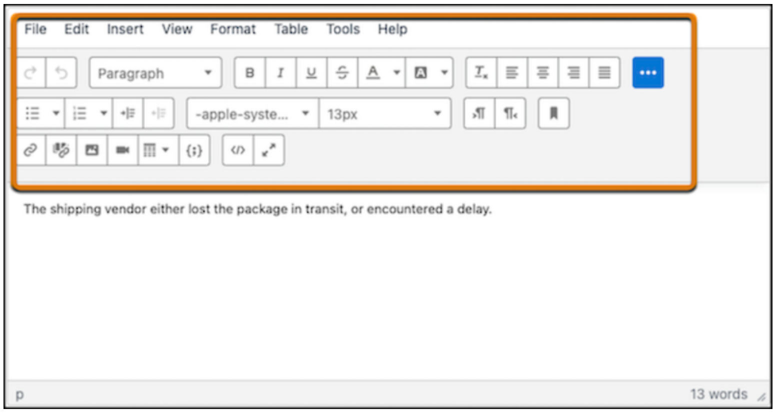
Why: With the Lightning Article Editor, you can:

- 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)
- *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, Classic Knowledge is no longer available.

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

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)

Entitlements and Milestones

Empower your service agents to stay on top of their jobs and boost overall service operations. By automating standard milestone actions through flows and using remaining milestone time to prioritize cases, your agents can work more efficiently and effectively.

IN THIS SECTION:

Boost Service Efficiency by Automating Milestone Actions with Flows

Automate standard milestone actions through a flow to reduce the manual work of agents and improve the efficiency of your service operations. Here are some actions that you can auto-trigger by using a flow when the milestone is completed, nearing violation, or violated: send email alerts powered by Einstein, update records for other cases simultaneously, send Slack notifications.

Where: This update applies to Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

How: Open the milestone from an entitlement process. Click **Add Actions** and select **New Flow** to add the autolaunched flow. Go to Flow Builder to customize and activate this action.

Help Agents Prioritize Cases Effectively by Tracking Milestone Time

Help agents prioritize cases needing attention and maintain high service standards. With Time to Next Milestone in the case list view, they can easily identify cases that are overdue, nearing completion, or paused, based on the remaining time to complete the milestone. Previously, while handling multiple cases simultaneously, agents didn't have a clear indication of which ones to prioritize.

Where: This update applies to Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

How: Open cases in a list view and check out the Time to Next Milestone column that shows how much time is left to complete the current milestone and when the next milestone is starting. Use the sort and filter options to view cases with overdue or paused milestones.

Employee Service

Employee Service is a new solution that is geared toward streamlining the human resource (HR) service processes for businesses. In this release, we're introducing the Employee Hub and HR Service Workspace features.

IN THIS SECTION:

Simplify Information Access, Service Requests, and Case Creation with Employee Hub

Employees can use Employee Hub to read knowledge articles for solutions to common problems, quickly navigate to important and frequently used resources and pages, submit service requests through Service Catalog, and obtain manager approvals. For further support, employees can create cases or contact human resource (HR) personnel through the email, voice, and messaging channels. Employees can also manage their own profile information. Administrators can customize the Employee Hub template based on organization needs and employee preferences.

Manage Employees and Inquiries Effectively, and Resolve Cases Efficiently with HR Service Workspace

Human resource (HR) personnel can use HR Service Workspace as a one-stop solution to create, update, and delete employee records; get a comprehensive understanding of employees; communicate with employees; create and track cases; and resolve service requests. With Workday integration, administrators can also create employee records through Workday. Administrators can create profiles and provide appropriate access to employees in bulk.

New Object

Use the new object in Employee Service to store employee information.

SEE ALSO:

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

Object Reference for the Salesforce Platform: Employee2 (can be outdated or unavailable during release preview)

Simplify Information Access, Service Requests, and Case Creation with Employee Hub

Employees can use Employee Hub to read knowledge articles for solutions to common problems, quickly navigate to important and frequently used resources and pages, submit service requests through Service Catalog, and obtain manager approvals. For further support, employees can create cases or contact human resource (HR) personnel through the email, voice, and messaging channels. Employees can also manage their own profile information. Administrators can customize the Employee Hub template based on organization needs and employee preferences.

