Salesforce Release Notes

Salesforce, Spring '25

Drive customer success with Agentforce 2.0

Last updated: January 24, 2025

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SALESFORCE SPRING '25 RELEASE NOTES

The Spring '25 release helps you increase productivity with new innovations, including Agentforce 2.0, where humans with agents drive customer success together.

IN THIS SECTION:

How to Use the Release Notes

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

Get Ready for the Release

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

Release Notes for Features Released Monthly

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

Release Note Changes

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

How and When Do Features Become Available?

Some features in Spring '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.

Supported Browsers

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

Salesforce Overall

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

Release Updates

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

Analytics

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

Commerce

Get your store up and running faster with simplified product import and configuration, store branding, and translation features. Boost conversions and elevate the shopping experience with engaging store pages, flexible search options, and an improved checkout flow. Keep customers coming back with easy-to-configure promotions and coupons, customizable messages, and the new Orders Dashboard that helps you analyze and adapt to customer trends.

Customization

Sort by multiple columns, easily manage roles and permission sets, and work more efficiently thanks to enhancements to list views and related lists. Manage included permission sets in permission set groups via summaries.

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

Enhanced LWR sites are now generally available. Create enhanced LWR sites and CMS workspaces, or upgrade existing sites to the enhanced framework. You can also customize your site URLs to remove the /s at the end. In security updates, use trusted sites while the content security provider is in strict mode, switch to single domain certificates for Salesforce CDN, and enjoy improvements to the identity experience. Upgrade your Aura record components to the LWR framework to see improved performance and style, and provide a seamless experience between apps by linking files from your LWR site to Salesforce.

Field Service

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

Hyperforce

Hyperforce is now available in more regions, including Israel and Osaka, Japan, expanding global data residency options. Hyperforce Assistant's instructions for automated pre-upgrade checks are clearer. Access to Hyperforce outbound IP addresses has been made more convenient. Hyperforce Premium products offer new capabilities. Out of Region Disaster Recovery provides additional data protection and business continuity. The Scale Test feature allows for high-traffic scenario simulations in sandbox environments. The Swiss Operating Zone offers a new avenue to address Swiss data residency requirements.

Industries

Salesforce introduces a range of enhancements to streamline operations and improve productivity across industries. Einstein Generative AI simplifies daily tasks across various sectors, including clean energy program suggestions in Energy and Utilities Cloud and benefit applicant household overviews in Public Sector Solutions. Asset Management helps streamline inventory processes and orchestrate real-time actions on assets. Automotive Cloud simplifies vehicle appraisals and loan negotiations, while Consumer Goods Cloud enhances field operations with advanced geofencing and VS Code-based app customization. Financial Services Cloud brings significant enhancements to business relationship plans, portfolio management, and wealth management, and Global Promotions Management introduces coupon codes and milestone-based promotions. Health Cloud improves financial management, scheduling, provider searches, and request processing, and Life Sciences Cloud streamlines pharmacy benefits verification and enrollments in financial assistance programs. Manufacturing Cloud enhances run-rate business with revenue management features, while Net Zero Cloud aligns disclosures and compliance workflows with CSRD guidelines. Salesforce for Education drives student engagement with Agentforce. We also bring exciting changes in Insurance, Media Cloud, Nonprofit Cloud, Communications Cloud, and other industry-specific features.

Marketing

Salesforce offers three marketing products: Account Engagement (formerly known as Pardot), Engagement (formerly known as Marketing Cloud), and Marketing Cloud Growth and Advanced editions.

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

User Opt-In Biometric Login is now generally available in Mobile Publisher. Customize your Experience Cloud app's security alerts with new fields and use newly supported download methods. There are also upgrades to the Salesforce mobile app and Briefcase Builder.

Omnistudio

Omnistudio now offers a standard designer and list view for all components. With this designer, explore new features including Omnistudio Design Assistant, OmniOut, and Lightning Rich Text Editor. Use Omnistudio with the Salesforce Lightning Design System 2 (SLDS 2) template for a refreshed user interface. OmniAnalytics is now enabled for guest users on Experience Cloud by default. Access customers' saved session information to create context-driven communications on your sites. In addition to improving usability, we made a few translation, accessibility, security, and deployment updates.

Revenue Cloud

Quickly create products by using Deep Clone. Speed up product discovery through faceted search and partial indexing. Improve Salesforce Pricing by using tools for accurate discounts, troubleshooting, pricing recipes, and optimal strategies. Save and reuse configurations. Use streamlined rules and dynamic configurations to design bundles faster. Support large, complex deals through robust quoting, ordering, contracting, and approvals. Manage usage-based products through usage modeling, rate management, and consumption tracking. Integrate Microsoft 365 with Salesforce Contracts to streamline reviews, configure file formats, enhance workflows, and extract data from images by using multimodal processing. With Dynamic Revenue Orchestrator, streamline order processing, automate tasks, track fulfillment changes, and manage ramp deal orders. Customize and optimize billing by using flexible invoice schedules, PDF generation, error reduction, multi-currency support, and automated journal entries.

Sales

Boost your sales teams' results with new features across Sales Cloud. Help your account teams collaborate, strategize, and succeed with more efficiency and accountability with enhancements to Account Plans. Manually upload video recordings to Einstein Conversation Insights to get key insights and action items for meetings from external sources. Forecast your consumption-based business. Customize the mobile app with Mobile Builder for Seller-Focused Experience. And plan quotas that reflect ramp-up time and seasonal sales patterns in Quota Planning.

Salesforce CMS

Classify CMS content with content taxonomy, then tag content to create dynamic collections. Clone content and save it to a shared workspace. Deliver content from any CMS workspace to any public or restricted channel, and remove more types of channels from enhanced CMS workspaces.

Salesforce Flow

Compose intelligent workflows with Flow Builder and Flow Orchestration. Build approval orchestrations with automated approvals. Integrate across any system with Flow Integration.

Salesforce for Slack Integrations

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

Security, Identity, and Privacy

Log in to Salesforce with your email address with the Log In with Email button on login.salesforce.com. Deliver convenient login experiences with headless user discovery. Use an external client apps to configure Salesforce as a SAML single sign-on identity provider. Use external auth identity providers to centralize your OAuth configurations for outbound callouts under named credentials. Define more HTTP status codes to refresh access tokens. Monitor details of Transaction Security Policy triggering events, and keep tabs on key certificate information. Monitor transactional database tenant secrets. To adopt the latest content security policy directives via a new release update, update your trusted URLs. A release update ends redirections for legacy host names in production and demo orgs, and another .

Service

Get Case Resolution Assistance at the Click of a Button (Generally Available). Monitor Real-time Conversations Between Agentforce Service Agents and Customers. Integrate Knowledge with Data Cloud.

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.

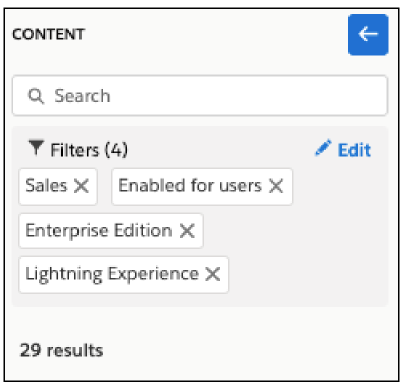
Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

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 #Spring25Feedback.
- **Feedback forms**—As you're working with our documentation in Salesforce Help, release notes, or developer guides, look for the feedback buttons and vote up or down. Add comments if you have them.
- **X**— Contact us at @askSalesforce.

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

Some of our documentation has preview versions available several weeks before the release. To access a preview version on Salesforce Developers, select **Preview** from the Documentation Version dropdown list.

Get Ready for the Release

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

Spring '25 Highlights for Admins

Check out this video for a preview of key features for admins in Spring '25. This video goes live the week of January 6, 2025.

Watch a video

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

For some products, Salesforce releases features and enhancements more frequently than three times per year. Find out what's new and read more about these features, as often as monthly, 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 release to your instance.

Example: Spring releases begin rolling out to customer instances in mid-January. Release notes for features released in January or February are linked to from the corresponding topic.

IN THIS SECTION:

January '25 Release

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

January '25 Release

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

- Einstein Features
- Einstein Platform

Release Note Changes

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

IN THIS SECTION:

January 27, 2025

January 21, 2025

January 14, 2025

January 13, 2025

December 31, 2024

January 27, 2025

IN THIS SECTION:

Salesforce Overall Updates

Salesforce Flow Updates

Commerce Updates

Development Updates

Field Service Updates

Industries Updates

Einstein Search Updates

Service Updates

Salesforce Overall Updates

Removed: Data Type Changes to the Additional Information and Comment Fields

Changes to the data type of the Additional Information and Comment fields of the Service Appointment object in Salesforce Scheduler were reverted. In the initial release, the data type was changed from Text to Text Area (Long). It has now been reverted to Text.

Reverted January 27, 2025.

Salesforce Flow Updates

Debug Flows at a Glance with the Improved Debugging Experience

Removed information about dismissing warnings in the Errors and Warnings pane. You can't dismiss warnings.

Added January 27, 2025.

Sort Apex Batch Action Results by Request Order (Release Update) on page 602

This update was postponed to Summer '25.

Added January 27, 2025.

Commerce Updates

Collect a Shipping Phone Number During Checkout on page 133

Clarified that shipping phone number formatting and validation relies upon the country code.

Added January 27, 2025.

New and Changed Objects on page 211

Added that the order reference number is populated on WebCart instead of CartCheckoutSession upon checkout in LWR stores.

Added January 27, 2025.

Development Updates

Enforce Reparenting Restrictions for Master-Detail Relationships in Apex

Added an example to demonstrate the new exception.

Added January 27, 2025.

New and Changed Lightning Web Components

Clarified what changed for the `lightning-button-menu` component. Also clarified a change to the color button on `lightning-input-rich-text`.

Added January 27, 2025.

Field Service Updates

Gain Visibility into the Scheduling History of Service Appointments

The When section was updated to indicate the new release date for this feature.

Added January 27, 2025.

Improve Scheduling in Japan with More Accurate Travel Time Predictions

Added release note to describe new functionality of Japan supporting point-to-point routing.

Added January 27, 2025.

Industries Updates

Energy and Utilities Cloud Spring '25 Release Notes

Added a link to Timesheets and Labor Cost Optimization Enhancements.

Added January 27, 2025.

New Connect REST API Resources

Added a release note to announce the availability of new Connect REST API Resources for the Business Compliance Suite.

Added January 27, 2025.

New Invocable Action in Business Compliance Suite

Added a release note to announce the availability of a new Invocable Action for the Business Compliance Suite.

Added January 27, 2025.

Enhance Public Health Monitoring '25 Release Notes

Updated the title and description to reflect that only the data model is live for this feature.

Added January 27, 2025.

Health Cloud

Added links to Industries common feature release notes that are relevant to Health Cloud audience.

Added January 27, 2025.

Einstein Search Updates

Advanced Lookup Search Has an Updated UI

Removed the When statement to reflect that this feature is released according to the standard Spring '25 release schedule.

Added January 27, 2025.

Customize Explicit Filters in Search Manager

Updated the When statement to reflect that this feature will be rolled out to all entities starting in Spring '25.

Added January 27, 2025.

Service Updates

Removed: Delete Salesforce Provisioned AWS Resources Automatically When You Delete a Contact Center

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

Added January 27, 2025.

Added: Get More Granular Voice Call Report Data with Role Hierarchy Filters

This feature is now available as part of the Spring '25 release.

Added January 27, 2025.

January 21, 2025

IN THIS SECTION:

API Updates

Salesforce Flow Updates

Development Updates

Field Service Updates

Hyperforce Updates

Industries Updates

Revenue Updates

Security, Identity, and Privacy Updates

Service Updates

API Updates

Metadata API

Changed the behavior for the `endpointUrl` field on the CspTrustedSite metadata type.

Added January 21, 2025

Metadata API

Changed the behavior for for the `url` field on the RedirectWhitelistUrl metadata type.

Added January 21, 2025

New and Changed Objects

Added changed behavior for the `EndpointUrl` field on the CspTrustedSite object.

Added January 21, 2025

New and Changed Objects

Added changed behavior for the `Url` field on the RedirectWhitelistUrl object.

Added January 21, 2025

Salesforce Flow Updates

Debug Flows at a Glance with the Improved Debugging Experience on page 595

Removed "record triggered flows" in Where section, this feature is only available for Marketing Cloud flows.

Added January 21, 2025.

Development Updates

LWC API Version 63.0 on page 174

Moved non-version specific material to separate release notes. There are no API 63.0 version-specific changes to LWC in this release.

Added January 21, 2025.

Removed: `Accept` Header Default Value for Apex Callouts Has Changed

This change has been reverted and is no longer part of the release.

Added January 21, 2025.

Field Service Updates

Update Field Service Records Quickly and Easily on page 283

Added more information about record edit on the Field Service mobile app.

Added on January 13, 2025.

Hyperforce Updates

Swiss Operating Zone

Updated the Where statement.

Added January 21, 2025.

Industries Updates

Save Discovery Framework Assessments as Drafts to Complete Later

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

Added January 21, 2025.

Business Compliance Suite

Added release notes for Business Compliance Suite.

Added January 21, 2025.

Revenue Updates

Preview Upcoming Invoices to Get Billing Estimates

Clarified that this feature is available only with the Billing Operations User permission set.

Added January 21, 2025.

Security, Identity, and Privacy Updates

Test Automation That Generates Trusted URLs

Added a release note announcing that new and updated trusted URLs must pass a syntax check.

Added January 21, 2025

Service Updates

Monitor Real-time Conversations Between Agentforce Service Agents and Customers (Release Update) on page 639

Updated the release note to reflect that this feature is not part of the initial Spring '25 release and may be included at a later date.

Added January 21, 2025.

Flag Supervisors to Help with Agentforce Service Agent Conversations on page 640

Updated the release note to reflect that this feature is not part of the initial Spring '25 release and may be included at a later date.

Added January 21, 2025.

Manage Your Workforce More Efficiently with Agentforce on page 690

Updated the release note to reflect that this feature is not part of the initial Spring '25 release and may be included at a later date.

Added January 21, 2025.

Eligible Salesforce Orgs Automatically Upgraded to Enhanced Omni-Channel

Removed this release note because we won't automatically perform this upgrade this release.

Added January 21, 2025.

Chat with Agentforce Service Agent in Japanese (Generally Available) on page 641

Updated to reflect that Japanese is generally available.

Added January 21, 2025.

Discover More Service Capabilities with My Service Journey (Generally Available) on page 699

Added a link to the new *My Service Journey App: Quick Look* badge on Trailhead.

Added January 21, 2025.

Removed: Use Status-Based Capacity with Voice (Beta)

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

Added January 21, 2025.

Removed: Manage Capacity via Status-Based Capacity for Voice (Beta)

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

Added January 21, 2025.

January 14, 2025

IN THIS SECTION:

Service Updates

Service Updates

Ingest Third-Party Bot Conversation History into the Service Console by Using an API

Updated the release note to reflect that this feature is not part of the initial Spring '25 release and may be included at a later date.

Mass Delete User Information to Comply with General Data Protection Regulation (GDPR) Guidelines by Using an API

Updated the release note to reflect that this feature is not part of the initial Spring '25 release and may be included at a later date.

January 13, 2025

IN THIS SECTION:

Salesforce Overall Updates

Customization Updates

Hyperforce Updates

Industries Updates

Revenue Updates

Sales Updates

Security, Identity, and Privacy Updates

Service Updates

Salesforce Overall Updates

Lightning Adoption Apps Are Being Retired

Clarified that the retirement date applies to orgs on Spring '25 and later.

Added January 13, 2025.

Say Hello to Agent for Setup, Your Sidekick for Admin Tasks on page 241

Updated the release note to reflect that this feature is not part of the initial Spring '25 release and may be included at a later date.

Added January 13, 2025.

Add AI-Powered Quick Actions to Record Pages **on page 250**

Updated the release note to reflect that this feature is not part of the initial Spring '25 release and may be included at a later date.

Added January 13, 2025.

Customization Updates

Removed: Let Sales Reps Research Accounts More Easily

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

Removed January 13, 2025.

Sort List Views by Multiple Columns (Generally Available)

Clarified that until the sort list views by multiple columns feature is generally available for an org, a user can still enable the beta version of the feature.

Added January 13, 2025.

Hyperforce Updates

Swiss Operating Zone

Updated the When statement.

Added January 13, 2025.

Industries Updates

Improve Readability and Clarity of Financial Account Party Record Names

Added a release note about the change in the auto-generated prefix for the financial account party record name.

Added January 13, 2025

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 Januaru 13, 2025.

New Connect REST API Resources

Added a release note to announce the new Invoice Estimated Tax Calculation (POST) resource available with Billing.

Added January 13, 2025.

Sales Updates

Removed: Enhance Your Sales Strategy by Researching Accounts

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

Added January 13, 2025.

Allowlist the Required Domain for Salesforce Inbox

Added a release note about allowlisting a required domain for email integration with Salesforce Inbox.

Added January 13, 2025.

Security, Identity, and Privacy Updates

Unlock Full Database Encryption in Hyperforce (Generally Available)

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

Added January 13, 2025.

Apply Database Encryption to Sandboxes (Beta)

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

Added January 13, 2025.

Update Your Trusted URLs for the Latest CSP Directives (Release Update)

Removed a statement that the Trusted URL and Browser Policy Violations list is only available in Lightning Experience.

Added January 13, 2025.

Diagnose Failed Redirections Faster on page 635

Removed a statement that the Trusted URL and Browser Policy Violations list is only available in Lightning Experience.

Added January 13, 2025.

Log In with Your Email Address on page 616

Updated the release note to reflect that this feature is not part of the initial Spring '25 release and may be included at a later date.

Added January 13, 2025.

Service Updates

Delete Salesforce Provisioned AWS Resources Automatically When You Delete a Contact Center

Added link to Knowledge Article.

Added January 13, 2025.

Updated: Get Case Resolution Assistance at the Click of a Button (Generally Available)

Clarified the supported editions in the Where section of the release note.

Added January 13, 2025.

Turn On Lightning Article Editor and Article Personalization for Knowledge (Release Update)

Removed this release note because the features were automatically enabled in the previous release.

Added January 13, 2025.

Added Stay Updated on Bring Your Own Channel Terminology on page 669

Added this release note to acknowledge terminology updates.

Added January 13, 2025.

December 31, 2024

Salesforce Spring '25 Release Notes

Published preview release notes.

How and When Do Features Become Available?

Some features in Spring '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.

Supported Browsers

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Supported Browsers and Devices for Lightning Experience	✓			
Supported Browsers and Devices for Salesforce Classic	✓			
Supported Browsers for CRM Analytics	✓			

Salesforce Overall

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				
Add the New Setup Domain	✓			
Prepare for Upcoming Restrictions on Salesforce Cookie Use		✓		
Monitor Your Usage of Sales and Service Cloud Agents with Digital Wallet			✓	
Cloudfront Is Replacing Akamai as the Lightning CDN Partner		✓		
Allow the Required Domain for Maps and Location Services		✓		
Redirect to a Newly Created Record	✓			
Track Salesforce Platform Login License Overages in Your Org				✓
Lightning Adoption Apps Are Being Retired		✓		
Enjoy Salesforce's Refreshed Visual Style with Themes for SLDS 2 (Beta)		✓		
Enable LWC Stacked Modals (Release Update)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Verify Your Return Email Address for Sender Verification (Release Update)			✓	
Explore Salesforce Products In-Depth with Product Detail Pages in the Your Account App	✓			
Choose Contact Details when Requesting a Call from Your Salesforce Account Executive	✓			
Get Personalized Suggestions in Setup		✓		
Get Notified When Usage Exceeds a Threshold in Digital Wallet		✓		
Einstein Search				
Customize Explicit Filters in Search Manager	✓			
Advanced Lookup Search Has an Updated UI	✓			
Salesforce Foundations				
Build Engaging Web Pages and Forms with Salesforce Foundations			✓	
Unlock AI Agents with Salesforce Foundations			✓	
Other Changes in Salesforce Foundations			✓	
Lightning Console				
Benefit from Better Lightning Console Performance with Deferred Inactive Workspace Page Loading	✓			
Salesforce Data Pipelines				
Get More Representative Sample Data in Recipes from Local Salesforce Connections	✓			
Preview Random Samples from Datasets in Recipes	✓			
Improved Data Preview in Recipes	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Secure Salesforce External Connections with OAuth 2.0	✓			
Monitor Dataflow and Recipe Deletions in the Audit Trail	✓			
Run Sequential Recipes Faster in Encrypted Orgs	✓			
Give Users Read-Only Access to Recipes (Generally Available)	✓			
Push Data from Government Cloud with Output Connectors	✓			
Improve Salesforce External Connector Sync Performance with Incremental Syncs (Beta)	✓			
Load Data Incrementally (Beta)	✓			
Salesforce Scheduler				
Book and Pay Easily with Payment Integration			✓	
Salesforce Archive				
Save on Storage and Boost Performance with Salesforce Archive (Generally Available)				

Analytics

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Unified Analytics Experiences				
Add Assets to Collections in Bulk	✓			
Run More CRM Analytics Dashboard Subscriptions Per Hour in Slack	✓			
Reports and Dashboards				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Delivered Idea: Do More with Custom Report Types (Generally Available)			✓	
Keep Charts Consistent with Reordered Report Data	✓			
Choose Which Dashboard Widgets to Refresh (Beta)			✓	
Designate One Email Address to Send Report Subscription Notifications (Beta)			✓	
Data Cloud Reports and Dashboards				
Define Filters on Aggregate Values in Data Cloud Reports	✓			
Highlight Min and Max Aggregates for Date Fields (Generally Available)	✓			
Create a Semantic Data Model Report with a Single Click (Beta)	✓			
Default Behavior When Creating a Semantic Data Model Report Has Changed (Beta)	✓			
Analyze Logical View and Semantic Union Metrics in Data Cloud Reports (Beta)	✓			
Categorize Semantic Model Records with Bucket Columns (Beta)	✓			
Assess Semantic Data Model Records with Advanced Formulas (Beta)	✓			
CRM Analytics				
Analytics Experience and Visualizations				
See More Color Contrast in Donut and Stacked Bar Charts			✓	
Use Version Control When Saving Dashboard Component Changes	✓			
Unify Your Data Across Dashboards			✓	
Enhance Your Dashboards with Customizable Tooltip Colors	✓			
Data Integration				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get More Representative Sample Data in Recipes from Local Salesforce Connections	✓			
Preview Random Samples from Datasets in Recipes	✓			
Improved Data Preview in Recipes	✓			
Secure Salesforce External Connections with OAuth 2.0	✓			
Monitor Dataflow and Recipe Deletions in the Audit Trail	✓			
Run Sequential Recipes Faster in Encrypted Orgs	✓			
Control Access to Data Based on a User's Assigned Territories (Generally Available)	✓			
Give Users Read-Only Access to Recipes (Generally Available)	✓			
Push Data from Government Cloud with Output Connectors	✓			
Improve Salesforce External Connector Sync Performance with Incremental Syncs (Beta)	✓			
Load Data Incrementally (Beta)	✓			
Tableau	✓			
Marketing Cloud Intelligence	✓			
Accessibility Enhancements in Analytics	✓			

Commerce

Get your store up and running faster with simplified product import and configuration, store branding, and translation features. Boost conversions and elevate the shopping experience with engaging store pages, flexible search options, and an improved checkout flow. Keep customers coming back with easy-to-configure promotions and coupons, customizable messages, and the new Orders Dashboard that helps you analyze and adapt to customer trends.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
		Salesforce B2B and D2C Commerce		
Commerce Store Pages				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Edit Product Details with Fewer Clicks		✓		
Enhance the Shopping Experience with the Redesigned Address Page		✓		
Provide Complete Order Details on the Order Confirmation Page		✓		
Translate Your Store in Minutes		✓		
Experience Improved D2C Store Performance		✓		
Create and Manage Product Attributes from Your Store Settings		✓		
Commerce Components				
Brand Your Store Faster with the Enhanced Website Design Workspace		✓		
Do More with the New Banner Component		✓		
Build Multilevel Navigation Menus with the Mega Menu Component for D2C Stores	✓			
Add Color Variations to the Product Detail Page	✓			
Commerce Cart, Checkout, and Shipping				
Collect a Shipping Phone Number During Checkout	✓			
Address Fields Autocomplete on All Store Pages	✓			
Improve the User Experience for Shipping to Multiple Addresses	✓			
Jump to the Top or Bottom of the Cart Items List with One Click	✓			
Improve the Shopping Experience with Enhanced Cart and Checkout Performance	✓			
Commerce Promotions				
Create a Promotion Based on Specific Product Variations	✓			
Create Coupons Using a Guided Workflow	✓			
Commerce Search				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Offer Shoppers Relevant Search Suggestions	✓			
Boost Product Discovery with the Enhanced Variation Display		✓		
Additional Commerce Features				
Sell and Manage Digital Subscriptions in B2B and D2C Stores (Generally Available)				✓
Analyze Order Trends on the Commerce Orders Dashboard		✓		
Get Notified When a Customer Abandons a Shopping Cart	✓			
Send a Customized Welcome Email to New Users		✓		
Streamline Product Imports in the Enhanced Workspace		✓		
Add Variations During Product Creation		✓		
Connect Your Custom Domain to Your Store from the Commerce App		✓		
Customize and Extend Commerce Messages Using Flow	✓			
Share Knowledge Articles with Your Customers	✓			
Omnichannel Inventory				
Import Inventory in Bulk			✓	
Salesforce Order Management				
Cancel, Return, and Route Orders Containing Product Bundles	✓			
Cancel Orders in Bulk	✓			
Salesforce Payments				
Elevate Your Customers' Shopping Experience with the Enhanced Pay Now Store	✓			
Capture or Refund Payments in the Payments Workspace	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View Where a Payment Originates from in the Payments Workspace		✓		

Customization

Sort by multiple columns, easily manage roles and permission sets, and work more efficiently thanks to enhancements to list views and related lists. Manage included permission sets in permission set groups via summaries.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
List Views				
Get Improved Performance with the Enhanced Role List View	✓			
Manage Permissions Sets with the Enhanced List View	✓			
View and Filter on More Fields in the Enhanced User List View	✓			
Get Better Performance for List Views	✓			
Delivered Idea: Sort List Views by Multiple Columns (Generally Available)	✓			
Delivered Idea: Organize Your Data with Multi-Column Sorting for Related Lists	✓			
Enforce View Roles and Role Hierarchy Permission When Editing Public List View Visibility (Release Update)		✓		
Simplify Related List Component Configuration		✓		
Edit List Filters Option Is No Longer Available	✓			
Permissions				
Delivered Idea: Manage Included Permission Sets in Permission Set Groups via Summaries		✓		
Delivered Idea: Allow Users to View All Fields for a Specified Object		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
The View All and Modify All Object Permissions Have New Names		✅		
Remove User and Custom Permissions in Permission Set Summaries		✅		
Fields				
Use Keyboard Shortcuts to Select Calendar Dates in Salesforce Classic	✅			
Capture More Data with the Increased Limit of Custom Fields for Activities		✅		
Troubleshoot a Deployment That Contains a Custom Field Type Conversion		✅		
Globalization				
Enable ICU Locale Formats (Release Update)		✅		
Present Your Custom Functionality in New English Language Variations		✅		
Review Updated Label Translations		✅		
Salesforce Connect				
Access Data Without Limits with Salesforce Connect		✅		
See Snowflake Views with the Salesforce Connect SQL Adapter			✅	
Sharing				
Manage Public Groups More Easily with Improvements to the Access Summary	✅			
Get Notified When Your Sharing Rule Targets External Users	✅			
Enable Secure Roles Behavior and Update Sharing Group References in Sandboxes (Release Update)			✅	
General Setup				
Add AI-Powered Quick Actions to Record Pages		✅		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Better Understand Your Custom Metadata Type Usage		✓		

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				
Cross Cloud Updates for Data Cloud				
Connect Data				
Allow Access to All Salesforce CRM Fields with One Permission		✓		
Act on Data				
Create Data Cloud Enrichments with Companion Org Data			✓	
Copy Field Enrichments with Multiple CRM Orgs Sync More Quickly	✓			
Display Insights from External Data in Your CRM Enrichments			✓	
Enhance Vehicle Records with Related List Enrichments	✓			
Export Enrichments to a Data Cloud Sandbox			✓	

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				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
LWC API Version 63.0		✓		
Custom Components Must Specify an API Version		✓		
Internal DOM Structure Is Changing for Base Lightning Components		✓		
Wire Adapters Have Improved Type Checking		✓		
Update JavaScript Selectors to Remove Extra Whitespace		✓		
Lightning Web Security Applies Stricter Restrictions on iframes		✓		
Find Lightning Components Security Documentation in One Place		✓		
API Distortion Changes in Lightning Web Security		✓		
Develop Lightning Web Components Faster in a Real-Time Preview of Your Lightning App (Generally Available)			✓	
Base Lightning Components Support for SLDS 2 (Beta)		✓		
Resolve Errors Related to Accessing Referenced Lightning Components		✓		
Lightning Design System				
Introducing Salesforce Lightning Design System (SLDS) 2 (Beta)	✓			
Validate Your SLDS and SLDS 2 Code and Get Improvement Recommendations	✓			
Lightning Design System Component Blueprints Updates	✓			
Apex				
Delivered Idea: Compress and Extract Zip Files in Apex (Generally Available)		✓		
Delivered Idea: Evaluate Dynamic Formulas in Apex (Generally Available)		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Scale Your Concurrent Long-Running Apex Requests Limit Based on Number of Org Licenses		✓		
Pause and Resume Scheduled Jobs by Using Apex		✓		
Enforce Reparenting Restrictions for Master-Detail Relationships in Apex		✓		
JSON Serialization for Exception Types Has Changed		✓		
API				
Service Protection Changes for Metadata API Read and Retrieve Endpoints	✓			
Update API Requests to Use Your My Domain Login URL (Release Update)		✓		
Other Improvements to Generating an OpenAPI Document for sObjects REST API (Beta)		✓		
Get Notified About Bulk API V2 Query Jobs with Platform Events (Beta)		✓		
Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)	✓			
Development Environments				
Data Mask				
Use Einstein to Generate Data Mask Custom Libraries		✓		
Set Your Configurations to Automatically Run Each Time You Refresh a Sandbox		✓		
Platform Development Tools				
Salesforce CLI				
Keep Up with the Latest Salesforce CLI Enhancements		✓		
Salesforce Extensions for Visual Studio Code		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Code Builder		✅		
Agentforce for Developers		✅		
Scalability				
Book Sandbox Slots for Peak Load Testing with Scale Test				✅
Identify Slow Reports, View Decrypted URLs, and Access Scale Center Deep Links				✅
Optimize Code with ApexGuru				✅
Remove Shift_JIS to Windows-31J Character Mapping			✅	
Salesforce Functions				
Salesforce Functions Is Being Retired				✅
AppExchange Partners				
AppExchange Developer Documentation Has Been Updated	✅			
Change Data Capture				
Receive Change Event Notifications for More Objects		✅		
Platform Events				
Discover the Grace Allocation for Daily Delivered Events for Salesforce Orgs with an Add-On License		✅		
Standard-Volume Platform Events Are Being Retired		✅		
Event Bus				
Package and Distribute Event Relays		✅		

Einstein

Supercharge your workforce efficiency with predictive and generative AI.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Features			✓	
Einstein Platform				
Agentforce				
Einstein Copilot for Salesforce is Now Agentforce	✓			
Batch Test with Agentforce Testing Center	✓			
Build, Test, and Troubleshoot Agents More Easily with Agent Versions	✓			
Chat with Agentforce in Your Preferred Language (Beta)			✓	
Say Hello to Agent for Setup, Your Sidekick for Admin Tasks			✓	
New and Changed Standard Agent Topics and Actions			✓	
Einstein Bots				
Create Agentforce Service Agents Easily from Your Einstein Bots (Beta)				✓
Improve Bot Conversations with Disambiguation (Generally Available)		✓		
Control Intent Recognition Enhancements for Enhanced Bots (Generally Available)			✓	
Use Salesforce Records in Bot Conversations (Generally Available)		✓		
Set Bot Variables to Custom Values in Bot Builder		✓		
Einstein Bots Are Available in More Regions	✓			
Transition to Generative Knowledge Answers and Data Cloud	✓			
Get More Customer Responses to Static Option Messaging Components	✓			
Control Session Timeout for Bot Conversations (Beta)				✓
End Messaging for In-App and Web Conversations Thoughtfully				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Connect REST API Resources for Einstein Bots (Beta)		✓		
Input Recommender (Beta) Is Being Retired		✓		
Legacy Chat is Being Retired			✓	
Agentforce Data Library				
Einstein Data Library Has a New Name: Introducing Agentforce Data Library	✓			
Einstein Development				
Try Out New Recipes for the LLM Open Connector				✓
Generative Canvas (Preview)				
Get the Information You Need with One Question to Generative Canvas (Preview)				
Other Changes				
Add AI-Powered Quick Actions to Record Pages		✓		
Track Generated Content Quality and Feedback in Flow Builder		✓		

Experience Cloud

Enhanced LWR sites are now generally available. Create enhanced LWR sites and CMS workspaces, or upgrade existing sites to the enhanced framework. You can also customize your site URLs to remove the /s at the end. In security updates, use trusted sites while the content security provider is in strict mode, switch to single domain certificates for Salesforce CDN, and enjoy improvements to the identity experience. Upgrade your Aura record components to the LWR framework to see improved performance and style, and provide a seamless experience between apps by linking files from your LWR site to Salesforce.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Aura and LWR Sites				
Upgrade to Enhanced LWR Sites (Release Update)			✓	
Update the URL of Your LWR Site			✓	
Improve LWR Site Performance with Experience Delivery (Beta)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Work More Efficiently in Experience Builder with Usability Updates		✓		
Components in Experience Builder				
Enable a Modernized Record Experience in Aura Sites (Release Update)		✓		
Help Your Site Visitors View Records More Easily with the New Record List Component (Beta)		✓		
Give Experience Cloud App Users the Ability to Log In with One Tap		✓		
Developer Productivity				
Link Files from Your LWR Site to Salesforce is Generally Available		✓		
Develop Lightning Web Components Faster in a Real-Time Preview of Your LWR Site (Beta)			✓	
Mobile for Experience Cloud				
Improve Your Experience Cloud App with the Latest Features from Mobile Publisher		✓		
Security and Sharing				
Use Trusted Sites and Disable Lightning Locker When CSP Is in Strict Mode		✓		
Salesforce No Longer Supports Shared Domain Certificates for the Salesforce CDN			✓	
Increase the Security of Your Site with When Managing External Users			✓	
Strengthen Your Customer Identity Implementation with New Features and Security Updates			✓	

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				
Boost Productivity and Resource Utilization by Easily Filling Schedule Gaps with Agentforce			✓	
Listen Safely to Pre-Work Briefs with a Tap of a Button	✓			
Get Solutions Easily from Agentforce by Including Images (not immediately available)	✓			
Work Smarter by Using Siri to Communicate with Agentforce	✓			
Field Service Setup Home				
Accelerate Time to Value with Field Service Setup (Beta)		✓		
Field Service Scheduling and Optimization				
Enhanced Scheduling and Optimization				
Increase Coverage with 24-Hour Availability for All Service Resources	✓			
Enhance Scheduling Flexibility by Assigning Service Appointments to Individuals or Crews			✓	
Reduce Labor Costs and Increase Resource Productivity with Consecutive Appointment Scheduling			✓	
Improve Scheduling in Japan with More Accurate Travel Time Predictions	✓			
Gain Visibility into the Scheduling History of Service Appointments (not immediately available)			✓	
Renamed Field Service Agent Permission Set Name and Agent Persona	✓			
Quickly Identify and Manage Empty Appointment Bundles (not immediately available)			✓	
Field Service Asset Management				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
View and Manage Asset Components in Real Time with the Asset Service Lifecycle Management Add-On	✓	✓		
Foresee Future Fixes with the Connected Assets Add-On				✓
Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)			✓	
Field Service Operations				
Monitor Field Service Operations with New Dashboards (Beta)	✓			
Customer Engagement				
Promote Your Brand During Visual Remote Assistant Sessions			✓	
Find Available Slots More Efficiently When Booking Appointments with Appointment Assistant	✓			
Mobile				
Field Service Mobile App Device Deprecations		✓		
Data Capture				
Simplify Mobile Forms with Data Capture Flow (Generally Available)		✓		
Empower Mobile Workers with Data Capture Forms (Generally Available)		✓		
Build Dynamic Forms with Discovery Framework Data Capture Flow (Generally Available)		✓		
Improve Mobile Worker Productivity with Discovery Framework Data Capture Forms (Generally Available)	✓			
Gather All the Answers with the Assessment Variable for Discovery Framework Data Capture		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automatically Unlock a Suite of Advanced Features with Lightning Data Service		✓		
Address Asset Issues Proactively with Asset Service Predictions (Generally Available)				✓
Manage Service Records Automatically On the Go			✓	
Get Notified When Mobile Workers Arrive at the Office or Pass by a Work Facility			✓	
Update Field Service Records Quickly and Easily	✓	✓	✓	
Minimize Work Disruptions with Seamless Updates	✓			
Update Service Appointment's En Route Status On the Go			✓	
Spotlight on Field Service Content				
Improve Your Scheduling and Optimization Proficiency with Revamped Salesforce Help Content	✓			

Hyperforce

Hyperforce is now available in more regions, including Israel and Osaka, Japan, expanding global data residency options. Hyperforce Assistant's instructions for automated pre-upgrade checks are clearer. Access to Hyperforce outbound IP addresses has been made more convenient. Hyperforce Premium products offer new capabilities. Out of Region Disaster Recovery provides additional data protection and business continuity. The Scale Test feature allows for high-traffic scenario simulations in sandbox environments. The Swiss Operating Zone offers a new avenue to address Swiss data residency requirements.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Access Salesforce in More Regions with Hyperforce			✓	
Improved Instructions in Hyperforce Assistant			✓	
Access Hyperforce Outbound IP Lists			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Out Of Region Disaster Recovery			✓	
Scale Test			✓	
Swiss Operating Zone			✓	

Industries

Salesforce introduces a range of enhancements to streamline operations and improve productivity across industries. Einstein Generative AI simplifies daily tasks across various sectors, including clean energy program suggestions in Energy and Utilities Cloud and benefit applicant household overviews in Public Sector Solutions. Asset Management helps streamline inventory processes and orchestrate real-time actions on assets. Automotive Cloud simplifies vehicle appraisals and loan negotiations, while Consumer Goods Cloud enhances field operations with advanced geofencing and VS Code-based app customization. Financial Services Cloud brings significant enhancements to business relationship plans, portfolio management, and wealth management, and Global Promotions Management introduces coupon codes and milestone-based promotions. Health Cloud improves financial management, scheduling, provider searches, and request processing, and Life Sciences Cloud streamlines pharmacy benefits verification and enrollments in financial assistance programs. Manufacturing Cloud enhances run-rate business with revenue management features, while Net Zero Cloud aligns disclosures and compliance workflows with CSRD guidelines. Salesforce for Education drives student engagement with Agentforce. We also bring exciting changes in Insurance, Media Cloud, Nonprofit Cloud, Communications Cloud, and other industry-specific features.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Asset Management				
Asset Service Lifecycle Management				
Work Order Estimation			✓	
Service Appointment Booking			✓	
Inventory Count			✓	
Inventory Replenishment			✓	
Timesheets and Labor Cost Optimization Enhancements			✓	
Connected Assets				
Represent Asset Events by Using a Predefined Context Definition			✓	
Accelerate Actionable Event Orchestration Implementation with Templates			✓	
Streamline Asset Registration Based on Telematics Events			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Schedule Asset Service Appointments Based on Telematics Events			✓	
Automotive Cloud				
Trade-In Appraisal Management (Generally Available)				
Quickly Initiate Appraisals for Customers and Prospects			✓	
Easily Capture Granular Vehicle Details for Appraisal			✓	
Enhance Valuation Accuracy with Vehicle Customization Details			✓	
Integrate External Sources for Better Vehicle Valuation			✓	
Efficiently Adjust and Approve the Final Appraisal Value			✓	
View Appraisals Related to a Vehicle in a Single List			✓	
Connected Vehicle Enhancements				
Create Actionable Event Orchestrations Faster			✓	
Automatically Register Vehicles and Assets Based on Telematics Events			✓	
Automatically Schedule Vehicle Service Appointments Based On Telematics Events			✓	
Vehicle and Asset Lending Enhancements				
Find a Different Vehicle for Your Vehicle Loan or Lease Application			✓	
Update the Application Payment Structure to Generate Better Offers			✓	
Easily Track Proposals During Various Stages of Decisioning			✓	
Easily Visualize Vehicle Inventory Search Results with a Card-Based View			✓	
Sync Financial Account Data by Using Prebuilt Data Streams			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Keep Your Financial Data Updated with Prebuilt Service Processes			✓	
Communications Cloud				
Enterprise Sales Management				
Tailor Quotes with Automatic Member Field Mapping			✓	
Streamline Pricing with Bulk Price Adjustments in Enterprise Sales Management			✓	
Simplify Pricing with Predefined Adjustment Codes			✓	
Increase Asset-to-Quote Limit in Enterprise Sales Management Asset Viewer			✓	
Improve Performance with Level-Based Item Retrieval in Enterprise Sales Management Configuration Cart			✓	
Simplify Discount Management with Advanced Search and Flexible Bundle Selection			✓	
Enhance Global Reach with Multilingual Support in Enterprise Sales Management			✓	
Optimize Bundle Management with Accurate Product and Attribute Sequencing			✓	
Keep Your Catalog and Cart Fresh			✓	
Communications Cloud Agent Console				
Streamline Customer Support for Service Issues			✓	
Einstein for Communications				
Easily Enable Einstein for Communications from Setup	✓			
Track Service Level Objectives and Identify Potential Upsell Opportunities				
Use Data Cloud to Proactively Track Service Level Objectives	✓			
Analyze Service Level Objectives and Identify Opportunities for Upsell			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Communications Cloud Sales				
Create Quotes for New and Existing Customers with the Onboard Customer Flow	✓			
Easily Add Multiple Locations to Quotes and Orders	✓			
Browse Product Catalogs and Assign Products to Locations	✓			
Manage Your MultiSite Customer Assets	✓			
New Objects in Communications Cloud	✓			
Asset Service Lifecycle Management			✓	
Consumer Goods Cloud				
Retail Execution				
Streamline Delivery Execution and Efficiently Complete Tours	✓			
Ensure Visit Integrity with Geofencing and Time Tracking	✓			
Boost Brand Visibilty by Adding Your Company Logo on Consumer Goods Cloud Offline Mobile App			✓	
Share Visits Is Retired		✓		
Usability Improvements for Desktop Orders		✓		
Other Improvements in Retail Execution		✓		
New and Changed Objects for Retail Execution		✓		
Plan for Windows Server Based Modeler's Retirement		✓		
Trade Promotion Management				
Reduce Time and Effort by Copying Manual Inputs for Tactics	✓			
Retrieve and Audit Account Plan Manual Inputs	✓			
Manage TPM Permission Sets Efficiently	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Preview Your Processing Service			✓	
New and Changed Objects for Trade Promotion Management		✓		
New and Changed Metadata Types		✓		
New and Changed APIs in Trade Promotion Management		✓		
Energy and Utilities Cloud				
Einstein Generative AI for Energy and Utilities Cloud Enhancements			✓	
Improve Case Management with Easy Access to Case Details			✓	
Timesheets and Labor Cost Optimization Enhancements			✓	
Financial Services Cloud				
Business Relationship Plan				
Closely Monitor Business Relationship Planning with Objective Tracking Metrics	✓			
Effectively Implement Objectives with Action Plans	✓			
Efficiently Create Measures for Account Plan Objectives By Using a Guided Flow	✓			
Data Cloud for Financial Services Cloud				
Keep Client Financial Goals on Track with Contextual Alerts and Actions			✓	
Portfolio Management				
Quickly Compare Actual and Target Allocations			✓	
Digital Lending—India				
Increase the Efficiency of Your Loan Approval Workflow		✓		
Service Process Automation				
Accelerate Retail Banking Service Process Setup with Prebuilt Templates			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Accelerate Wealth Banking Service Process Setup with Prebuilt Templates			✓	
Wealth Management				
Boost Productivity with Financial Services Cloud Embedded AI for Agents			✓	
Improve Readability and Clarity of Financial Account Party Record Names			✓	
Get Started Faster with Guided Setups				
Configure Business Relationship Plans with Ease by Using Guided Setup		✓		
New and Changed Financial Services Cloud Object Fields				
Health Cloud				
Disease Surveillance				
Track Public Health Information with the Disease Surveillance Data Model			✓	
Financial Assistance Program Enhancements				
Home Health Enhancements				
Streamline Home Healthcare with Integrated Quoting and Budgeting Capabilities			✓	
Expedite Your Home Health Setup			✓	
Intelligent Appointment Management Enhancements				
Verify Prerequisites for Appointments			✓	
Optimize Resource Use with Capacity-Based Scheduling			✓	
Schedule Ongoing Care with Recurring Appointments			✓	
Give Patients the Ability to Book Assets			✓	
Simplify Scheduling with Enhanced Appointment Guidance			✓	
Pharmacy Benefits Verification Enhancements				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Provider Network Management Enhancements				
Streamline Roster File Submission with Provider Portal Enhancements			✓	
Automate Field Mapping with Einstein			✓	
Provider Search Enhancements				
Automate Patient Services with an AI Agent			✓	
Site Management (Pilot)				
Utilization Management Enhancements				
Make Coverage Requirements Easily Accessible for Providers			✓	
Ensure Submission of Required Documentation for Prior Authorization Requests			✓	
Author FHIR-Aligned Questionnaires Using the Enhanced Discovery Framework Designer			✓	
Capture Metrics for Coverage Requirement Discovery, Documentation Templates and Rules, and Prior Authorization Requests			✓	
Expedite Your Health Cloud Setup			✓	
New and Changed Objects in Health Cloud		✓		
Insurance				
Insurance				
Policy Management				
Products				
Pricing				
Quoting				
Rules				
New Connect REST APIs in Insurance		✓		
New Invocable Actions in Insurance		✓		
Insurance (Managed Package)				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Transform Insurance Offerings with Multi-Root Policy Services	✓			
Ensure Precision in Pending Payment Calculations		✓		
New Services in Insurance		✓		
Life Sciences Cloud				
Financial Assistance Program Enhancements				
Manage Appeals for Financial Assistance Program			✓	
View the Appeals History of a Rejected Application			✓	
Participant Management Enhancements				
Access Recruitment Features on Mobile or Tablet Devices			✓	
Configure Criteria-Based Search and Filter Automatically with a Toggle			✓	
Merge Prescreening and Registration Omniscripts for a Unified Flow			✓	
Refine Search Results by Using Range-Based Filtering Options			✓	
Pharmacy Benefits Verification Enhancements				
Boost Representative's Productivity with Electronic Verification			✓	
Site Management (Pilot)				
Identify Investigators and Sites for Clinical Trials by Using Enhanced Search Capabilities (Pilot)			✓	
Create and Deploy Site Feasibility Assessments (Pilot)			✓	
Assign Scores to the Investigators and Sites for Effective and Faster Site Selection (Pilot)			✓	
Accelerate the Site Feasibility Assessment Process (Pilot)			✓	
Tag the Sites and Investigators for Future Site Selection Efforts (Pilot)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Accelerate Your Site Management Configurations with a Guided Setup (Pilot)			✓	
New and Changed Objects in Life Sciences Cloud		✓		
Loyalty Management				
Gamify Member Engagement with Milestone-Based Promotions	✓			
Report Liability Accurately by Tracing Negative Points Usage	✓			
Effectively Track Promotional Points by Using Currency Subtype	✓			
Gather Richer Customer Insights with the Enhanced Data Kit			✓	
Global Promotions Management				
Empower Customers and Sales Reps to Select Promotions by Using Coupons	✓			
Accurately Search for Products Using Enhanced Search Options	✓			
Exclude Ineligible Products and Categories Efficiently	✓			
Simplify the Evaluation of In-Store Promotions	✓			
Easily List Accounts Eligible for Promotions with Campaigns	✓			
Easily Select All Eligible Products for a Promotion Rule	✓			
Automate Promotion Data Sync with Prebuilt Data Streams			✓	
Decide How Customers' Data Cloud Segment is Verified			✓	
New and Changed Objects in Loyalty Management		✓		
Manufacturing Cloud				
Revenue Management Features for Sales Agreements				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Identify Perfect Products for Sales Agreements from Expansive Catalogs			✓	
Drive Sales by Tailoring Product Configurations to Customer Preferences			✓	
Maximize Your Margins with Rules-Driven Pricing in Sales Agreements			✓	
Easily Compare Committed and Fulfilled Sales of Products with Attributes in Sales Agreements			✓	
Check Product Specifications for Sales Agreements Without Switching Pages			✓	
Renew Sales Agreements with Same Products and Attributes			✓	
Sales Agreements Foundations Enhancements				
Calculate Sales Agreement Actuals by Using Data Processing Engine			✓	
Maximize Sales Agreement Profitability with Cost Visibility			✓	
Recalculate Actuals for Future Schedules			✓	
Add Multiple Instances of the Same Product to a Sales Agreement			✓	
Easily View the Unallocated Quantity for a Product			✓	
Streamline Your Inventory Counting Processes			✓	
Minimize Stockouts with Automated Inventory Replenishment			✓	
Media Cloud				
Advertising Sales Management				
Boost Efficiency in Your Advertising Sales Workflow	✓			
Target Granular Audience Segments By Using Salesforce Data Cloud	✓			
Net Zero Cloud				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Author Disclosure Reports in Google Docs			✓	
Perform Materiality Assessments and Score Impacts and Risks and Opportunities for CSRD Compliance			✓	
Streamline CSRD Reporting with Simplified Setup and Enhanced Features			✓	
Find XBRL Tagging Providers to Comply with CSRD Requirements			✓	
Allocate Scorecard Emissions Based on Spent Amount			✓	
New and Changed Objects in Net Zero Cloud	✓			
Public Sector Solutions				
Help Caseworkers Quickly Learn About a Household with Einstein			✓	
Enhance Job Applications for Talent Recruitment Management			✓	
Easily Create Personalized Care Plans for Employees			✓	
Quickly Migrate Dynamic Assessments with Metadata API			✓	
Updated Metadata API Type in Public Sector Solutions			✓	
New and Changed Objects in Public Sector Solutions		✓		
Referral Marketing				
Enhance Your Promotion's Reach with WhatsApp Messages			✓	
Choose How to Verify Advocates' Data Cloud Segments			✓	
Sync Referral Marketing Data with Prebuilt Data Streams			✓	
Get Predictions on Contacts' Likelihood to Refer			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Objects in Referral Marketing		✓		
Salesforce for Education				
Autonomously Answer and Support Prospective Students			✓	
Gain Meaningful Insights with the Philanthropic Research Agent			✓	
Consolidate Information in Student Records with the Student Management App			✓	
Get More from the Intelligent Degree Planner and the Learner Progress View		✓		
Streamline Advancement-Specific Data Processing			✓	
Drive Comprehensive Prospect Research Activities			✓	
Unlock Deeper Insights with Generational Categories			✓	
Gain Holistic Student Insights and Visualize Learner Progress			✓	
Get a Unified View of Student Data with Learner Profile		✓		
Schedule Appointments Efficiently with a New Lightning Web Component		✓		
Capture Student Sentiment with Icon Responses in Pulse Checks			✓	
Score Applications with Rubrics			✓	
Streamline Admissions Reviews with Stage Management		✓		
New and Changed Objects in Education Cloud		✓		
New and Changed Data Model Objects in Education Cloud		✓		
Salesforce for Nonprofits				
Nonprofit Cloud			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce for Nonprofits Managed Packages				
foundationConnect is Being Retired	✓			
Vlocity Contract Lifecycle Management				
Visualforce-Based Document Generation Omniscripts Are Being Retired		✓		
Document Generation 1.0 is Being Retired		✓		
Enhance Document Generation with Document Generation 2.0				
Migrate and Sync Custom Fonts		✓		
Industries Common Features				
AI Accelerator and Scoring Framework				
Improve Prediction Accuracy by Optimizing Training and Scoring Data		✓		
Action Launcher				
Reduce the Cognitive Load of Contact Center Agents with Recommended Actions	✓			
Action Plans				
Automate Status Update for Action Plans			✓	
Business Compliance Suite				
Capture Business Operations Processes for Compliance	✓			
Define Regulations and Track Amendments for Compliance	✓			
Create Compliance Policies and Manage Updates	✓			
Combine Validation Controls by Using Validation Procedures			✓	
Protect Your Company from Compliance Risks			✓	
Track Compliance by Using Non-Validation Compliance Controls			✓	
View Relationships for Compliance Objects			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Demonstrate Compliance Effectiveness			✓	
Extract Clauses from Regulations by Using Generative AI (Beta)			✓	
New Connect REST API Resources			✓	
New Invocable Action in Business Compliance Suite			✓	
New Objects in Business Compliance Suite				
Business Rules Engine				
Monitor the Usage of Business Rules Engine Components	✓			
Simplify Calculations By Using Transient Attributes	✓			
Easily Activate Expression Set Templates in a Single Step	✓			
Efficiently Configure Context-Based Expression Sets	✓			
Simplify Datetime Retrieval with the New Date/Time Data Type		✓		
Monitor CSV Upload Progress for Decision Tables		✓		
Collections				
Manage Collection Activities Efficiently with Collections Console App			✓	
Save Time and Effort with a Preconfigured Action Launcher Deployment			✓	
Create Promise to Pay Agreements Quickly			✓	
Offer Additional Payment Options with Salesforce Pay Now			✓	
Automatically Update Payments Received in Collection Plans and Payment Schedules			✓	
Notify Customers of Payment Status Automatically			✓	
Automate Case Creation and Closure for Collection Plans			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Determine Collection Plan Segments with Business Rules Engine			✓	
Create a Prioritized List of Collection Plans with Actionable Segmentation			✓	
Maximize Collections with Request Direct Debit Action			✓	
Import Collections Data with CSV File Import		✓		
Streamline Record Creation for Collection Plan and Related Objects with Composite Graph API		✓		
Create Effective Collection Campaigns with Collections Data Kit		✓		
Get Collections Up and Running with Ease			✓	
New and Changed Objects		✓		
Compliant Data Sharing				
Deactivate Users and Retain Compliant Data Sharing Participant Records			✓	
Context Service				
Optimize Performance by Using Reference Definitions		✓		
Simplify Data Population for Nodes and Attributes		✓		
Conveniently Store Temporary Changes to Attributes		✓		
Efficiently Manage Context Instances by Using Context Actions in Flows		✓		
Increase Database Efficiency with Polymorphic Fields		✓		
Effortlessly Sync Extended Context Definitions		✓		
Easily Generate Tags for Attributes		✓		
Easily Clone a Context Mapping		✓		
Conveniently Map Context Definitions to Data Model Objects		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
New Object in Context Service			✓	
Cross-Object Field History (Beta)				
Track Changes Across Related Objects with Cross-Object Field History (Beta)		✓		
Data Processing Engine				
Automate Your Field Mapping with Einstein		✓		
Perform Bulk Transformations with Data Cloud		✓		
Ensure Data Integrity for the Writeback of Transformed Data		✓		
Troubleshoot Composite Writeback or CSV File Ingestion		✓		
Changed Object in Data Processing Engine		✓		
Einstein Autofill (Beta)				
Boost Efficiency and Customer Satisfaction with Einstein Autofill (Beta)			✓	
Fundraising				
Scale Your Fundraising Efforts by Autogenerating Outreach Source Codes			✓	
Understand Donor Impact by Using Soft Credit Rollups			✓	
Automatically Receive Fundraising Rollup Calculation Updates		✓		
Delivered Idea: Customize Summary Displays		✓		
Enhance Donor Segmentation	✓			
Delivered Idea: Improve Donor Relations and Track the Impact of Gifts		✓		
Create and Manage Pledges in Bulk		✓		
Customize Sources and Destinations for RFM Scoring			✓	
Streamline Advancement-Specific Data Processing		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Drive Comprehensive Prospect Research Activities		✓		
Gain Insight Through Generational Cohorts and Graduation Status	✓			
New and Changed Objects and Fields for Fundraising		✓		
Grantmaking				
Delivered Idea: Save Time by Bulk-Assigning Grant Application Reviews			✓	
Streamline Grantmaking Processes with Stage Management			✓	
Enter Multiple Grant Funding Results in Experience Cloud			✓	
Delivered Idea: Share Funding Disbursements		✓		
Changed Objects for Grantmaking		✓		
Group Membership and Households				
Receive Change Event Notifications for More Objects			✓	
Easily Find Contacts for Party Relationship Groups			✓	
Industries Configure, Price, Quote (CPQ)				
Detect and Resolve Duplicate Offers During Hierarchical Catalog Compilation	✓			
Configuring and Pricing Bundles for Anonymous User	✓			
Support for Offer Specification	✓			
Ensure Seamless Promotion Management Across Digital Commerce and Standard CPQ	✓			
Process Large Promotion Bundles Seamlessly in Standard Digital Commerce	✓			
Automate Cache Cleanup with Lifecycle Management	✓			
Simplify MACD (Move, Add, Change, Delete) Journeys with Guided Transform Multiplay	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Integrate Salesforce Pricing with Standard Digital Commerce APIs	✓			
Attribute Validation in PutCartsItems API	✓			
Sync Product and Promotion Launch Dates Across Time Zones	✓			
Integration Solutions with MuleSoft				
Save and Reuse Connection Settings When You Enable MuleSoft Integrations				
Integration Solutions with MuleSoft Video				
Omnistudio Document Generation				
Process More Batch Server-Side Document Generation Requests with Increased Limits		✓		
Document Generation 1.0 is Being Retired		✓		
Enhance Document Generation with Document Generation 2.0			✓	
Enrich Server-Side Document Generation with Dynamic Images		✓		
Outcome Management				
Create Multiple Indicator Results			✓	
Program and Case Management				
Delivered Idea: Create Custom Care Plan Goals			✓	
Delivered Idea: Clone Care Plan Templates			✓	
Improve Accuracy and Compliance with Stage Management			✓	
Set a Default Status for Program Enrollments		✓		
Updated Objects for Program and Case Management			✓	
Record Rollup Definitions				
Aggregate Tasks and Events with Record Rollup Definitions			✓	
Delete Record Rollup Definitions			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Provide More Meaningful Names and Descriptions to Your Record Rollup Definitions			✓	
Stage Management				
Manage Parent and Child Stage Transitions Declaratively		✓		
Clone and Customize Stage Definitions		✓		
Define Key Checkpoints with Milestones		✓		
Automate Step Definition Execution		✓		

Marketing

Salesforce offers three marketing products: Account Engagement (formerly known as Pardot), Engagement (formerly known as Marketing Cloud), and Marketing Cloud Growth and Advanced editions.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Marketing Cloud				
Reach More People with WhatsApp	✓			
Save Time with New AI Capabilities for Campaigns and Content	✓			
Create Campaigns with Agentforce Campaign Designer (Beta)	✓			
Personalize Emails Consistently with Reusable Personalization Settings and Expressions	✓			
Reach the Right Customers with Enhanced Audience Tools	✓			
Connect Experiences on External Sites	✓			
Extend Your Marketing with Enhanced Messaging Tools	✓			
Get More Flexibility and Visibility with Campaigns and Flows	✓			
Create and Manage Content More Efficiently	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Started Faster with Setup Enhancements	✓			
User Interface Updates in Marketing Cloud	✓			
Marketing Cloud Account Engagement				
Get Helpful Resources for Enabling Marketing Cloud	✓			
Automate Account Engagement Data Stream Creation in Data Cloud	✓			
Expedite Content Creation by Copying Assets to CMS via API		✓		
Streamline Content Creation by Copying Additional Asset Types to CMS			✓	
Get More Visibility into Email Send Issues	✓			
Generate Account Engagement Content in More Languages	✓			
Prepare for End of Support for Enhanced Email Experience	✓			
Marketing Cloud Engagement				
Personalization				
Einstein Personalization Is Now Called Personalization		✓		
Explore the Enhanced Web Personalization Manager		✓		
Define Custom Objectives for Recommendations		✓		
Use Scheduling Rules for Decisions		✓		
Test the Effectiveness of Personalized Experiences		✓		
Use Only Authenticated Endpoints When Accessing Data Cloud		✓		
View Recommender Training Status and Refresh History		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track and Evaluate Visitor Engagement Through Attribution		✓		
Visualize the Customer Journey with the Attribution Dashboard		✓		
Personalize Business Processes and Screens with Flow		✓		

Mobile

User Opt-In Biometric Login is now generally available in Mobile Publisher. Customize your Experience Cloud app's security alerts with new fields and use newly supported download methods. There are also upgrades to the Salesforce mobile app and 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				
Malware Detection Security Policy for Android is Being Retired		✓		
Send Attachments in Messaging on the Salesforce Mobile App			✓	
Mobile Publisher				
Download Files Your Way in Mobile Publisher for Experience Cloud	✓			
Remove Unwanted /s Elements in Older Experience Cloud LWR Site URLs		✓		
Set Up Opt-In Biometric Login for Fast and Secure Experience Cloud App Logins (Generally Available)		✓		
Customize Mobile Publisher Android App Permission Requests to Post Notifications		✓		
Customize the Style of Your Experience Cloud App's Security Alerts		✓		
General Mobile Updates				
Assign Briefcases to Users by Profile		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Do More with Seller-Focused Mobile Experience		✓		
Validate Mobile Lightning Web Components with ESLint Rules	✓			
Reduce Mobile Performance Issues with the Salesforce Extensions Pack	✓			
Accept On-Site Payments with Tap-to-Pay		✓		

Omnistudio

Omnistudio now offers a standard designer and list view for all components. With this designer, explore new features including Omnistudio Design Assistant, OmniOut, and Lightning Rich Text Editor. Use Omnistudio with the Salesforce Lightning Design System 2 (SLDS 2) template for a refreshed user interface. OmniAnalytics is now enabled for guest users on Experience Cloud by default. Access customers' saved session information to create context-driven communications on your sites. In addition to improving usability, we made a few translation, accessibility, security, and deployment updates.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Explore Omnistudio's Refreshed Visual Style with SLDS 2		✓		
Integrate Guest User Data on Experience Cloud with OmniAnalytics		✓		
Use Omniscript Saved Sessions in Emails and Email Templates		✓		
Save Costs and Time with Built-In Translations for Omniscripts and Flexcards		✓		
Seamlessly Enable Omnistudio Metadata in Scratch Orgs by Updating the Org Shape File		✓		
Upgrade to a Secure Node.js Version for OmniOut		✓		
Securely Deploy Omnistudio Components by Using the Latest Versions of Build Tool and Node.js		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Accessibility Enhancements in Omnistudio		✓		
Other Improvements in Omnistudio		✓		
Deprecation and End of Support for AngularJS-Based Omniscripts		✓		
Omnistudio Minor Releases				✓

Revenue Cloud

Quickly create products by using Deep Clone. Speed up product discovery through faceted search and partial indexing. Improve Salesforce Pricing by using tools for accurate discounts, troubleshooting, pricing recipes, and optimal strategies. Save and reuse configurations. Use streamlined rules and dynamic configurations to design bundles faster. Support large, complex deals through robust quoting, ordering, contracting, and approvals. Manage usage-based products through usage modeling, rate management, and consumption tracking. Integrate Microsoft 365 with Salesforce Contracts to streamline reviews, configure file formats, enhance workflows, and extract data from images by using multimodal processing. With Dynamic Revenue Orchestrator, streamline order processing, automate tasks, track fulfillment changes, and manage ramp deal orders. Customize and optimize billing by using flexible invoice schedules, PDF generation, error reduction, multi-currency support, and automated journal entries.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Product Catalog Management				
Accelerate Product Creation with Deep Clone			✓	
Define Decimal Values for Product Quantity			✓	
Update Product Index Quickly with Partial Index Rebuilds			✓	
Enhance Product Discovery with Faceted Search			✓	
Changed Objects in Product Catalog Management			✓	
Connect REST APIs				
New and Updated Connect REST API Resources			✓	
Changed Connect REST API Request Bodies	✓			
Changed Connect REST API Response Bodies	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Pricing				
Add Context Tags Automatically to Your Pricing Elements			✓	
Apply Discounts Accurately by Using the Discount Distribution Service Element	✓			
Determine the Right Price for a Product by Combining Multiple Outputs	✓			
Troubleshoot Pricing Errors with the Pricing Operations Console			✓	
Streamline Line Item Tagging	✓			
Delete Pricing Recipes	✓			
Enhance Flexibility with New Data Types in Assignment Element	✓			
Simplify Line Item Mapping		✓		
New and Changed Objects in Salesforce Pricing			✓	
Product Configurator				
Create Quotes and Orders Faster by Saving and Reusing Configurations	✓			
Create Precise Configurations with Decimal Quantity Support	✓			
Design Product Configurations Faster With Product Classes and Flexible Rules		✓		
View More Products at Once with Compact Mode in Product Configurator	✓			
Find Products in a Large Bundle Easily	✓			
Show More Details About Your Products with Customized Product Cards	✓			
Set Up Complex Product Validation Rules Easily by Using Advanced Configurator (Closed Beta)			✓	
Configure Complex Products Accurately with Constraint Models (Closed Beta)	✓			
New Configurator Flow Component Fields		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Transaction Management				
Amend Evergreen Subscriptions on Any Date	✓			
Create Precise Quotes and Orders with Decimal Quantity Support	✓			
Negotiate Tiered Volume Adjustments and Prices by Using Contract Pricing	✓			
Unlock More Flexibility with Line Item Level Pricing Contracts	✓			
Specify Pricing Agreement Type Contracts for Quotes and Orders	✓			
Track Pricing Agreement Contracts Easily	✓			
Organize Quote and Order Line Items into Groups with Ease	✓			
Enhance Transparency with Custom Fields on Usage-Based Products		✓		
Enable Usage Selling on Experience Cloud Sites			✓	
Receive Email Notifications for Approval Submissions	✓			
Manage Advanced Approvals Through Email	✓			
Create Quotes and Orders Fast with More Responsive Pages	✓			
Create Complex Quotes and Orders	✓			
New and Changed Objects in Transaction Management			✓	
Usage Management (Generally Available)				
Usage Modeling				
Define Sellable Products and Usage Resources			✓	
Define Units of Measure to Quantify Usage Resources			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track and Rate Usage Consumption with Product Usage Grants			✓	
Define Refresh Policies for Usage Resources			✓	
Manage Unused Usage Grants Effectively			✓	
Define Usage Aggregation Methods and Periods			✓	
Manage Grants for Sellable Products			✓	
Rate Management				
Optimize Usage Costs with Predefined Negotiable Rating Elements			✓	
Manage the Lifecycle of Rate Card Entries Effectively			✓	
New and Changed Objects in Rate Management			✓	
Consumption Management				
Enhance Reporting with On-Demand Summary Generation			✓	
Calculate Rates for Usage Summaries on Demand			✓	
Streamline Billing with Enhanced Liable Summary Generation			✓	
Wallet Management				
Manage Wallets for Usage Resources			✓	
New Objects in Usage Management			✓	
		Salesforce Contracts		
Use a Guided Setup to Easily Integrate Microsoft 365 with Salesforce Contracts		✓		
Enhance Privacy with a Discreet External Review Process	✓			
Specify Attachment Format During Document Check-In		✓		
Manage Custom Fonts for Consistent Document Branding		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Dynamic Revenue Orchestrator				
Prioritize Orders for Processing	✓			
Optimize Fulfillment Efficiency with Staged Assetization	✓			
Manage Dependencies Across Related Fulfillment Plans	✓			
Define Rules to Assign Manual Tasks	✓			
Track Your Fulfillment Step Changes	✓			
Configure Future Dated Steps		✓		
Decompose Orders with Decimal Quantities	✓			
Fulfill Ramp Deal Orders		✓		
New and Changed Objects in Dynamic Revenue Orchestrator			✓	
Billing				
Manage Bulk Invoicing Efficiently with the New Invoice Scheduler Features	✓			
Suspend and Resume Billing for Accounts and Billing Schedule Groups		✓		
Preview Upcoming Invoices to Get Billing Estimates		✓		
Update Billing Parameters Any Time During the Customer Lifecycle	✓			
Generate Invoices on Demand for Accounts and Orders	✓			
Create Invoices from Internal or External Data		✓		
Streamline Invoice Due Dates with End-of-Month Payment Terms	✓			
Accurately Bill Amended or Canceled Evergreen Subscriptions	✓			
Align Billing Subscriptions with Early Renewal	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Make Billing for Rampable Products More Efficient	✓			
Simplify Financial Accounting by Capturing Transaction Amounts in Corporate Currency		✓		
New and Changed Objects for Billing		✓		
New Platform Events for Billing		✓		
Changed Metadata Types			✓	
Connect REST APIs				
New Connect REST API Resources			✓	
Changed Connect REST API Request Bodies	✓			

Sales

Boost your sales teams' results with new features across Sales Cloud. Help your account teams collaborate, strategize, and succeed with more efficiency and accountability with enhancements to Account Plans. Manually upload video recordings to Einstein Conversation Insights to get key insights and action items for meetings from external sources. Forecast your consumption-based business. Customize the mobile app with Mobile Builder for Seller-Focused Experience. And plan quotas that reflect ramp-up time and seasonal sales patterns in Quota Planning.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Agentforce for Sales				
Agentforce Sales Coach				
Coach Sales Reps at Scale with Agentforce Sales Coach			✓	
Enhance Agentforce Sales Coach Responses with a Data Library			✓	
Scale Your Sales Funnel with Agentforce SDR			✓	
Monitor Agentforce Sales Coach and SDR Usage with Digital Wallet			✓	
Sales Cloud Go				
View and Assign Permission Sets and Monitor Usage in Sales Cloud Go		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Sales Fundamentals				
Accounts				
Track Progress Toward Sales Account Plan Objectives More Easily			✓	
Delivered Idea: Coordinate Your Sales Team's Activities with More Transparency			✓	
Discover Untapped Selling Opportunities			✓	
Activities				
Take Advantage of the Increased Custom Field Limit for Activities		✓		
Einstein Conversation Insights				
Identify Coachable Moments from Recorded Video Calls with Einstein Conversation Insights			✓	
Use Generative AI in All Languages Supported by Einstein Conversation Insights	✓			
Use Call Explorer in Flows	✓			
Sales Engagement				
Find Your Next Customer with Prospecting Center, a new Data Cloud App			✓	
Change Einstein Activity Capture Permissions for Sales Engagement Basic Users (Release Update)			✓	
Salesforce Forecasting				
Collaborative Forecasts Is Now Pipeline Forecasting	✓			
Improve Pipeline Forecast Visibility with Manager Judgments on Opportunity Splits			✓	
Forecast Your Consumption-Based Business			✓	
Pipeline Inspection				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get an Improved User Experience in Pipeline Inspection List View	✓			
Close Date Predictions Has Been Retired	✓			
Sales Programs, Partner Tracks, and In-App Guidance				
Sales Programs and Partner Tracks with Enablement				
Empower Your Sales Leaders with Enablement Analytics		✓		
Take Full Control of Your Enablement Settings with One Switch			✓	
In-App Guidance				
Deliver In-App Guidance Quickly with Managed Packages		✓		
Sales Performance Management				
Sales Planning				
Plan Accurate Quotas That Account for Ramp and Seasonality	✓			
Publish Quota Plans to Pipeline Forecasting	✓			
Design Sales Strategies with a More Intuitive Experience	✓			
Other Improvements Within Sales Performance Management	✓			
Salesforce Maps				
Simplify Activity Tracking and Reimburse for Qualified Travel Distances			✓	
The Enhanced User Experience Is Now Standard	✓			
New Permission Set for Communications with Hyperforce		✓		
Email, Calendar, and Integrations				
Einstein Activity Capture				
Upgrade Your Service Account Connections to Org-Level OAuth 2.0 Authentication		✓		
Outlook Integration				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Maintain Access to the Outlook Integration			✓	
Gmail Integration				
Use Agentforce with Your Gmail Integration	✓			
Increase Efficiency by Using the Gmail Integration in the Chrome Side Panel	✓			
Salesforce Inbox				
Allowlist the Required Domain for Salesforce Inbox			✓	
Salesforce for Outlook Is Being Retired in December 2027		✓		
Partner Relationship Management				
Expand and Maintain Shared Business with Trusted Partners			✓	
Sales Cloud Everywhere				
Access Your Records Easily in Everywhere			✓	
Sales Cloud on Mobile				
Prepare for Meetings Without Opening Your Laptop			✓	
Customize Seller-Focused Mobile Experience (Beta)			✓	
Other Changes in the Sales Cloud				
Einstein Automated Contacts Is Being Retired in February 2025			✓	

Salesforce CMS

Classify CMS content with content taxonomy, then tag content to create dynamic collections. Clone content and save it to a shared workspace. Deliver content from any CMS workspace to any public or restricted channel, and remove more types of channels from enhanced CMS workspaces.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Classify CMS Content with Content Taxonomy		✓		
Streamline Content Management with Automated Tag-Based Conditions		✓		
Save Time with Content Record Cloning in Your Shared Enhanced CMS Workspaces		✓		
Scale Content Delivery for High Performance		✓		
Deliver Content from Any CMS Workspace to Any Public or Restricted Channel		✓		
Remove More Types of Channels from Enhanced CMS Workspaces		✓		

Salesforce Flow

Compose intelligent workflows with Flow Builder and Flow Orchestration. Build approval orchestrations with automated approvals. Integrate across any system with Flow Integration.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow Builder				
Flow Builder Updates				
Screen Flow Updates				
User Experience Updates		✓		
Get Help Building Flows Faster and More Accurately with Einstein (Generally Available)			✓	
Generate a Detailed Description of a Flow with Einstein			✓	
Get Help Creating Flow Formulas with Einstein (Generally Available)		✓		
Join Collections with the Transform Element		✓		
Send Emails with Attachments in Flow Builder	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Retrieve More Information from Data Cloud by Using Newly Supported Data Types		✓		
Launch an Active Autolaunched Flow as a Subflow Within a Prompt Flow		✓		
Enhance Flow Performance by Controlling the Number of Records Retrieved with Get Records	✓			
Flow for Marketing Cloud				
Automate Your Responses to Common Customer Actions with More Automation Events		✓		
Pick a Winning Path, Test Subsets of your Audience, and More in the Path Experiment Element			✓	
Define Your Own Flow Trigger by Using Real-Time Data from Data Cloud		✓		
Personalize Your Flows with Access to Data Cloud Data in More Elements		✓		
View Metrics in Flow Builder with Embedded Analytics	✓			
Preview and Test WhatsApp Messages		✓		
Debug Automation Event-Triggered Flows		✓		
Debug Flows at a Glance with the Improved Debugging Experience		✓		
Flow Runtime				
Flow and Process Run-Time Changes		✓		
Flow Management				
Copy Data Cloud-Triggered Flows from Sandbox to Production		✓		
Monitor All Failed and Paused Flow Interviews from the Automation Lightning app	✓			
Flow Extensions				
Design Component Errors for a Better Experience		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow and Process Release Updates				
Enable Secure Redirection for Flows (Release Update)			✓	
Enforce Permission Requirements Defined on Built-In Apex Classes Used as Inputs (Release Update)			✓	
Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)			✓	
Enhance Flexibility and Reusability in Prompt Flows (Release Update)			✓	
Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)			✓	
Restrict User Access to Run Flows (Release Update)			✓	
Sort Apex Batch Action Results by Request Order (Release Update)			✓	
Flow Orchestration				
Customize Email Notifications for Interactive Steps		✓		
View Improved Orchestration Run Details		✓		
Other Improvements		✓		
Flow Approval Processes				
Assign Approval Steps to Groups or Queues		✓		
Send Notifications to Approval Users		✓		
Reply to Emails to Approve or Reject Approval Work Item		✓		
MuleSoft for Flow: Integration				
Enhance Data Exchange with Third-Party Connectors	✓			
Manage External System Integrations in the Connections Tab	✓			
Trigger Flows from External Systems	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Map Flow Fields to Fields in Third-Party Systems	✓			
MuleSoft Composer for Salesforce			✓	

Security, Identity, and Privacy

Log in to Salesforce with your email address with the Log In with Email button on login.salesforce.com. Deliver convenient login experiences with headless user discovery. Use an external client apps to configure Salesforce as a SAML single sign-on identity provider. Use external auth identity providers to centralize your OAuth configurations for outbound callouts under named credentials. Define more HTTP status codes to refresh access tokens. Monitor details of Transaction Security Policy triggering events, and keep tabs on key certificate information. Monitor transactional database tenant secrets. To adopt the latest content security policy directives via a new release update, update your trusted URLs. A release update ends redirections for legacy host names in production and demo orgs, and another .

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Domains				
Update References to Legacy Host Names (Release Update)			✓	
Disable Redirections for Legacy Host Names		✓		
Trailhead Playgrounds Use Salesforce Edge Network	✓			
Identity and Access Management				
Log In with Your Email Address	✓			
Delivered Idea: Brand the Welcome Email for Internal Users			✓	
Use Multi-Factor Authentication for Password Reset	✓			
Password Reset Link Stays Valid After Multiple Clicks	✓			
Control Access to the setPassword() API More Easily		✓		
Give Headless App Users More Ways to Log In			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Troubleshoot Errors with the Headless Registration Apex Handler		✓		
Issue JSON Web Token (JWT)-Based Access Tokens in Hybrid OAuth Flows			✓	
Manage Sessions Associated with JSON Web Token (JWT)-Based Access Tokens		✓		
Additional Session Is Established When a User Logs In to the UI		✓		
GET Requests with Access Tokens in the URL Query String Are Blocked for the Single Access Endpoint		✓		
Enjoy Usability Improvements for Token Exchange Setup		✓		
Integrate Single Sign-On Service Providers with the External Client Apps Framework			✓	
Triple DES Encryption Is No Longer Supported for SAML Single Sign-On		✓		
Verify SAML Integrations (Release Update)		✓		
Migrate to a Multiple-Configuration SAML Framework (Release Update)		✓		
Enable Embedded Login			✓	
Named Credentials				
Simplify OAuth Configurations with External Auth Identity Providers			✓	
Refresh Access Tokens for Named Credentials with More HTTP Status Codes			✓	
Privacy Center				
Process the User Object with Privacy Policies		✓		
Bypass Triggers and Validation Rules While Processing Records		✓		
Salesforce Shield				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Event Monitoring				
Query Low-Latency Event Data with Event Log Objects (Generally Available)			✓	
Correlate Logs with a Custom Request Identifier			✓	
Access All Event Monitoring Data with One Permission Set			✓	
Monitor Content Security Policy (CSP) Violations		✓		
Dig into Details About Blocked Redirections		✓		
Shield Platform Encryption				
Bring Your Own Data Encryption Keys for Search Indexes			✓	
Encrypt Data Cloud Search Indexes			✓	
Used Named Principal Authentication with Cache-Only Keys			✓	
Security Center				
Monitor Certificates Across Your Salesforce Landscape		✓		
Track your Transactional Database Encryption status with the Existing Encryption Policies metric		✓		
Discover More Ways to Optimize Security Center		✓		
Streamline Navigation with New Icons		✓		
Policy Center				
Manage Privacy and Security Policies in Policy Center		✓		
Other Changes				
Update Your Trusted URLs for the Latest CSP Directives (Release Update)			✓	
Diagnose Failed Redirections Faster		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Locate the Source of Content Security Policy (CSP) Violations and Blocked Redirections		✓		
Test Automation That Generates Trusted URLs		✓		
Secure Cross-Cloud Integrations Across Asia with Private Connect			✓	

Service

Get Case Resolution Assistance at the Click of a Button (Generally Available). Monitor Real-time Conversations Between Agentforce Service Agents and Customers. Integrate Knowledge with Data Cloud.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Agentforce for Service Cloud				
Agentforce Service Agent				
Monitor Real-time Conversations Between Agentforce Service Agents and Customers (Release Update)			✓	
Flag Supervisors to Help with Agentforce Service Agent Conversations			✓	
Agentforce Service Agent is Now ASA Messaging in Digital Wallet			✓	
Enhance User Search Experience by Using Context-Driven Conversations with Agentforce Service Agent	✓			
Chat with Agentforce Service Agent in Japanese (Generally Available)		✓		
Agentforce Service Planner				
Get Case Resolution Assistance at the Click of a Button (Generally Available)			✓	
Einstein for Service				
Einstein Conversation Mining				
Gain Insights from Customer Conversations in More Languages		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Mine Insights from Voice Conversations		✓		
Einstein Reply Recommendations				
Customize Service Replies for Email in Prompt Builder		✓		
Einstein Work Summaries				
Enjoy Rich Text and Additional Supported Languages in Conversation Catch-Up			✓	
Get a Quick Overview of a Case and Ongoing Developments with Case Summaries (Beta)	✓			
Customize Work Summaries for Case Using the Summarize Case Prompt Template	✓			
		Employee Service		
Simplify Information Access, Service Requests, and Networking with Alumni Portal		✓		
Experience Improved Clarity with the Renamed Employee Hub and HR Service Workspace Features		✓		
Equip Service Representatives with Historical Context by Rapidly Deploying a Preconfigured Timeline		✓		
Efficiently Create Employee Records by Using CSV File Import		✓		
Showcase Actions and Simplify Navigation with Navigation Tiles		✓		
Ascertain that Important Information Reaches Employees with CMS Collection		✓		
Streamline Employee Life Events with Employee Enablement Program		✓		
Conveniently Comment on Cases By Using the Case Management Bot		✓		
Improve Accountability with Enhanced Approval Capabilities		✓		
Improve Employee Service by Managing Feedback with Feedback Management		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Manage Workday Employee Data by Using Prebuilt MuleSoft Integrations			✓	
Changed Object in Employee Service		✓		
Service Data Kit				
Add More Service Data to Data Cloud for Greater Insights			✓	
Service Insights				
Reduce Costs and Improve Operations with Service Insights	✓			
Channels				
Email				
Enjoy Improved Flexibility When Refining Automated Emails		✓		
Omni-Channel Flow for Email-to-Case Is Now Invoked Synchronously		✓		
Disable Ref ID and Transition to New Email Threading Behavior (Release Update)			✓	
Transition to the Lightning Editor for Email Composers in Email-to-Case (Generally Available) (Release Update)			✓	
Messaging				
Customize the Style of Text Message Bubbles in Messaging for In-App and Web		✓		
Warn End Users Before Automatically Inactivating Their Messaging Session			✓	
Messaging on the Mobile App to Include Attachments		✓		
Blur Potentially Harmful Content Sent to Service Reps in Attachments			✓	
Help Customers Contact You During a Service Downtime in Messaging for In-App and Web			✓	
More Customers Can End a Messaging Session in Messaging for In-App and Web		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Notify End Users When a Salesforce Org Migration Happens in Messaging for In-App and Web			✓	
Expand the Scope of Messaging for In-App and Web Engagement with Supported File Types		✓		
Start a Messaging Session from a Contact, Account, or Lead Record		✓		
Conversation Catch-up for Messaging to Include Rich Text and Additional Supported Languages		✓		
Collect Date Information from End Users in Secure Forms			✓	
The Enhanced Messaging Component Gets a Style Update			✓	
Empower Reps to Resolve Cases Faster with Einstein Article Recommendations for Messaging (Pilot)				✓
Customize the Size of Your Customer-Facing Chat Window		✓		
Use a Custom Font on Your Messaging Window		✓		
Insert Messaging Components in Service Rep Text Boxes and Send Messages on Their Behalf Using Lightning Console Methods		✓		
Improvements to Existing Lightning Console APIs		✓		
Remove All Messaging Components from a Web Page by Using an API		✓		
Ingest Third-Party Bot Conversation History into the Service Console by Using an API		✓		
Mass Delete User Information to Comply with General Data Protection Regulation (GDPR) Guidelines by Using an API			✓	
Optimize Business Processes Based on the Sentiment and Intent of Real-Time Messages (Pilot)				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Added Support for Reply Messages in LINE		✓		
Save Time with Automated Outbound Messages for LINE			✓	
Streamline User Interactions with Auto-Populated Language Data			✓	
Use Rich Link Format in Enhanced LINE Links			✓	
Bring Your Own Channel				
Voice				
Route Work Items Through a Single System with Unified Routing for Voice (Pilot)				✓
Use Omni-Channel Routing with Automatic Queue and User Sync During Disaster Recovery	✓			
Manage Call Actions from Your Headset			✓	
Empower Reps to Resolve Cases Faster with Einstein Article Recommendations (Pilot)				✓
Customize Softphone Options to Support Call Handling Compliance			✓	
Use Desk Phones Without Another Audio Device	✓			
Leverage Customized Usernames for Contact Centers	✓			
Use External ID for Provisioning Role for Additional Security			✓	
Get the Latest Enhancements for Your Amazon Connect Contact Center			✓	
Optimize Business Processes Based on the Sentiment and Intent of Real-Time Conversations (Pilot)				✓
Updated Format of Usage Details Field in Amazon Connect Usage and Amazon Lex Reports		✓		
Conversation Catch-Up Offers Additional Supported Languages		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get More Granular Voice Call Report Data with Role Hierarchy Filters		✓		
Display Voice Call Audio Statistics in Real Time Using the Service Cloud Voice Toolkit API		✓		
Dissociate Voice Call Recordings from Voice Calls		✓		
Focus on Primary Tasks by Using Voice in an App with Standard Navigation (Beta)			✓	
Use an Apex-Defined Variable for All Intelligence Signal Types (Release Update)			✓	
Knowledge				
Create Advanced Approval Processes for Knowledge Articles		✓		
Revise Knowledge Articles for Grammar and Readability with Einstein Knowledge Edits (Generally Available)			✓	
Leverage Data Cloud Connectors to Ingest Knowledge Articles			✓	
Sync Knowledge with Data Cloud			✓	
Unify Knowledge with MindTouch Connector			✓	
Get More Done in the Lightning Article Editor			✓	
Open Ingested Article Links from Third-Party Sources in Salesforce			✓	
Sync Options Enhanced for Your Knowledge Base			✓	
Run the Lightning Knowledge Migration Tool (Release Update)			✓	
Alert Agents to Knowledge Articles with Einstein Knowledge Creation Async Notification		✓		
Entitlements and Milestones				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Boost Rep Productivity and Reporting Accuracy by Automating Milestone Completion with Flows	✓			
Optimize Data Analysis, Reporting, and Decision Making with the Case Milestones Report Type	✓			
Self-Service				
Resolve User Search Queries Faster by Using Context-Driven Conversations with Agentforce Service Agent	✓			
Routing				
Reassign Work Items from Service Channels			✓	
Manage Your Workforce More Efficiently with Agentforce			✓	
Perform Actions from More Flow Types			✓	
Increase Rep Productivity with Omni-Channel Sidebar	✓			
Other Enhancements for Routing Work to Agentforce Service Agents			✓	
Route Voice Calls with Other Channels by Using Omni-Channel (Pilot)				✓
Feedback Management				
Improve Data Gathering with Partial Survey Responses	✓			
Customize NPS Question Labels for Better Relevance	✓			
Access Customer Feedback Directly from the Messaging Sessions Page	✓			
Customer Experience Intelligence				
Unify Customer Data for a Holistic Profile	✓			
Extract Product Insights from Customer Interactions	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enhance Data Quality by Restricting the Length of Key Phrases	✓			
Improve Customer Experience with Email Insights	✓			
Optimize Engagement Efficiency by Analyzing Interactions Across Products	✓			
Boost Productivity by Creating Multiple Cases Simultaneously	✓			
Get a Comprehensive Summary of Customer Engagement, Experience, and Data	✓			
Service Adoption				
Discover More Service Capabilities with My Service Journey (Generally Available)	✓			

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 when 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.

For the latest information on supported browsers and devices for Lightning Experience, see Supported Browsers and Devices for Lightning Experience

Supported Browsers and Devices for Salesforce Classic

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

For the latest information on supported browsers and devices for Salesforce Classic, see Supported Browsers and Devices for Salesforce Classic.

Supported Browsers for CRM Analytics

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

Salesforce Overall

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

IN THIS SECTION:

General Enhancements
Spring '25 gives you more reasons to love Lightning Experience.

Einstein Search
Customize your search results in the Search Manager to show the results that users want. Find data easily with enhanced Advanced Lookup.

Salesforce Foundations
Take advantage of a limited set of capabilities to try out autonomous AI Agents. Generate more leads with custom pages and forms. Save time on campaign and store management with new layouts and preconfigured options.

Lightning Console
Gain improved performance with fewer extra page loads.

Salesforce Data Pipelines
Get a better view of a recipe's outcome with new features for building sample data and examining content in recipe previews. Monitor dataflow and recipe deletions in the Audit Trail.

Salesforce Scheduler
Add support for payments to Salesforce Scheduler.

Salesforce Archive
Get to know Salesforce Archive.

General Enhancements

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

IN THIS SECTION:

Add the New Setup Domain
Ensure that Setup pages in Lightning Experience load content correctly when browsers block third-party cookies. If your users have general access to the internet, no action is required. If your company controls users' or servers' access to the internet through firewalls or allowlists, your IT department must add `*.salesforce-setup.com` to the company's list of allowed domains. Salesforce Setup pages are now hosted on that domain.

Prepare for Upcoming Restrictions on Salesforce Cookie Use

To support users that block third-party cookies, test custom functionality and code that uses a Salesforce session cookie. To test, enable the My Domain setting, "Require first-party use of Salesforce cookies." Salesforce plans to enforce that setting in a future release.

Monitor Your Usage of Sales and Service Cloud Agents with Digital Wallet

Monitor more of your Agentforce usage for Sales and Service Cloud with Digital Wallet, an account management tool for consumption-based features. Now, on the Digital Wallet homepage, the Conversations consumption card summarizes your org's combined usage of Agentforce Sales Coach and Agentforce SDR (Sales Development Rep) along with ASA Messaging (formerly Agentforce Service Agent - Inbound). Additionally, Digital Wallet's Consumption Insights page offers a breakdown of your combined Agentforce usage by time period to help you detect trends over time.

Cloudfront Is Replacing Akamai as the Lightning CDN Partner

All new and existing orgs automatically migrate from the content delivery network (CDN) partner Akamai to the partner Cloudfront. If your company's firewall only lets through specific domains, add *.static.lightning.force.com to the allowlist.

Allow the Required Domain for Maps and Location Services

Maps and location services use Google Maps to display maps on standard address fields, enable creation of Visualforce maps, and help users enter new addresses with autocomplete. To use these features, add `*.forceusercontent.com` to the allowlists for your network, firewalls, and proxies. Previously, that domain was erroneously included in the list of domains used only in orgs without enhanced domains.

Redirect to a Newly Created Record

When you create a new record by using a quick action, you can now quickly redirect to the newly created record by clicking default or custom toast messages. Previously, on desktop, you could only click the default toast message to be redirected to the newly created record.