Where: This change applies to Experience Cloud.

Who: To use this feature, users need the Service Cloud Employee Hub Community User Add-On license and the Employee Hub Community User permission set.

How: Administrators must log in to Employee Hub to configure the Employee Hub template. Employees must log in to Employee Hub to read articles and contact support.

Manage Employees and Inquiries Effectively, and Resolve Cases Efficiently with HR Service Workspace

Human resource (HR) personnel can use HR Service Workspace as a one-stop solution to create, update, and delete employee records; get a comprehensive understanding of employees; communicate with employees; create and track cases; and resolve service requests. With Workday integration, administrators can also create employee records through Workday. Administrators can create profiles and provide appropriate access to employees in bulk.

Where: This change applies to Lightning Experience in the Enterprise Edition with Service Cloud.

Who: To use this feature, users need the Service Cloud Employee Hub HR Service Workspace Add-On license and the HR Service Workspace HR service personnel permission set.

How: To access HR Service Workspace, from App Launcher, find and select HR Service Workspace. From Setup, in the Quick Find box, enter `Integrations`, and then expand Industry Integrations Solutions. Go to Integrations Setup and enable the Workday to Salesforce integration app.

New Object

Use the new object in Employee Service to store employee information.

Represent an employee within a company or organization

Use the new Employee2 object.

Routing

Eligible Salesforce orgs are automatically upgraded to Enhanced Omni-Channel. Support customers while on the go with Omni-Channel for mobile.

IN THIS SECTION:

Eligible Salesforce Orgs Automatically Upgraded to Enhanced Omni-Channel

To take advantage of the latest work-routing features, some orgs are automatically upgraded from Standard to Enhanced Omni-Channel. To be eligible, your org must run on Hyperforce, not have any active Standard Messaging channels, and not have any LiveChatTranscript records created in the last 90 days.

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

SEE ALSO:

Salesforce Help: Comparison of Standard and Enhanced Omni-Channel (can be outdated or unavailable during release preview)

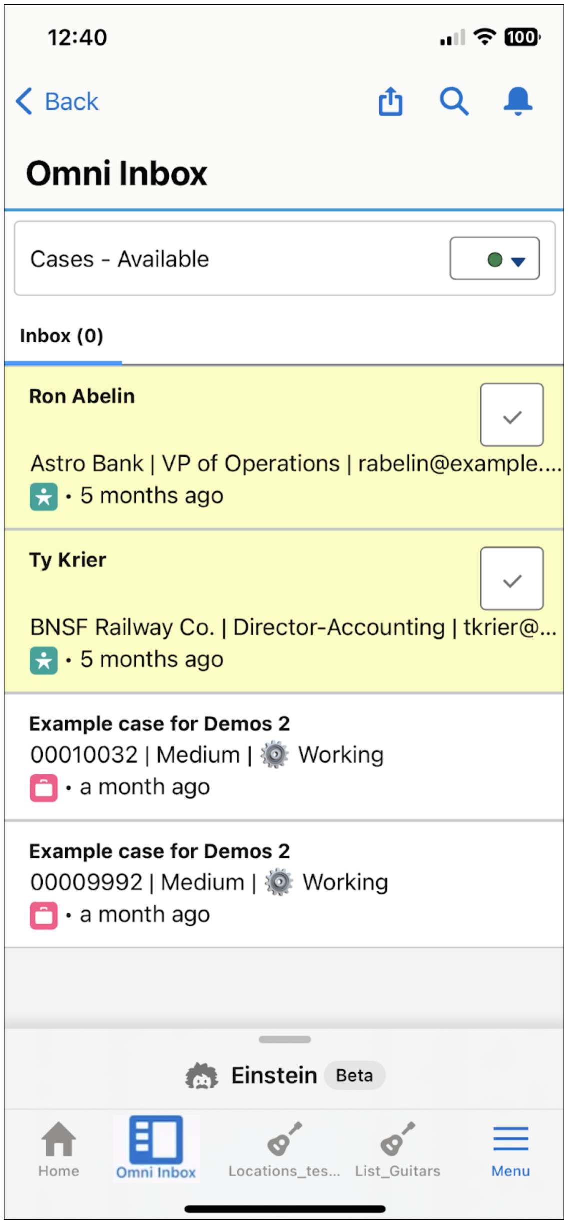
Support Customers While on the Go with Omni-Channel for Mobile (Generally Available)

Omni-Channel users can now use their mobile device to complete work from service channels enabled with status-based capacity. 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. This feature is now generally available. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: Turn on status-based capacity in the Omni-Channel settings. To use this capacity model when routing work from a specific service channel, turn on status-based capacity in the service channel settings as well.

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. 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 (can be outdated or unavailable during release preview)

Salesforce Help: Understand Capacity Models (can be outdated or unavailable during release preview)

Pause Messaging Sessions with Omni-Channel Status-Based Capacity (Generally Available)

Because status-based capacity now works with Enhanced Messaging, you can pause messaging sessions and track inactive sessions. If a messaging session goes inactive, you don't need to use flows to set ownership or provide a notification when it becomes active again. Pausing messaging sessions with status-based capacity was in beta in Summer '24 and is now generally available.

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

SEE ALSO:

Use Status-Based Capacity with Messaging (Generally Available)

Salesforce Help: Understand Capacity Models (can be outdated or unavailable during release preview)

Get Informed with Proactive Monitoring

Signature customers now receive alerts via email if Omni-Channel experiences service degradation. For example, Salesforce sends alerts if users can't log in to Omni-Channel or if a work item isn't routed punctually.

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

How: To set up the alerts, contact Salesforce Customer Support.

Get the Latest Omni-Channel Features for Government Cloud Plus

If your Government Cloud Plus org runs on Hyperforce, you can now 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. Salesforce is migrating some of these orgs to Hyperforce between May 10, 2024 and August 23, 2024.

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

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

Sync Queues for More Channel Types to Partner Systems

Streamline your workflow by using Salesforce to create combined Voice and Messaging queues for external routing. Then map these queues to a CCaaS partner system to process the routing there. Previously you could map Voice queues only to a partner telephony system. Now you can map Messaging queues and mixed Messaging and Voice queues with an external CCaaS partner system for external routing. Synchronizing these queues and capacity between Salesforce and CCaaS partner systems allows for seamless telephony and messaging interactions within the same contact center.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions and is available with Service Cloud Voice with Partner Telephony and Bring Your Own Channel for CCaaS.

How: Create queues with external routing for Messaging Session objects, Voice Call objects, or both. If a CCaaS partner has the queue management capability enabled, add queues from the contact center details page under Contact Center Queues. Map your Salesforce queues to CCaaS vendor queues and assign queue members.

Add a Description for Queues

You can now add a description when you create or edit a queue. Offer a brief description of the purpose, function, and any other pertinent information about the queue. 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 `Queues`, and then select **Queues**. Create a new queue or choose an existing one. Then edit the Queue Description field.

SEE ALSO:

IdeaExchange :Description Field on Public Groups and Queues

Feedback Management

Collect timely feedback and gain comprehensive insights with unique post-chat survey invitations.

IN THIS SECTION:

Gain Contextual Insights with Unique Post-Chat Survey Invitations

At the end of an in-app or web messaging session, automatically send a unique survey to collect timely feedback. Associate responses with leads and contact participants for accurate customer contexts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled.

Who: To send unique survey invitations within a chat window, users need the Salesforce Advanced Features Starter permission or the Salesforce Surveys Advanced Features permission.