Track Salesforce Platform Login License Overages in Your Org

You can keep track of Salesforce Platform Login users who exceed the number of custom objects that they're allowed on the System Overview page. Click the number next to Salesforce Platform Login Users Over Custom Object Limit to download a CSV file of the user names and the custom objects that they created.

Lightning Adoption Apps Are Being Retired

Lightning Adoption apps, including Lightning Experience Transition Assistant, Lightning Experience Configuration Converter, and Lightning Experience Readiness Check, are scheduled for retirement on January 10, 2025. After the retirement date, you can no longer use Lightning Adoption apps in orgs on Spring '25 and later.

Enjoy Salesforce's Refreshed Visual Style with Themes for SLDS 2 (Beta)

Create custom themes that represent your brand with all the benefits of Salesforce Lightning Design System (SLDS 2), or select the new built-in SLDS 2 theme, Salesforce Cosmos. To find the perfect fit, you can easily switch between SLDS and SLDS 2 themes. In-app guidance and visual cues ensure that you always know which SLDS version you're working in. Previously, the enhanced Lightning user interface setting in User Interface Settings controlled enablement of SLDS 2.

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.

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.

Explore Salesforce Products In-Depth with Product Detail Pages in the Your Account App

Get more details about Salesforce products so that you can make more informed purchase decisions in the Your Account app.

Choose Contact Details when Requesting a Call from Your Salesforce Account Executive

Now when you request a call from your Salesforce Account Executive regarding a Salesforce product, you can confirm your contact information, choose the contact method, and add details about your request. Get ready for a more productive conversation about the products you're exploring.

Get Personalized Suggestions in Setup

Get relevant suggestions just for you, right where you work in Setup. Suggested for You makes personalized recommendations based on the products you have and how you and others in your company work.

Get Notified When Usage Exceeds a Threshold in Digital Wallet

Learn how to activate Digital Wallet's Consumption Threshold Alerts flow template to get usage notification emails and in-app alerts when your org's usage exceeds specified thresholds. Customize who gets notified, the consumption cards you want to be alerted on, and the thresholds of usage that trigger the notifications.

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: We're using a staggered rollout to move the Setup pages to the `*.salesforce-setup.com` domain. The rollout began in Spring '24 and continues through Spring '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

Knowledge Article: Understand How Google's Privacy Sandbox Initiative Impacts Salesforce

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

Prepare for Upcoming Restrictions on Salesforce Cookie Use

To support users that block third-party cookies, test custom functionality and code that uses a Salesforce session cookie. To test, enable the My Domain setting, "Require first-party use of Salesforce cookies." Salesforce plans to enforce that setting in a future release.

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:

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

Knowledge Article: Visualforce Limitations in Salesforce Classic When Third-Party Cookies are Blocked

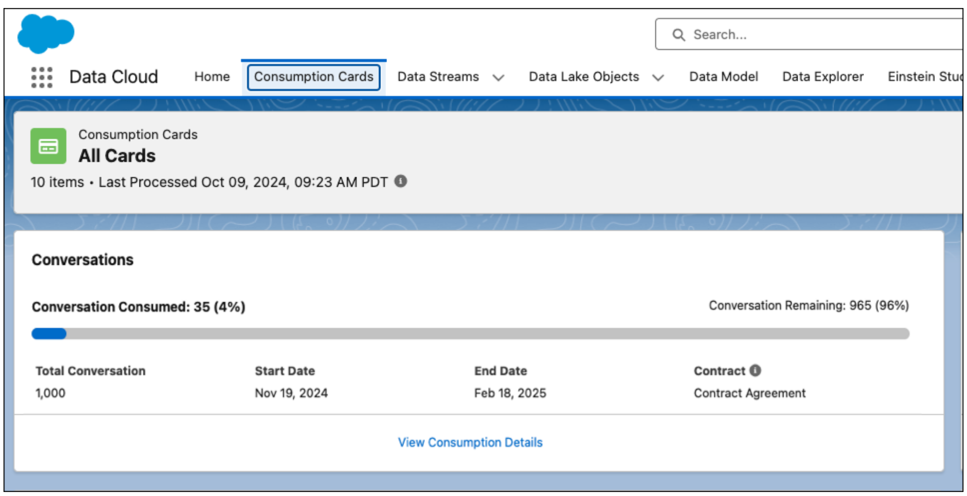
Monitor Your Usage of Sales and Service Cloud Agents with Digital Wallet

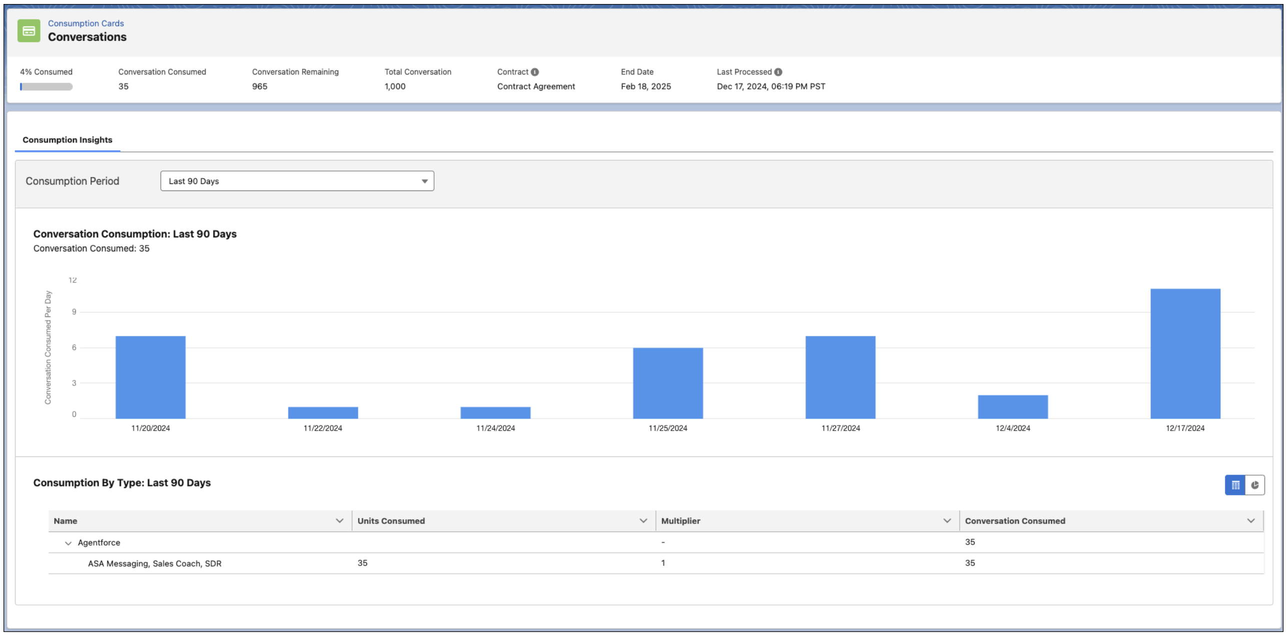
Monitor more of your Agentforce usage for Sales and Service Cloud with Digital Wallet, an account management tool for consumption-based features. Now, on the Digital Wallet homepage, the Conversations consumption card summarizes your org's combined usage of Agentforce Sales Coach and Agentforce SDR (Sales Development Rep) along with ASA Messaging (formerly Agentforce Service Agent - Inbound). Additionally, Digital Wallet's Consumption Insights page offers a breakdown of your combined Agentforce usage by time period to help you detect trends over time.

Where: Digital Wallet is available in Lightning Experience in Enterprise and Unlimited editions. SDR is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. Setup for agents is available on the desktop site. Sales Coach is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. ASA Messaging is part of Service Cloud Usage Billing and is available in Lightning Experience in Enterprise and Unlimited editions.

Who: Digital Wallet is available to users with the View Consumption user permission or Your Account access. SDR is available with the Agentforce SDR add-on. Sales Coach is available to users with the Agentforce Sales Coach add-on. Service Cloud Usage Billing is available to users with the Conversation add-on.

How: To get started with Digital Wallet, see Access Digital Wallet. To get started with Agentforce SDR, see Set Up Agentforce SDR. To get started with Agentforce Sales Coach, see Setting Up Agentforce Sales Coach.





Cloudfront Is Replacing Akamai as the Lightning CDN Partner

All new and existing orgs automatically migrate from the content delivery network (CDN) partner Akamai to the partner Cloudfront. If your company's firewall only lets through specific domains, add *.static.lightning.force.com to the allowlist.

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

Allow the Required Domain for Maps and Location Services

Maps and location services use Google Maps to display maps on standard address fields, enable creation of Visualforce maps, and help users enter new addresses with autocomplete. To use these features, add `*.forceusercontent.com` to the allowlists for your network, firewalls, and proxies. Previously, that domain was erroneously included in the list of domains used only in orgs without enhanced domains.

Where: This change applies to Lightning Experience, Salesforce Classic (not available in all orgs), and all versions of the mobile app in Professional, Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Provide Maps and Location Services (can be outdated or unavailable during release preview)

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

Redirect to a Newly Created Record

When you create a new record by using a quick action, you can now quickly redirect to the newly created record by clicking default or custom toast messages. Previously, on desktop, you could only click the default toast message to be redirected to the newly created record.

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

Track Salesforce Platform Login License Overages in Your Org

You can keep track of Salesforce Platform Login users who exceed the number of custom objects that they're allowed on the System Overview page. Click the number next to Salesforce Platform Login Users Over Custom Object Limit to download a CSV file of the user names and the custom objects that they created.

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

SEE ALSO:

Salesforce Help: Salesforce Platform Login License Details (can be outdated or unavailable during release preview)

Lightning Adoption Apps Are Being Retired

Lightning Adoption apps, including Lightning Experience Transition Assistant, Lightning Experience Configuration Converter, and Lightning Experience Readiness Check, are scheduled for retirement on January 10, 2025. After the retirement date, you can no longer use Lightning Adoption apps in orgs on Spring '25 and later.

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:

Knowledge Article: Retirement of Lightning Adoption Apps

Enjoy Salesforce's Refreshed Visual Style with Themes for SLDS 2 (Beta)

Create custom themes that represent your brand with all the benefits of Salesforce Lightning Design System (SLDS 2), or select the new built-in SLDS 2 theme, Salesforce Cosmos. To find the perfect fit, you can easily switch between SLDS and SLDS 2 themes. In-app guidance and visual cues ensure that you always know which SLDS version you're working in. Previously, the enhanced Lightning user interface setting in User Interface Settings controlled enablement of SLDS 2.

Where:

Note: SLDS 2 themes 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.

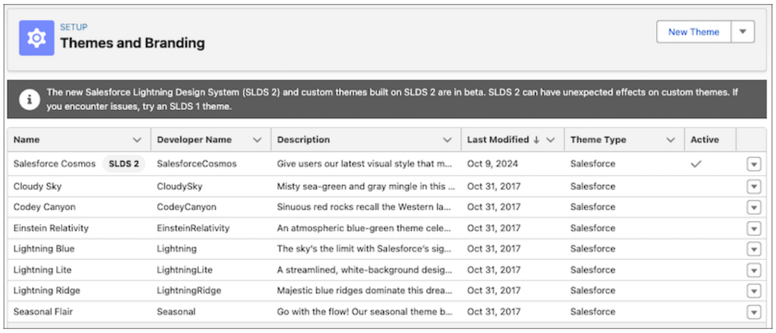
This change applies to Lightning Experience in all editions.

SLDS 2 is enabled in new and existing Starter and Pro Suite orgs by default. It's enabled in new Sales orgs across all editions and in select new Service orgs. For more information about when SLDS 2 becomes available in your new and existing orgs, see Salesforce Cosmos Theme Availability in Salesforce Help.

Not all Salesforce apps support SLDS 2. If an app or area of Salesforce doesn't support SLDS 2, it's displayed with SLDS styling even when SLDS 2 is activated. For example, areas such as CRMA, Setup, and some builders still use SLDS styling.

How: From Setup, search for and select **Themes and Branding**. To create a custom SLDS 2 theme, click **New Theme**, then configure and activate the theme. To use the built-in SLDS 2 theme, from the Salesforce Cosmos theme dropdown list, select **Activate**. When you activate an SLDS 2 theme, you also enable SLDS 2 for your org.

To switch to SLDS, activate a theme without a badge next to the theme name. To create an SLDS theme, from the New Theme dropdown list, select **New SLDS 1 Theme**, then configure and activate the theme. When you activate an SLDS theme, you enable SLDS for your org.



Some themes and branding features are unavailable in SLDS 2 due to accessibility implications, such as background color and background image. Existing built-in and custom themes built on SLDS aren’t migrated to SLDS 2. To recreate an existing SLDS custom theme with SLDS 2, from the Themes and Branding page, click **New Theme** and manually rebuild the theme.

SEE ALSO:

Salesforce Help: Brand Your Org in Lightning Experience (can be outdated or unavailable during release preview)

SLDS: Salesforce Lightning Design System

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: 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.

Post-save navigation has changed for modals that are launched by a quick action. For LWC quick actions that open a stacked modal for record creation, you’re returned to the record page after record save. For non-stacked LWC quick actions and Aura quick actions, you are redirected to the newly created record page after record save.

If you use custom quick actions, consider these guidelines.

- **Aura quick actions**—Modals launched by Aura quick actions redirect you to the newly created record page after record save. If you used `force:createRecord`, consider using LWC quick actions instead. Use the `lightning/navigation` module to configure post-save navigation to return you back to the original record page that launched the quick action.
- **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`. When replace is `true`, post-save navigation redirects you to the newly created record.

This table shows post-save navigation behavior with the release update enabled as compared to its previous behavior.

	Enable LWC Stacked Modal Release Update	LWC Stacked Modal Release Update Not Enabled	Example
Create from Lookup	Returns back	Returns back	On a contact page, click the Edit action. On the Account Name field, click New Account. A stacked modal for new account creation is displayed.
Standard Quick Action	Returns back	Returns back	On an account page, click the New Case action. A stacked modal for new case creation is displayed.
LWC Quick Action (stacked)	Returns back	Returns back	Add an LWC quick action to a contact page. The quick action launches a modal, which contains a button that launches another modal using `lightning/navigation`.
LWC Quick Action (not stacked)	Redirects to newly created record page	Redirects to newly created record page	Add an LWC quick action to a contact page. The quick action launches a modal.
Aura Quick Action (not stacked)	Redirects to newly created record page	Returns back	Add an Aura (Lightning Component) quick action to a contact page. The quick action creates a case using a `lightning:recordEditForm` base component.

Note: Modals that are launched by Aura quick actions are not stacked. For example, if you launch a modal using an Aura quick action, and then launch another modal using `force:createRecord`, the previous modal is closed automatically and the newer modal is not stacked.

`force:createRecord` launches an LWC-based modal if you pass in an LWC-enabled object. For example, if you call `force:createRecord` from an Aura quick action, the modal that's displayed follows post-save navigation behavior of an LWC quick action (not stacked).

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

Explore Salesforce Products In-Depth with Product Detail Pages in the Your Account App

Get more details about Salesforce products so that you can make more informed purchase decisions in the Your Account app.

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

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

How: Select the product name in the Product Catalog. Get more information about a Salesforce product and take a deep dive on its included capabilities. If you have more than one contract, select which one you want to add it to before adding it to your cart. If it's a product you own, you can add quantity here.

Choose Contact Details when Requesting a Call from Your Salesforce Account Executive

Now when you request a call from your Salesforce Account Executive regarding a Salesforce product, you can confirm your contact information, choose the contact method, and add details about your request. Get ready for a more productive conversation about the products you're exploring.

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

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

Why: Add yourself or a teammate as the point of contact when requesting a call from your Salesforce Account Executive.

How: Select the **Talk to Sales** or **Request an Upgrade** button in the Your Account app. Confirm your contact information, select your preferred contact method, and add any details about your interest or questions. The Sales team then reaches out to you.

Get Personalized Suggestions in Setup

Get relevant suggestions just for you, right where you work in Setup. Suggested for You makes personalized recommendations based on the products you have and how you and others in your company work.

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

Why: When you see a suggested action you'd like to take, click the action button. Use the copy button to save the content for later. You can manage suggestion preferences in Adoption Assistance in Setup. You can also dismiss an individual suggestion if you don't want to see it again.

Get Notified When Usage Exceeds a Threshold in Digital Wallet

Learn how to activate Digital Wallet's Consumption Threshold Alerts flow template to get usage notification emails and in-app alerts when your org's usage exceeds specified thresholds. Customize who gets notified, the consumption cards you want to be alerted on, and the thresholds of usage that trigger the notifications.

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. The Consumption Threshold Alerts flow can be activated and modified by users with the Manage Flows user permission.

How: To activate the flow, see Get Digital Wallet Notifications about Your Usage in Digital Wallet's help guides.

Einstein Search

Customize your search results in the Search Manager to show the results that users want. Find data easily with enhanced Advanced Lookup.

IN THIS SECTION:

Customize Explicit Filters in Search Manager

Tailor the explicit search filters to address specific objects and profiles. For example, customize the search filters that appear for the Contacts object specifically for the Contract Manager profile.

Advanced Lookup Search Has an Updated UI

For easier viewing, the Advanced Lookup window now lists possible matches under the search bar, not in a dropdown. To change the sorting parameter for search results, click the column titles. If you don't find the proper result, create a record from the Lookup input field, not from the Advanced Lookup window.

Customize Explicit Filters in Search Manager

Tailor the explicit search filters to address specific objects and profiles. For example, customize the search filters that appear for the Contacts object specifically for the Contract Manager profile.

Where: This change applies to Lightning Experience in all editions

When: This functionality is rolling out to all entities starting in Spring '25.

Advanced Lookup Search Has an Updated UI

For easier viewing, the Advanced Lookup window now lists possible matches under the search bar, not in a dropdown. To change the sorting parameter for search results, click the column titles. If you don't find the proper result, create a record from the Lookup input field, not from the Advanced Lookup window.

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

Salesforce Foundations

Take advantage of a limited set of capabilities to try out autonomous AI Agents. Generate more leads with custom pages and forms. Save time on campaign and store management with new layouts and preconfigured options.

IN THIS SECTION:

Build Engaging Web Pages and Forms with Salesforce Foundations

Enhance your lead generation strategy with custom web pages and forms. Easily monitor key KPIs with default reports and dashboards. And, thanks to a signup form campaign flow, automate lead creation and marketing consent data updates after customers complete your opt-in form.

Unlock AI Agents with Salesforce Foundations

Say hello to autonomous AI agents. Now enabling Foundations unlocks Agentforce and gives you a set of agent conversations to get started.

Other Changes in Salesforce Foundations

Learn about other marketing and commerce changes we made in Spring '25.

Build Engaging Web Pages and Forms with Salesforce Foundations

Enhance your lead generation strategy with custom web pages and forms. Easily monitor key KPIs with default reports and dashboards. And, thanks to a signup form campaign flow, automate lead creation and marketing consent data updates after customers complete your opt-in form.

Where: This change applies to supported editions for Salesforce Foundations.

Who: To create landing pages and forms, you need the Marketing Manager and Starter Marketing app permission sets. You also need the Modify All Data user permission and a CMS workspace contributor role of Content Manager or Content Admin.

How: To use this feature, in Setup, go to Salesforce Foundations. If you added Salesforce Foundations before Spring '25, turn on Digital Experiences on this page. If you added Foundations after Spring '25, turn on all required marketing settings on this page. Then, set up landing pages and forms.

SEE ALSO:

Salesforce Help: Salesforce Foundations Setup (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Landing Pages and Forms (can be outdated or unavailable during release preview)

Unlock AI Agents with Salesforce Foundations

Say hello to autonomous AI agents. Now enabling Foundations unlocks Agentforce and gives you a set of agent conversations to get started.

Where: This feature is available in supported editions for Foundations.

How: To use AI agents, in Setup, go to Salesforce Foundations. If you added Foundations before Spring '25, add the product with Your Account. If you added Foundations after Spring '25, add all the required products with Your Account. Then refer to the relevant Salesforce Help to set up your agents.

SEE ALSO:

Salesforce Help: Salesforce Foundations Allocations (can be outdated or unavailable during release preview)

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

Salesforce Help: Service Agent (can be outdated or unavailable during release preview)

Salesforce: Salesforce Foundations FAQ

Other Changes in Salesforce Foundations

Learn about other marketing and commerce changes we made in Spring '25.

Where: These changes apply to supported editions for Foundations.

How: These changes are available.

- With our revised campaign record page layout, you can more easily manage flows that automate different parts of your campaign. From the campaign record, view up to 5 flow elements in the same order they appear in Flow Builder. You can edit message or time-based wait elements without opening Flow Builder.
- Save time on segment creation for marketing campaigns with preconfigured filters. From the campaign record, click **Select Segment** and then select **Use Quick Filters**.
- Preview which customers are in a segment before you send out a marketing campaign. To preview a segment, publish it from the campaign record, and then click **Preview**. Segments are automatically published again when you activate the campaign.
- The refreshed Pay Now experience provides a redesigned landing page for store home, easier navigation, and improved access to your content with revamped workspaces.

SEE ALSO:

Salesforce Help: Promote My Business (can be outdated or unavailable during release preview)

Salesforce Help: Marketing Segments (can be outdated or unavailable during release preview)

Salesforce Help: Start Selling Online (can be outdated or unavailable during release preview)

Lightning Console

Gain improved performance with fewer extra page loads.

IN THIS SECTION:

Benefit from Better Lightning Console Performance with Deferred Inactive Workspace Page Loading

Lightning Console now defers the loading of inactive workspace pages by default, which minimizes extra page loads and improves performance. An inactive workspace page doesn't load until the user navigates to that page. Regardless of whether the Defer loading inactive console workspace pages setting is enabled or disabled, content in pinned regions is always considered active and loads immediately. Previously, if a workspace page opened via a navigation rule, then the page immediately began loading even if the user remained on a different workspace page.

Benefit from Better Lightning Console Performance with Deferred Inactive Workspace Page Loading

Lightning Console now defers the loading of inactive workspace pages by default, which minimizes extra page loads and improves performance. An inactive workspace page doesn't load until the user navigates to that page. Regardless of whether the Defer loading inactive console workspace pages setting is enabled or disabled, content in pinned regions is always considered active and loads immediately. Previously, if a workspace page opened via a navigation rule, then the page immediately began loading even if the user remained on a different workspace page.

Where: This change applies to Lightning console apps in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

How: This setting is on by default. To turn off this setting, from Setup, in the Quick Find box, enter `Console Settings`, and select **Console Workspace Page Loading Preference**. Then turn off **Defer loading inactive console workspace pages**.

SEE ALSO:

Salesforce Help: Defer Loading Inactive Lightning Console Workspace Pages (can be outdated or unavailable during release preview)

Salesforce Data Pipelines

Get a better view of a recipe's outcome with new features for building sample data and examining content in recipe previews. Monitor dataflow and recipe deletions in the Audit Trail.

IN THIS SECTION:

Get More Representative Sample Data in Recipes from Local Salesforce Connections

When adding local Salesforce data to a recipe, you can now filter the rows added to the preview or get samples that include one row for each value in a column. These new sample modes help you better assess whether a recipe achieves the desired outcome by selecting more relevant preview data.

Preview Random Samples from Datasets in Recipes

When adding a dataset to a recipe, get random sample rows to help you better assess whether the recipe is achieving the desired outcome. Random sampling increases the likelihood that preview data remains available through your recipe transformations.

Improved Data Preview in Recipes

You can now sort on any column and search the preview data. Freeze columns and highlight rows. Hover over a cell to see the full value. You can also copy API names and cell values.

Secure Salesforce External Connections with OAuth 2.0

Use OAuth 2.0 to create a secure connection to an external Salesforce org that's adding your data to CRM Analytics.

Monitor Dataflow and Recipe Deletions in the Audit Trail

You can now view who deleted a dataflow or recipe and when in the Salesforce setup audit trail. For example, you can follow up to find out why a dataflow or recipe was deleted.

Run Sequential Recipes Faster in Encrypted Orgs

Reduce processing time when your data strategy involves multiple recipes by using staged data instead of datasets. An initial recipe outputs results as staged data, and then the subsequent recipes use the staged data in input nodes. For example, rather than merge account and opportunity data in several region-specific forecasting recipes, merge in an initial recipe that outputs the results as staged data. Then use the staged data in the other recipes. Previously, you could use staged data only with unencrypted orgs.

Give Users Read-Only Access to Recipes (Generally Available)

Let coworkers 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.

Push Data from Government Cloud with Output Connectors

You can now use the Amazon S3, Salesforce, and Snowflake output connectors to push data from Salesforce Government Cloud customer orgs. When using these connectors, data in transit is encrypted using FIPS 140 validated cryptography, in accordance with US federal requirements.

Improve Salesforce External Connector Sync Performance with Incremental Syncs (Beta)

Improve your data sync times when using the Salesforce External connector by loading object data incrementally. An incremental sync extracts only the latest changes to external Salesforce data.

Load Data Incrementally (Beta)

Improve upload time when using the Analytics External Data API by loading CSV files incrementally. In addition to appending data, you can now incrementally upsert and delete data.

Get More Representative Sample Data in Recipes from Local Salesforce Connections

When adding local Salesforce data to a recipe, you can now filter the rows added to the preview or get samples that include one row for each value in a column. These new sample modes help you better assess whether a recipe achieves the desired outcome by selecting more relevant preview 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: Add a dataset to a recipe. In the input node, from Sampling Mode, select **Filtered rows** to preview rows based on filters or **All Column Values** to include at least one row for each value in a column in the preview.

SEE ALSO:

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

Preview Random Samples from Datasets in Recipes

When adding a dataset to a recipe, get random sample rows to help you better assess whether the recipe is achieving the desired outcome. Random sampling increases the likelihood that preview data remains available through your recipe transformations.

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: Add a dataset to a recipe. In the input node, from Sampling Mode, select **Random Sampling**.

SEE ALSO:

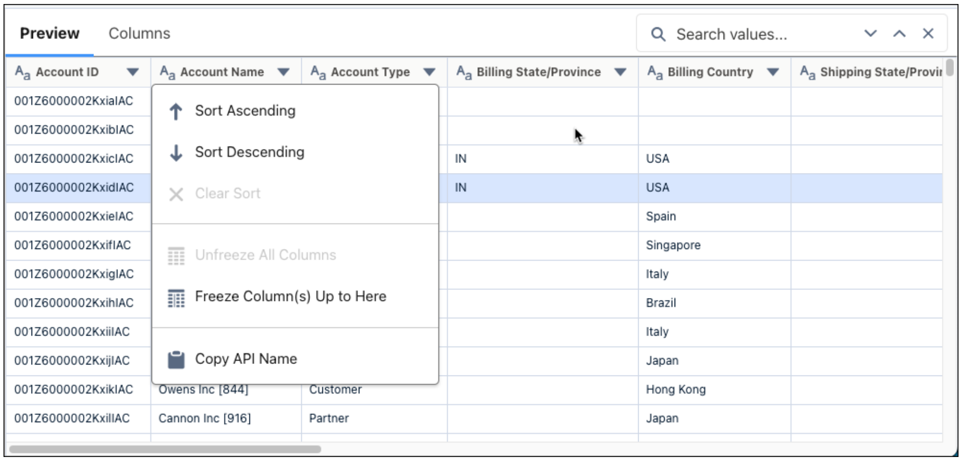
Salesforce Help: Data Preview Sampling (can be outdated or unavailable during release preview)

Improved Data Preview in Recipes

You can now sort on any column and search the preview data. Freeze columns and highlight rows. Hover over a cell to see the full value. You can also copy API names and cell values.

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 a recipe node, from the column menu, select a sort option or freeze the column. To highlight a row, click it and scroll left and right to review the column values for that row. Use the new search box to find values in the preview data.



SEE ALSO:

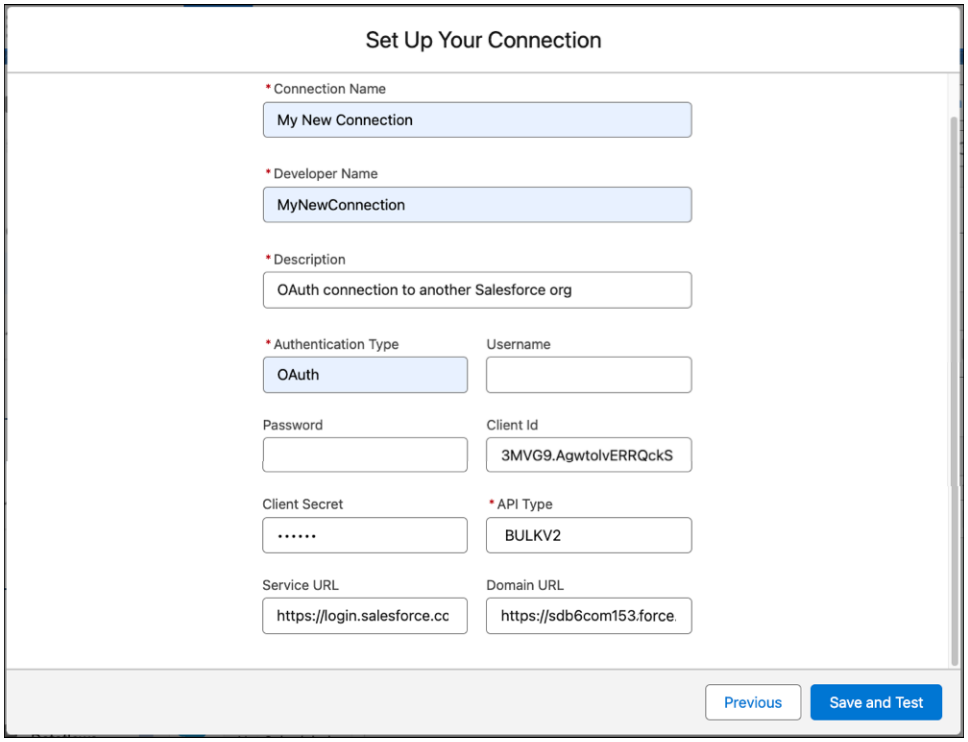
Salesforce Help: Create a Recipe with Data Prep (can be outdated or unavailable during release preview)

Secure Salesforce External Connections with OAuth 2.0

Use OAuth 2.0 to create a secure connection to an external Salesforce org that's adding your data to CRM Analytics.

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: When you create the Salesforce external connector, enter OAuth as the authentication type. Enter the client ID and client secret for the OAuth connection.



SEE ALSO:

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

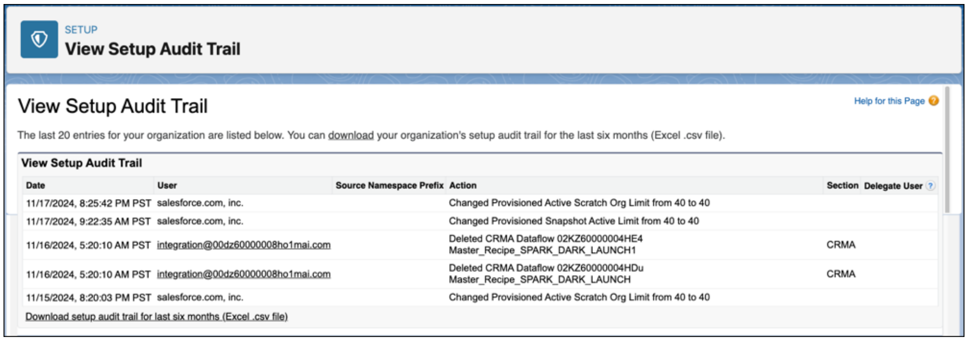
Salesforce Help: Connected Apps (can be outdated or unavailable during release preview)

Monitor Dataflow and Recipe Deletions in the Audit Trail

You can now view who deleted a dataflow or recipe and when in the Salesforce setup audit trail. For example, you can follow up to find out why a dataflow or recipe was deleted.

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 `View Setup Audit Trail` and select it.



SEE ALSO:

Salesforce Help: Monitor Setup Changes with Setup Audit Trail (can be outdated or unavailable during release preview)

Salesforce Help: Delete a Recipe (can be outdated or unavailable during release preview)

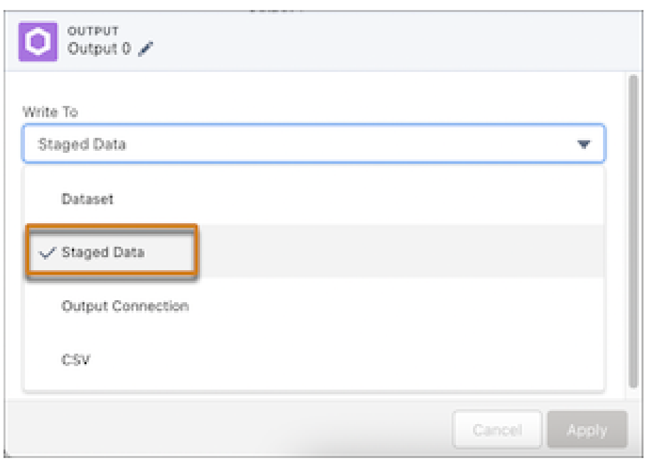
Run Sequential Recipes Faster in Encrypted Orgs

Reduce processing time when your data strategy involves multiple recipes by using staged data instead of datasets. An initial recipe outputs results as staged data, and then the subsequent recipes use the staged data in input nodes. For example, rather than merge account and opportunity data in several region-specific forecasting recipes, merge in an initial recipe that outputs the results as staged data. Then use the staged data in the other recipes. Previously, you could use staged data only with unencrypted orgs.

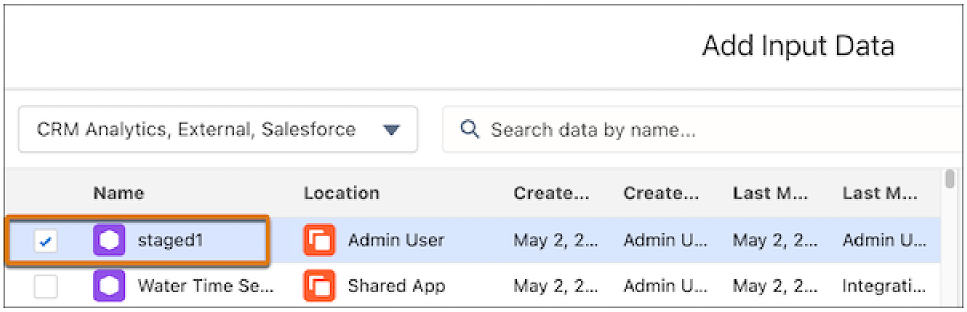
Where: This change applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited editions.

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

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



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



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

SEE ALSO:

Salesforce Help: Running Sequential Recipes with Staged Data Output (can be outdated or unavailable during release preview)

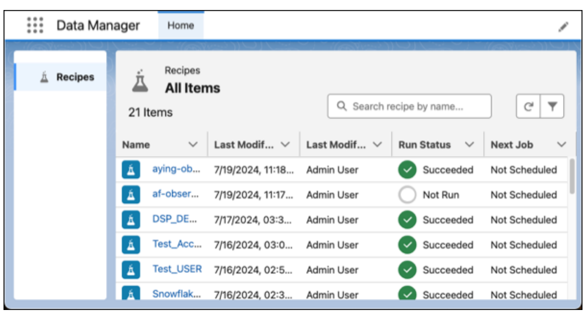
Give Users Read-Only Access to Recipes (Generally Available)

Let coworkers 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.

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**.

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: View or Edit a Recipe (can be outdated or unavailable during release preview)

Push Data from Government Cloud with Output Connectors

You can now use the Amazon S3, Salesforce, and Snowflake output connectors to push data from Salesforce Government Cloud customer orgs. When using these connectors, data in transit is encrypted using FIPS 140 validated cryptography, in accordance with US federal requirements.

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: Amazon S3 Output Connection (can be outdated or unavailable during release preview)

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

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

Improve Salesforce External Connector Sync Performance with Incremental Syncs (Beta)

Improve your data sync times when using the Salesforce External connector by loading object data incrementally. An incremental sync extracts only the latest changes to external Salesforce data.

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

Note: Incremental syncs for the Salesforce External connector are 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 Data Manager, open a Salesforce external connection from the Connection tab and select the object that you want to sync. For the Edit Connection Mode, select **Incremental Sync (Beta)**.

SEE ALSO:

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

Salesforce Help: Configure Incremental Sync for Salesforce Data (can be outdated or unavailable during release preview)

Load Data Incrementally (Beta)

Improve upload time when using the Analytics External Data API by loading CSV files incrementally. In addition to appending data, you can now incrementally upsert and delete data.

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

Note: Incremental uploads in the external data API 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.

How: When using the Analytics External Data API to load data, set the mode to incremental.

SEE ALSO:

Salesforce Help: Update the Data with Staged Data Output (can be outdated or unavailable during release preview)

Salesforce Scheduler

Add support for payments to Salesforce Scheduler.

IN THIS SECTION:

[Book and Pay Easily with Payment Integration](#)

Streamline appointment bookings with the ability to pay for service appointments. Set prices for appointments by configuring rate cards for combinations of work types and service territories. For outbound appointments, your customer support representatives can generate and send payment links to customers. For inbound appointments, your customers can pay for their appointments while booking them. Also, automatically send emails to customers to pay for their bookings by using new email templates for payments.

Book and Pay Easily with Payment Integration

Streamline appointment bookings with the ability to pay for service appointments. Set prices for appointments by configuring rate cards for combinations of work types and service territories. For outbound appointments, your customer support representatives can generate and send payment links to customers. For inbound appointments, your customers can pay for their appointments while booking them. Also, automatically send emails to customers to pay for their bookings by using new email templates for payments.

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

Why: Use this feature when your customers must pay to book an appointment. For example, use this feature when a patient schedules a doctor's appointment or the customer of a bank makes an appointment to notarize a document.

How: To turn on Payments, go to the Salesforce Scheduler Settings page in Setup.

SEE ALSO:

Salesforce Help: Set Up Payments in Salesforce Scheduler

Salesforce Archive

Get to know Salesforce Archive.

IN THIS SECTION:

[Save on Storage and Boost Performance with Salesforce Archive (Generally Available)](#)

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 (Generally Available)

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.

Salesforce Archive is available to customers on most Salesforce instances. The remaining unsupported instances are:

- South Korea: kor* instances
- Indonesia: idn* instances
- Brazil: bra* instances
- Middle East: are* instances

To find out your org instance, go to Company Information in Setup, or 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: 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.

SEE ALSO:

Salesforce Help: Store Data Externally with Salesforce Archive (can be outdated or unavailable during release preview)

Salesforce Help: Access External Data with the Salesforce Connect Adaptor for Salesforce Archive (can be outdated or unavailable during release preview)

Release Updates

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

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

Often, release updates provide a Test Run option so you can enable an update and examine any changes to your org, including changes to customizations, before that update's Complete Steps By date. You can view attachments in the Salesforce mobile app, but you can't edit them.

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

Enforced with This Release

These updates are scheduled to be enforced this release.

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 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.

Enable ICU Locale Formats (Release Update)

With this update, the International Components for Unicode (ICU) locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. 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. This update was first made available in Winter '20 and is enforced in 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.

Enhance Flexibility and Reusability in Prompt Flows (Release Update)

This update removes the ability to specify a flex prompt template type from a template-triggered prompt flow. Instead, create template-triggered prompt flows that use manual inputs because the flows aren't limited to a single prompt template type. You must update existing flows that reference flex prompt template types to use manual inputs. 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, 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.

Update API Requests to Use Your MyDomain Login URL (Release Update)

If you're using an instance-specific URL for API traffic, you must replace it with your My Domain URL. Salesforce is decommissioning the service that supports hard-coded references to an instance name in API application traffic routing.

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.

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.

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.

Enable a Modernized Record Experience in Aura Sites (Release Update)

Starting in Winter '25, you can upgrade record components in your Experience Cloud Aura sites and see improved accessibility and stylistic changes. Upgraded Create Record Form, Record Banner, and Record Detail components run on Lightning Web Component technology, which improves accessibility and performance. In Summer '25, the upgrade is enforced for all orgs. We strongly recommend that you test all customized record components before the update.

Enable Secure Roles Behavior and Update Sharing Group References in Sandboxes (Release Update)

To prevent unintended access for external site users if you enable digital experiences, Salesforce is securing access to records in sandbox orgs. The default sharing group available for roles and subordinates before you enable digital experiences is now displayed as Roles and Internal Subordinates instead of Roles and Subordinates. To prepare for this change, update code and customizations that reference the old group name. Although Salesforce dynamically converts outdated references during a transition period, you must update all code and customizations to prevent errors.

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.

Run the Lightning Knowledge Migration Tool (Release Update)

To access Classic Knowledge, run the Lightning Knowledge Migration Tool. To prepare for the retirement of the Classic Knowledge data model, upgrade to Lightning Knowledge. The upgrade offers enhanced article editing, improved search, and AI-driven features like Einstein Article Recommendations, Einstein Search for Knowledge, and Agentforce Service Agents. After you migrate, you can still use Classic Knowledge with limitations.

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.

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. This release update was first available in Summer '24 and was scheduled to be enforced in Spring '25, but we postponed the enforcement date to Summer '25.

Update Your Trusted URLs for the Latest CSP Directives (Release Update)

To help protect your org from cross-site scripting (XSS) and other code-injection attacks, Salesforce updated the delivered content security policy (CSP) directives for Lightning pages. This change can prevent externally hosted fonts and images from loading. It can also prevent external websites from loading within an iframe on your Lightning pages. To adopt these required directives, review the impact and update your trusted URLs. This release update is available starting in Spring ’25 and is enforced in Summer ’25.

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 was scheduled to be enforced in Spring ’25, but we postponed the enforcement date to Summer ’25. To avoid potential service interruptions, test your SAML integrations as soon as Summer ’25 sandboxes become available.

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.

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. This release update was first available in Summer ’24 and was scheduled to be enforced in Spring ’25, but we postponed the enforcement date to Winter ’26.

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)

This update was first made available in Winter '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement to Winter '26. 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. Salesforce postponed the enforcement to allow additional time for admins to test and prepare for the change. There is no impact to admins who already enabled the update. We appreciate your adoption of this change.

Scheduled to Be Enforced in Spring '26

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

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 for production instances in Spring '26.

Upgrade to Enhanced LWR Sites (Release Update)

Upgrade existing LWR sites to enhanced LWR sites to take advantage of the latest features, including partial deployment, enhanced CMS workspaces and channels, expression-based visibility, and more. This feature, now generally available, includes some changes since the last release, and is available as an update starting in Spring '25.

Update References to Legacy Host Names (Release Update)

Prevent disruption for your customers and end users when the temporary redirection of legacy (non-enhanced) Salesforce host names ends in orgs created in June 2022 or earlier. With this release update, legacy host name redirections end in production and demo orgs. Those redirections already ended in all other orgs in Winter '25. This update is available starting in Spring '25.

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.

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

To improve the quality of service, supervisors can now monitor live messaging sessions between this type of AI agent and your customers. Specifically, they can monitor enhanced Messaging sessions, such as Messaging for In-App and Web and WhatsApp, from within Omni Supervisor. To notify supervisors which conversations need human support, add the Raise Flag action to the AI agent. Supervisors can lower the flag and transfer conversations to human representatives.

Monitor Real-time Conversations Between Agentforce Service Agents and Customers (Release Update)

To improve the quality of service, supervisors can now monitor live messaging sessions between this type of AI agent and your customers. Specifically, they can monitor enhanced Messaging sessions, such as Messaging for In-App and Web and WhatsApp, from within Omni Supervisor. To notify supervisors which conversations need human support, add the Raise Flag action to the AI agent. Supervisors can lower the flag and transfer conversations to human representatives.

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

To improve the quality of service, supervisors can now monitor live messaging sessions between this type of AI agent and your customers. Specifically, they can monitor enhanced Messaging sessions, such as Messaging for In-App and Web and WhatsApp, from within Omni Supervisor. To notify supervisors which conversations need human support, add the Raise Flag action to the AI agent. Supervisors can lower the flag and transfer conversations to human representatives.

Analytics

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

IN THIS SECTION:

Unified Analytics Experiences

Add assets to collections more efficiently in batches. Schedule more CRM Analytics dashboard subscriptions per hour in Slack.

Lightning Reports and Dashboards

Create effective report types with ease in the enhanced custom report type builder. Sort report charts automatically when you change report grouping order.

Data Cloud Reports and Dashboards

Filter a Data Cloud report by aggregate values. Review the earliest and latest values on date fields. Say hello to logical views and semantic unions in Data Cloud reports (beta).

CRM Analytics

Construct datasets with confidence with recipe preview enhancements. Unify data sources in dashboards with Data Cloud One integration.

Tableau

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

Marketing Cloud Intelligence

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

Accessibility Enhancements in Analytics

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

Unified Analytics Experiences

Add assets to collections more efficiently in batches. Schedule more CRM Analytics dashboard subscriptions per hour in Slack.

IN THIS SECTION:

Add Assets to Collections in Bulk

Say goodbye to adding assets to collections one at a time. You can now add items to collections in batches. You can also add multiple items to multiple collections with one action.

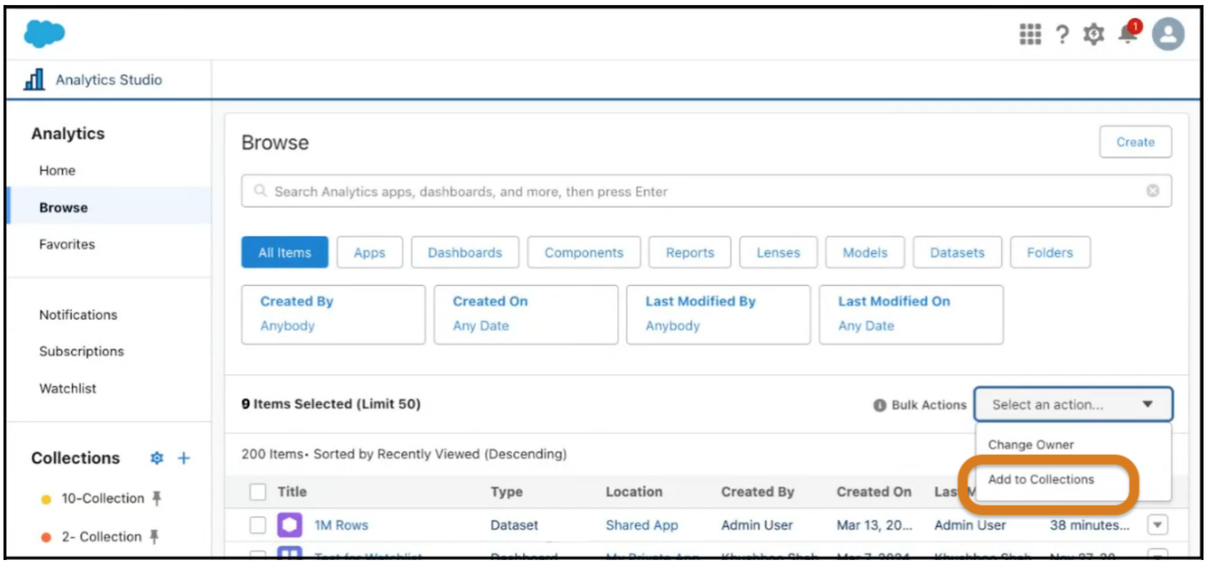
[Run More CRM Analytics Dashboard Subscriptions Per Hour in Slack]
With the new upper limit of 500 subscriptions per hour per org, you have more opportunity to view and share the latest data in Slack on the schedule you want. Previously, the limit was 100 per hour per org.

Add Assets to Collections in Bulk

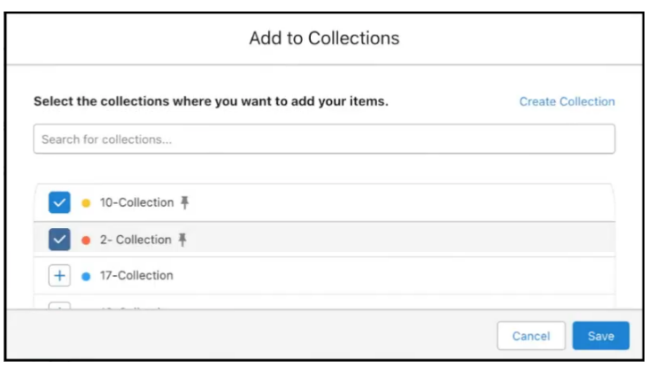
Say goodbye to adding assets to collections one at a time. You can now add items to collections in batches. You can also add multiple items to multiple collections with one action.

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

How: On the Analytics tab or in Analytics Studio, click either **Browse** or **Favorites**. Select the items you want to add. From the Bulk Actions dropdown menu, select **Add to Collections**.



Select one or more collections to add your items to.



SEE ALSO:

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

Run More CRM Analytics Dashboard Subscriptions Per Hour in Slack

With the new upper limit of 500 subscriptions per hour per org, you have more opportunity to view and share the latest data in Slack on the schedule you want. Previously, the limit was 100 per hour per org.

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

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

SEE ALSO:

Salesforce Help: Subscribe to CRM Analytics Dashboards in Slack (can be outdated or unavailable during release preview)

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

Lightning Reports and Dashboards

Create effective report types with ease in the enhanced custom report type builder. Sort report charts automatically when you change report grouping order.

IN THIS SECTION:

Delivered Idea: Do More with Custom Report Types (Generally Available)

Find your report types more easily, and create personalized list views of your custom report types using the improved Custom Report Type 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. We delivered this feature thanks to your ideas on IdeaExchange.

Keep Charts Consistent with Reordered Report Data

When you sort by a field, the report chart updates to match the new order so that it's consistent with the data table. For example, if you sort regions by descending order of sales, the chart reorders the regions accordingly, making it easier to interpret your data.

Choose Which Dashboard Widgets to Refresh (Beta)

Refresh only the dashboard widgets that you need rather than the entire dashboard. For example, a support team member can refresh only the Open Tickets widget to see the most up-to-date list of unresolved issues, without refreshing other widgets on the dashboard.

Designate One Email Address to Send Report Subscription Notifications (Beta)

Create consistent email communications and reduce the risk of spoofing by using an organization-wide email address to send report subscriptions. Previously, emails were sent with the address of the user who created the report subscription.

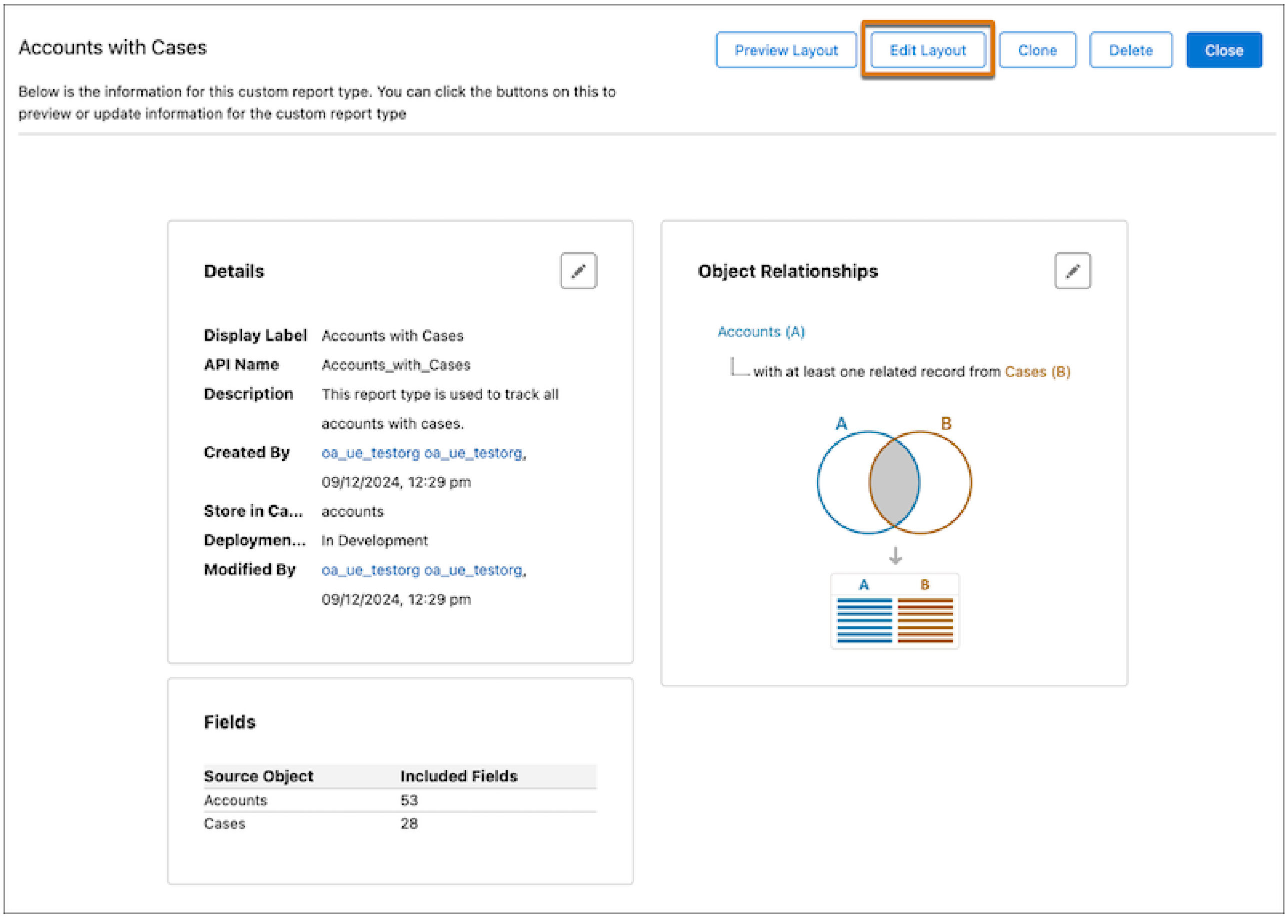
Do More with Custom Report Types (Generally Available)

Find your report types more easily, and create personalized list views of your custom report types using the improved Custom Report Type 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. We delivered this feature thanks to your ideas on IdeaExchange.

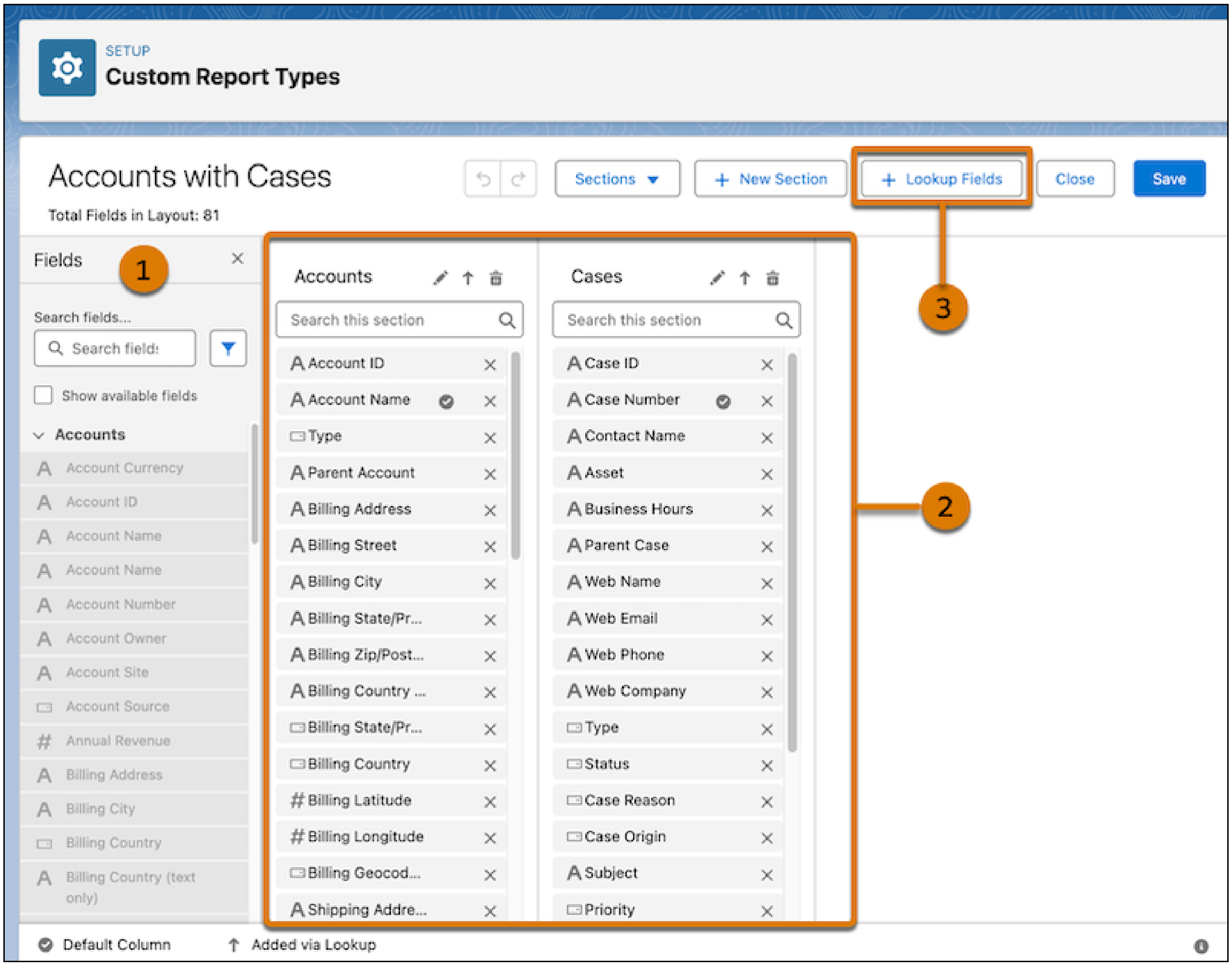
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: In Setup, in the Quick Find box, enter `Reports` and select **Reports and Dashboards Settings**. Select **Enhanced Custom Report Type Setup Page**. Then, in the Quick Find box, search for and select **Report Types**.

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



Drag fields from the Fields panel (1) to the appropriate section on the right. You can search for fields, move them, view their details, and customize their display names (2). To find lookup fields and add them to the report type, click **Lookup Fields** (3).



SEE ALSO:

Salesforce Help: Custom Report Types (can be outdated or unavailable during release preview)

Keep Charts Consistent with Reordered Report Data

When you sort by a field, the report chart updates to match the new order so that it's consistent with the data table. For example, if you sort regions by descending order of sales, the chart reorders the regions accordingly, making it easier to interpret your data.

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

How: On the widget, click the Chart Properties icon , and select **Sort Report Charts**.

Choose Which Dashboard Widgets to Refresh (Beta)

Refresh only the dashboard widgets that you need rather than the entire dashboard. For example, a support team member can refresh only the Open Tickets widget to see the most up-to-date list of unresolved issues, without refreshing other widgets on the dashboard.

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

Note: Widget Refresh 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 select **Reports and Dashboards Settings**. Select **Let users refresh individual widgets for dashboards (Beta)**.

In the dashboard, click the widget's refresh icon to view its latest data.

Designate One Email Address to Send Report Subscription Notifications (Beta)

Create consistent email communications and reduce the risk of spoofing by using an organization-wide email address to send report subscriptions. Previously, emails were sent with the address of the user who created the report subscription.

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

Note: Organization-Wide Email Addresses for Report Subscriptions 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 then select **Reports and Dashboards Settings**. Select **Enable Org Wide Email Address for Report Subscription (Beta)**, and then select the email address to use from the dropdown.

Data Cloud Reports and Dashboards

Filter a Data Cloud report by aggregate values. Review the earliest and latest values on date fields. Say hello to logical views and semantic unions in Data Cloud reports (beta).

IN THIS SECTION:

Define Filters on Aggregate Values in Data Cloud Reports

Fine-tune the results in a Data Cloud report with filters on the sum, average, highest, or lowest values of a numeric column. You can apply these filters in reports on data model objects (DMO), calculated insights, or semantic data models. If you define more than one filter, the AND logic is applied. For example, in a Sales Order DMO report, add a summary filter on the sum of sales to review just the high-value orders.

Highlight Min and Max Aggregates for Date Fields (Generally Available)

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) or semantic data model 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 a Semantic Data Model Report with a Single Click (Beta)

Analyze and build a standard report on a semantic data model directly in the flow of work. You can now create these reports from the semantic model's list view page. Previously, you could create the report only from the Reports tab.

Default Behavior When Creating a Semantic Data Model Report Has Changed (Beta)

When you create a semantic data model report, its count of rows and detail rows are disabled by default. To view report data, add at least one grouping column.

[Analyze Logical View and Semantic Union Metrics in Data Cloud Reports (Beta)](#)

Get a comprehensive analysis of records in a semantic data model by including its logical views and semantic unions in a Data Cloud report. When you create a semantic model report, the Report Builder maintains the logical views that connect the data objects and the relationship joins between them. It also preserves the view's semantic unions so that you can unify shared columns across different data objects, treat them as a single logical entity, and report on dimensions more efficiently. You can quickly define filters on logical view fields, apply conditional formatting, visualize the data in charts, and embed them in dashboards.

[Categorize Semantic Model Records with Bucket Columns (Beta)](#)

Organize data in a semantic data model into groups without the hassle of creating a formula or custom field. Instead, in the report, create a bucket column to define multiple categories or ranges for the same measure or dimension. For example, get a better understanding of your customers from the Individuals semantic model by bucketing customer spending amounts into Low, Medium, and High ranges. You can bucket Data Cloud reports on numeric, picklist, and text data types. Sort, filter, or group the report based on the bucket column.

[Assess Semantic Data Model Records with Advanced Formulas (Beta)](#)

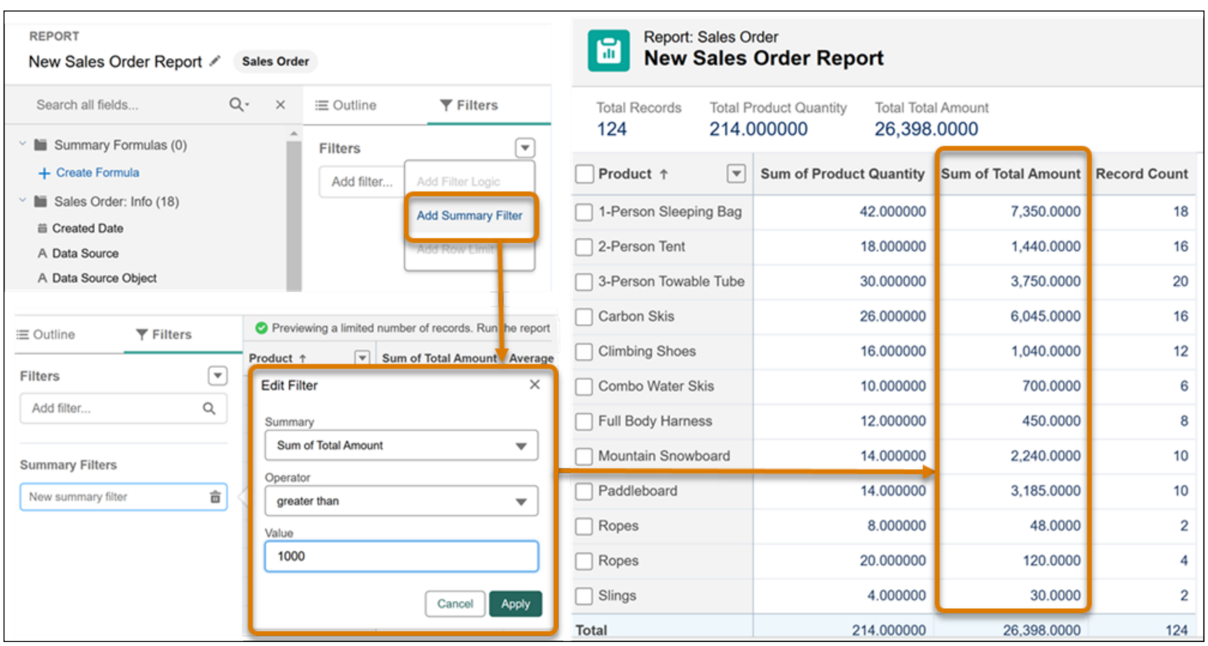
Compare grouped data in a semantic data model report more efficiently with summary formula columns. To analyze each record in the report, apply row-level formulas. With these advanced formula types, you can easily evaluate percentages, ratios, and aggregate values. For example, in a Sales Order semantic model report, add a summary formula to determine the monthly average sales amount by product category.

Define Filters on Aggregate Values in Data Cloud Reports

Fine-tune the results in a Data Cloud report with filters on the sum, average, highest, or lowest values of a numeric column. You can apply these filters in reports on data model objects (DMO), calculated insights, or semantic data models. If you define more than one filter, the AND logic is applied. For example, in a Sales Order DMO report, add a summary filter on the sum of sales to review just the high-value orders.

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

How: On a summary report with detail rows disabled, in the Fields panel, click ▾. In the Edit Filter window, define the summary filter and click **Apply**.

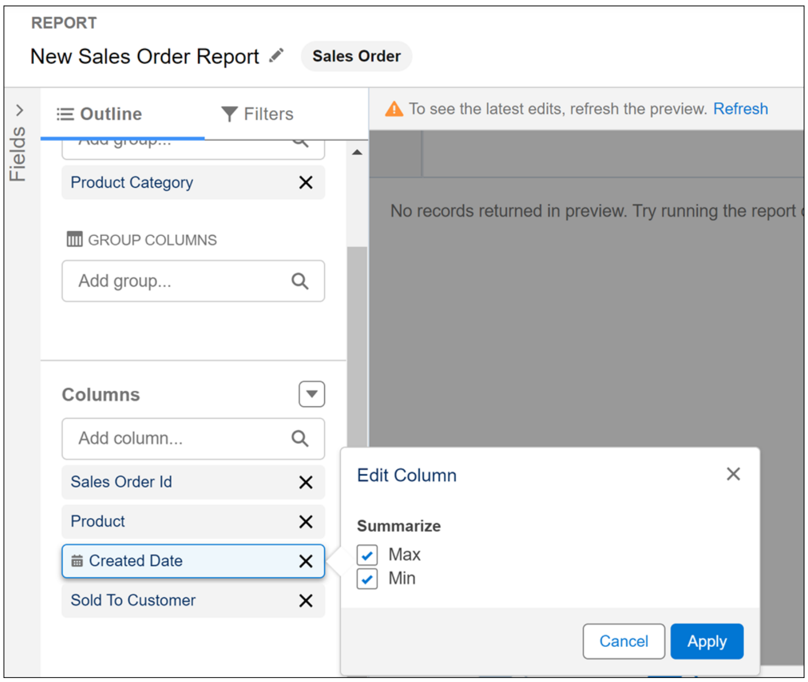


Highlight Min and Max Aggregates for Date Fields (Generally Available)

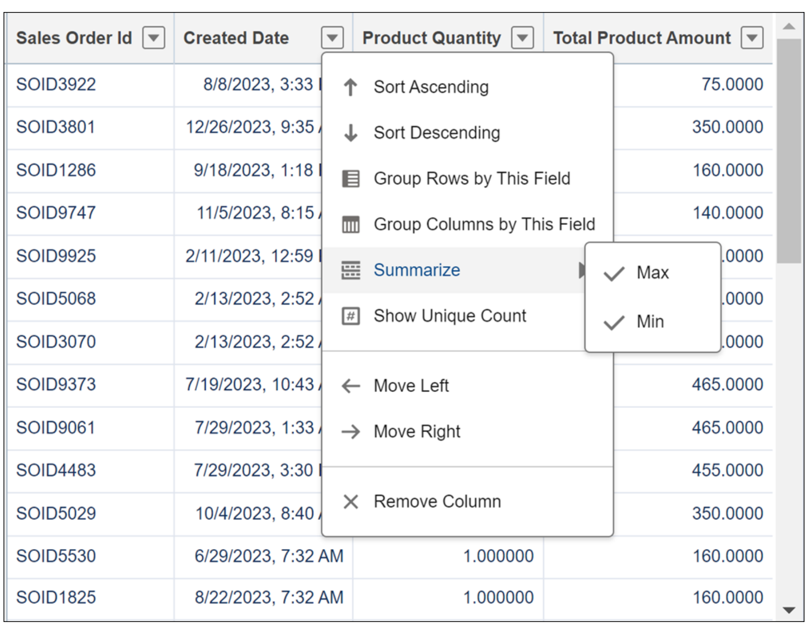
Surface the earliest and latest values of a date, datetime, or row-level formula field with these data types in a data model object (DMO) or semantic data model report. You can also review the min and max aggregates for each report grouping. For example, in a Sales Order DMO report that's grouped by 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.

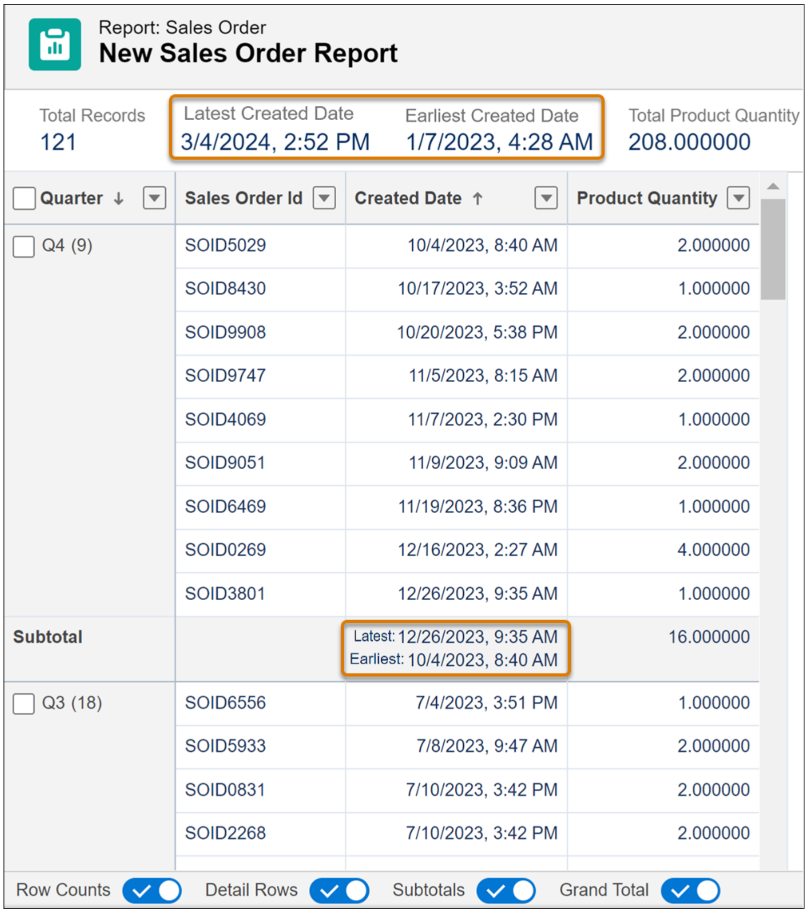
How: To add the aggregates, select the column in the Fields pane. Select the aggregates, and click **Apply**.



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



You can view the date field's earliest and latest values for each group in the subtotal row and for the entire report in the report header.



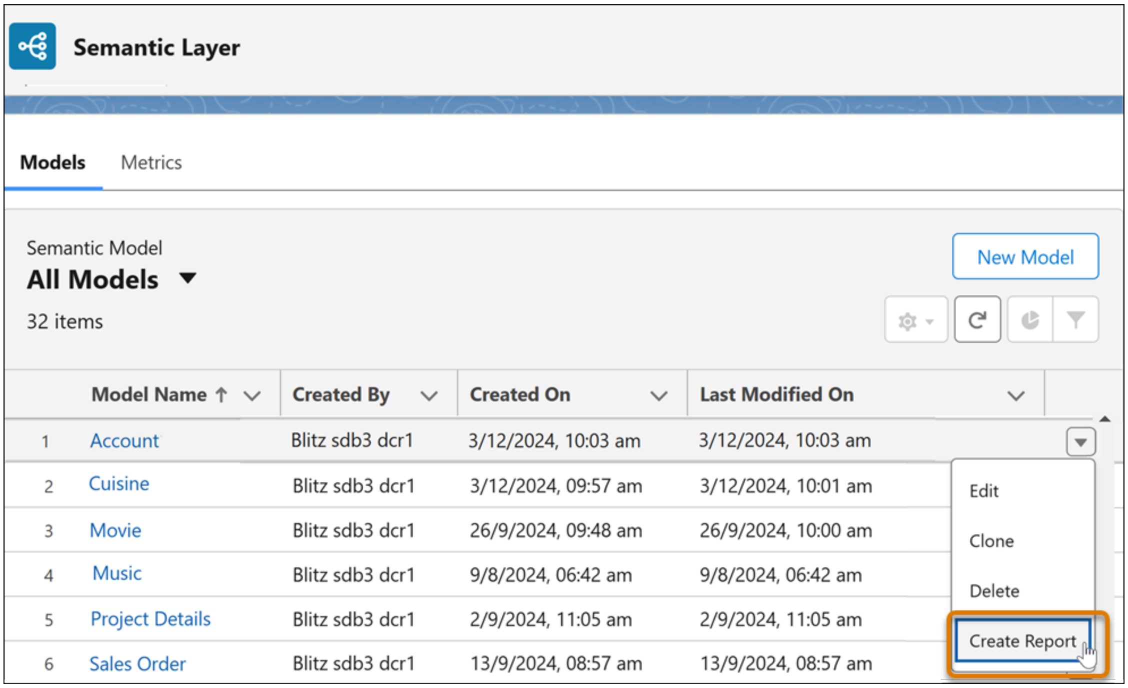
Create a Semantic Data Model Report with a Single Click (Beta)

Analyze and build a standard report on a semantic data model directly in the flow of work. You can now create these reports from the semantic model's list view page. Previously, you could create the report only from the Reports tab.

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

Note: Semantic Data Model is a beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com, and the Non-GA Credit Consumption terms in the Product Terms Directory. Use of this beta service consumes Customer Data Cloud Credits and is at the Customer's sole discretion. At the conclusion of the open beta period, use of portions of the Semantic Data Model may be subject to additional purchase and/or additional credit consumption.

How: On the Semantic Layer tab, select **Create Report** from a semantic model's Actions menu.



Default Behavior When Creating a Semantic Data Model Report Has Changed (Beta)

When you create a semantic data model report, its count of rows and detail rows are disabled by default. To view report data, add at least one grouping column.

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Analyze Logical View and Semantic Union Metrics in Data Cloud Reports (Beta)

Get a comprehensive analysis of records in a semantic data model by including its logical views and semantic unions in a Data Cloud report. When you create a semantic model report, the Report Builder maintains the logical views that connect the data objects and the relationship joins between them. It also preserves the view's semantic unions so that you can unify shared columns across different data objects, treat them as a single logical entity, and report on dimensions more efficiently. You can quickly define filters on logical view fields, apply conditional formatting, visualize the data in charts, and embed them in dashboards.

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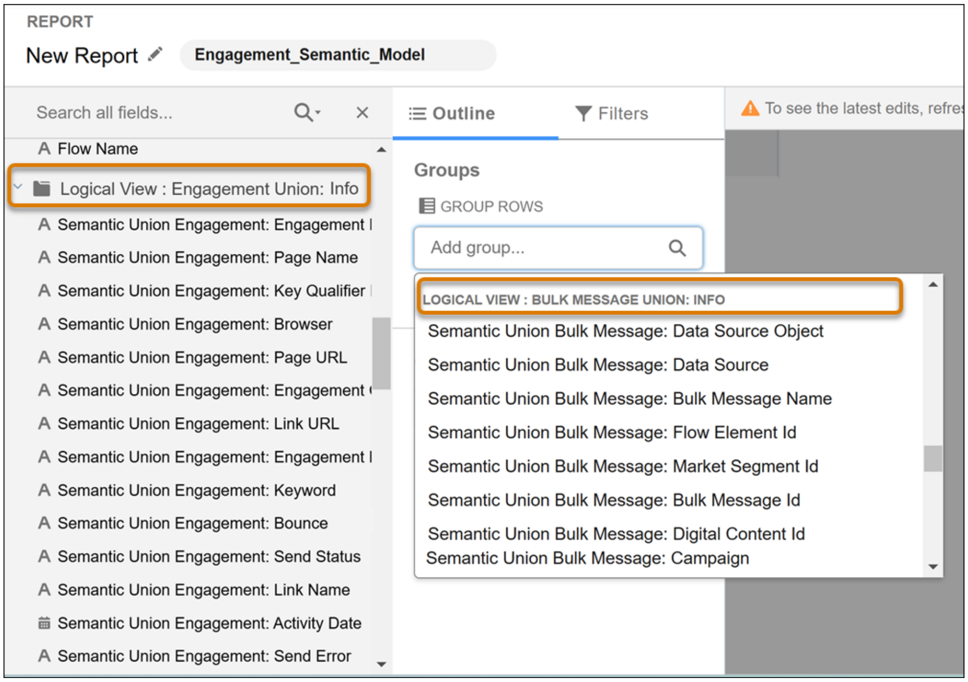
Why: For example, let's say you want to discover insights about your customers' engagement with your campaigns. In a report on the Customer Engagement semantic model, include logical view fields that join customer data across multiple channels, such as email open rates, web browsing patterns, and SMS clicks.

How: To add a field as a report column, in edit mode, double-click it in the Fields pane. To add a field as a grouping, select it from the Add group dropdown.



Categorize Semantic Model Records with Bucket Columns (Beta)

Organize data in a semantic data model into groups without the hassle of creating a formula or custom field. Instead, in the report, create a bucket column to define multiple categories or ranges for the same measure or dimension. For example, get a better understanding of your customers from the Individuals semantic model by bucketing customer spending amounts into Low, Medium, and High ranges. You can bucket Data Cloud reports on numeric, picklist, and text data types. Sort, filter, or group the report based on the bucket column.

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

Note: Semantic Data Model is a beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com, and the Non-GA Credit Consumption terms in the Product Terms Directory. Use of this beta service consumes Customer Data Cloud Credits and is at the Customer's sole discretion. At the conclusion of the open beta period, use of portions of the Semantic Data Model may be subject to additional purchase and/or additional credit consumption.

How: In edit mode, from the Columns section, click and select **Add Bucket Column**.

Assess Semantic Data Model Records with Advanced Formulas (Beta)

Compare grouped data in a semantic data model report more efficiently with summary formula columns. To analyze each record in the report, apply row-level formulas. With these advanced formula types, you can easily evaluate percentages, ratios, and aggregate values. For example, in a Sales Order semantic model report, add a summary formula to determine the monthly average sales amount by product category.

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

Note: Semantic Data Model is a beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com, and the Non-GA Credit Consumption terms in the Product Terms Directory. Use of this beta service consumes Customer Data Cloud Credits and is at the Customer's sole discretion. At the conclusion of the open beta period, use of portions of the Semantic Data Model may be subject to additional purchase and/or additional credit consumption.

How: In edit mode, from the Columns section, click ▾ and select **Add Summary Formula** or **Add Row-Level Formula**.

CRM Analytics

Construct datasets with confidence with recipe preview enhancements. Unify data sources in dashboards with Data Cloud One integration.

IN THIS SECTION:

Analytics Experience and Visualizations

Build dashboards with all your connected Data Cloud sources through Data Cloud One integration. Manage changes to dashboard components with version control.

Data Integration

Get a better view of a recipe's outcome with new features for building sample data and examining content in recipe previews. Monitor dataflow and recipe deletions in the Audit Trail. Control access to data based on a user's assigned territories (now generally available).

Analytics Experience and Visualizations

Build dashboards with all your connected Data Cloud sources through Data Cloud One integration. Manage changes to dashboard components with version control.

IN THIS SECTION:

See More Color Contrast in Donut and Stacked Bar Charts

Get better legibility and understanding of data with enriched color contrast for donut and stacked bar charts. It's now easier to distinguish between adjacent chart segments or between chart segments and the dashboard background. You don't see enhanced color contrast if the chart has more than five segments.

Use Version Control When Saving Dashboard Component Changes

Track changes in your dashboard components with version control to view and restore past versions. Previously, you had to take manual steps to restore previous configurations.

Unify Your Data Across Dashboards

Your dashboards can now have a single source of truth across every connected Data Cloud server. The connected Data Cloud One companion org and shared data spaces enable access to unified data as if it were a local Data Cloud.

Enhance Your Dashboards with Customizable Tooltip Colors

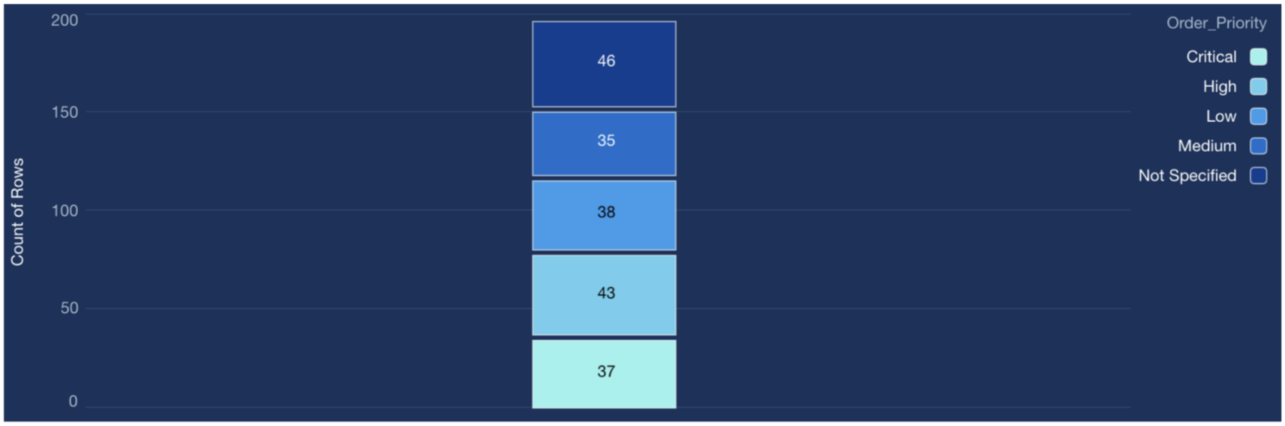
You can now customize a tooltip's background, label, and value to match your company themes, highlight data, and improve accessibility.

See More Color Contrast in Donut and Stacked Bar Charts

Get better legibility and understanding of data with enriched color contrast for donut and stacked bar charts. It's now easier to distinguish between adjacent chart segments or between chart segments and the dashboard background. You don't see enhanced color contrast if the chart has more than five segments.

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**. Select **Enable high contrast chart widgets**.



SEE ALSO:

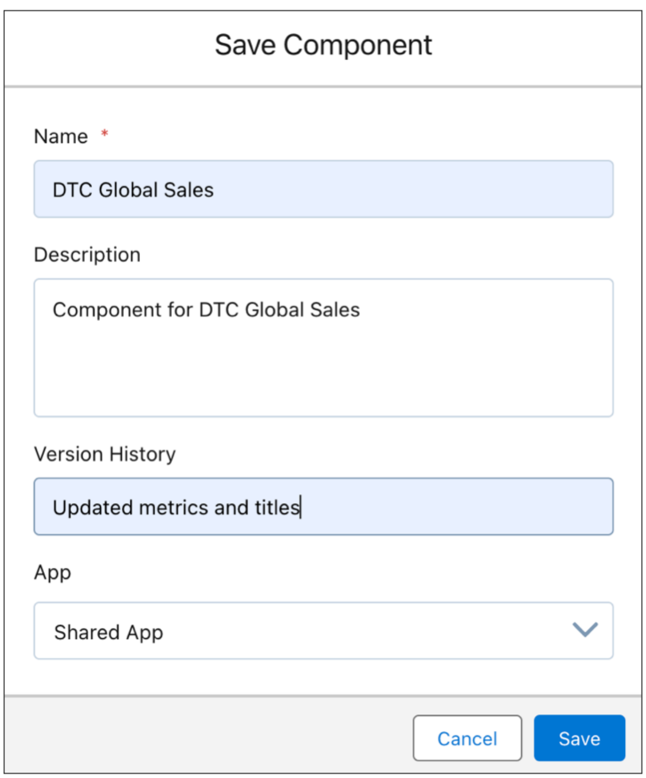
Salesforce Help: Enable Color Contrast (can be outdated or unavailable during release preview)

Use Version Control When Saving Dashboard Component Changes

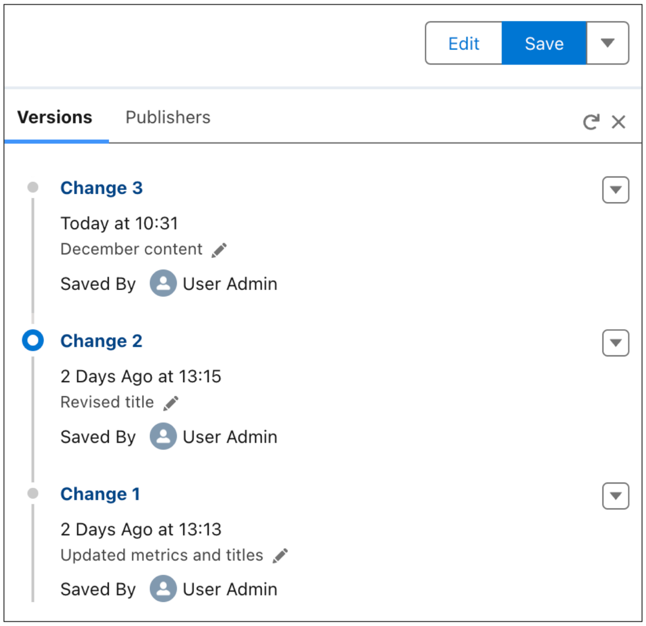
Track changes in your dashboard components with version control to view and restore past versions. Previously, you had to take manual steps to restore previous configurations.

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: After you make changes to a dashboard component, save it and describe the update in the Version History field.



To view a component's current and past versions, click **Preview**. Click ▾ and select **Version History**. To restore another version, select the version that you want and click **Save**.



SEE ALSO:

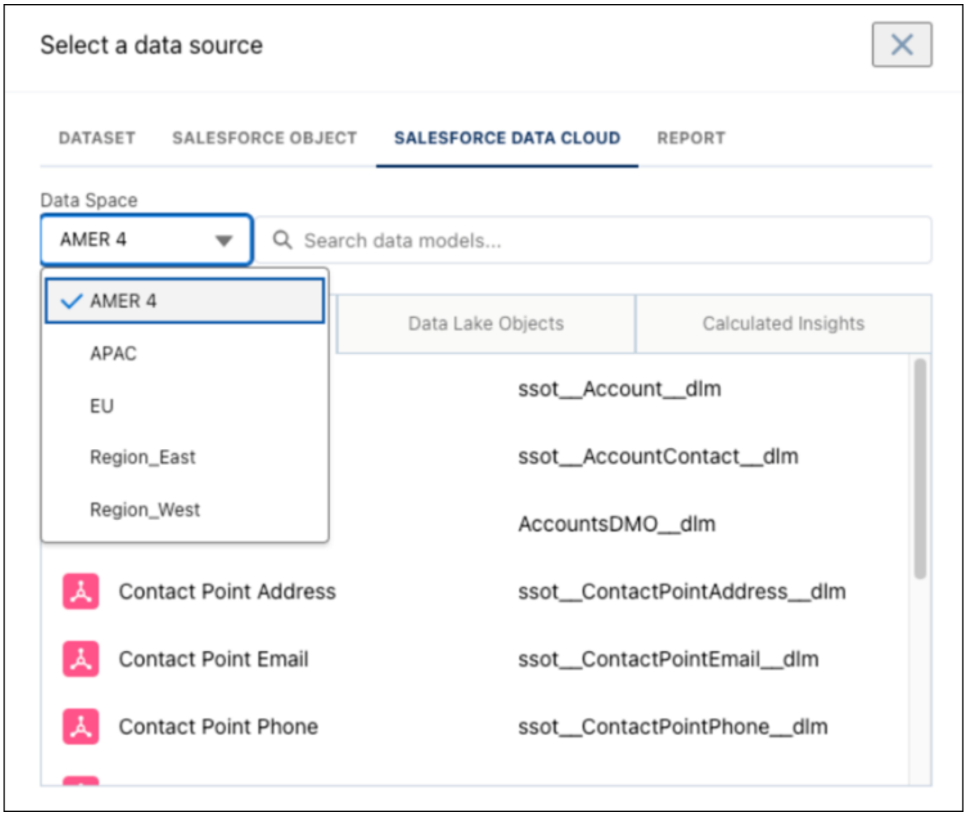
Salesforce Help: Restore a Previous Version of a Component (can be outdated or unavailable during release preview)

Unify Your Data Across Dashboards

Your dashboards can now have a single source of truth across every connected Data Cloud server. The connected Data Cloud One companion org and shared data spaces enable access to unified data as if it were a local Data Cloud.

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.



SEE ALSO:

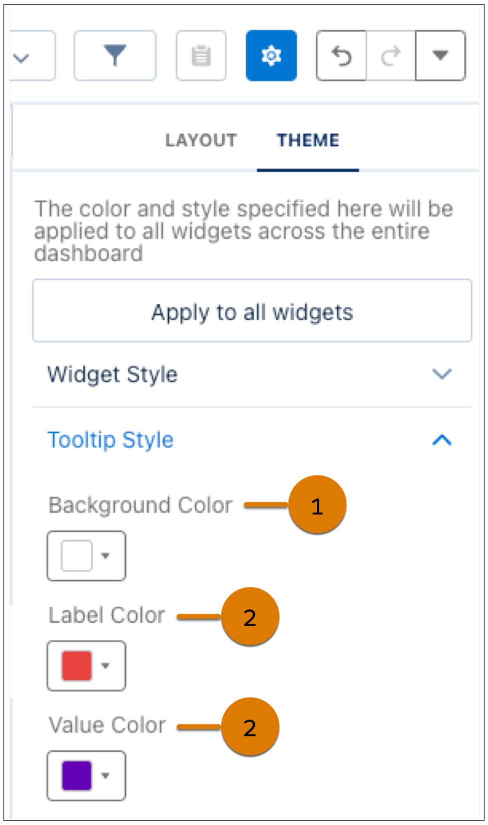
Revolutionize Multi-Org Architecture with Data Cloud One

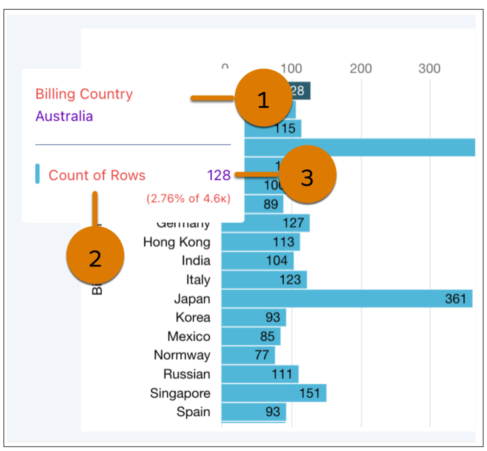
Enhance Your Dashboards with Customizable Tooltip Colors

You can now customize a tooltip's background, label, and value to match your company themes, highlight data, and improve accessibility.