How: From Setup, find and select **Messaging Components**. Create an autoresponse component and add the web page messaging format. Select the messaging configuration type as **Constant**, the URL type as **Survey Link**, and the display method as **Popup Message**. In the Quick Find box, find and select **Messaging Settings**. Find the channel for which you want to define the survey, and click **Configure Survey**. Select a survey and save the configuration.

SEE ALSO:

Salesforce Help: Set Up Post-Chat Surveys for Messaging for In-App and Web (can be outdated or unavailable during release preview)

Work.com

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

See the Work.com release notes for the latest updates: Work.com Release Notes

Other Salesforce Products and Services

Get the latest information on these new features.

Customer Success Group

Salesforce Success Plans provide access to resources, guidance, and support at every step of your 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 Winter '25 include:

- Signature:
  - Virtual Instructor-Led Training
    - Virtual instructor-led classes are now included in the Signature Success Plan. Enable your teams to be more efficient and maximize product functionality with 1- to 5-day immersive classes that deep dive into product- and role-based topics. Register for any available seat in the catalog of public classes.
  - Customer Success Score Enhancements
    - Redesigned User Experience for a more intuitive, efficient, and satisfying interaction, addressing user feedback
    - Available to Marketing Cloud Intelligence with signals for Product Adoption, Customer Expertise, and Technical Health
    - Available for Tableau with signals for Product Adoption and Customer Expertise
    - Scale Center integration within the Technical Health Score for enhanced troubleshooting and analysis. After reviewing the Technical Health scores in the Customer Success Score, navigate to Scale Center within your production org to get to the root cause of any issues in a matter of minutes
  - Reliability Reviews
    - This Specialized Architect Review provides personalized expertise to detect and address performance and scale issues, proactively enhance efficiency and mitigate risks, and educate on effective design and optimization. Experience enhanced productivity, cost efficiency, and a system ready for new innovations and scale.
  - Proactive Monitoring Enhancements
    - Proactive Monitoring on Salesforce Help now available for Marketing Cloud - Signature Marketing Cloud Intelligence customers that have completed Proactive Monitoring set up can view and access the Proactive Monitoring tab within their Salesforce Help portal. Users can now utilize all the features described in this knowledge article for existing Proactive Monitoring alerts.
      - [7 alerts] Marketing Cloud Intelligence
    - New alerts for Service Cloud - Signature Service Cloud customers can receive proactive notifications from Salesforce whenever there is a service outage or performance degradation for SCRT2 service features. Similarly, Signature customers can proactively learn about issues with their Search functionality, helping them to mitigate actions and reducing business impact.
      - [6 alerts] Service Cloud SCRT2 (Voice, Messaging, Chat)
        - [Service Cloud Voice] Telephony Integration Failures
        - [In-App & Web Messaging] Initialization Failures
        - [Einstein Bot] Transfer-To-Agent Failures
        - [Einstein Bot] Threshold Validation Errors
        - [Einstein Bot] Connection Failures
        - [Einstein Bot] Slow Response Rate
      - - [1 alert] Search
          - Search Query Errors

- Premier:

- Onboarding
  - New Premier customers have access to a new program where you'll work one-on-one with an Onboarding Specialist to map your goals to Salesforce capabilities, assess your adoption strategy with tailored recommendations, and build a personalized Success Path aligned to your business objectives. It demystifies exactly what it takes to be successful with Salesforce.
- Expert Coaching Enhancements
  - New Expert Coaching Sessions have been added so that you can continue to learn how to implement and use the latest Salesforce capabilities. Expert Coaching Sessions include videos, webinars, and individual sessions. Customers can request individual follow-up directly from Salesforce experts from any Expert Coaching Session.

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.

Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

Trust & Compliance

For a complete list of changes to the Trust & Compliance documents related to this release, see the Salesforce Trust & Compliance Documentation Change Log.

Business Associate Addendum Restrictions

For a complete list of changes to the Business Associate Addendum Restriction documents, see the Business Associate Addendum Restrictions Change Log.

Acceptable Use Policy

For a complete list of changes to the Acceptable Use Policy documents, see the Acceptable Use Policy Change Log.