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 . On the Theme tab, select colors for the background (1), label (2), and value (3) in the Tooltip Style section.





SEE ALSO:

Salesforce Help: Manage Widget Properties with Themes(can be outdated or unavailable during release preview)

Data Integration

Get a better view of a recipe's outcome with new features for building sample data and examining content in recipe previews. Monitor dataflow and recipe deletions in the Audit Trail. Control access to data based on a user's assigned territories (now generally available).

IN THIS SECTION:

Get More Representative Sample Data in Recipes from Local Salesforce Connections

When adding local Salesforce data to a recipe, you can now filter the rows added to the preview or get samples that include one row for each value in a column. These new sample modes help you better assess whether a recipe achieves the desired outcome by selecting more relevant preview data.

Preview Random Samples from Datasets in Recipes

When adding a dataset to a recipe, get random sample rows to help you better assess whether the recipe is achieving the desired outcome. Random sampling increases the likelihood that preview data remains available through your recipe transformations.

Improved Data Preview in Recipes

You can now sort on any column and search the preview data. Freeze columns and highlight rows. Hover over a cell to see the full value. You can also copy API names and cell values.

Secure Salesforce External Connections with OAuth 2.0

Use OAuth 2.0 to create a secure connection to an external Salesforce org that's adding your data to CRM Analytics.

Monitor Dataflow and Recipe Deletions in the Audit Trail

You can now view who deleted a dataflow or recipe and when in the Salesforce setup audit trail. For example, you can follow up to find out why a dataflow or recipe was deleted.

Run Sequential Recipes Faster in Encrypted Orgs

Reduce processing time when your data strategy involves multiple recipes by using staged data instead of datasets. An initial recipe outputs results as staged data, and then the subsequent recipes use the staged data in input nodes. For example, rather than merge account and opportunity data in several region-specific forecasting recipes, merge in an initial recipe that outputs the results as staged data. Then use the staged data in the other recipes. Previously, you could use staged data only with unencrypted orgs.

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

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

Give Users Read-Only Access to Recipes (Generally Available)

Let coworkers 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.

Push Data from Government Cloud with Output Connectors

You can now use the Amazon S3, Salesforce, and Snowflake output connectors to push data from Salesforce Government Cloud customer orgs. When using these connectors, data in transit is encrypted using FIPS 140 validated cryptography, in accordance with US federal requirements.

Improve Salesforce External Connector Sync Performance with Incremental Syncs (Beta)

Improve your data sync times when using the Salesforce External connector by loading object data incrementally. An incremental sync extracts only the latest changes to external Salesforce data.

Load Data Incrementally (Beta)

Improve upload time when using the Analytics External Data API by loading CSV files incrementally. In addition to appending data, you can now incrementally upsert and delete data.

Get More Representative Sample Data in Recipes from Local Salesforce Connections

When adding local Salesforce data to a recipe, you can now filter the rows added to the preview or get samples that include one row for each value in a column. These new sample modes help you better assess whether a recipe achieves the desired outcome by selecting more relevant preview 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: Add a dataset to a recipe. In the input node, from Sampling Mode, select **Filtered rows** to preview rows based on filters or **All Column Values** to include at least one row for each value in a column in the preview.

SEE ALSO:

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

Preview Random Samples from Datasets in Recipes

When adding a dataset to a recipe, get random sample rows to help you better assess whether the recipe is achieving the desired outcome. Random sampling increases the likelihood that preview data remains available through your recipe transformations.

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: Add a dataset to a recipe. In the input node, from Sampling Mode, select **Random Sampling**.

SEE ALSO:

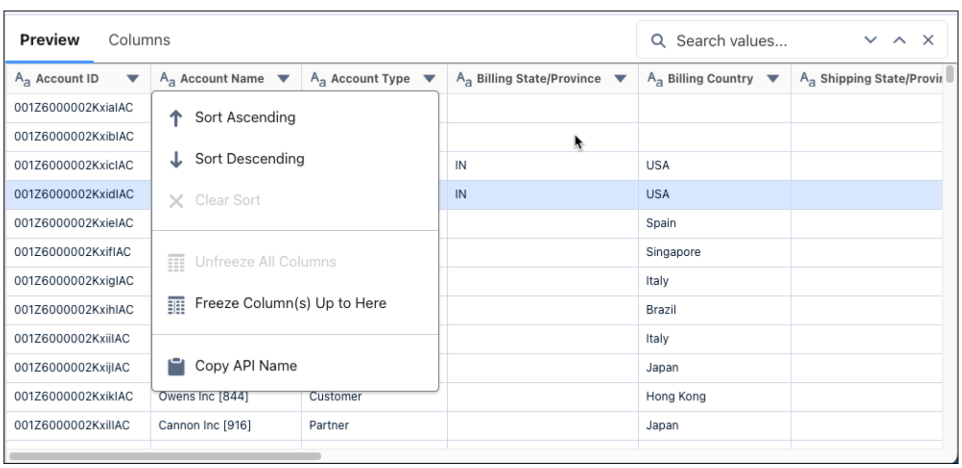
Salesforce Help: Data Preview Sampling (can be outdated or unavailable during release preview)

Improved Data Preview in Recipes

You can now sort on any column and search the preview data. Freeze columns and highlight rows. Hover over a cell to see the full value. You can also copy API names and cell values.

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

How: In a recipe node, from the column menu, select a sort option or freeze the column. To highlight a row, click it and scroll left and right to review the column values for that row. Use the new search box to find values in the preview data.



SEE ALSO:

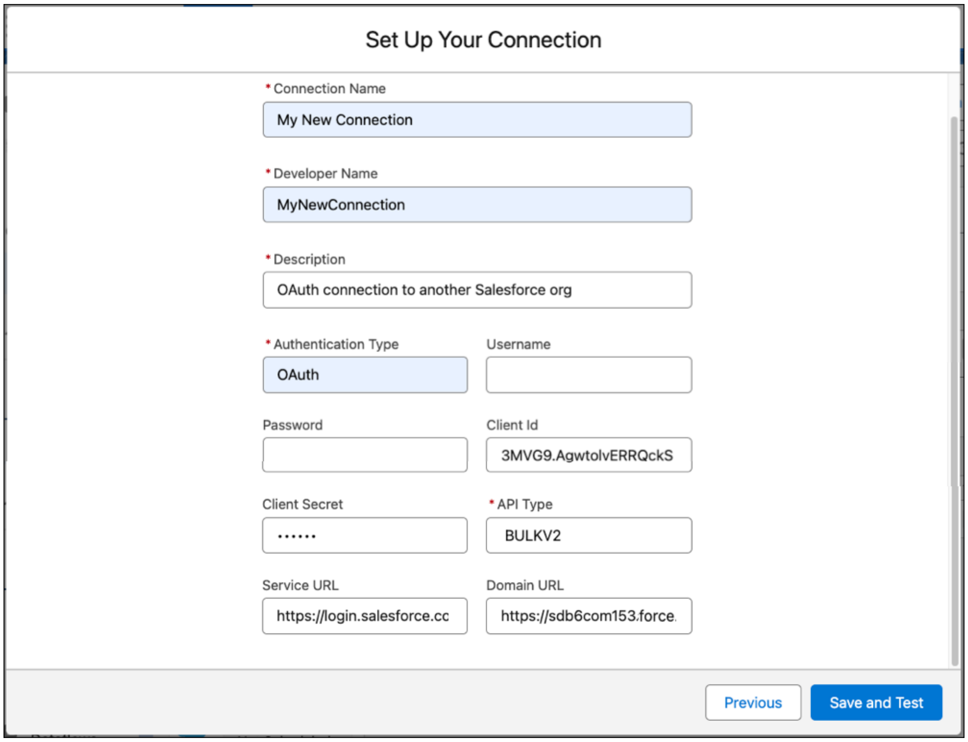
Salesforce Help: Create a Recipe with Data Prep (can be outdated or unavailable during release preview)

Secure Salesforce External Connections with OAuth 2.0

Use OAuth 2.0 to create a secure connection to an external Salesforce org that's adding your data to CRM Analytics.

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

How: When you create the Salesforce external connector, enter OAuth as the authentication type. Enter the client ID and client secret for the OAuth connection.



SEE ALSO:

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

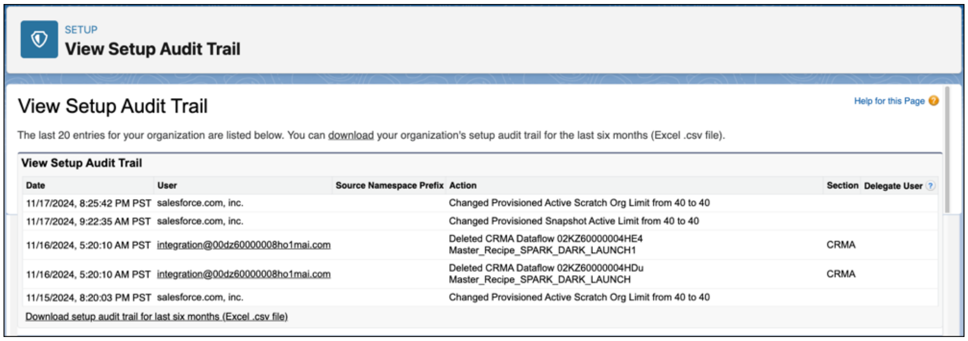
Salesforce Help: Connected Apps (can be outdated or unavailable during release preview)

Monitor Dataflow and Recipe Deletions in the Audit Trail

You can now view who deleted a dataflow or recipe and when in the Salesforce setup audit trail. For example, you can follow up to find out why a dataflow or recipe was deleted.

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 `View Setup Audit Trail` and select it.



SEE ALSO:

Salesforce Help: Monitor Setup Changes with Setup Audit Trail (can be outdated or unavailable during release preview)

Salesforce Help: Delete a Recipe (can be outdated or unavailable during release preview)

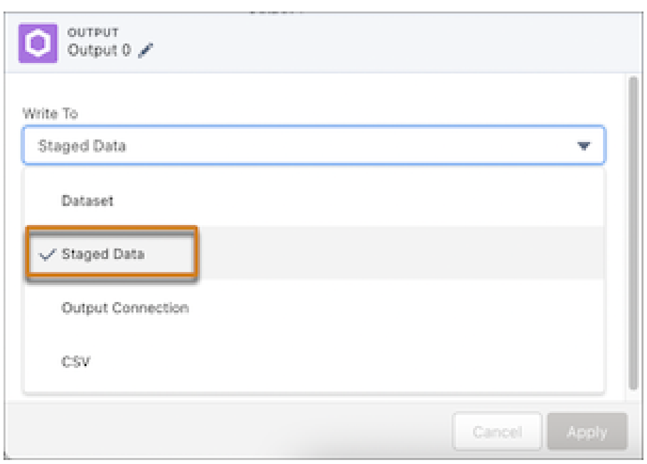
Run Sequential Recipes Faster in Encrypted Orgs

Reduce processing time when your data strategy involves multiple recipes by using staged data instead of datasets. An initial recipe outputs results as staged data, and then the subsequent recipes use the staged data in input nodes. For example, rather than merge account and opportunity data in several region-specific forecasting recipes, merge in an initial recipe that outputs the results as staged data. Then use the staged data in the other recipes. Previously, you could use staged data only with unencrypted orgs.

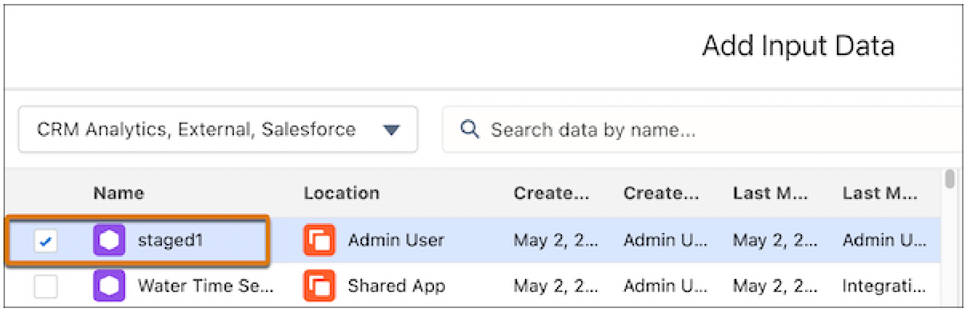
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

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

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



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



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

SEE ALSO:

Salesforce Help: Running Sequential Recipes with Staged Data Output (can be outdated or unavailable during release preview)

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

Allow users to see data in dashboards and insights only for the territories they're assigned to in Territory Management 2.0. 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.

How: In the recipe or dataflow that defines 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)

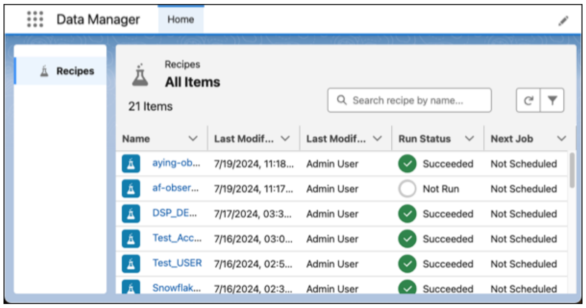
Give Users Read-Only Access to Recipes (Generally Available)

Let coworkers 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.

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**.

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: View or Edit a Recipe (can be outdated or unavailable during release preview)

Push Data from Government Cloud with Output Connectors

You can now use the Amazon S3, Salesforce, and Snowflake output connectors to push data from Salesforce Government Cloud customer orgs. When using these connectors, data in transit is encrypted using FIPS 140 validated cryptography, in accordance with US federal requirements.

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: Amazon S3 Output Connection (can be outdated or unavailable during release preview)

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

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

Improve Salesforce External Connector Sync Performance with Incremental Syncs (Beta)

Improve your data sync times when using the Salesforce External connector by loading object data incrementally. An incremental sync extracts only the latest changes to external Salesforce 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: Incremental syncs for the Salesforce External connector are 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 Data Manager, open a Salesforce external connection from the Connection tab and select the object that you want to sync. For the Edit Connection Mode, select **Incremental Sync (Beta)**.

SEE ALSO:

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

Salesforce Help: Configure Incremental Sync for Salesforce Data (can be outdated or unavailable during release preview)

Load Data Incrementally (Beta)

Improve upload time when using the Analytics External Data API by loading CSV files incrementally. In addition to appending data, you can now incrementally upsert and delete 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: Incremental uploads in the external data API 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.

How: When using the Analytics External Data API to load data, set the mode to incremental.

SEE ALSO:

Salesforce Help: Update the Data with Staged Data Output (can be outdated or unavailable during release preview)

Tableau

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

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

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

Marketing Cloud Intelligence

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.

- Contrast, keyboard navigation, focus order, and assistive text are enhanced for the Home and Browse tabs, Watchlist, and Notifications panel.
- Action completion and screen change announcements are added.
- Descriptive assistive text enhancements are added for Collections.

Commerce

Get your store up and running faster with simplified product import and configuration, store branding, and translation features. Boost conversions and elevate the shopping experience with engaging store pages, flexible search options, and an improved checkout flow. Keep customers coming back with easy-to-configure promotions and coupons, customizable messages, and the new Orders Dashboard that helps you analyze and adapt to customer trends.

IN THIS SECTION:

Salesforce B2B and D2C Commerce

Use the improved workflow to import products in bulk for your store. Delight customers with store pages that load fast and smart search that predicts shopper queries. Translate the text on your store in minutes. Improve conversion rates with enhanced cart and checkout performance. Easily connect a custom domain to your store.

Omnichannel Inventory

Add inventory and update existing records in bulk using a CSV or JSON file.

Salesforce Order Management

Service more orders more efficiently using bulk cancellations and letting customers cancel or return orders containing bundles.

Salesforce Payments

Process captures and refunds, and view where a payment originates from in the Payments Workspace. Consent to auto-published updates for your Pay Now store. Easily add products to your payment links when using Pay Now with Commerce.

Salesforce B2B and D2C Commerce

Use the improved workflow to import products in bulk for your store. Delight customers with store pages that load fast and smart search that predicts shopper queries. Translate the text on your store in minutes. Improve conversion rates with enhanced cart and checkout performance. Easily connect a custom domain to your store.

IN THIS SECTION:

Commerce Store Pages

Easily edit product details on the new Edit Product page. The updated address form includes auto-complete suggestions. Reassure customers with a clear and detailed order confirmation page. Swiftly translate your store into another language using automated tools. Enable server-side rendering to load D2C site pages faster.

Commerce Components

Show customers color swatches for your products right on the Product List. Make your store easier to navigate with multilevel menus. Use the new header components to quickly brand your store.

Commerce Cart, Checkout, and Shipping

Collect a shipping phone number during checkout. Address fields now autocomplete and suggest addresses for shoppers on every store page. Customers can more easily ship to multiple addresses. Continuous scrolling for cart items has improved accessibility.

Commerce Promotions

Create targeted promotions using specific product attributes like size, color, or weight. Select attributes by applying rules to discounts or qualifiers. Create coupons for discounts using the guided workflow.

Commerce Search

Enable predictive search suggestions in any search bar component. Display the most relevant product for a search term on the Product List page.

Additional Commerce Features

Save time and stress by importing your products using the streamlined import interface. Make your customers feel valued by sending them a customized welcome email. Open up potential sales by offering subscription-based products in your store. Refine merchandising strategies by tracking order trends in the new Orders Dashboard.

Commerce Store Pages

Easily edit product details on the new Edit Product page. The updated address form includes auto-complete suggestions. Reassure customers with a clear and detailed order confirmation page. Swiftly translate your store into another language using automated tools. Enable server-side rendering to load D2C site pages faster.

IN THIS SECTION:

Edit Product Details with Fewer Clicks

Edit product details directly from an intuitive Edit Product page. Click a product to open the page. You can update the product name, code, family, description, SKU, and pricing details.

Enhance the Shopping Experience with the Redesigned Address Page

The updated address form has a more modern design and includes a navigation menu. Auto-complete lets users fill in addresses by entering the first few characters. You can also add a field to capture phone numbers.

Provide Complete Order Details on the Order Confirmation Page

Give your shoppers instant reassurance with a detailed order confirmation page, which now includes the order number, item details, price breakdown, payment method, and shipping address. Shoppers can verify their order details immediately after purchase. Authenticated users can always access this page, and guest users can access it until the guest cart expiration duration configured in store settings.

Translate Your Store in Minutes

Reduce the time it takes to set up a store in a non-English language from hours to minutes with the new automated translation feature. With just a few clicks, you can translate your store's text elements into Dutch, French, German, Italian, Japanese, Spanish, or Portuguese.

Experience Improved D2C Store Performance

Get faster page load times, enhanced security, and improved search engine optimization when you create a new D2C store. D2C store pages created after the Spring '25 release are hosted on Experience Delivery, which uses server-side rendering to accelerate performance of site components and key pages.

Create and Manage Product Attributes from Your Store Settings

Streamline product variation management by creating and editing attributes directly from your store's product settings. Use the new Product Attribute tab to update attributes or add options.

Edit Product Details with Fewer Clicks

Edit product details directly from an intuitive Edit Product page. Click a product to open the page. You can update the product name, code, family, description, SKU, and pricing details.

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

SEE ALSO:

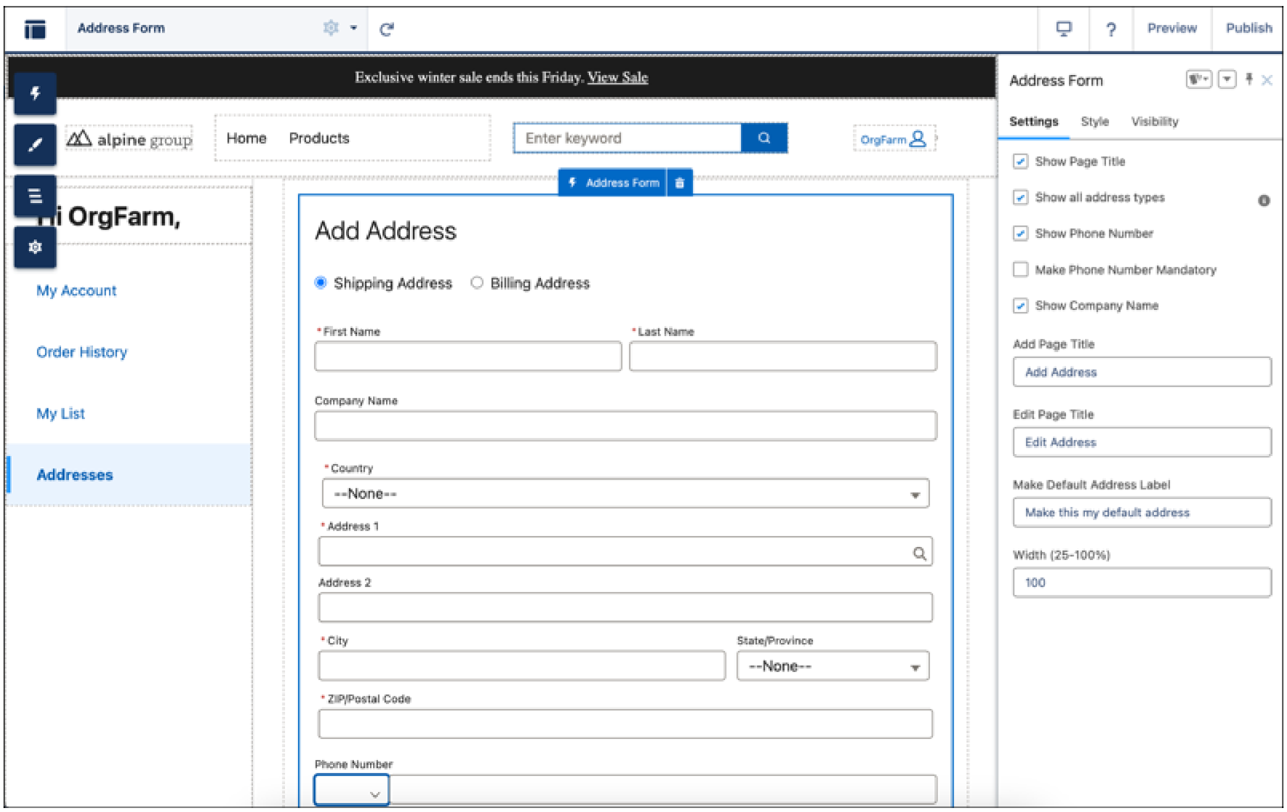
Salesforce Help: Add a Product to a Commerce Store (can be outdated or unavailable during release preview)

Enhance the Shopping Experience with the Redesigned Address Page

The updated address form has a more modern design and includes a navigation menu. Auto-complete lets users fill in addresses by entering the first few characters. You can also add a field to capture phone numbers.

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

How: In your store, go to **Website Design** > **Experience Builder**. Open the Address Form page.



SEE ALSO:

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

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

How: Go to **Experience Builder** > **Settings** > **Languages**, select a language, and click **Export Content** to download the XLF file. From your email, open the translation tool and translate the XLF file. Import the translated file back into your store to automatically update the language.

SEE ALSO:

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

Experience Improved D2C Store Performance

Get faster page load times, enhanced security, and improved search engine optimization when you create a new D2C store. D2C store pages created after the Spring '25 release are hosted on Experience Delivery, which uses server-side rendering to accelerate performance of site components and key pages.

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

SEE ALSO:

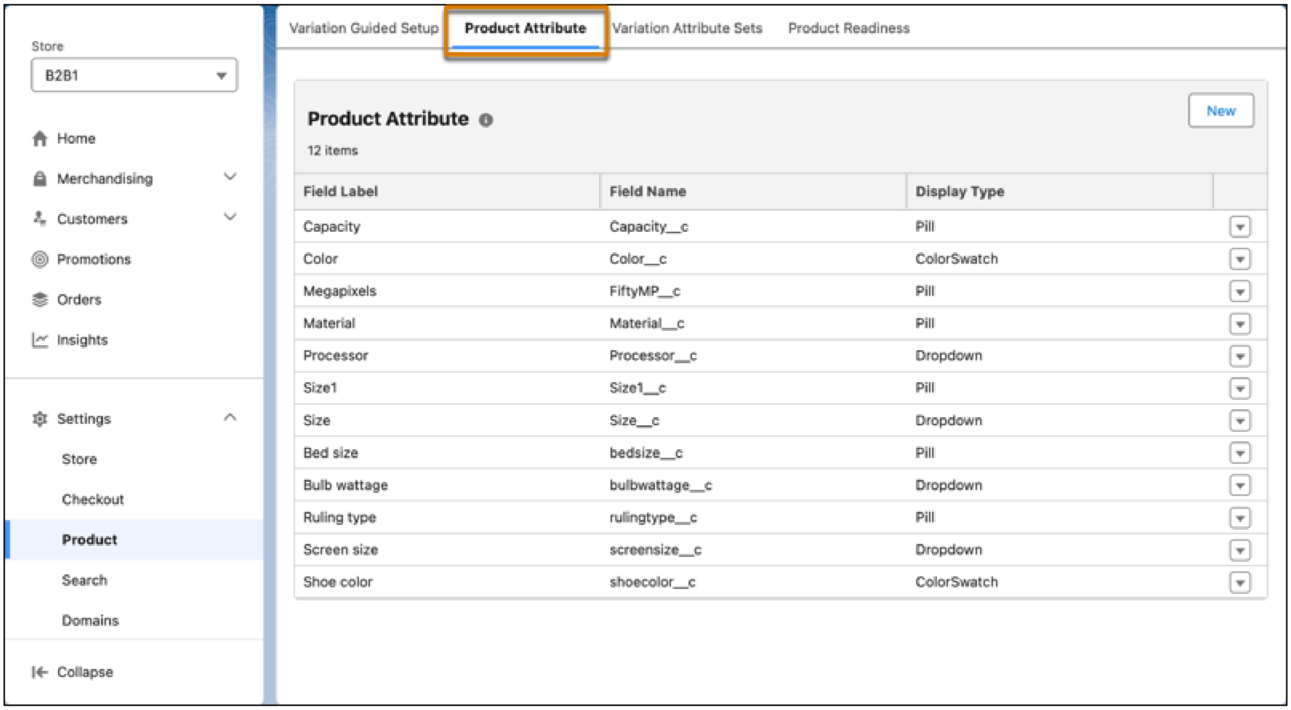
Lightning Web Runtime Developer Guide: Server-Side Rendering (can be outdated or unavailable during release preview)

Create and Manage Product Attributes from Your Store Settings

Streamline product variation management by creating and editing attributes directly from your store's product settings. Use the new Product Attribute tab to update attributes or add options.

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

How: In your store, go to **Settings** > **Product** and click **Product Attribute**.



SEE ALSO:

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

Commerce Components

Show customers color swatches for your products right on the Product List. Make your store easier to navigate with multilevel menus. Use the new header components to quickly brand your store.

IN THIS SECTION:

Brand Your Store Faster with the Enhanced Website Design Workspace

No more going back and forth between your Commerce app and Experience Builder while setting up your store. You can now add branding, edit image and text components, and get real-time previews in the Website Design workspace. Other updates to the workspace include component edits highlighted in the preview, improved preview options, and undo and redo icons to easily reverse modifications.

Do More with the New Banner Component

Use the enhanced banner component to upload banner images to your product categories. The Banner component, which replaces the Category Banner component, provides more control and flexibility to add images.

Build Multilevel Navigation Menus with the Mega Menu Component for D2C Stores

Help your site visitors find their way directly to the page that they're looking for. The Mega Menu component shows multiple navigation levels in one glance on your desktop and mobile sites. On sites created in Spring '25 and later, the Mega Menu component is included in the header by default.

Add Color Variations to the Product Detail Page

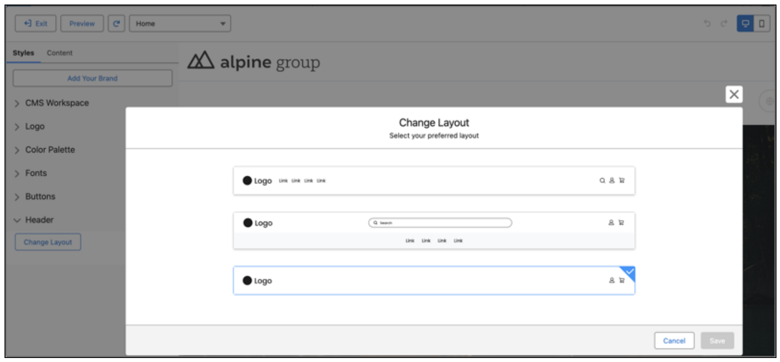
Help customers make more informed decisions by showing color variations on the product detail page. You can display the color variations using a dropdown, pills, or swatches. For swatches, you can use color hex codes. Pills support any attribute and can display text.

Brand Your Store Faster with the Enhanced Website Design Workspace

No more going back and forth between your Commerce app and Experience Builder while setting up your store. You can now add branding, edit image and text components, and get real-time previews in the Website Design workspace. Other updates to the workspace include component edits highlighted in the preview, improved preview options, and undo and redo icons to easily reverse modifications.

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

How: Check out the new header layout options that are designed to minimize development effort.



SEE ALSO:

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

Do More with the New Banner Component

Use the enhanced banner component to upload banner images to your product categories. The Banner component, which replaces the Category Banner component, provides more control and flexibility to add images.

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

How: In Experience Builder, drag the Banner component to the Category page.

SEE ALSO:

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

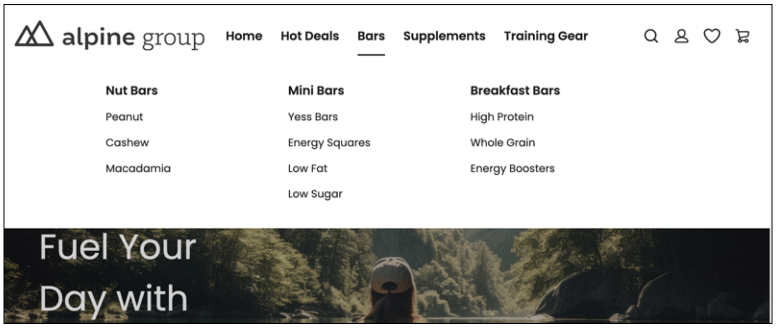
Salesforce Help: Add Media to Products and Categories (can be outdated or unavailable during release preview)

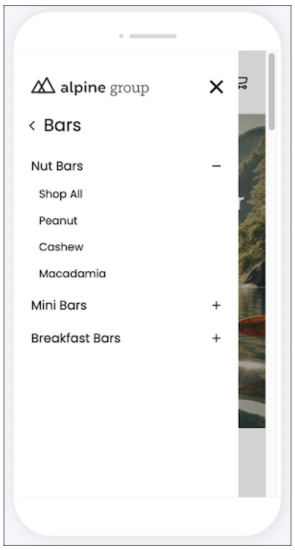
Build Multilevel Navigation Menus with the Mega Menu Component for D2C Stores

Help your site visitors find their way directly to the page that they're looking for. The Mega Menu component shows multiple navigation levels in one glance on your desktop and mobile sites. On sites created in Spring '25 and later, the Mega Menu component is included in the header by default.

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

How: Find the Mega Menu component in the new Site Headers section of the component palette, and drag it to the canvas. A mega menu listing can show up to three navigation levels.





SEE ALSO:

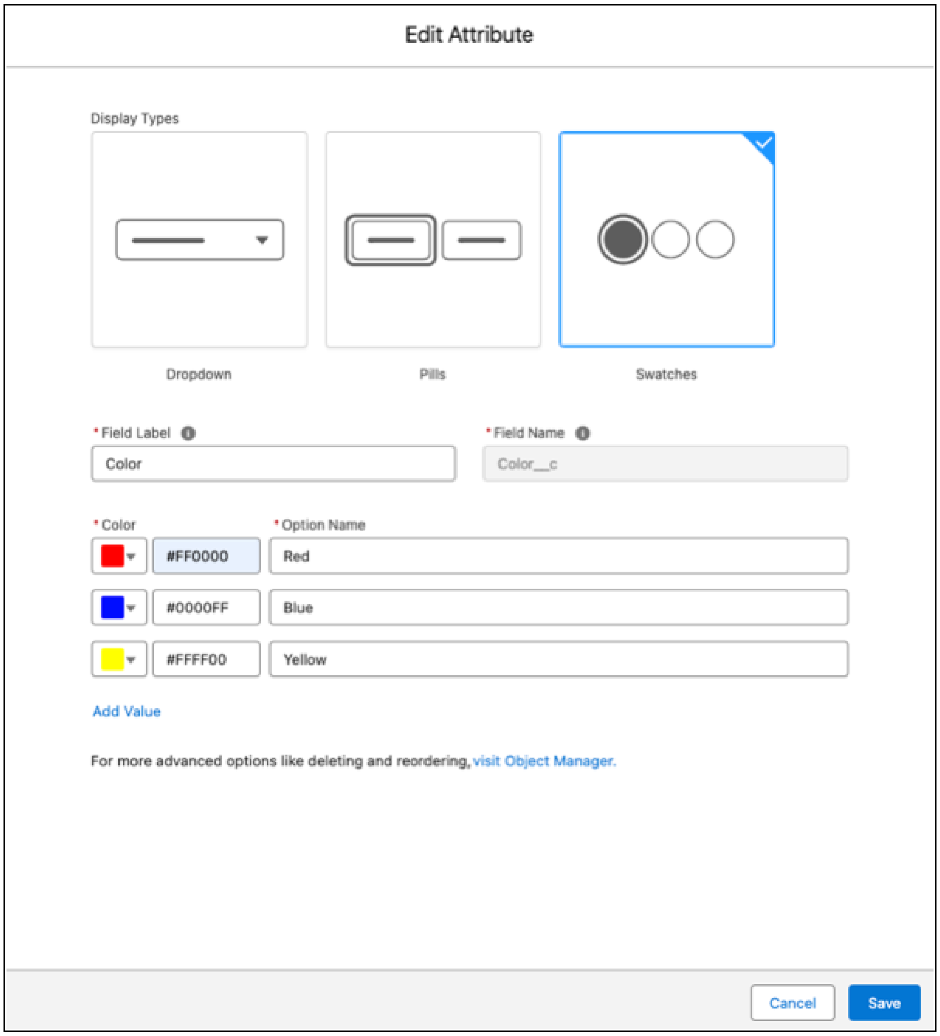
Salesforce Help: LWR Store Components (can be outdated or unavailable during release preview)

Add Color Variations to the Product Detail Page

Help customers make more informed decisions by showing color variations on the product detail page. You can display the color variations using a dropdown, pills, or swatches. For swatches, you can use color hex codes. Pills support any attribute and can display text.

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

How: In your store's Settings, select **Product**. Use the guided setup to add color variations and attributes. In the Experience Builder product variations component, configure how the color variations are displayed.



SEE ALSO:

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

Commerce Cart, Checkout, and Shipping

Collect a shipping phone number during checkout. Address fields now autocomplete and suggest addresses for shoppers on every store page. Customers can more easily ship to multiple addresses. Continuous scrolling for cart items has improved accessibility.

IN THIS SECTION:

Collect a Shipping Phone Number During Checkout

Add a field to collect a shipping phone number during checkout in case you need to contact the customer regarding their order. Previously, you could collect only a billing phone number.

Address Fields Autocomplete on All Store Pages

When a customer enters their address information on any page in your store, suggested matches are shown and the address fields autocomplete. Address autocomplete is now enabled for B2B stores, Custom Checkout, Pay Now, and address forms on the My Profile page. For D2C stores, address autocomplete was previously enabled only for shipping and billing address forms using Managed Checkout.

Improve the User Experience for Shipping to Multiple Addresses

During checkout, customers see a more detailed list of cart items for each shipment, a cart summary with active loading states, and improved visual queues for managing addresses and navigation. When a customer updates their information, the changes are now saved incrementally, reducing the risk of losing their progress if they leave checkout. If you have an existing store, add the updated Split Shipment Layout component to take advantage of the new features. Stores created in the Spring '25 release and later already have the new component.

Jump to the Top or Bottom of the Cart Items List with One Click

Customers can now easily navigate to the top or bottom of large lists of cart items with "Skip to" buttons when your store uses the Scroll option for cart item pagination. These buttons also improve usability for customers using screen readers or other accessibility devices.

Improve the Shopping Experience with Enhanced Cart and Checkout Performance

Cart and checkout pages now load faster and are more responsive in LWR stores with the Cart Calculate API enabled. Customers can add, edit, and delete cart items and coupons faster, providing a smoother checkout experience. Cart APIs can also handle cart changes during checkout.

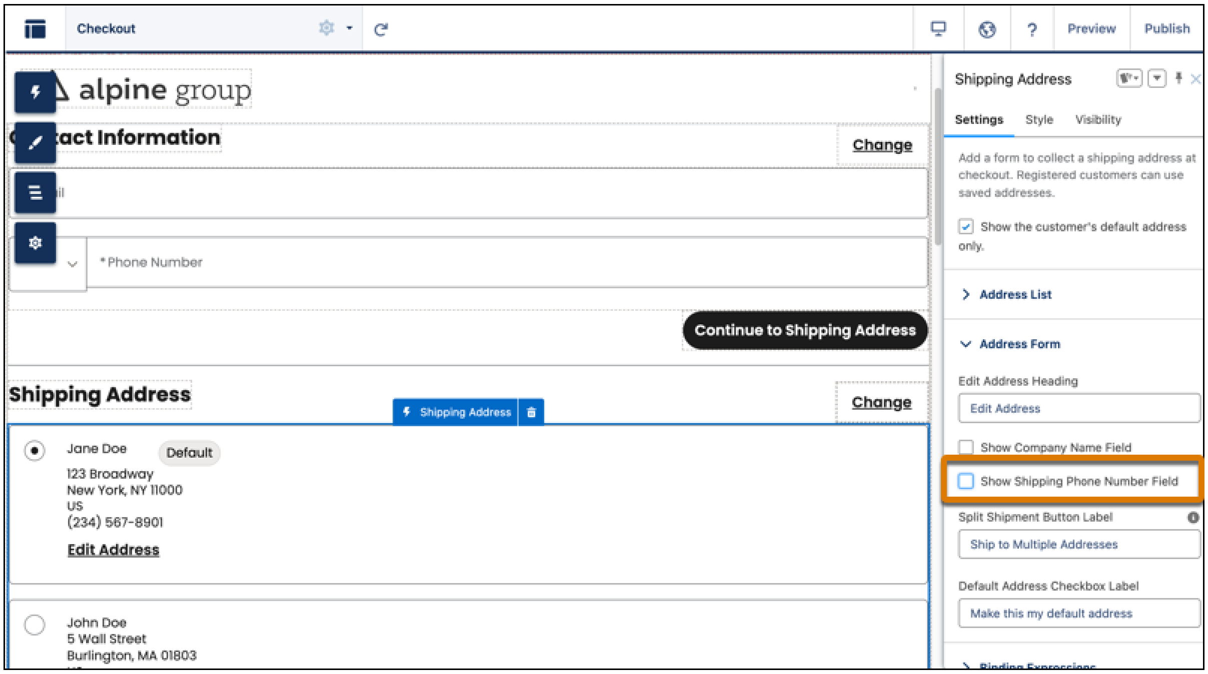
Collect a Shipping Phone Number During Checkout

Add a field to collect a shipping phone number during checkout in case you need to contact the customer regarding their order. Previously, you could collect only a billing phone number.

Important: When a country code is provided, the shipping phone number is formatted and validated according to that country's phone number standards. If no country code is provided, the shipping phone number is validated according to US phone number standards by default. To avoid validation errors, we recommend collecting a country code along with the shipping phone number.

Where: This change applies to B2B Commerce and D2C Commerce stores that use Custom Checkout in Enterprise, Unlimited, and Developer editions.

How: From Website Design, open Experience Builder and go to the Checkout page. Customize the Shipping Address component.



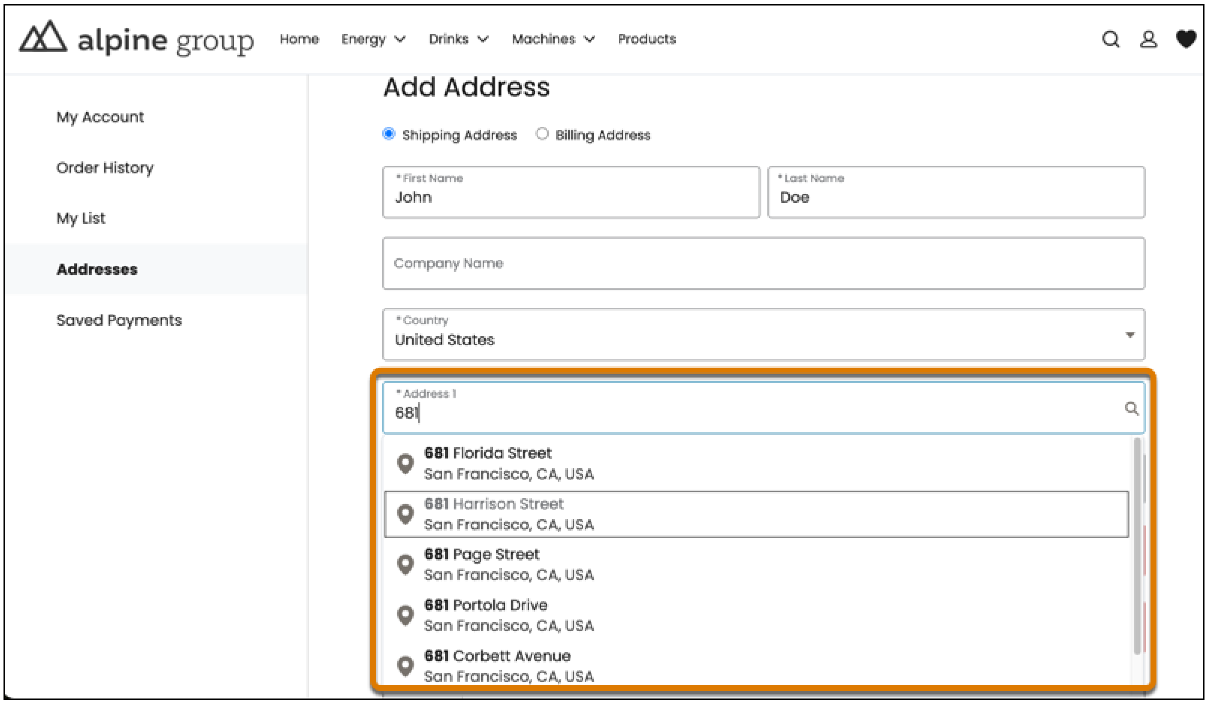
SEE ALSO:

Salesforce Help: Collect Shipping Information During Checkout (can be outdated or unavailable during release preview)

Address Fields Autocomplete on All Store Pages

When a customer enters their address information on any page in your store, suggested matches are shown and the address fields autocomplete. Address autocomplete is now enabled for B2B stores, Custom Checkout, Pay Now, and address forms on the My Profile page. For D2C stores, address autocomplete was previously enabled only for shipping and billing address forms using Managed Checkout.

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



SEE ALSO:

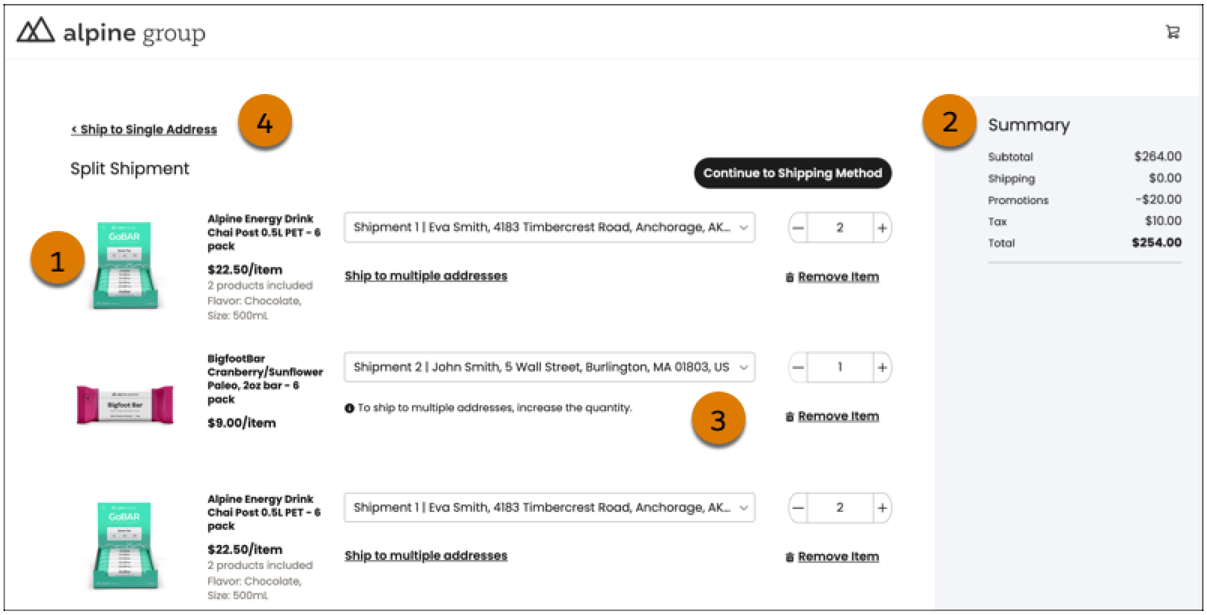
Salesforce Help: Considerations for Address Autocomplete for B2B and D2C Stores (can be outdated or unavailable during release preview)

Improve the User Experience for Shipping to Multiple Addresses

During checkout, customers see a more detailed list of cart items for each shipment, a cart summary with active loading states, and improved visual queues for managing addresses and navigation. When a customer updates their information, the changes are now saved incrementally, reducing the risk of losing their progress if they leave checkout. If you have an existing store, add the updated Split Shipment Layout component to take advantage of the new features. Stores created in the Spring '25 release and later already have the new component.

Where: This change applies to B2B Commerce and D2C Commerce and Salesforce Payments in Enterprise, Unlimited, and Developer editions. Shipping to multiple addresses isn't available for stores using Managed Checkout.

How: First, enable split shipping in Commerce. If you have an existing store, in Experience Builder, go to the Split Shipment page and add the new Split Shipment Layout component. The new layout provides a more detailed view of cart items (1), a cart summary (2), improved visual queues (3), and clear navigation (4).



SEE ALSO:

Salesforce Help: Enable Shipping to Multiple Addresses for Custom Checkout (can be outdated or unavailable during release preview)

Salesforce Help: Collect Split Shipping Information During Checkout (can be outdated or unavailable during release preview)

Jump to the Top or Bottom of the Cart Items List with One Click

Customers can now easily navigate to the top or bottom of large lists of cart items with "Skip to" buttons when your store uses the Scroll option for cart item pagination. These buttons also improve usability for customers using screen readers or other accessibility devices.

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

SEE ALSO:

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

Improve the Shopping Experience with Enhanced Cart and Checkout Performance

Cart and checkout pages now load faster and are more responsive in LWR stores with the Cart Calculate API enabled. Customers can add, edit, and delete cart items and coupons faster, providing a smoother checkout experience. Cart APIs can also handle cart changes during checkout.

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

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)

B2B Commerce and D2C Commerce Developer Guide: Simplified Cart Cleanup (can be outdated or unavailable during release preview)

Commerce Promotions

Create targeted promotions using specific product attributes like size, color, or weight. Select attributes by applying rules to discounts or qualifiers. Create coupons for discounts using the guided workflow.

IN THIS SECTION:

Create a Promotion Based on Specific Product Variations

Offer targeted promotions based on specific attributes, such as size, color, or weight. Whether you choose a parent product or a category as your discount or qualifier type, you can easily apply rules and conditions using attributes. For instance, when drafting a discount or qualifier, you might choose whether it applies to a parent product or a category. If you select a parent product, you could then apply a rule to choose an attribute like "Color" and set the value to "Red" to specify that the discount applies only to red items within that product line.

Create Coupons Using a Guided Workflow

Use the guided workflow to set up custom coupon codes for any promotion that you want to offer. Now you don't need to go to the Promotion Record page to set up coupons in your store. Within the guided workflow, you can set start and end times for your coupons, specify redemption limits per buyer, and set an overall limit on the total number of uses, all in one easy process.

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

SEE ALSO:

Salesforce Help: Create a Promotion Using the Guided Workflow (can be outdated or unavailable during release preview)

Salesforce Help: Create Promotions Using the Guided Workflow with Einstein (can be outdated or unavailable during release preview)

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Use the guided workflow to set up custom coupon codes for any promotion that you want to offer. Now you don't need to go to the Promotion Record page to set up coupons in your store. Within the guided workflow, you can set start and end times for your coupons, specify redemption limits per buyer, and set an overall limit on the total number of uses, all in one easy process.

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

How: In the guided workflow, click **Add** to customize the coupon section.

SEE ALSO:

Salesforce Help: Create a Promotion Using the Guided Workflow (can be outdated or unavailable during release preview)

Salesforce Help: Create Promotions Using the Guided Workflow with Einstein (can be outdated or unavailable during release preview)

Commerce Search

Enable predictive search suggestions in any search bar component. Display the most relevant product for a search term on the Product List page.

IN THIS SECTION:

Offer Shoppers Relevant Search Suggestions

Show shoppers search results based on data from your catalog. Predictive search suggestions uses terms from the Product Name, SKU, Category Name, and Product Code fields to generate suggestions. For instance, if a shopper starts entering "blu" in the search bar, the suggestions are limited to the products in your store. To improve the search experience, you can opt to turn on Commerce Einstein. Commerce Einstein uses search activity from shoppers to learn the best search terms over time.

Boost Product Discovery with the Enhanced Variation Display

Help shoppers find what they want by providing the most relevant product based on their search term. Show only the best-matched product, just the parent product, or the parent product with all its variations. Enriched search results include interactive color swatches or summarized text to showcase product variations. For example, you can configure the page to group product variations by color and size or show a color swatch to represent other variations. When you click the product, the detail page shows the different variations.

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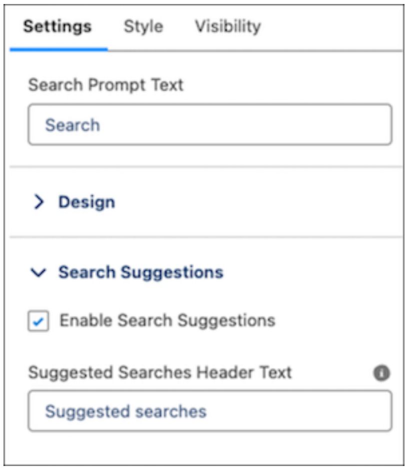
Where: This change applies to D2C and B2B Commerce in Lightning Experience.

How: Perform a full update of the search index. Then, in any search component, select **Enable Search Suggestions**.



SEE ALSO:

Salesforce Help: Commerce Administrator Considerations for Product Searchability (can be outdated or unavailable during release preview)

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

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

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

Boost Product Discovery with the Enhanced Variation Display

Help shoppers find what they want by providing the most relevant product based on their search term. Show only the best-matched product, just the parent product, or the parent product with all its variations. Enriched search results include interactive color swatches or summarized text to showcase product variations. For example, you can configure the page to group product variations by color and size or show a color swatch to represent other variations. When you click the product, the detail page shows the different variations.

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

How: From your store Settings, go to **Search** > **Results Display Settings**. Under Product Variation Display Settings, select a variation display.

SEE ALSO:

Salesforce Help: Get to Know Product Variation Grouping (can be outdated or unavailable during release preview)

Additional Commerce Features

Save time and stress by importing your products using the streamlined import interface. Make your customers feel valued by sending them a customized welcome email. Open up potential sales by offering subscription-based products in your store. Refine merchandising strategies by tracking order trends in the new Orders Dashboard.

IN THIS SECTION:

Sell and Manage Digital Subscriptions in B2B and D2C Stores (Generally Available)

Create, manage, and sell digital subscription products through an integration with Salesforce Revenue Cloud. Bill and collect payment from customers on a defined schedule, and manage subscription pricing policies. Customers can view or cancel their active subscriptions and update payment methods from their account. Commerce Subscriptions requires updating your pricing engine to use Salesforce Pricing. Commerce Subscriptions isn't included with the Commerce license. To purchase it, contact your account representative.

Analyze Order Trends on the Commerce Orders Dashboard

Get insights into order volume, fulfillment efficiency, returns, and refunds using the Orders dashboard. Analyze trends in cancellations, appeasements, and product returns to make informed decisions that streamline operations, reduce costs, and improve customer satisfaction.

Get Notified When a Customer Abandons a Shopping Cart

Use the Abandoned Cart event in an automation event-triggered flow to initiate an action, such as sending the customer an email or creating a support case. You can also subscribe to the WebCartAbandonedEvent platform event to get notified when a customer abandons a shopping cart.

Send a Customized Welcome Email to New Users

Welcome newly registered users with a customized email instead of the default plain text message. Add branding, rich text, and tailored content. In the Messaging workspace, enable Welcome Email. You can customize the email template and modify the welcome email flow.

Streamline Product Imports in the Enhanced Workspace

Import products in the enhanced Products workspace using the provided CSV file template, or create your own CSV file and map its fields to corresponding Salesforce fields. Make future imports quicker by saving the field mappings. Preview and validate data, track the import progress, and get notifications upon completion.

Add Variations During Product Creation

Add and manage product variations while creating or editing a product.

Connect Your Custom Domain to Your Store from the Commerce App

Enhance your B2B or D2C store by setting up a content delivery network (CDN) and linking your third-party domain to your store with just a few clicks. You no longer need to navigate through multiple steps. Instead, connect your store to your domain from your Commerce app directly. After you enter your domain address, you're guided on the path to connect your store. Plus, if you don't yet own a domain, you can purchase one from the list of example registrars.

Customize and Extend Commerce Messages Using Flow

Commerce Messaging is now integrated with Flow. Use Flow Builder to add more elements and actions to the default message flows, such as sending the customer an SMS message or creating a support case.

Share Knowledge Articles with Your Customers

Use Salesforce Knowledge to embed knowledge articles directly in your store. Knowledge articles can answer your customers' frequently asked questions and explain common procedures. You can create FAQ pages and embed knowledge in support widgets. Knowledge articles help answer customer questions, provide a better shopping experience, and decrease the burden on support.

Sell and Manage Digital Subscriptions in B2B and D2C Stores (Generally Available)

Create, manage, and sell digital subscription products through an integration with Salesforce Revenue Cloud. Bill and collect payment from customers on a defined schedule, and manage subscription pricing policies. Customers can view or cancel their active subscriptions and update payment methods from their account. Commerce Subscriptions requires updating your pricing engine to use Salesforce Pricing. Commerce Subscriptions isn't included with the Commerce license. To purchase it, contact your account representative.

Where: This change applies to B2B Commerce and D2C Commerce and Revenue Cloud in Enterprise, Unlimited, and Developer editions where Salesforce Pricing is enabled. Commerce Subscriptions requires Salesforce Payments.

How: From your store's Pricing settings, enable Salesforce Pricing and Subscriptions. Enabling these features applies to every store in your Commerce org.

SEE ALSO:

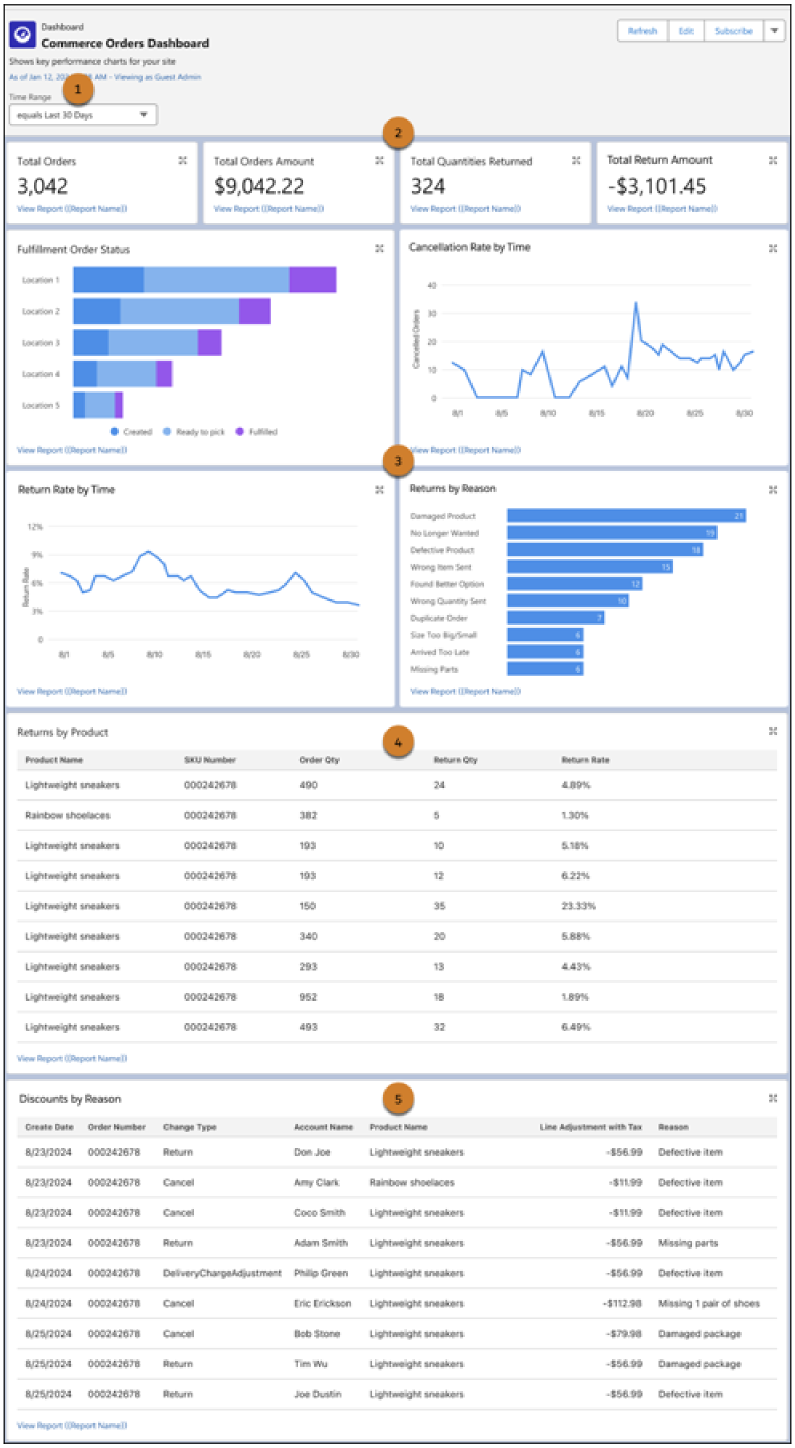
Salesforce Help: Sell Subscription Products in a Commerce Store (can be outdated or unavailable during release preview)

Analyze Order Trends on the Commerce Orders Dashboard

Get insights into order volume, fulfillment efficiency, returns, and refunds using the Orders dashboard. Analyze trends in cancellations, appeasements, and product returns to make informed decisions that streamline operations, reduce costs, and improve customer satisfaction.

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

How: In your store, go to **Insights** > **Orders**. Select a time period (1). View the count and value of orders and returns (2), and stay on top of fulfillment status, cancellations, returns, and refunds (3). Get reports on product returns (4) and discounts offered as appeasements (5).



SEE ALSO:

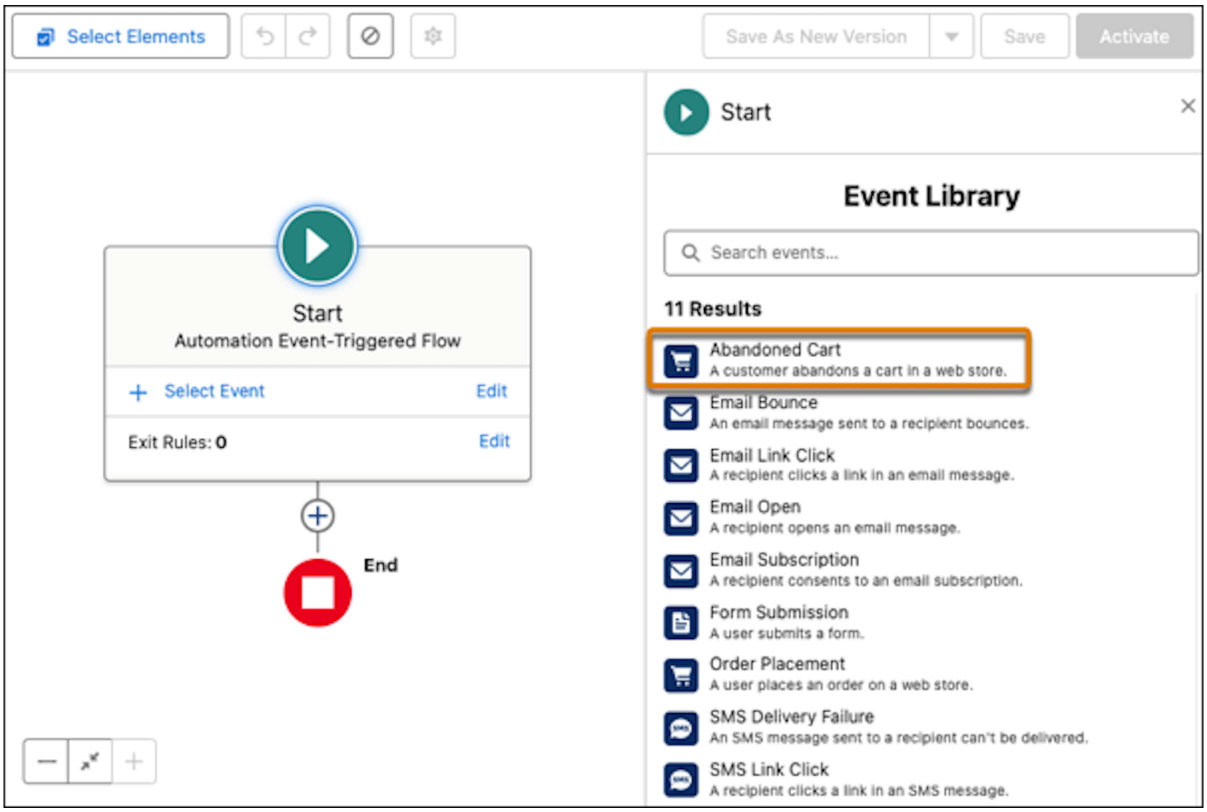
Salesforce Help: Interpreting Commerce Analytics Dashboards (can be outdated or unavailable during release preview)

Get Notified When a Customer Abandons a Shopping Cart

Use the Abandoned Cart event in an automation event-triggered flow to initiate an action, such as sending the customer an email or creating a support case. You can also subscribe to the WebCartAbandonedEvent platform event to get notified when a customer abandons a shopping cart.

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

How: When you create an automation event-triggered flow, select **Abandoned Cart** from the Event Library. Configure the event, add elements and actions, and save the flow.



SEE ALSO:

Salesforce Release Notes: Automate Your Responses to Common Customer Actions with Out-of-the-Box Automation Event-Triggered Flows (can be outdated or unavailable during release preview)

Platform Events Developer Guide: WebCartAbandonedEvent (can be outdated or unavailable during release preview)

Send a Customized Welcome Email to New Users

Welcome newly registered users with a customized email instead of the default plain text message. Add branding, rich text, and tailored content. In the Messaging workspace, enable Welcome Email. You can customize the email template and modify the welcome email flow.

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

SEE ALSO:

Salesforce Help: Automate Customer Notifications in the Commerce Messaging Workspace (can be outdated or unavailable during release preview)

Streamline Product Imports in the Enhanced Workspace

Import products in the enhanced Products workspace using the provided CSV file template, or create your own CSV file and map its fields to corresponding Salesforce fields. Make future imports quicker by saving the field mappings. Preview and validate data, track the import progress, and get notifications upon completion.

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

How: From your store, go to **Merchandising** > **Products** > **Import**. Use the template to add and update products, or upload your CSV file.

SEE ALSO:

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

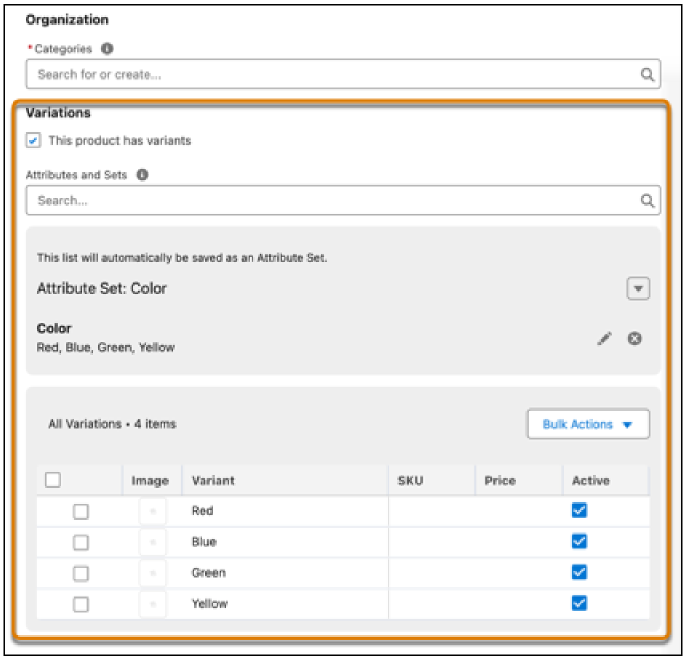
Salesforce Help: CSV File Format for Importing Commerce Data (can be outdated or unavailable during release preview)

Add Variations During Product Creation

Add and manage product variations while creating or editing a product.

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

How: When adding or updating a product, select **This product has variations**. Add attributes, such as size and color, and choose how to display the information.



SEE ALSO:

Salesforce Help: Add a Product to a Commerce Store (can be outdated or unavailable during release preview)

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

Connect Your Custom Domain to Your Store from the Commerce App

Enhance your B2B or D2C store by setting up a content delivery network (CDN) and linking your third-party domain to your store with just a few clicks. You no longer need to navigate through multiple steps. Instead, connect your store to your domain from your Commerce app directly. After you enter your domain address, you're guided on the path to connect your store. Plus, if you don't yet own a domain, you can purchase one from the list of example registrars.

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

How: From your store, under Settings, click **Domains**, and enter your domain address.

SEE ALSO:

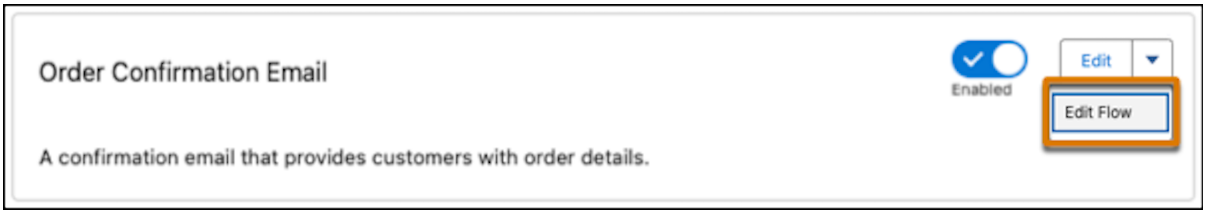
Salesforce Help: Configure a Custom Domain and CDN (can be outdated or unavailable during release preview)

Customize and Extend Commerce Messages Using Flow

Commerce Messaging is now integrated with Flow. Use Flow Builder to add more elements and actions to the default message flows, such as sending the customer an SMS message or creating a support case.

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

How: In the navigation sidebar, select **Settings** | **Messaging**. To modify the message flow, click and select **Edit Flow**.



SEE ALSO:

Salesforce Help: Automate Customer Notifications in the Commerce Messaging Workspace (can be outdated or unavailable during release preview)

Share Knowledge Articles with Your Customers

Use Salesforce Knowledge to embed knowledge articles directly in your store. Knowledge articles can answer your customers' frequently asked questions and explain common procedures. You can create FAQ pages and embed knowledge in support widgets. Knowledge articles help answer customer questions, provide a better shopping experience, and decrease the burden on support.

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

SEE ALSO:

Salesforce Help: Create a Knowledge Base with Salesforce Knowledge (can be outdated or unavailable during release preview)

Omnichannel Inventory

Add inventory and update existing records in bulk using a CSV or JSON file.

IN THIS SECTION:

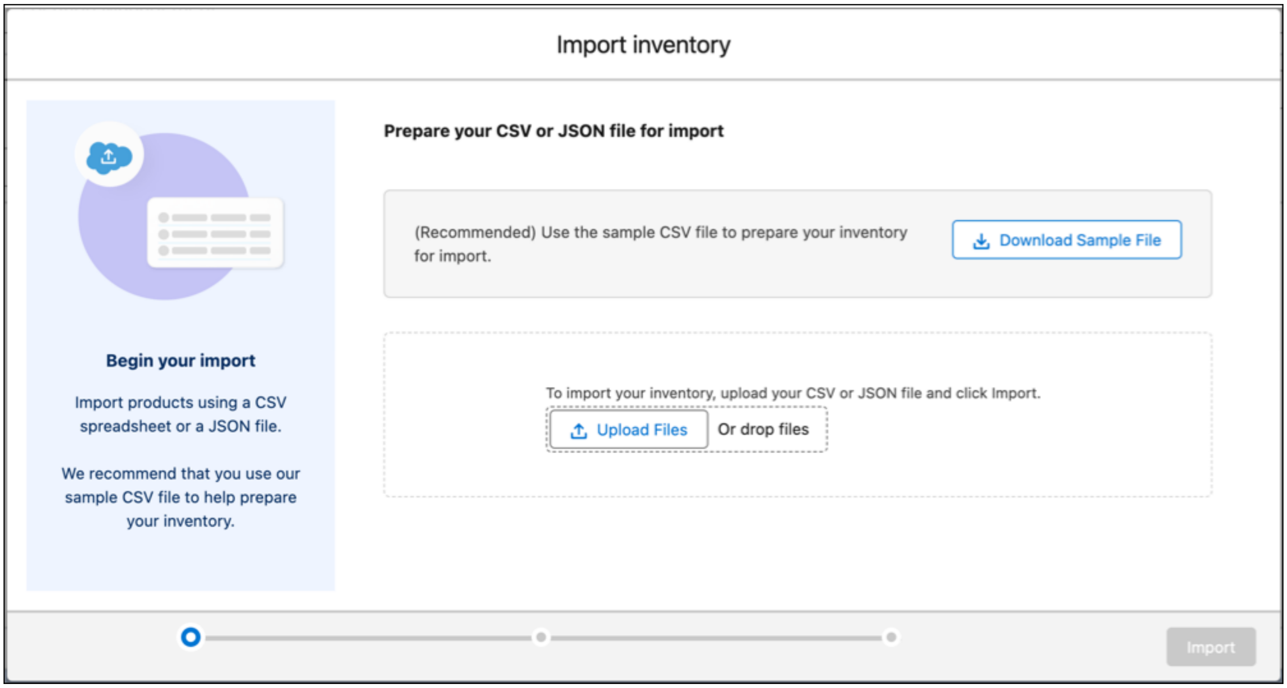
Import Inventory in Bulk

Add inventory and update existing records in bulk using the Omnichannel Inventory app instead of APIs or adding records individually. Use the provided sample CSV file to prepare your inventory. You can then import the information using either a CSV or JSON file.

Import Inventory in Bulk

Add inventory and update existing records in bulk using the Omnichannel Inventory app instead of APIs or adding records individually. Use the provided sample CSV file to prepare your inventory. You can then import the information using either a CSV or JSON file.

How: In the Omnichannel Inventory app, go to the Inventory Lookup tab. Click **Import**, upload your CSV or JSON file, and click **Import**.



SEE ALSO:

Salesforce Help: Omnichannel Inventory App (can be outdated or unavailable during release preview)

Salesforce Order Management

Service more orders more efficiently using bulk cancellations and letting customers cancel or return orders containing bundles.

IN THIS SECTION:

Cancel, Return, and Route Orders Containing Product Bundles

Let customers cancel or return orders that contain bundles. You can also use Salesforce Routing to route and fulfill orders that contain bundles.

Cancel Orders in Bulk

Efficiently cancel large orders using bulk cancellation.

Cancel, Return, and Route Orders Containing Product Bundles

Let customers cancel or return orders that contain bundles. You can also use Salesforce Routing to route and fulfill orders that contain bundles.

Where: This change applies to Order Management for B2B Commerce and D2C Commerce in Unlimited, Developer, and Enterprise editions with the Order Management Growth license.

How: Download the Distributed Order Management package for your org. If you've previously downloaded the package, download it again for the most up-to-date version. Then modify your Return, RMA, and Cancellation flows.

SEE ALSO:

Salesforce Help: Considerations for Bundles (can be outdated or unavailable during release preview)

Cancel Orders in Bulk

Efficiently cancel large orders using bulk cancellation.

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

How: Use the Cancel All APIs to set up bulk cancellation.

SEE ALSO:

Salesforce Help: Cancel All Preview (can be outdated or unavailable during release preview)

Salesforce Help: Cancel All Submit (can be outdated or unavailable during release preview)

Salesforce Payments

Process captures and refunds, and view where a payment originates from in the Payments Workspace. Consent to auto-published updates for your Pay Now store. Easily add products to your payment links when using Pay Now with Commerce.

IN THIS SECTION:

Elevate Your Customers' Shopping Experience with the Enhanced Pay Now Store

Include products with the amount in the payment link to let your customers know exactly what they're paying for. If you have a B2B or D2C store that uses Pay Now, you can monitor key performance metrics on the Insights dashboard to make more-informed business decisions. Upgrade from custom to managed checkout with a one-way switch to deliver a native checkout experience to your customers.

Capture or Refund Payments in the Payments Workspace

Manage transactions in one place. You no longer have to go to the dashboard of the payment gateway, such as Stripe, to capture or refund payments. The status of the payment determines which action is available. Capture is available only if the status is Authorized. Refund is available only if the status is Captured or Succeeded.

View Where a Payment Originates from in the Payments Workspace

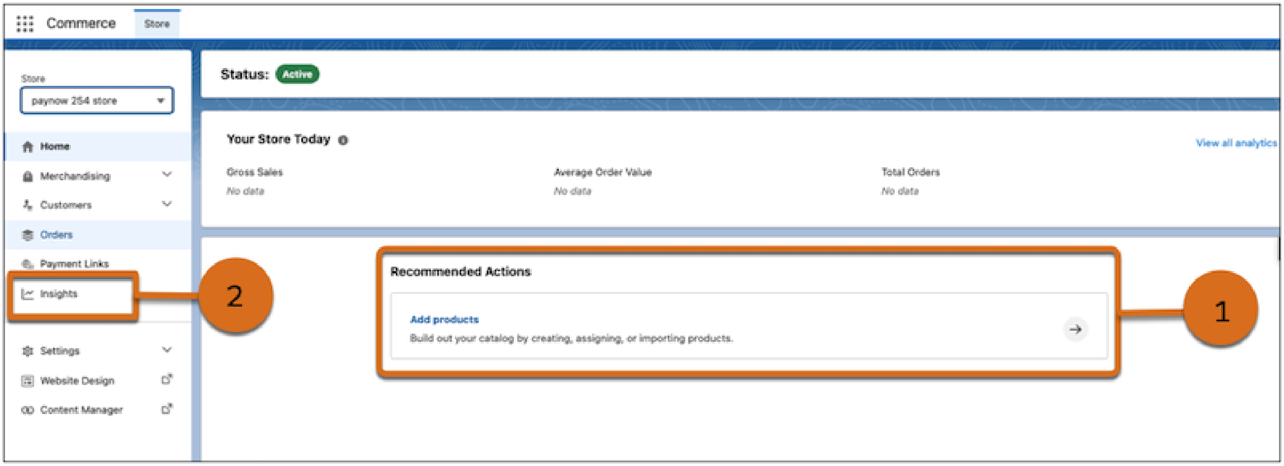
Track payment sources to integrate Salesforce products with Payments. Each payment now shows the Salesforce application and the related object linked to the payment being made. Use the source information to integrate Payments into different Salesforce products.

Elevate Your Customers' Shopping Experience with the Enhanced Pay Now Store

Include products with the amount in the payment link to let your customers know exactly what they're paying for. If you have a B2B or D2C store that uses Pay Now, you can monitor key performance metrics on the Insights dashboard to make more-informed business decisions. Upgrade from custom to managed checkout with a one-way switch to deliver a native checkout experience to your customers.

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

How: On the Pay Now store home page, add products from Recommended Actions (1), view the Insights dashboard (2).



SEE ALSO:

Salesforce Help: Set up Pay Now with the Commerce Setup Assistant (can be outdated or unavailable during release preview)

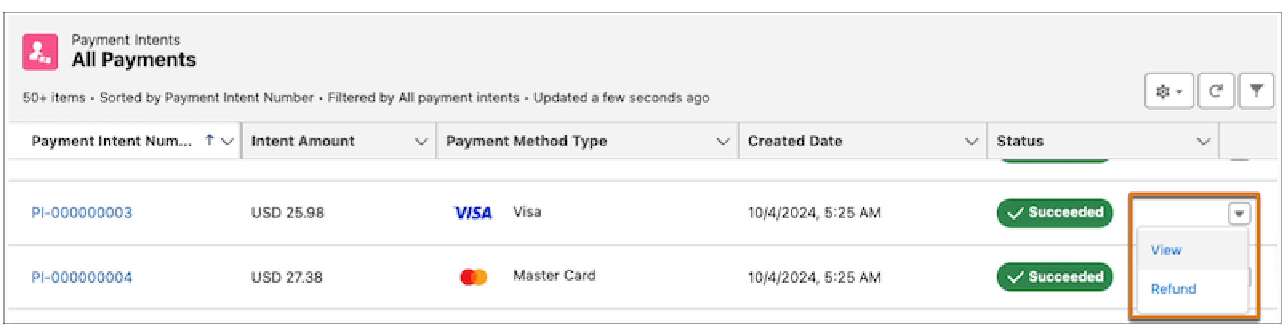
Salesforce Help: Configure Checkout for a Commerce Store (can be outdated or unavailable during release preview)

Capture or Refund Payments in the Payments Workspace

Manage transactions in one place. You no longer have to go to the dashboard of the payment gateway, such as Stripe, to capture or refund payments. The status of the payment determines which action is available. Capture is available only if the status is Authorized. Refund is available only if the status is Captured or Succeeded.

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

How: In the Payments workspace, click the payment intent's dropdown menu, and select the action that you want to take. Here's a refund action.



SEE ALSO:

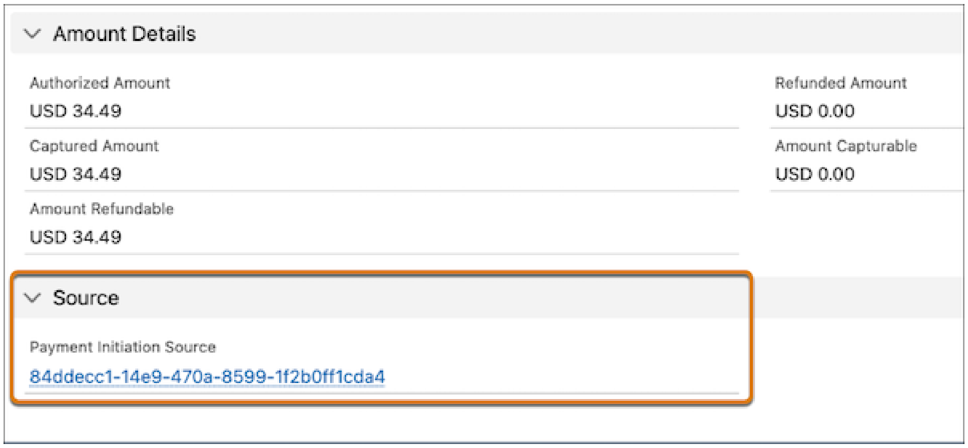
Salesforce Help: Payment Activity in the Payments Workspace (can be outdated or unavailable during release preview)

View Where a Payment Originates from in the Payments Workspace

Track payment sources to integrate Salesforce products with Payments. Each payment now shows the Salesforce application and the related object linked to the payment being made. Use the source information to integrate Payments into different Salesforce products.

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

How: Select a payment in the Payments Workspace. On the Details tab, click the payment initiation source link to view the record. You can also filter the list by the application or object field to search for source information.



SEE ALSO:

Salesforce Help: Salesforce Payments Monitoring (can be outdated or unavailable during release preview)

Customization

Sort by multiple columns, easily manage roles and permission sets, and work more efficiently thanks to enhancements to list views and related lists. Manage included permission sets in permission set groups via summaries.

IN THIS SECTION:

List Views

List views for custom and standard objects render faster with Lightning Web Components (LWC). Sorting list views by multiple columns is generally available, and you can also sort related lists by multiple columns. The release update to block users with only the Manage Public List Views permission from seeing roles and role hierarchies when they edit public list views is enforced. Manage roles and permission sets more easily using enhanced list views.

Permissions

Updates to the permission set summary view simplify user access management. Assign new View All Fields object-level permissions to users who require widespread access. The View All and Modify All object permissions have new names.

Fields

The Salesforce Classic datepicker for the Date and DateTime fields now supports keyboard shortcuts. Custom fields limit for activities is increased from 100 to 300 for Salesforce orgs with fewer than 400 million activities.

Globalization

ICU locale formats keep your data consistent across regions. Deliver a more tailored global experience with expanded English language variations as platform-only languages.

Salesforce Connect

Increased limits for some Salesforce Connect adapters help you access external data with confidence. The Salesforce Connect SQL adapter now supports Snowflake views.

Sharing

In the public group access summary, improvements make it easier to see related sharing rules, list views, and queues. Get notified when your sharing rule exposes data to external users. Review the release update on securing roles in sandboxes.

General Setup

Make the power of AI work for you by adding agent quick actions to your record pages. Get a better snapshot of your custom metadata type usage with enhancements to the System Overview page.

List Views

List views for custom and standard objects render faster with Lightning Web Components (LWC). Sorting list views by multiple columns is generally available, and you can also sort related lists by multiple columns. The release update to block users with only the Manage Public List Views permission from seeing roles and role hierarchies when they edit public list views is enforced. Manage roles and permission sets more easily using enhanced list views.

IN THIS SECTION:

Get Improved Performance with the Enhanced Role List View

With a new user experience, you can view, sort, and filter user roles in a list format and edit roles inline. This enhancement makes it easier to manage role-based access control so that users see the data that they need.

Manage Permissions Sets with the Enhanced List View

This revamped user experience provides streamlined navigation, improved filtering options, search capabilities, and a more intuitive layout. This enhancement makes it easier to manage and navigate through permission sets. Key improvements include advanced filtering options, a more organized layout, and quicker access to critical actions.

View and Filter on More Fields in the Enhanced User List View

You can now work with user list views more effectively with new added fields. Add the Delegated Approver, End of Day, Is Partner, Start of Day, User Verified Email, User Verified Mobile Number and Password Expiration Date fields to your user list views. Then sort, filter, search, and edit your user records using these fields

Get Better Performance for List Views

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. List views for custom and standard objects rendered with LWC have some differences, but overall, how your users work in list views hasn't changed. Previously, list views rendered with LWC only in a sandbox.

Delivered Idea: Sort List Views by Multiple Columns (Generally Available)

To see your data in a more intuitive way and to make your list views more actionable, you can now sort list views on object home pages by up to five 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. Sorting by multiple columns affects only your user preferences, and you can't save your multi-column sorting configuration as a default. We delivered this feature thanks to your ideas on IdeaExchange.

Delivered Idea: Organize Your Data with Multi-Column Sorting for Related Lists

To organize and understand your data better, sort related lists by up to five columns. Quickly identify patterns and trends so that you can make informed decisions. Previously, you could sort a related list by only a single column. We delivered this feature thanks to your ideas on IdeaExchange.

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.

[Simplify Related List Component Configuration]

When you configure a Dynamic Related List–Single component or a Related List–Single component, you now see the API names of the available related lists. Previously, you saw only the names of the related lists, which was confusing if multiple objects had the same name or similar names. Every API name is unique, so the additional information makes it easier to identify and select the related list that you want.

[Edit List Filters Option Is No Longer Available]

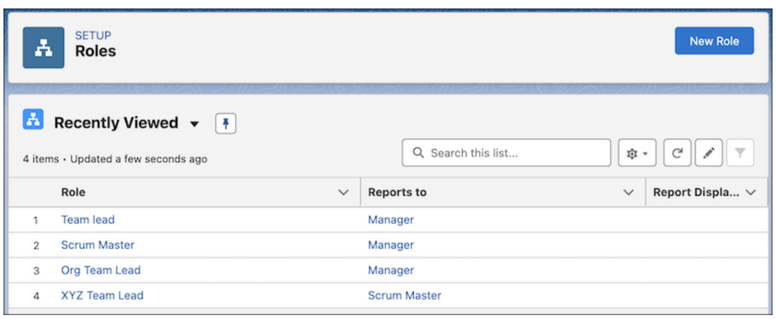
The Edit List Filters option in List Views Control is removed from all list views. To edit your list view filters, click the Filters icon. Previously, the Edit List Filters option was unavailable only for list views rendered with Lightning Web Components (LWC).

Get Improved Performance with the Enhanced Role List View

With a new user experience, you can view, sort, and filter user roles in a list format and edit roles inline. This enhancement makes it easier to manage role-based access control so that users see the data that they need.

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 `Users`, and then select **User Management Settings**. Enable **Enhanced Role List View**. To view the enhanced page, go to the Roles Setup page.



SEE ALSO:

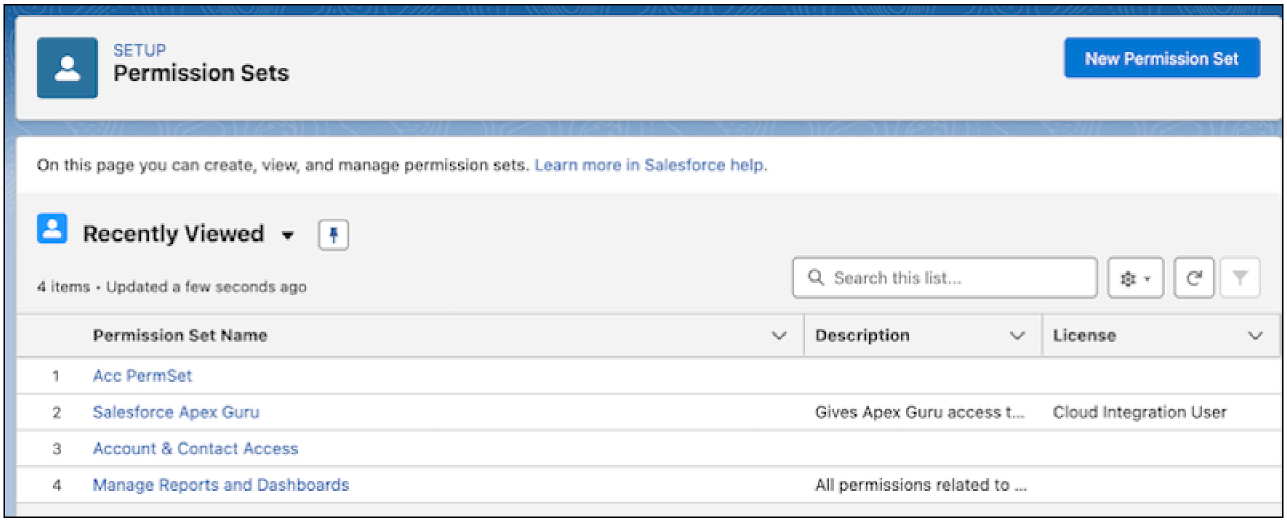
Salesforce Help: Manage Roles in the Enhanced Role List View (can be outdated or unavailable during release preview)

Manage Permissions Sets with the Enhanced List View

This revamped user experience provides streamlined navigation, improved filtering options, search capabilities, and a more intuitive layout. This enhancement makes it easier to manage and navigate through permission sets. Key improvements include advanced filtering options, a more organized layout, and quicker access to critical actions.

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 `Users`, and then select **User Management Settings**. Enable **Enhanced Permission Set List View**. To view the enhanced page, go to the Permissions Sets Setup page.



SEE ALSO:

Salesforce Help: Manage Permission Sets in the Enhanced Permission Set List View (can be outdated or unavailable during release preview)

View and Filter on More Fields in the Enhanced User List View

You can now work with user list views more effectively with new added fields. Add the Delegated Approver, End of Day, Is Partner, Start of Day, User Verified Email, User Verified Mobile Number and Password Expiration Date fields to your user list views. Then sort, filter, search, and edit your user records using these fields

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 `Users`, and then select **User Management Settings**. Enable **Enhanced User List View**. To view the enhanced page, from Setup, go to the Users page. To change and reorder the columns displayed in a list view, select **Select Fields to Display**.

SEE ALSO:

Salesforce Help: Manage Users in the Enhanced User List View (can be outdated or unavailable during release preview)

Get Better Performance for List Views

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. List views for custom and standard objects rendered with LWC have some differences, but overall, how your users work in list views hasn't changed. Previously, list views rendered with LWC only in a sandbox.

Where: This change applies to Lightning Experience in all editions, except Starter and Pro Suite.

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

SEE ALSO:

Knowledge Article: List Views Rendered with Lightning Web Components (LWC)

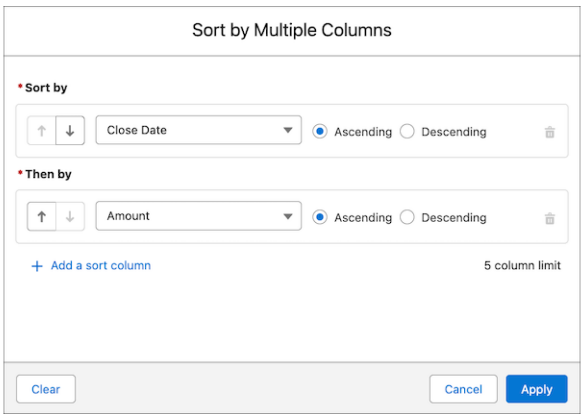
Sort List Views by Multiple Columns (Generally Available)

To see your data in a more intuitive way and to make your list views more actionable, you can now sort list views on object home pages by up to five 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. Sorting by multiple columns affects only your user preferences, and you can't save your multi-column sorting configuration as a default. We delivered this feature thanks to your ideas on IdeaExchange.

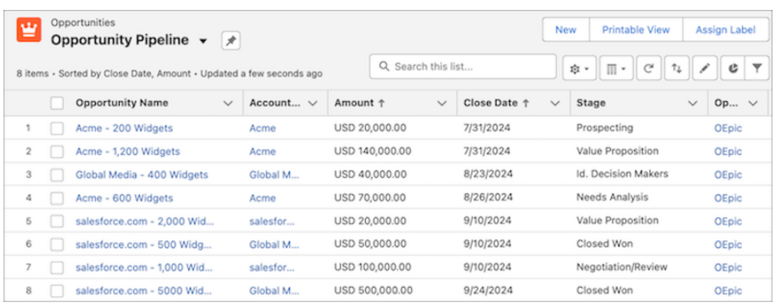
Where: This change applies to Lightning Experience in all editions, except Starter and Pro Suite.

When: Sort list views by multiple columns is generally available on a rolling basis starting in Spring '25.

How: To sort a list view by multiple columns, from a list view, click , and then select the columns to include in the sort. Click **Apply**.



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**.

If you don't see the option to sort list views by multiple columns yet, you can still enable the beta version of the feature. 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 the beta feature, list views for all supported custom and standard objects are rendered with Lightning Web Components (LWC) instead of with Aura.

SEE ALSO:

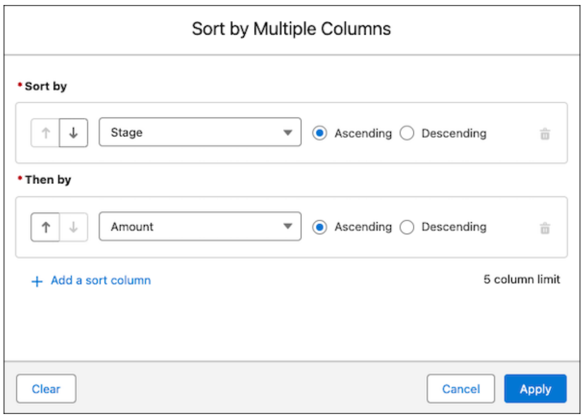
Salesforce Help: Sort List Views (can be outdated or unavailable during release preview)

Organize Your Data with Multi-Column Sorting for Related Lists

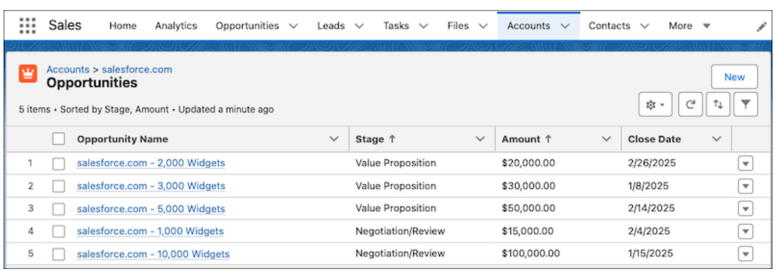
To organize and understand your data better, sort related lists by up to five columns. Quickly identify patterns and trends so that you can make informed decisions. Previously, you could sort a related list by only a single column. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: To sort by multiple columns, from a related list, click **View All**, and then click ↑↓. Select the columns to include in the sort, and then click **Apply**.



For example, let's say that you have an Opportunities related list on the Account page. Sort the Opportunities related list by Stage 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**.

Sort by multiple columns affects only your user preferences. You can't save your multi-column sorting configuration as a default.

SEE ALSO:

Salesforce Help: Work with Related Lists in Lightning Experience (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, also grant a user the View Roles and Role Hierarchy permission so that they can make list views visible to roles. 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.

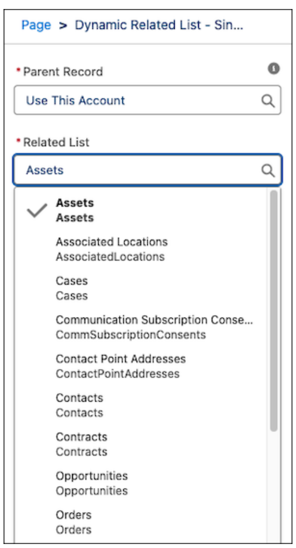
To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Enforce View Roles and Role Hierarchy Permission When Editing Public List View Visibility, follow the testing and activation steps.

Simplify Related List Component Configuration

When you configure a Dynamic Related List–Single component or a Related List–Single component, you now see the API names of the available related lists. Previously, you saw only the names of the related lists, which was confusing if multiple objects had the same name or similar names. Every API name is unique, so the additional information makes it easier to identify and select the related list that you want.

Where: This change applies to Lightning Experience in all editions

How: In Lightning App Builder, add a Dynamic Related List–Single component or a Related List–Single component to a page. Click the new component, and then click the Related List dropdown menu. Under each available related list, the API name is listed.



Edit List Filters Option Is No Longer Available

The Edit List Filters option in List Views Control is removed from all list views. To edit your list view filters, click the Filters icon. Previously, the Edit List Filters option was unavailable only for list views rendered with Lightning Web Components (LWC).

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

Permissions

Updates to the permission set summary view simplify user access management. Assign new View All Fields object-level permissions to users who require widespread access. The View All and Modify All object permissions have new names.

IN THIS SECTION:

[Delivered Idea: Manage Included Permission Sets in Permission Set Groups via Summaries]

Update access more efficiently by specifying which permission set groups include a permission set directly from the permission set's summary. Previously, to manage included permission sets, you were required to navigate to each permission set group's page. We delivered this feature thanks to your ideas on IdeaExchange.

[Delivered Idea: Allow Users to View All Fields for a Specified Object]

It's easier to manage permissions for users who require broad data access. Assign the object-level View All Fields permission, which grants assignees access to all fields and field data for a specific object. This permission is available for all standard and custom objects that support field permissions. Users are automatically granted access for any new fields created for the object. We delivered this feature thanks to your ideas on IdeaExchange.

[The View All and Modify All Object Permissions Have New Names]

To better represent the access granted by these object permissions, the View All object permission is now named View All Records, and the Modify All object permission is now named Modify All Records.

[Remove User and Custom Permissions in Permission Set Summaries]

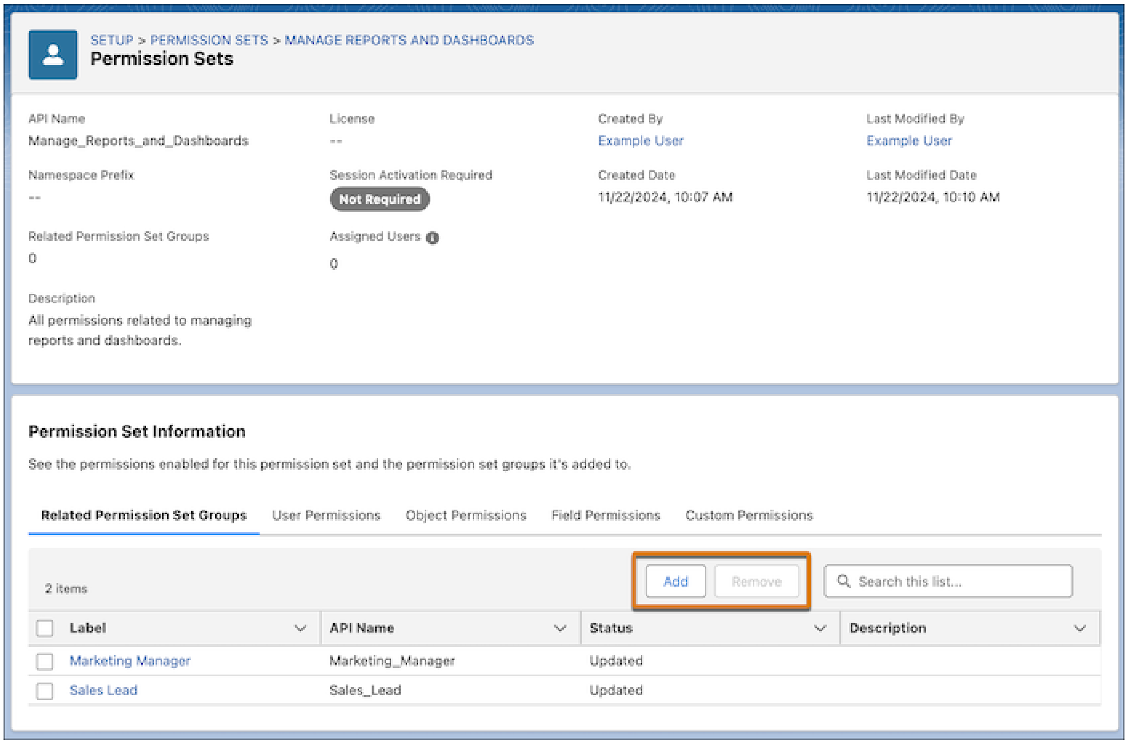
Save time and clicks by removing user and custom permissions from a permission set's summary view. Previously, you only saw which permissions were enabled and weren't able to make any edits. This change introduces editability to the summary view, with additional enhancements planned for future releases.

Manage Included Permission Sets in Permission Set Groups via Summaries

Update access more efficiently by specifying which permission set groups include a permission set directly from the permission set's summary. Previously, to manage included permission sets, you were required to navigate to each permission set group's page. 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 Contact Manager, Group, Essentials, Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions.

How: From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**. Select a permission set, and then click **View Summary**. In the Related Permission Set Groups tab, click **Add** or **Remove**.



SEE ALSO:

IdeaExchange: Add Permission Set to Permission Set Group from Permission Set

IdeaExchange: Add Permission Set Groups to Manage Assignments

Salesforce Help: View Permissions Enabled in a Permission Set or Permission Set Group (can be outdated or unavailable during release preview)

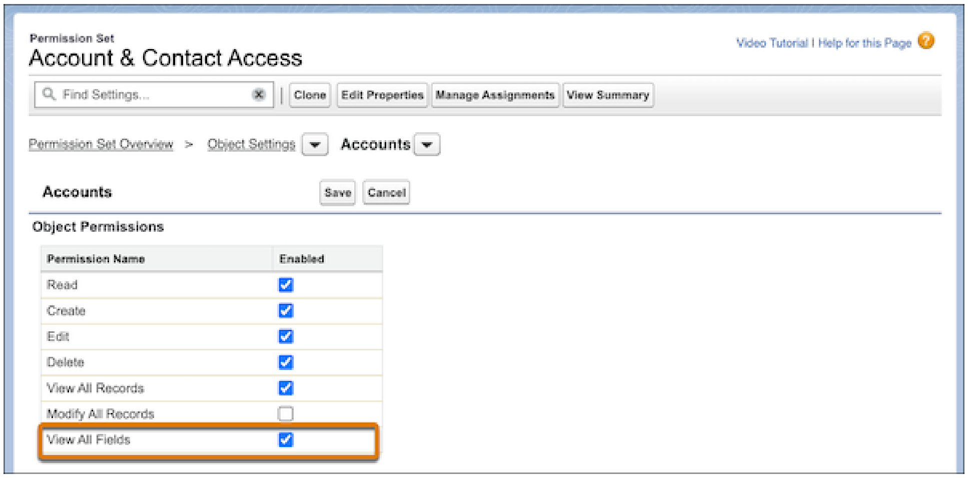
Salesforce Help: Add Permission Sets to a Permission Set Group (can be outdated or unavailable during release preview)

Allow Users to View All Fields for a Specified Object

It's easier to manage permissions for users who require broad data access. Assign the object-level View All Fields permission, which grants assignees access to all fields and field data for a specific object. This permission is available for all standard and custom objects that support field permissions. Users are automatically granted access for any new fields created for the object. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: We recommend that you manage permissions in permission sets, not profiles. In Setup, select a permission set. On the Object Settings page for a specific object, enable the View All Fields permission, and then save.



SEE ALSO:

IdeaExchange: Permission Sets - Read/Edit All Fields Permission

Salesforce Help: "View All" and "Modify All" Permissions Overview (can be outdated or unavailable during release preview)

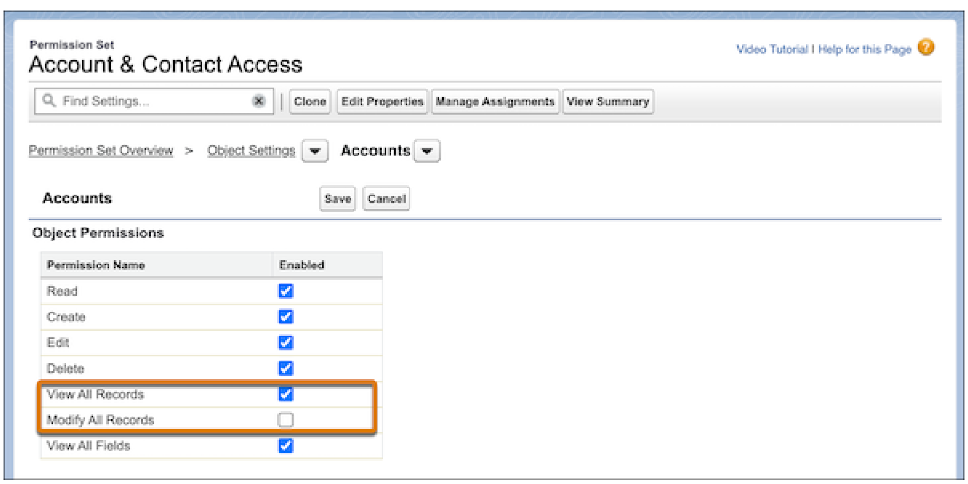
Salesforce Help: Enable Object Permissions in Permission Sets (can be outdated or unavailable during release preview)

The View All and Modify All Object Permissions Have New Names

To better represent the access granted by these object permissions, the View All object permission is now named View All Records, and the Modify All object permission is now named Modify All Records.

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

How: You see these updated permission names in your profiles and permission sets automatically. No action is required.



SEE ALSO:

Salesforce Help: Object Permissions (can be outdated or unavailable during release preview)

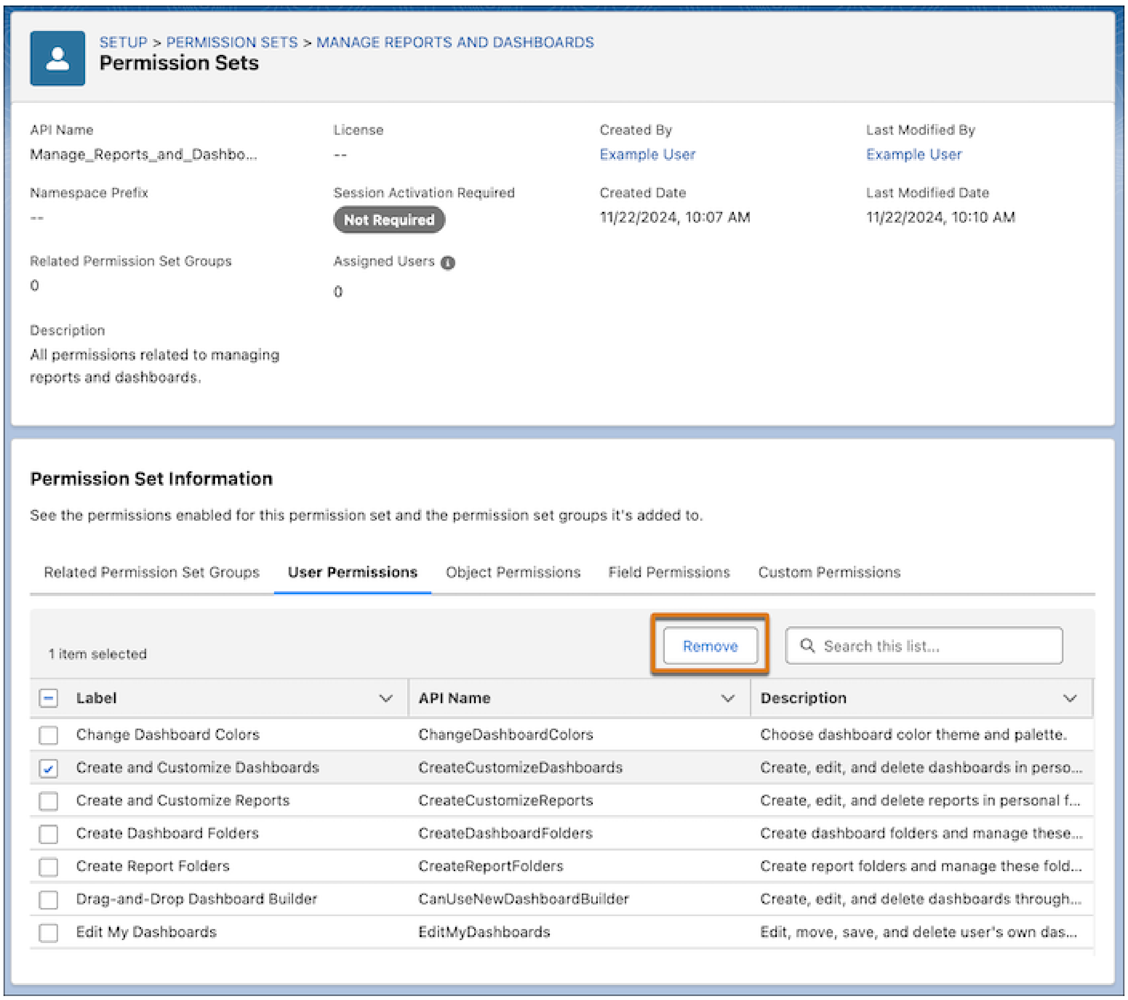
Salesforce Help: "View All" and "Modify All" Permissions Overview (can be outdated or unavailable during release preview)

Remove User and Custom Permissions in Permission Set Summaries

Save time and clicks by removing user and custom permissions from a permission set's summary view. Previously, you only saw which permissions were enabled and weren't able to make any edits. This change introduces editability to the summary view, with additional enhancements planned for future releases.

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

How: In Setup, select a permission set, and then click **View Summary**. In the User Permissions or Custom Permissions tabs, select permissions, and then click **Remove**.



For object and field permissions, you continue to make edits on the permission set's Object Settings page. To add any permission types to a permission set, you still make edits from the relevant settings pages.

SEE ALSO:

Salesforce Help: View Permissions Enabled in a Permission Set or Permission Set Group (can be outdated or unavailable during release preview)

Salesforce Help: Enable User Permissions in Permission Sets (can be outdated or unavailable during release preview)

Salesforce Help: Enable Custom Permissions in Permission Sets (can be outdated or unavailable during release preview)

Fields

The Salesforce Classic datepicker for the Date and DateTime fields now supports keyboard shortcuts. Custom fields limit for activities is increased from 100 to 300 for Salesforce orgs with fewer than 400 million activities.

IN THIS SECTION:

Use Keyboard Shortcuts to Select Calendar Dates in Salesforce Classic

The datepicker in Salesforce Classic has improved accessibility options, including keyboard navigation. You can use the datepicker keyboard shortcuts on pages opened in Salesforce Classic and on Visualforce pages where `<apex:inputField>` is associated with a `Date` or `DateTime` field.

Capture More Data with the Increased Limit of Custom Fields for Activities

If your Salesforce org has fewer than 400 million activities, you can now capture more information about your sales process than ever before with 300 custom fields. The previous limit was 100. Track more data and create more powerful reports, with no complex workarounds required. You can also implement more features and integrations.

Troubleshoot a Deployment That Contains a Custom Field Type Conversion

You can get an error when you use the metadata `deploy()` method or run a package upgrade and either of these deployments contains the conversion of a custom field from one data type to another. The error occurs if a deployment changes the data type of one or more custom fields and the objects that contain the affected custom fields contain a large amount of data. The limit is 85 million custom field type conversions.

Use Keyboard Shortcuts to Select Calendar Dates in Salesforce Classic

The datepicker in Salesforce Classic has improved accessibility options, including keyboard navigation. You can use the datepicker keyboard shortcuts on pages opened in Salesforce Classic and on Visualforce pages where `<apex:inputField>` is associated with a `Date` or `DateTime` field.

Where: This change applies to Salesforce Classic (not available in all orgs) in all editions.

How: Use these keyboard shortcuts.

Action	Keyboard Shortcut
Open the datepicker.	Tab to the date input field. Tab again to focus the datepicker.
Cycle focus through the calendar, the Today button, the Previous Month button (<), the Month dropdown, the Next Month button (>), and the Year dropdown.	Tab
Select a day.	Tab to the calendar. Then use the arrow keys to navigate between days. To select the day in focus, press Enter, and then close the datepicker.
Select a month.	Tab to the Month dropdown. To navigate between months, use the Up and Down arrow keys. To select the month, press Enter. Alternatively, tab to the Previous Month button (<) or the Next Month button (>) button. To cycle through months, press Enter. To select the month, tab to another part of the datepicker.

Action	Keyboard Shortcut
Select a year.	Tab to the Year dropdown. To navigate between years, use the Up and Down arrow keys. To select a year, press Enter.
Select today's date.	Tab to the Today button, and then press Enter.
Close the datepicker without selecting a date.	Esc
Close the datepicker after selecting a date.	Enter

SEE ALSO:

Salesforce Help: Keyboard Shortcuts (can be outdated or unavailable during release preview)

Capture More Data with the Increased Limit of Custom Fields for Activities

If your Salesforce org has fewer than 400 million activities, you can now capture more information about your sales process than ever before with 300 custom fields. The previous limit was 100. Track more data and create more powerful reports, with no complex workarounds required. You can also implement more features and integrations.

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

SEE ALSO:

Salesforce Help: Custom Fields Allowed Per Object (can be outdated or unavailable during release preview)

Troubleshoot a Deployment That Contains a Custom Field Type Conversion

You can get an error when you use the metadata `deploy()` method or run a package upgrade and either of these deployments contains the conversion of a custom field from one data type to another. The error occurs if a deployment changes the data type of one or more custom fields and the objects that contain the affected custom fields contain a large amount of data. The limit is 85 million custom field type conversions.

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: In a deployment, if you're converting a custom field from text to picklist, the deployment could fail with this error.

`The deployment failed because we couldn't change the data type of one or more custom fields.` To resolve this error, see this knowledge article.

SEE ALSO:

Salesforce Help: Considerations When Changing a Custom Field Type (can be outdated or unavailable during release preview)

Salesforce Help: Related Knowledge Article (can be outdated or unavailable during release preview)

Globalization

ICU locale formats keep your data consistent across regions. Deliver a more tailored global experience with expanded English language variations as platform-only languages.

IN THIS SECTION:

Enable ICU Locale Formats (Release Update)

With this update, the International Components for Unicode (ICU) locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. Locales control the format 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. This update was first made available in Winter '20 and is enforced in Spring '25.

Present Your Custom Functionality in New English Language Variations

To help your global users use Salesforce in their language, use German (Liechtenstein), Spanish (Andorra), Svenska (Finland), and the 30 new English language variations to localize your apps, custom labels, custom objects, and field names. These platform-only languages are available everywhere that you can select a language in the application. However, all standard Salesforce labels default to English. Use Translation Workbench to customize the translations for these languages.

Review Updated Label Translations

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Chinese (Simplified), Chinese (Traditional), Czech, Danish, Finnish, French, German, Greek, Hungarian, Indonesian, Japanese, Korean, Polish, Portuguese (Brazil), Russian, Slovenian, Spanish, Spanish (Mexico), Swedish, Thai, and Ukrainian.

Enable ICU Locale Formats (Release Update)

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Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions, except Database.com.

When: Salesforce enforces this update in Spring '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.

Salesforce orgs created in Winter '20 or later have ICU locale formats enabled by default. You can defer the enforcement until Summer '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 Summer '25, in Setup, in the Quick Find box, enter `User Interface`, and select **User Interface**. Then deselect **Enable ICU locale formats as part of the scheduled rollout** and save your changes. This option is visible only if your org uses the JDK locale formats.

SEE ALSO:

Salesforce Help: Enable the ICU Locale Formats

Salesforce Knowledge Article: JDK Locale Format Retirement and the Enable ICU Locale Formats Release Update

Present Your Custom Functionality in New English Language Variations

To help your global users use Salesforce in their language, use German (Liechtenstein), Spanish (Andorra), Svenska (Finland), and the 30 new English language variations to localize your apps, custom labels, custom objects, and field names. These platform-only languages are available everywhere that you can select a language in the application. However, all standard Salesforce labels default to English. Use Translation Workbench to customize the translations for these languages.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions, except Database.com.

SEE ALSO:

Knowledge Article: Salesforce Locale Name Changes in Spring '25

Salesforce Help: Supported Languages

Salesforce Help: Manage Your Translations

Review Updated Label Translations

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Chinese (Simplified), Chinese (Traditional), Czech, Danish, Finnish, French, German, Greek, Hungarian, Indonesian, Japanese, Korean, Polish, Portuguese (Brazil), Russian, Slovenian, Spanish, Spanish (Mexico), Swedish, Thai, and Ukrainian.

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

How: To review the changes, see Review Spring '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.

Salesforce Connect

Increased limits for some Salesforce Connect adapters help you access external data with confidence. The Salesforce Connect SQL adapter now supports Snowflake views.

IN THIS SECTION:

Access Data Without Limits with Salesforce Connect

Access data outside of your Salesforce org without worrying about how many new rows your adapter creates or retrieves each hour. Limits for new rows are removed for the OData 4.01 adapter, GraphQL adapter, and the SQL adapters for Amazon Athena and Snowflake. Previously, these Salesforce Connect adapters could retrieve or create up to 100,000 new rows per hour. This feature doesn't impact callout limits.

See Snowflake Views with the Salesforce Connect SQL Adapter

Now you can directly access Snowflake query results as views in your Salesforce org with the Salesforce Connect SQL adapter. Previously, to access Snowflake views, you first created a dynamic table in Snowflake using the view.

Access Data Without Limits with Salesforce Connect

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

When: This functionality is available to orgs hosted on Hyperforce on a rolling basis starting in Spring '25.

SEE ALSO:

Salesforce Help: General Limits for Salesforce Connect (can be outdated or unavailable during release preview)

See Snowflake Views with the Salesforce Connect SQL Adapter

Now you can directly access Snowflake query results as views in your Salesforce org with the Salesforce Connect SQL adapter. Previously, to access Snowflake views, you first created a dynamic table in Snowflake using the view.

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: Validate and Sync External Data Source Configured for Snowflake (can be outdated or unavailable during release preview)

Sharing

In the public group access summary, improvements make it easier to see related sharing rules, list views, and queues. Get notified when your sharing rule exposes data to external users. Review the release update on securing roles in sandboxes.

IN THIS SECTION:

Manage Public Groups More Easily with Improvements to the Access Summary

For a specific public group, view the sharing rules and list views for all objects where the public group is used to grant access. Previously, you were required to select a specific object. You can also view all the queues that are part of a specific public group.

Get Notified When Your Sharing Rule Targets External Users

To better protect your data, you now get an alert when your sharing rule opens up record access to external users. This pop-up message appears when you save a sharing rule after selecting the Portal Roles, Portal Roles and Subordinates, or Roles, Internal and Portal Subordinates sharing rule category.

Enable Secure Roles Behavior and Update Sharing Group References in Sandboxes (Release Update)

To prevent unintended access for external site users if you enable digital experiences, Salesforce is securing access to records in sandbox orgs. The default sharing group available for roles and subordinates before you enable digital experiences is now displayed as Roles and Internal Subordinates instead of Roles and Subordinates. To prepare for this change, update code and customizations that reference the old group name. Although Salesforce dynamically converts outdated references during a transition period, you must update all code and customizations to prevent errors.

Manage Public Groups More Easily with Improvements to the Access Summary

For a specific public group, view the sharing rules and list views for all objects where the public group is used to grant access. Previously, you were required to select a specific object. You can also view all the queues that are part of a specific public group.

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 `Public Groups`, and then select **Public Groups**. Select a public group, and then click **View Summary**. Click the **Object Name** dropdown and then select **All Objects** in the owner-based sharing rules, criteria-based sharing rules, and list views tabs.

SEE ALSO:

Salesforce Help: View the Public Group Access Summary (can be outdated or unavailable during release preview)

Get Notified When Your Sharing Rule Targets External Users

To better protect your data, you now get an alert when your sharing rule opens up record access to external users. This pop-up message appears when you save a sharing rule after selecting the Portal Roles, Portal Roles and Subordinates, or Roles, Internal and Portal Subordinates sharing rule category.

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 `Sharing Settings`, then select **Sharing Settings**. Create a sharing rule and specify the users who get access to the data. For Share with, select the **Portal Roles**, **Portal Roles and Subordinates**, and **Roles, Internal and Portal Subordinates** sharing rule category. After you click **Save**, a pop-up message informs you that your data will be shared to external users. To continue, click **OK**.

SEE ALSO:

Salesforce Help: Sharing Rule Considerations (can be outdated or unavailable during release preview)

Enable Secure Roles Behavior and Update Sharing Group References in Sandboxes (Release Update)

To prevent unintended access for external site users if you enable digital experiences, Salesforce is securing access to records in sandbox orgs. The default sharing group available for roles and subordinates before you enable digital experiences is now displayed as Roles and Internal Subordinates instead of Roles and Subordinates. To prepare for this change, update code and customizations that reference the old group name. Although Salesforce dynamically converts outdated references during a transition period, you must update all code and customizations to prevent errors.

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

This release update is intended for sandbox orgs. Salesforce plans to provide a separate release update for these changes for production orgs in Summer '25 and enforce it in Winter '26.

Why: Previously, when you enabled digital experiences, records shared with Roles and Subordinates were made available automatically to external site users. To secure access so that records were only available to internal users, it was necessary to use the Convert External User Access wizard and make manual updates. With this update, access to those records is limited to internal users by default.

How: Use this release update to test these changes in a sandbox and identify necessary fixes for when this change is later enabled in production via a separate release update.

Take caution if you enable this release update by using the test run in a production org. If your code and customizations still reference the Roles and Subordinates value, your users can experience issues.

SEE ALSO:

Release Updates

Knowledge Article: Prepare for Changes to "Role and Subordinates" Group (roleAndSubordinates)

General Setup

Make the power of AI work for you by adding agent quick actions to your record pages. Get a better snapshot of your custom metadata type usage with enhancements to the System Overview page.

IN THIS SECTION:

Add AI-Powered Quick Actions to Record Pages

Harness the power of AI with agent quick actions. Create the actions in Setup and add them to record pages, helping users to quickly see how AI can assist in their daily tasks.

Better Understand Your Custom Metadata Type Usage

The System Overview page now shows you custom metadata type usage in two categories instead of one. The Your Custom Metadata Types category shows the number of custom metadata types that originate from anywhere other than a certified managed package. The Total Custom Metadata Types category shows the total number of custom metadata types, including those that were installed from a certified managed package.

Add AI-Powered Quick Actions to Record Pages

Harness the power of AI with agent quick actions. Create the actions in Setup and add them to record pages, helping users to quickly see how AI can assist in their daily tasks.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

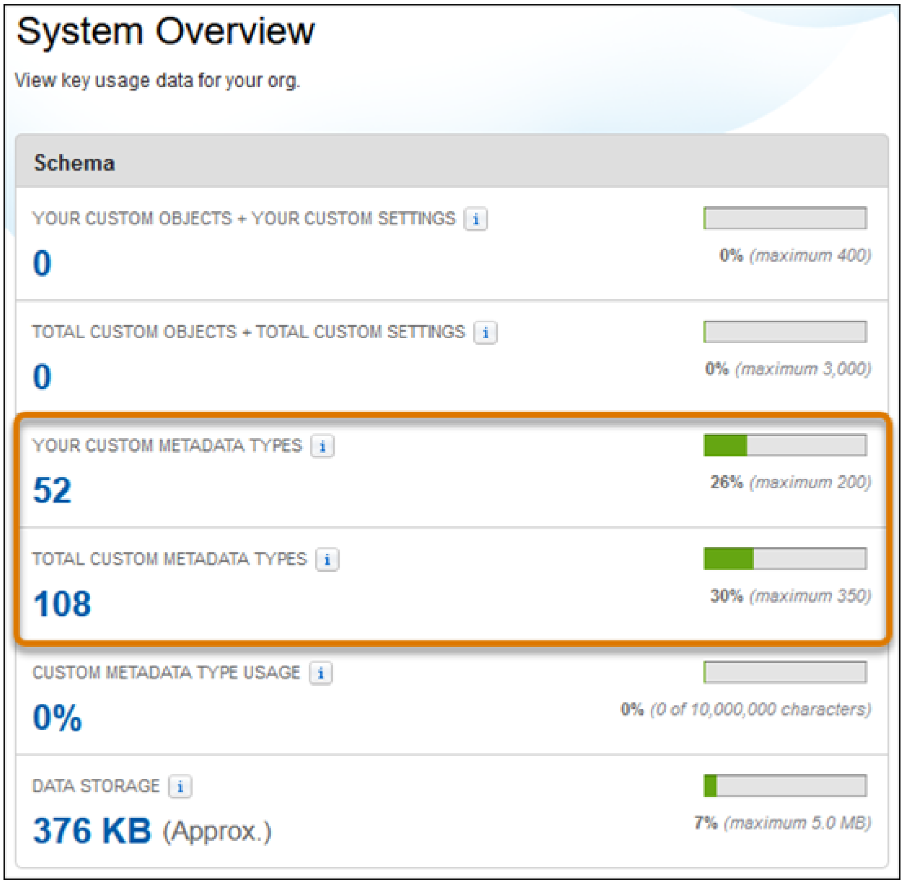
Add AI-Powered Quick Actions to Record Pages

Better Understand Your Custom Metadata Type Usage

The System Overview page now shows you custom metadata type usage in two categories instead of one. The Your Custom Metadata Types category shows the number of custom metadata types that originate from anywhere other than a certified managed package. The Total Custom Metadata Types category shows the total number of custom metadata types, including those that were installed from a certified managed package.

Where: This change applies to Lightning Experience, Salesforce Classic (not available in all orgs), and all versions of the mobile app in all editions, except Personal Edition.

How: From Setup, in the Quick Find box, enter `System Overview`, and then select **System Overview**.



SEE ALSO:

Salesforce Help: System Overview: Schema (can be outdated or unavailable during release preview)

Salesforce Help: Custom Metadata Allocations and Usage Calculations (can be outdated or unavailable during release preview)

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 Spring '25 release are generally listed under February.

Cross Cloud Updates for Data Cloud
Our latest round of cross cloud features for Data Cloud.

Connect Data
Bring data into Data Cloud by either ingesting data or connecting metadata using data federation.

Act on Data

Share your data with external data sources, create data actions, build flows, or enrich your Salesforce org with Data Cloud data.

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 Spring '25 release are generally listed under February.

KEY JOB AREA	Release Note
February '25	
Cross Cloud	Cross Cloud Updates for Data Cloud
Connect Data	Allow Access to All Salesforce CRM Fields with One Permission
Act on Data	Create Data Cloud Enrichments with Companion Org Data
Act on Data	Copy Field Enrichments with Multiple CRM Orgs Sync More Quickly
Act on Data	Display Insights from External Data in Your CRM Enrichments
Act on Data	Enhance Vehicle Records with Related List Enrichments
Act on Data	Export Enrichments to a Data Cloud Sandbox

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: Unify Your Data Across Dashboards
  - Data Cloud Reports and Dashboards
- Data Cloud and Loyalty Management: Gather Richer Customer Insights with the Enhanced Data Kit
- Data Cloud and Global Promotions Management: Automate Promotion Data Sync with Prebuilt Data Streams
- Data Cloud and Communications Cloud:
  - Use Data Cloud to Proactively Track Service Level Objectives
  - Analyze Service Level Objectives and Identify Opportunities for Upsell
- Data Cloud and Marketing Cloud (Growth and Advanced):
  - Get Started Faster with Setup Enhancements
  - Reach the Right Customers with Enhanced Audience Tools
- Data Cloud and Referral Marketing: Sync Referral Marketing Data with Prebuilt Data Streams
- Data Cloud and Education Cloud:

  - Gain Holistic Student Insights and Visualize Learner Progress
  - New and Changed Data Model Objects in Education Cloud

- Platform Encryption for Data Cloud: Encrypt Data Cloud Search Indexes

Connect Data

Bring data into Data Cloud by either ingesting data or connecting metadata using data federation.

IN THIS SECTION:

Allow Access to All Salesforce CRM Fields with One Permission

Set up access to Data Cloud fields faster by enabling the View All Fields (Global) user permission. This permission allows access to view all fields and field data, including for fields created later on. Previously, to grant this widespread access, you enabled field permissions for each object individually. You can assign the View All Fields (Global) user permission only to the Platform Integration User for access to fields in Data Cloud. This permission is displayed in permission sets without a related license, but you can't assign it to users other than the Platform Integration User.

Allow Access to All Salesforce CRM Fields with One Permission

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

When: This change is being rolled out in February 2025.

How: To enable the View All Fields (Global) user permission, go to the Permission Sets Setup page. Select the **Data Cloud Salesforce Connector** permission set, and then enable this permission on the System Permissions page.

SEE ALSO:

Salesforce Help: Object and Field Permissions for Salesforce CRM in Data Cloud (can be outdated or unavailable during release preview)

Act on Data

Share your data with external data sources, create data actions, build flows, or enrich your Salesforce org with Data Cloud data.

IN THIS SECTION:

Create Data Cloud Enrichments with Companion Org Data

Use Data Cloud One to enrich your Sales, Service, and Commerce clouds and other orgs with data from anywhere in your Data Cloud ecosystem. When creating your companion org, share the data spaces that you want the enrichments to query data from. Then, create your copy field or related list enrichments using data from any companion org.

Copy Field Enrichments with Multiple CRM Orgs Sync More Quickly

In a Data Cloud ecosystem with multiple CRM orgs, copy field enrichments sync more quickly and exclude fewer records. Because copy field enrichments can now use a CRM org's key qualifier, the enrichment query selects only the records that are relevant to the enrichment's org.

Display Insights from External Data in Your CRM Enrichments
Enrich your CRM org with insights created from Snowflake, Amazon Redshift, and other bring-your-own-lake data streams. Create an accelerated data stream from a supported data source. An accelerated data stream temporarily stores the external data as a data lake object, allowing enrichments to query the data. Then map the data stream to a data model object and create your enrichment.

Enhance Vehicle Records with Related List Enrichments
In Automotive Cloud, create related list enrichments on vehicles to display information such as location history, engine performance, or drivers behaviors. Use this information to provide individualized service, such as vehicle maintenance reminders, or to price a driver's insurance risk. Identify related records with the vehicle identification number or other unique ID, rather than a unified individual.

Export Enrichments to a Data Cloud Sandbox
Build, test, and collaborate on your enrichments by copying them to a Data Cloud sandbox. You can then re-create the enrichment in your CRM org. You can't deploy enrichments from a sandbox to a CRM org.

Create Data Cloud Enrichments with Companion Org Data

Use Data Cloud One to enrich your Sales, Service, and Commerce clouds and other orgs with data from anywhere in your Data Cloud ecosystem. When creating your companion org, share the data spaces that you want the enrichments to query data from. Then, create your copy field or related list enrichments using data from any companion org.

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

When: This change is being rolled out in February 2025.

Development

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

IN THIS SECTION:

Lightning Components

LWC API version 63.0 improves type validation for wire adapters. More base Lightning components have been adapted to support native shadow DOM. iframe elements must follow new Lightning Web Security restrictions. Local Dev is generally available for Lightning apps.

Lightning Design System

The Salesforce Lightning Design System (SLDS) and the SLDS 2 (Beta) include the resources to create user interfaces consistent with Salesforce Lightning principles, design language, and best practices.

Apex

Compressing and extracting Zip files and evaluating dynamic formulas in Apex are now generally available. The concurrent long-running Apex requests limit now depends on the type and number of org licenses. Pause and resume Apex scheduled jobs by using new methods in the `System` class.

API

Get standard platform event for Bulk API V2 query jobs. Update instanced URLs in API calls to prevent service interruptions.

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.

Salesforce Functions

Salesforce Functions is no longer available for purchase or renewal. Learn about the retirement plan for Salesforce Functions.

AppExchange Partners

This release introduces improved guidance for navigating security reviews and publishing listings.

Change Data Capture

Receive change event notifications for more Salesforce objects.

Platform Events

View more information about event allocations in Setup. Prepare for the retirement of the legacy standard-volume platform events.

Event Bus

Package and distribute event relays.

[New and Changed Items for Developers]

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

Lightning Components

LWC API version 63.0 improves type validation for wire adapters. More base Lightning components have been adapted to support native shadow DOM. iframe elements must follow new Lightning Web Security restrictions. Local Dev is generally available for Lightning apps.

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 63.0

Update the API version for your components to use new features and improvements. Versioning your Lightning web components ensures that your existing components aren't affected when Salesforce ships new features, bug fixes, and performance improvements that change existing behavior. Versioning also helps Salesforce deprecate legacy features.

Custom Components Must Specify an API Version

The `apiVersion` key is a required element for all custom components. Custom components that were previously saved without an `apiVersion` key in the component `.js-meta.xml` configuration file have an `apiVersion` key added to the configuration file automatically when the component is retrieved from Salesforce.

Internal DOM Structure Is Changing for Base Lightning Components

To enhance performance and comply with web components standards, Salesforce is preparing the base Lightning components to adopt native shadow DOM. These updates change the internal DOM structure. Ensure that your tests don't rely on the previous internal structure of these components.

Wire Adapters Have Improved Type Checking

In LWC API version 63.0 and later, TypeScript users get better type checking of `@wire` configuration and property values. Type checking also resolves reactive props to the type used by the component. For example, a string starting with `$` like `$reactiveProp.`

Update JavaScript Selectors to Remove Extra Whitespace

Revise your JavaScript selectors to ignore whitespace (spaces, tabs, and so on). This change removes inconsistencies in the rendering of extra whitespace.

Lightning Web Security Applies Stricter Restrictions on iframes

Previously, LWS allowed access to content in iframe elements that have the same origin as the parent page. Now, all iframes that have an explicit `src` attribute are subject to cross-origin restrictions regardless of whether their source is same-origin or cross-origin.

Find Lightning Components Security Documentation in One Place

We moved the documentation about building secure Aura components and Lightning web components (LWC) to the new *Security for Lightning Components* developer guide. Previously, documentation for Lightning Web Security (LWS) and Lightning Locker was divided between the *Lightning Aura Components Developer Guide* and the *LWC Developer Guide*, even though these security architectures apply to both component frameworks. With this change, all documentation for Lightning components security is available in one place, making it easier to find the information you need. Requests to the old documentation redirect to the equivalent page in the new guide.

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 Faster in a Real-Time Preview of Your Lightning App (Generally Available)

Local Dev is now generally available for Lightning apps. We made some changes since the beta release. By using Local Dev, you can develop your Lightning web components in a real-time preview of your Lightning app without deploying code or manually refreshing your browser. Local Dev is in beta for Lightning Web Runtime sites.

Base Lightning Components Support for SLDS 2 (Beta)

The base Lightning components support Salesforce Lightning Design System 2 (Beta), which enables advanced theming and branding capabilities. To achieve these advanced capabilities, SLDS 2 (Beta) doesn't yet support some customization features of the previous-generation SLDS architecture, such as component-specific styling hooks.

Resolve Errors Related to Accessing Referenced Lightning Components

Salesforce performs strict access checks when Aura components and Lightning web components (LWC) import or reference other components or modules. If you receive a `No {COMPONENT or MODULE} named {component or module name} found` error, check your imports before deploying to an org. If you're an ISV partner, confirm that the Lightning components and modules in your managed packages are exposed to subscribers.

SEE ALSO:

Lightning Web Components Developer Guide

Lightning Aura Components Developer Guide

Lightning Components: New and Changed Items

LWC API Version 63.0

Update the API version for your components to use new features and improvements. Versioning your Lightning web components ensures that your existing components aren't affected when Salesforce ships new features, bug fixes, and performance improvements that change existing behavior. Versioning also helps Salesforce deprecate legacy features.

Components that specify LWC API version 59.0 and later use the LWC framework version that corresponds to the specified API version for that component. Components that specify LWC API version 58.0 and earlier continue to work based on LWC framework behavior in Summer '23 (API 58.0). You can change a component's API version in its `.js-meta.xml` file.

Important: We recommend that you upgrade your component API version one version at a time. For example, from 58.0, upgrade from 58.0 to 59.0, fix any errors or warnings you encounter, and then repeat until you get to the latest API version.

LWC API version 63.0 has no version-specific changes. That makes this release a good one to update your existing components to the current API version, especially now that component versioning is required.

SEE ALSO:

Custom Components Must Specify an API Version

Lightning Web Components Developer Guide: API Versioning (can be outdated or unavailable during release preview)

Lightning Web Components Developer Guide: XML Configuration File Elements (can be outdated or unavailable during release preview)

Custom Components Must Specify an API Version

The `apiVersion` key is a required element for all custom components. Custom components that were previously saved without an `apiVersion` key in the component `.js-meta.xml` configuration file have an `apiVersion` key added to the configuration file automatically when the component is retrieved from Salesforce.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app.

When: Beginning in this release, you must set the `apiVersion` key for custom components. This change applies to all custom components, not just components using API 63.0 or later.

To assist with this transition, if a component was previously saved without an `apiVersion` key, the required element is added to a component's `.js-meta.xml` configuration file when the component is retrieved from Salesforce. Retrieval is most frequently done using Salesforce development tools, such as the Salesforce CLI or VS Code add-ons, within your development environment. An `apiVersion` key is added only to components that don't already have one.

Why: Component-level API versioning became available for custom Lightning web components in Winter '24. Previously it was possible to save a component to Salesforce without setting an API version. Behind the scenes, the component was compiled with an internal API version. This implicit versioning could cause ambiguity regarding the version of the LWC framework the component was executed with. Adding an `apiVersion` key to the component's configuration file makes it clear which version of the LWC framework a component will use.

How: To view or change the added `apiVersion` key for your component, view it in the `.js-meta.xml` file for the component.

```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
    ...
    <apiVersion>63.0</apiVersion>
    ...
</LightningComponentBundle>
```

This change is a source-level alteration of the component's configuration file. It's saved when you deploy the component back to Salesforce. If you manage your components with external version control, you'll want to preserve the change there, too.

SEE ALSO:

Lightning Web Components Developer Guide: API Versioning (can be outdated or unavailable during release preview)

Lightning Web Components Developer Guide: XML Configuration File Elements (can be outdated or unavailable during release preview)

Knowledge Article: Custom Lightning web components require the apiVersion key

Internal DOM Structure Is Changing for Base Lightning Components

To enhance performance and comply with web components standards, Salesforce is preparing the base Lightning components to adopt native shadow DOM. 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, Experience Builder sites, and all versions of the mobile app in all editions.

Why: Since the Spring '23 release, 79 components have been adapted to prepare for native shadow DOM.

In Spring '25, these additional components have been adapted to prepare for native shadow DOM.

- `lightning-carousel`
- `lightning-carousel-image`
- `lightning-click-to-dial`
- `lightning-datatable`
- `lightning-file-upload`
- `lightning-input-field`
- `lightning-output-field`
- `lightning-record-form`
- `lightning-record-edit-form`

- `lightning-record-view-form`
- `lightning-tree`

These modules have been adapted to prepare for native shadow DOM.

- `lightning/logger`
- `lightning/pageReferenceUtils`
- `lightning/platformShowToastEvent`

Changes to some LWC base components also affect their Aura counterparts. The affected base components are:

- `lightning:carouselImage`
- `lightning:clickToDial`
- `lightning:datatable`
- `lightning:fileUpload`
- `lightning:inputField`
- `lightning:outputField`
- `lightning:recordForm`
- `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 How to Automate Shadow DOM in Selenium WebDriver. For supported CSS styling, see Style Components with Lightning Design System in the *Lightning Web Components Developer Guide*.

Wire Adapters Have Improved Type Checking

In LWC API version 63.0 and later, TypeScript users get better type checking of `@wire` configuration and property values. Type checking also resolves reactive props to the type used by the component. For example, a string starting with `$` like `$reactiveProp`.

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: Given `@wire(adapter, config) prop`, the types of `config` and `prop` must now match the type that's used by `adapter`.

Note: TypeScript's `experimentalDecorators` is no longer supported. You must either specify `"experimentalDecorators": false` or remove the option from your `tsconfig.json` file.

For more information, see GitHub LWC Repo: v8.0.0.

SEE ALSO:

Lightning Web Components Developer Guide: Understand the Wire Service

Lightning Web Components Developer Guide: TypeScript Type Definitions for LWC (Developer Preview)

Update JavaScript Selectors to Remove Extra Whitespace

Revise your JavaScript selectors to ignore whitespace (spaces, tabs, and so on). This change removes inconsistencies in the rendering of extra whitespace.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components in open source.

Why: For example, given `<div class=" slds-var-m-around_medium highlight yellow ">`, the component markup is rendered as `<div class="slds-var-m-around_medium highlight yellow">` without extra whitespace.

Additionally, empty `class` and `style` attributes are no longer rendered. In this example, the component markup shows empty `class` and `style` attributes.

```
<!-- myCmp.html -->
<div class="">Content here</div>
<div style=" ">Content here</div>
```

In LWC API version 63.0 and later, the example results in the removal of the empty `class` and `style` attributes.

```
<!-- DOM Rendering -->
<div>Content here</div>
<div>Content here</div>
```

How: Revise your JavaScript selectors to ignore whitespace.

```
document.querySelector(".slds-var-m-around_medium.highlight.yellow");
```

Queries that include whitespace for an exact string match no longer work.

```
/* Don't do this */
document.querySelector('[class="highlight yellow"]');
```

Lightning Web Security Applies Stricter Restrictions on iframes

Previously, LWS allowed access to content in iframe elements that have the same origin as the parent page. Now, all iframes that have an explicit `src` attribute are subject to cross-origin restrictions regardless of whether their source is same-origin or cross-origin.

Where: This change applies to Lightning Experience and all versions of the mobile app in Enterprise, Performance, Unlimited, and Developer editions if LWS is enabled. The change also applies to LWR, Aura, and Visualforce sites accessed through Lightning Experience if LWS is enabled.

How: For an example of how this new restriction works, consider a Lightning component that loads a static HTML file in an iframe element. If the HTML file contains a script that relies on direct access to the `window.parent` or `window.top` properties, the script fails. The failure occurs because the iframe is subject to cross-origin restrictions, which include blocking access to these properties. Instead, to communicate between the host page and iframe content, use the `window.postMessage()` method from the MessageEvent interface.

SEE ALSO:

Security for Lightning Components: Access to iframe Content in Lightning Web Security (can be outdated or unavailable during release preview)

Find Lightning Components Security Documentation in One Place

We moved the documentation about building secure Aura components and Lightning web components (LWC) to the new *Security for Lightning Components* developer guide. Previously, documentation for Lightning Web Security (LWS) and Lightning Locker was divided between the *Lightning Aura Components Developer Guide* and the *LWC Developer Guide*, even though these security architectures apply to both component frameworks. With this change, all documentation for Lightning components security is available in one place, making it easier to find the information you need. Requests to the old documentation redirect to the equivalent page in the new guide.

How: The new *Security for Lightning Components* developer guide is available at https://developer.salesforce.com/docs/platform/lightning-components-security/guide (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.

- `AbstractRange.prototype.endContainer` getter
- `AbstractRange.prototype.startContainer` getter
- `Document.prototype.requestStorageAccess`
- `Element.prototype.setHTMLUnsafe`
- `HTMLIFrameElement.prototype.sandbox` getter
- `HTMLIFrameElement.prototype.sandbox` setter

These distortions changed.

- `HTMLIFrameElement.prototype.src` setter
- `Window.open`
- `Window: securitypolicyviolation` event

Develop Lightning Web Components Faster in a Real-Time Preview of Your Lightning App (Generally Available)

Local Dev is now generally available for Lightning apps. We made some changes since the beta release. By using Local Dev, you can develop your Lightning web components in a real-time preview of your Lightning app without deploying code or manually refreshing your browser. Local Dev is in beta for Lightning Web Runtime sites.

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

How: To use this feature, first install Salesforce CLI. To turn on Local Dev for your org, from Setup, in the Quick Find box, enter **Local Dev** and then select **Local Dev**. To turn on Local Dev for all org users, select **Enable Local Dev**. Then, to install the Local Dev plug-in, run the CLI command:

```
sf plugins install @salesforce/plugin-lightning-dev
```

SEE ALSO:

Lightning Web Components Developer Guide: Preview Components with Local Dev

Salesforce Developers Blog: Develop LWC at Lightning Speed with the New Local Dev Experience

Base Lightning Components Support for SLDS 2 (Beta)

The base Lightning components support Salesforce Lightning Design System 2 (Beta), which enables advanced theming and branding capabilities. To achieve these advanced capabilities, SLDS 2 (Beta) doesn't yet support some customization features of the previous-generation SLDS architecture, such as component-specific styling hooks.

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

Important: SLDS 2 is a beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Why: This is an interim step in the development of our SLDS 2 (Beta) architecture. Visit Prepare Customizations for SLDS Architecture Updates first to enable your components to migrate to SLDS 2 (Beta) in a future release.

How: When you switch an org to the SLDS 2 standard Salesforce Cosmos theme (Beta), base components used in your custom components exhibit the new theme if they use the default styling.

Note: SLDS component-specific styling hooks can cause unexpected behavior in SLDS 2. Component styling hooks use the `--slds-c-*` prefix and change styling for specific elements or properties of a component. If you use component styling hooks, limit the components to SLDS themes until SLDS 2 and the Salesforce Cosmos theme become generally available.

SEE ALSO:

Introducing Salesforce Lightning Design System (SLDS) 2 (Beta)

Lightning Design System: Best Practices

Enhanced Lightning User Interface

Resolve Errors Related to Accessing Referenced Lightning Components

Salesforce performs strict access checks when Aura components and Lightning web components (LWC) import or reference other components or modules. If you receive a `No {COMPONENT or MODULE} named {component or module name} found` error, check your imports before deploying to an org. If you're an ISV partner, confirm that the Lightning components and modules in your managed packages are exposed to subscribers.

Where: This change applies to custom Lightning Aura components, custom Lightning apps, and custom Lightning web components in Lightning Experience, Experience Sites, and all versions of the Salesforce mobile app in all editions.

How: If your Lightning component triggers a `No {COMPONENT or MODULE} named {name of the component or module name} found` error, then your component doesn't have access to the component or module specified in the error message.

- If the specified component or module is Salesforce-provided, then remove references to that component or module from your code. Salesforce owns certain components that you can't directly access.

- If the referenced component or module is from a managed package, contact the package owner and follow their guidance.

If you're an ISV partner, confirm that the Lightning components and modules in your managed packages are properly exposed to subscribers. Review Component Access Control for Aura components and Add Components to Managed Packages for Lightning web components.

Lightning Design System

The Salesforce Lightning Design System (SLDS) and the SLDS 2 (Beta) include the resources to create user interfaces consistent with Salesforce Lightning principles, design language, and best practices.

IN THIS SECTION:

Introducing Salesforce Lightning Design System (SLDS) 2 (Beta)

Now available in Spring '25, SLDS 2 is the latest design system for Salesforce products on the Lightning Platform. Use SLDS 2 to build scalable and flexible user interfaces with themes that adapt to future changes, ensuring your code remains efficient and modern. The new design of SLDS 2 is achieved through CSS updates and the implementation of styling hooks, without changing the markup or structure of components. This approach allows for seamless UI changes while preserving the Lightning Experience.

Validate Your SLDS and SLDS 2 Code and Get Improvement Recommendations

Use SLDS Validator to scan your UI code, validate it against a set of Salesforce Lightning Design System (SLDS) rules, and receive recommendations to improve your SLDS and SLDS 2 code. SLDS Validator now provides SLDS and SLDS 2 linting support, validation with recommended SLDS tokens, SLDS 2 styling hooks, and utility classes. These changes apply to SLDS Validator version 2.0 and later.

Lightning Design System Component Blueprints Updates

Get more out of SLDS component blueprints and utilities with these enhancements and bug fixes.

Introducing Salesforce Lightning Design System (SLDS) 2 (Beta)

Now available in Spring '25, SLDS 2 is the latest design system for Salesforce products on the Lightning Platform. Use SLDS 2 to build scalable and flexible user interfaces with themes that adapt to future changes, ensuring your code remains efficient and modern. The new design of SLDS 2 is achieved through CSS updates and the implementation of styling hooks, without changing the markup or structure of components. This approach allows for seamless UI changes while preserving the Lightning Experience.

Where:

Note: Salesforce Lightning Design System (SLDS) 2 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.

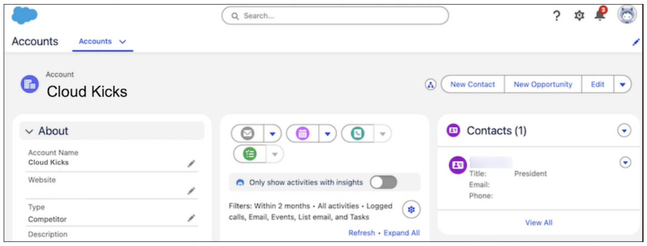
SLDS 2 is enabled in new and existing Starter and Pro Suite orgs by default. It's enabled in new Sales orgs across all editions and select new Service orgs. Starting in Spring '25, SLDS 2 is available to new and existing orgs that opt in to Salesforce Cosmos. For information about when you can opt in to SLDS 2 in a new or existing org, read Salesforce Cosmos Theme Availability in Salesforce Help.

How: If your components are built using SLDS development best practices, your existing org's transition from SLDS to SLDS 2 is simple.

As a developer, transition your org to SLDS 2 using SLDS Validator to audit your code. SLDS Validator analyzes your code, validates it against SLDS 2 guidelines, and identifies custom components that need updates. SLDS Validator also provides automated fixes and suggests improvements to ensure compliance with SLDS 2 standards. To learn how to support your custom components in SLDS 2, use Figma Kit: Components for Web | Lightning Design System v2 and Figma Kit: Style Guide - SLDS Web Components v2.

As an admin, use Themes and Branding to create a custom theme or use Salesforce Cosmos, a new SLDS 2 theme. To turn on the Cosmos theme, follow the directions in Explore Salesforce's Refreshed Visual Style with Themes for SLDS 2 (Beta).

SLDS 2 doesn't yet support component-level styling hooks. If you use `--slds-c-*` styling hooks to customize the styling of your components built from SLDS blueprints or base Lightning components, they might not work as expected when you use the Cosmos theme.



SEE ALSO:

- Explore Salesforce's Refreshed Visual Style with Themes for SLDS 2 (Beta)
- Figma Kit: Components for Web | Lightning Design System v2
- Figma Kit: Style Guide—SLDS Web Components v2
- SLDS: Salesforce Lightning Design System
- SLDS: SLDS Development Best Practices
- SLDS: SLDS Validator for VS Code

Validate Your SLDS and SLDS 2 Code and Get Improvement Recommendations

Use SLDS Validator to scan your UI code, validate it against a set of Salesforce Lightning Design System (SLDS) rules, and receive recommendations to improve your SLDS and SLDS 2 code. SLDS Validator now provides SLDS and SLDS 2 linting support, validation with recommended SLDS tokens, SLDS 2 styling hooks, and utility classes. These changes apply to SLDS Validator version 2.0 and later.

Where: We release new versions of SLDS Validator on Visual Studio Marketplace throughout the year. To learn about recent updates, read the changelog.

How: Install the SLDS Validator extension in Visual Studio Code.

SEE ALSO:

- Visual Studio Code Marketplace: SLDS Validator

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 Spring '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.

Why: Improve your UI with these recent updates to SLDS component blueprints.

- We removed the `slds-truncate` class from the combobox and menu blueprints to address an issue with obscured text. The label text of list items can now wrap in combobox and menu components.
- We also updated the `modals` blueprint in Winter '25 to display a white background for the close button (X), which improves visibility for people with low vision. Specifically, we changed the close button color from white to gray by removing the

`slds-button_icon-inverse` class. To display the modal close button correctly, don't use the `slds-button_icon-inverse` class in your close button markup.

SEE ALSO:

Known Issue: Modal close button is not visible with the new white background

Salesforce Lightning Design System

Web Content Accessibility Guidelines (WCAG)

Apex

Compressing and extracting Zip files and evaluating dynamic formulas in Apex are now generally available. The concurrent long-running Apex requests limit now depends on the type and number of org licenses. Pause and resume Apex scheduled jobs by using new methods in the `System` class.

For more information on these enhancements, see the Apex Developer Guide and the Apex Reference Guide.

IN THIS SECTION:

Delivered Idea: Compress and Extract Zip Files in Apex (Generally Available)

Use the `Compression` namespace and take advantage of a native Apex Zip library to compress and extract files. Easily compress files into a Zip file from blobs and directly decompress files stored in a Zip file to blobs. Optimize compression by specifying the compression method and level. You can compress multiple attachments or documents as an Apex blob in a Zip archive. You can also specify the data to extract from the Zip archive without uncompressing the entire Zip archive. We delivered this feature thanks to your ideas on IdeaExchange.

Delivered Idea: Evaluate Dynamic Formulas in Apex (Generally Available)

Dynamic formulas in Apex support SObjects and Apex objects as context objects. Use the class methods in the `FormulaEval` namespace to build and evaluate dynamic formulas. This feature, now generally available, supports accessing polymorphic relationship fields. You can also reference standard lookups and custom lookups in formula fields. We delivered this feature thanks to your ideas on IdeaExchange.

Scale Your Concurrent Long-Running Apex Requests Limit Based on Number of Org Licenses

The default limit for the number of synchronous concurrent transactions for long-running Apex requests now depends on the type and number of licenses in your org. Scaled license-based limits can avoid service disruptions caused by the limit, increase system stability with minimal risk to performance, and improve resource allocation. To ensure fair usage, the limit is capped at a maximum of 50 Apex requests. The minimum number of long-running concurrent Apex requests remains at 10.

Pause and Resume Scheduled Jobs by Using Apex

With new methods in the `System` class, you can programmatically pause and resume Apex scheduled jobs. This feature complements the ability to monitor scheduled jobs from the Setup UI, which was introduced in Summer '24. To pause or resume a scheduled job, you specify the job's name or cronTriggerId. Calling the pause and resume methods counts towards the DML statement limit.

Enforce Reparenting Restrictions for Master-Detail Relationships in Apex

In API version 63.0 and later, an attempt to reparent a child record in Apex throws a `System.DmlException` exception if the option to allow reparenting isn't selected in the master-detail definition. This behavior is versioned. In API 62.0 and earlier, reparenting such child records could succeed and not result in an exception, depending on the sequence in which the fields were set.

JSON Serialization for Exception Types Has Changed

In API version 63.0 and later, Apex doesn't support JSON serialization of custom exception types and most built-in exceptions. Attempting to serialize an exception type throws an error: `Type unsupported in JSON: MyException`. This behavior is versioned. In API 62.0 and earlier, exception types could be serialized, but the serialization was incomplete and triggered unexpected exception errors.

SEE ALSO:

Apex: New and Changed Items

Compress and Extract Zip Files in Apex (Generally Available)

Use the `Compression` namespace and take advantage of a native Apex Zip library to compress and extract files. Easily compress files into a Zip file from blobs and directly decompress files stored in a Zip file to blobs. Optimize compression by specifying the compression method and level. You can compress multiple attachments or documents as an Apex blob in a Zip archive. You can also specify the data to extract from the Zip archive without uncompressing the entire Zip archive. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to all editions.

How: To add zip entry details, such as an entry name, comment, and compression method, use the `addEntry(String name, Blob data)`, `addEntry(compression.ZipEntry prototype)`, and `setMethod(compression.Method method)` methods in the `ZipWriter` class. To generate a zipped archive and return the result as an Apex blob, use the `getArchive()` method. This code sample compresses email attachments into a single file.

```
Compression.ZipWriter writer = new Compression.ZipWriter();

List<id> contentDocumentIds = new List<id>();

// Add IDs of documents to be compressed to contentDocumentIds

for ( ContentVersion cv : [SELECT PathOnClient, Versiondata
                           FROM ContentVersion
                           WHERE ContentDocumentId IN :contentDocumentIds])
{
      writer.addEntry(cv.PathOnClient, cv.versiondata);
}

blob zipAttachment = writer.getArchive();

Messaging.EmailFileAttachment efa = new Messaging.EmailFileAttachment();
efa.setFileName('attachments.zip');
efa.setBody(zipAttachment);

List<Messaging.EmailFileAttachment> fileAttachments = new
List<Messaging.EmailFileAttachment>();
fileAttachments.add(efa);

Messaging.SingleEmailMessage email = new Messaging.SingleEmailMessage();

// Set all the other email fields, such as addresses, subject, and body
```

```
email.setFileAttachments(fileAttachments);

Messaging.sendEmail(new Messaging.SingleEmailMessage[] { email });
```

Get zip entry details and extract the Zip file's contents by using the `getEntries()`, `getEntry(String name)`, `extract(ZipEntry entry)`, and other methods in the `ZipReader` class. This code sample extracts the translation from a callout response.

```
HttpRequest request = new HttpRequest();
request.setEndpoint('callout:My_Named_Credential/translationService');
request.setMethod('POST');

// Set translation service request payload for input to translate
// The translation endpoint will return translations to the requested languages as JSON
in a Zip archive

HttpResponse response = new Http().send(request);
Blob translationZip = response.getBodyAsBlob();

Compression.ZipReader reader = new Compression.ZipReader(translationZip);
ZipEntry frTranslation = reader.getEntry('translations/fr.json');
Blob frTranslationData = reader.extractEntry(frTranslation);
```

SEE ALSO:

Apex Reference Guide: Compression Namespace (can be outdated or unavailable during release preview)

IdeaExchange: Apex or API - Zip file creation in Salesforce

Evaluate Dynamic Formulas in Apex (Generally Available)

Dynamic formulas in Apex support SObjects and Apex objects as context objects. Use the class methods in the `FormulaEval` namespace to build and evaluate dynamic formulas. This feature, now generally available, supports accessing polymorphic relationship fields. You can also reference standard lookups and custom lookups in formula fields. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to all editions.

How: This example uses the `build()` and `evaluate()` methods to validate a formula instance, calculate the formula expression, and return the result.

```
Account myAcc = new Account(Name='123');
       FormulaEval.FormulaInstance ff = Formula.builder()
           .withType(Schema.Account.class)
           .withReturnType(FormulaEval.FormulaReturnType.STRING)
           .withFormula('name & " (" & website & ")"')
           .build();

//Use the list of field names returned by the getReferenced method to generate dynamic
soql
       String fieldNameList = String.join(ff.getReferencedFields(),',');
       String queryStr = 'select ' + fieldNameList + ' from Account LIMIT 1'; //select
name, website from Account
```

```
        Account s = Database.query(queryStr);
        system.debug(ff.evaluate(s));
```

SEE ALSO:

Apex Reference Guide: FormulaEval Namespace (can be outdated or unavailable during release preview)

IdeaExchange: Evaluate Dynamic Formula with Apex

Scale Your Concurrent Long-Running Apex Requests Limit Based on Number of Org Licenses

The default limit for the number of synchronous concurrent transactions for long-running Apex requests now depends on the type and number of licenses in your org. Scaled license-based limits can avoid service disruptions caused by the limit, increase system stability with minimal risk to performance, and improve resource allocation. To ensure fair usage, the limit is capped at a maximum of 50 Apex requests. The minimum number of long-running concurrent Apex requests remains at 10.

Where: The license types that count toward this limit include full Salesforce and Salesforce Platform user licenses, App Subscription user licenses, Chatter Only users, Identity users, and Company Communities users.

How: For orgs with 1,000 to 5,000 licenses, the limit is calculated based on the ratio of 100 licenses to one concurrent long-running Apex request. For example, if your org has 4,000 licenses, the concurrent long-running Apex requests limit is set at 40. If your org has 5,000 or more licenses, the concurrent long-running Apex requests limit is set at 50, which is the maximum capped limit. If your org has 1,000 or fewer licenses, the concurrent long-running Apex requests limit is set at 10 due to the minimum floor limit.

Pause and Resume Scheduled Jobs by Using Apex

With new methods in the `System` class, you can programmatically pause and resume Apex scheduled jobs. This feature complements the ability to monitor scheduled jobs from the Setup UI, which was introduced in Summer '24. To pause or resume a scheduled job, you specify the job's name or cronTriggerId. Calling the pause and resume methods counts towards the DML statement limit.

Where: This change applies to all editions.

How: Use the new `pauseJobByName()`, `pauseJobById()`, `resumeJobByName()`, and `resumeJobById()` System methods. This example code pauses all Apex scheduled jobs for a specific class.

```
// Scheduled class to be paused
Id apexClassIdToPause = '01p4u000000dVf7AAE';
List<AsyncApexJob> jobsToPause = [SELECT CronTriggerId FROM AsyncApexJob WHERE ApexClassId
 = :apexClassIdToPause];
for(AsyncApexJob jobToPause : jobsToPause) {
    System.pauseJobById(jobToPause.CronTriggerId);
}
```

Enforce Reparenting Restrictions for Master-Detail Relationships in Apex

In API version 63.0 and later, an attempt to reparent a child record in Apex throws a `System.DmlException` exception if the option to allow reparenting isn't selected in the master-detail definition. This behavior is versioned. In API 62.0 and earlier, reparenting such child records could succeed and not result in an exception, depending on the sequence in which the fields were set.

Where: This change applies to all editions.

How: This versioned behavior depends on the sequence in which field values are set. In this example, the master-detail relationship field is set before the ID field and a `System.DmlException` exception is thrown. However, if the ID field is set before the master-detail field, validation occurs at the time of the `.put` call, throwing the sObjectException: `System.SObjectException: Field master__c is not editable`.

```
master__c parentRecord1 = new master__c(Name = 'Sample Parent 1');
insert parentRecord1;

child__c childRecord = new child__c(
    Name = 'Sample Child Record',
    master__c = parentRecord1.Id
);
insert childRecord;

master__c parentRecord2 = new master__c(Name = 'Sample Parent 2');
insert parentRecord2;

// Attempting to directly change the master-detail relationship field is not permitted
// when reparenting is disabled
try {
    childRecord.master__c = parentRecord2.Id;
    update childRecord;
} catch (System.SObjectException ex) {
    Assert.areEqual('Field is not writeable: Child__c.Master__c', ex.getMessage());
}

SObject record = new child__c();
// If the Id is set before the master-detail relationship field then the exception occurs
// when attempting to change the relationship when reparenting is disabled
try {
    record.put('Id',childRecord.Id);
    record.put('master__c',parentRecord2.Id);
} catch (System.SObjectException ex) {
    Assert.areEqual('Field master__c is not editable', ex.getMessage());
}

// reset
record = new child__c();


// New API versioned validation when the master-detail field is set before the record Id

record.put('master__c',parentRecord2.Id);
record.put('Id',childRecord.Id);

try {
    Database.SaveResult[] updateResults = Database.update(new List<SObject> {record},
true);
} catch (System.DmlException ex) {
    Assert.isTrue(ex.getMessage().contains(
        'INVALID_FIELD_FOR_INSERT_UPDATE, Unable to create/update fields: Master__c'));
}
```

JSON Serialization for Exception Types Has Changed

In API version 63.0 and later, Apex doesn't support JSON serialization of custom exception types and most built-in exceptions. Attempting to serialize an exception type throws an error: `Type unsupported in JSON: MyException`. This behavior is versioned. In API 62.0 and earlier, exception types could be serialized, but the serialization was incomplete and triggered unexpected exception errors.

Where: This change applies to all editions.

Why: This example includes JSON serialization that fails in API version 63.0 and later.

```
MyException e = new MyException();
String js = JSON.serialize(e);
```

API

Get standard platform event for Bulk API V2 query jobs. Update instanced URLs in API calls to prevent service interruptions.

IN THIS SECTION:

Service Protection Changes for Metadata API Read and Retrieve Endpoints

To avoid putting the health of the service at risk, `readMetadata()` and `retrieve()` requests to the Metadata API may return an error in new orgs created in Winter '25 and later. The API returns an error when the server receives more requests than it can handle.

Update API Requests to Use Your My Domain Login URL (Release Update)

If you're using an instance-specific URL for API traffic, you must replace it with your My Domain URL. Salesforce is decommissioning the service that supports hard-coded references to an instance name in API application traffic routing.

Other Improvements to Generating an OpenAPI Document for sObjects REST API (Beta)

With the latest version of the OpenAPI Specification, you can generate an OpenAPI document. Also, return a list of updated sObjects, use a shorter base URI, and more.

Get Notified About Bulk API V2 Query Jobs with Platform Events (Beta)

Subscribe to the BulkApi2JobEvent platform event to get notified about the progress and completion of Bulk API V2 query jobs. By subscribing to the platform event, you avoid polling the API or waiting for job completion before downloading results.

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.

Service Protection Changes for Metadata API Read and Retrieve Endpoints

To avoid putting the health of the service at risk, `readMetadata()` and `retrieve()` requests to the Metadata API may return an error in new orgs created in Winter '25 and later. The API returns an error when the server receives more requests than it can handle.

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

Update API Requests to Use Your My Domain Login URL (Release Update)

If you're using an instance-specific URL for API traffic, you must replace it with your My Domain URL. Salesforce is decommissioning the service that supports hard-coded references to an instance name in API application traffic routing.

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

When: This decommission occurs on April 1, 2025 for sandbox environments and June 14, 2025 for production environments.

How: For example, if your API traffic is pointing to the URL `https://na44.salesforce.com/services/Soap/class/AcmeDemoService`, you must change it to `https://acme.my.salesforce.com/services/Soap/class/AcmeDemoService`.

To review this update, from Setup, in the Quick Find box, enter *`Release Updates`*, and then select **Release Updates**. For Update API Requests to Use Your My Domain Login URL, follow the testing and activation steps.

SEE ALSO:

Salesforce Help: Update API Calls to Use Your My Domain Login URL

Salesforce Help: Updating Hard-Coded References

Other Improvements to Generating an OpenAPI Document for sObjects REST API (Beta)

With the latest version of the OpenAPI Specification, you can generate an OpenAPI document. Also, return a list of updated sObjects, use a shorter base URI, and more.

Where: This change affects API version 63.0 and later. This beta feature is available in all Salesforce editions, sandboxes, and scratch orgs that have API Enabled.

Note: OpenAPI document generation for sObjectds REST 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 Diretctory. Use of this pilot or beta service is at the Customer's sole discretion.

Why: The sObjects REST API OpenAPI document generation feature (beta) now:

- Includes the `/sobjects/{sObject}/updated`, `/query`, and `/query/`***`queryLocator`*** resources
- Supports all Salesforce editions that have API Enabled
- Uses a shorter base URI
- Removes 6-hour limit on requests in queue per org
- Uses a parameterized sObjects spec

Get Notified About Bulk API V2 Query Jobs with Platform Events (Beta)

Subscribe to the BulkApi2JobEvent platform event to get notified about the progress and completion of Bulk API V2 query jobs. By subscribing to the platform event, you avoid polling the API or waiting for job completion before downloading results.

Where: This change affects API version 63.0 and later. This beta feature is available in all Salesforce editions, sandboxes, and scratch orgs that have API Enabled.

Note: OpenAPI document generation for sObjectds REST 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 Diretctory. Use of this pilot or beta service is at the Customer's sole discretion.

How: From Setup, in the Quick Find box, enter `User Interface`, and then select **User Interface**. On the User Interface page, select **Enable Salesforce Platform Bulk API 2.0 Query Partial Download and Job Completion Events (Beta)**. Then subscribe to BulkApi2JobEvent using one of the subscription methods. See Subscribing to Platform Events in the *Platform Events Developer Guide*.

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 older or unsupported API versions of SOAP API, REST API, and Bulk API by using the API Total Usage event.

You can enforce the retirement of these API versions ahead of Summer '25. In Setup, in Release Updates, find Salesforce Platform API Versions 21.0 Through 30.0 Retirement, and then click **Get Started**. To reject calls to the API versions scheduled for retirement, click **Enable Test Run**. To disable the enforcement, click **Disable Test Run**.

Development Environments

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

IN THIS SECTION:

Data Mask

Let Einstein do the heavy lifting and create your custom libraries. Automatically run masking configurations each time you refresh your sandbox.

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IN THIS SECTION:

Use Einstein to Generate Data Mask Custom Libraries

Ask Einstein to generate values for a custom Data Mask library in a sandbox. Describe the type of values that you want for masking sensitive data, and let Einstein do the rest.

Set Your Configurations to Automatically Run Each Time You Refresh a Sandbox

With Run on Refresh, there's no downtime between when new data enters your sandbox and when the next masking configuration is scheduled to run.

Use Einstein to Generate Data Mask Custom Libraries

Ask Einstein to generate values for a custom Data Mask library in a sandbox. Describe the type of values that you want for masking sensitive data, and let Einstein do the rest.

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.

How: In Data Mask, from the Custom Libraries tab, create and save a new custom library. Then click **Create with Einstein**.

SEE ALSO:

Salesforce Help: Create Custom Libraries

Set Your Configurations to Automatically Run Each Time You Refresh a Sandbox

With Run on Refresh, there's no downtime between when new data enters your sandbox and when the next masking configuration is scheduled to run.

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.

SEE ALSO:

Salesforce Help: Run a Data Mask Job

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.

Salesforce Extensions for Visual Studio Code

The Salesforce Extension pack includes tools for developing on the Salesforce platform in the lightweight, extensible VS Code editor. These tools provide features for working with development orgs (scratch orgs, sandboxes, and DE orgs), Apex, Lightning web components, Aura components, and Visualforce.

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.

Agentforce for Developers

Agentforce for Developers is an AI-powered developer tool that's available as a Visual Studio Code extension in VS Code desktop and Code Builder. Agentforce for Developers is built using `CodeGen` and `xGen-Code`, secure and custom AI models from Salesforce. It's enabled by default in Enterprise, Performance, Unlimited, Partner Developer, and Developer editions.

Scalability

Optimize and test your implementations. Troubleshoot errors, identify issues with application performance, and improve how you scale.

Remove Shift_JIS to Windows-31J Character Mapping

The system property sun.nio.cs.map for Japanese character mapping from Shift_JIS to Windows-31J is no longer available.

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 that you can learn about better ways to work with your Salesforce DX projects.

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Stay up to date with recent Salesforce CLI enhancements so that you can learn about better ways to work with your Salesforce DX projects.

Where: These changes apply to Salesforce CLI version 2.53.6 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 that we recently delivered.

Do More with Data

We made a number of improvements and additions to the commands in the `data` topic.

Tree Commands

You can now specify multiple `--query` flags to the `data export tree` command. As a result, you can now easily export records from junction objects and their parents so that their many-to-many relationships are preserved when you specify the generated CSV file to the `data import tree` command. An example of a junction object is AccountContactRelation.

Bulk Commands

- We added these new commands that work with large datasets.
  - `data export|resume bulk`
  - `data import|resume bulk`
  - `data update|resume bulk`

  Together with the existing `data delete|upsert bulk`, you can now use Salesforce CLI commands to run any of the ingest operations of Bulk API 2.0.

- Get the results of a completed bulk import, update, upsert, or delete with the new `data bulk results` command. The command works for jobs executed with a CLI command such as `data import bulk` or an external tool like Data Loader.

Query Commands

- Execute a SOSL search in your org from the command line with the new `data search` command.
- Write the CSV or JSON results of a SOQL query to a file with the new `--output-file` flag of `data query`.

We also improved the documentation in the *Salesforce DX Developer Guide* about working with data. Check it out!

Execute GraphQL and REST APIs Directly (Beta)

Use the new `api request rest` CLI command to make an authenticated HTTP request to your org by using the Salesforce REST API. This example lists information about limits in the org with the alias `my-org`.

Note: This feature is a Beta Service. Customers may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms (https://www.salesforce.com/company/legal/agreements/).

```
sf api request rest 'services/data/v63.0/limits' --target-org my-org
```

Use the new `api request graphql` CLI command to execute a GraphQL statement. The command uses the GraphQL API to query or modify Salesforce objects. This example executes a GraphQL query on the Account object in your default org by specifying the query directly to the `--body` flag.

```
sf api request graphql --body "query accounts { uiapi { query { Account { edges { node {
Id \n Name { value } } } } } } }"
```

Install on Windows ARM64 Computers

You can now install Salesforce CLI on Windows ARM64 computers with our new `sf-arm64.exe` installer.

Get Detailed Coverage Information from Apex Tests

Get detailed coverage results about a previously run Apex test by specifying the new `--detailed-coverage` flag of the `apex get test` command. Detailed coverage results are available for only human-readable results. For example:

```
sf apex get test --test-run-id <ID> --code-coverage --detailed-coverage
```

Open an Agent in Your Org's Agent Builder

Open an agent in your org's Agent Builder UI with the new `open org agent` command. Use the `--name` flag to specify its API name. For example:

```
sf org open agent --name Coral_Cloud_Agent
```

To find the agent's API name, go to Setup in your org and navigate to the agent's details page.

Customize New Sandboxes with More Options

When you create a sandbox with the `org create sandbox` command, you can now configure the public group of Salesforce users that can access the sandbox. Include either the `activationUserGroupId` or `activationUserGroupName` option (but not both) in the sandbox definition file. In this example, the `ExpertUsers` Salesforce public user group can access the sandbox after it's created.

```
{
       "sandboxName": "dev1",
       "licenseType": "Developer",
       "activationUserGroupName": "ExpertUsers"
       }
```

We also made these improvements to sandbox creation and cloning.

- Specify the name of the Apex class that runs after each copy of the sandbox with the new `apexClassName` definition file option. Previously, you could specify it only with an ID (`apexClassId`).
- Specify the ID of the sandbox that you want to clone with the new `--source-id` flag or `sourceId` definition file option. Previously, you could specify it only with its name (`--source-sandbox-name`).

View the Stages of a Running Command

Get a behind-the-scenes look at what happens when you execute certain CLI commands with the new multi-stage output feature. For example, when you execute `org create scratch`, you now see this output while the command is executing.

```
$ sf org create scratch --edition developer --alias my-scratch-org

  ────────────── Creating Scratch Org ──────────────

  □ Prepare Request 37ms
  □ Send Request 14.61s
  □ Wait For Org - Skipped
  □ Available 5ms
  □ Authenticate 1.46s
  □ Deploy Settings
  □ Done

  Request Id: 2SRWs000002aOttOAE
  OrgId: 00DOv00000C6RbJ
  Username: test-p4bh29a7jcvc@example.com
  Alias: my-scratch-org
  Elapsed Time: 16.21s
```

Other commands that display this multi-stage output include `project deploy start` and `project deploy retrieve`. We also added two environment variables for you to control how this new output behaves in a continuous integration (CI) environment.

- `SF_CI_UPDATE_FREQUENCY_MS`

- `SF_CI_HEARTBEAT_FREQUENCY_MS`

Enjoy Better Table Output

Commands that display tabular output, such as `org list limits`, now display tables that are more visually appealing and easier to read.

You can customize how the new table output looks like with these new environment variables.

- `SF_NO_TABLE_STYLE`
- `SF_TABLE_OVERFLOW`
- `SF_TABLE_BORDER_STYLE`

SEE ALSO:

GitHub: Salesforce CLI Release Notes

Salesforce DX Developer Guide: Working with Data

Salesforce CLI Command Reference: `data` Commands

Salesforce CLI Setup Guide: Environment Variables

Salesforce CLI Download Page

Salesforce CLI Command Reference: `api request` Commands

Salesforce Extensions for Visual Studio Code

The Salesforce Extension pack includes tools for developing on the Salesforce platform in the lightweight, extensible VS Code editor. These tools provide features for working with development orgs (scratch orgs, sandboxes, and DE orgs), Apex, Lightning web components, Aura components, and Visualforce.

We release new versions of the extensions weekly. Read the weekly release notes to learn about recent updates.

SEE ALSO:

Salesforce Extensions for Visual Studio Code

Code Builder

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We release new versions of Code Builder, as needed.

See the off-cycle Code Builder release notes on GitHub.

SEE ALSO:

Code Builder Developer Guide

Agentforce for Developers

Agentforce for Developers is an AI-powered developer tool that's available as a Visual Studio Code extension in VS Code desktop and Code Builder. Agentforce for Developers is built using `CodeGen` and `xGen-Code`, secure and custom AI models from Salesforce. It's enabled by default in Enterprise, Performance, Unlimited, Partner Developer, and Developer editions.

Read the weekly release notes to learn about recent updates.

SEE ALSO:

Agentforce for Developers

Scalability

Optimize and test your implementations. Troubleshoot errors, identify issues with application performance, and improve how you scale.

IN THIS SECTION:

Book Sandbox Slots for Peak Load Testing with Scale Test

Book a slot on your sandbox instance calendar and test at production peak load by using Scale Test. Business metrics, use cases, and flows now have more input options. 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.

Identify Slow Reports, View Decrypted URLs, and Access Scale Center Deep Links

The Report Insights feature shows you which reports were slow over the last week. Fully decrypted URLs appear 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.

Optimize Code with ApexGuru

Antipattern detection features 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.

Book Sandbox Slots for Peak Load Testing with Scale Test

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Where: This change applies to Lightning Experience in all editions. Scale Test is available for customers with a Full sandbox in all Hyperforce regions, except Singapore. To get access, contact your customer success representative or account executive.

How: From Setup, in the Quick Find box, enter `Scale`, and then click **Scale Test**.

Identify Slow Reports, View Decrypted URLs, and Access Scale Center Deep Links

The Report Insights feature shows you which reports were slow over the last week. Fully decrypted URLs appear 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. 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**.

Optimize Code with ApexGuru

Antipattern detection features 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 Full sandbox and production environments with ApexGuru enabled. 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`, and then click **Scale Center**. Navigate to Scale Insights, and then click **ApexGuru Insights**.

Remove Shift_JIS to Windows-31J Character Mapping

The system property sun.nio.cs.map for Japanese character mapping from Shift_JIS to Windows-31J is no longer available.

Where: This change applies to Java environments.

Why: The system property `sun.nio.cs.map` was originally added in JDK 1.4.1 to assist with application migration from the old definition of Shift_JIS (equivalent to Microsoft Windows code page 932) to the set defined by IANA.

How: Stagger the removal of the `sun.nio.cs.map` system property from customer environments, beginning with sandboxes.

Salesforce Functions

Salesforce Functions is no longer available for purchase or renewal. Learn about the retirement plan for Salesforce Functions.

IN THIS SECTION:

Salesforce Functions Is Being Retired

Salesforce Functions is no longer available for purchase or renewal. You can continue using your subscription through your existing order term. To preserve the capabilities that Salesforce Functions provided to your org, deploy an alternative solution before your existing order term ends.

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Where: This change applies to Lightning Experience, Salesforce Classic (not available in all orgs), and all versions of the Salesforce mobile app in Professional, Unlimited, and Developer editions.

For the end-of-life timeline and more information on migrating your functions, see Salesforce Functions Retirement on the Heroku Dev Center.

SEE ALSO:

Developer Doc: Salesforce Functions Release Notes

AppExchange Partners

This release introduces improved guidance for navigating security reviews and publishing listings.

IN THIS SECTION:

AppExchange Developer Documentation Has Been Updated

The revamped security and publishing sections in the ISVforce Guide provide improved guidance for passing a security review and managing your AppExchange listings.

AppExchange Developer Documentation Has Been Updated

The revamped security and publishing sections in the ISVforce Guide provide improved guidance for passing a security review and managing your AppExchange listings.

Where: This change applies to the ISVforce Guide.

When: The updated documentation is available in early January 2025.

SEE ALSO:

ISVforce Guide: Manage Your Security Reviews

ISVforce Guide: Manage Your AppExchange Listings

Change Data Capture

Receive change event notifications for more Salesforce objects.

IN THIS SECTION:

Receive Change Event Notifications for More Objects
With Change Data Capture, you can now receive notifications of record changes for more objects.

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for more objects.

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

How: Select the objects that you want to get notifications for on the Change Data Capture page in Setup, or create a custom channel.

You can now receive change events for these objects.

Commerce

- CustomFieldDisplayValue

Industries

Net Zero Cloud

- AirTravelEnrgyUse
- AnnualEmssnInventory
- AntiCorruptionInitSum
- DisclsReportingPeriod
- DivrsEquityInclSum
- EconomicPerformanceSum
- EmpBenefitSummary
- EmployeeDemographicSum
- EmployeeDevelopmentSum
- FrgtHaulingEnrgyUse

- GeneratedWaste
- GovtFinancialAsstSum
- GroundTravelEnrgyUse
- HotelStayEnrgyUse
- OrgIncidentSummary
- RentalCarEnrgyUse
- Scope3CrbnFtprnt
- Scope3EmssnSrc
- Scope3PcmtItem
- Scope3PcmtSummary
- SocialContributionSum
- StnryAssetCrbnFtprnt
- StnryAssetCrbnFtprntItm
- StnryAssetEnrgyUse
- StnryAssetEnvrSrc
- StnryAssetWaterActvty
- StnryAssetWaterFtprnt
- StnryAssetWtrFtprntItm
- TaxDisclosureSummary
- VehicleAssetCrbnFtprnt
- VehicleAssetEmssnSrc
- VehicleAssetEnrgyUse
- WasteFootprint
- WasteFootprintItem

Loyalty Management

- GameReward
- GameParticipant
- TransactionJournal

Salesforce Flow

- FlowOrchestration
- FlowOrchestrationVersion

Platform Events

View more information about event allocations in Setup. Prepare for the retirement of the legacy standard-volume platform events.

IN THIS SECTION:

Discover the Grace Allocation for Daily Delivered Events for Salesforce Orgs with an Add-On License

The Event Allocations section now displays the grace allocation for daily event delivery on the Platform Events page in Setup. Also, to flag overages, usage is now marked in red. The grace allocation isn't new but you can now more easily discover it in Setup. Salesforce reserves the right to adjust grace allocations at any time. The grace allocation for daily event delivery, which is higher than the allocation that you get through the add-on, helps prevent disruption to your subscribers due to usage spikes. As long as the daily event delivery usage is within the grace allocation, your subscribers aren't stopped and continue to receive events.

Standard-Volume Platform Events Are Being Retired

Standard-volume platform events are legacy custom events and are 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.

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

Who: Salesforce provides the grace allocation for orgs that have the add-on license for additional platform events or change events.

This image shows the Event Allocations table with the new Grace Allocation column.

Event Allocations

Item	Usage	Allocation	Grace Allocation
High-Volume Platform Event Hourly Publishing Allocation	48,011	275,000	Not Applicable
High-Volume Platform Event and Change Event Daily Delivery Allocation	126,142	125,000	525,000
High-Volume Platform Event and Change Event Monthly Delivery Allocation	4,000,052	3,750,000	Not Applicable

SEE ALSO:

Platform Events Developer Guide: Platform Event Allocations

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

SEE ALSO:

Knowledge Article: Migrate Standard-Volume Platform Events to High-Volume Platform Events Before Retirement

Event Bus

Package and distribute event relays.

IN THIS SECTION:

Package and Distribute Event Relays

Event relays are now available in second-generation managed packages, unlocked packages, and first-generation managed packages. Previously, event relays were available only in unmanaged packages. To use an event relay from a managed package, customers can install the managed package from AppExchange.

Package and Distribute Event Relays

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

SEE ALSO:

Salesforce DX Developer Guide: Build and Release Your App

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

IN THIS SECTION:

Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

Apex: New and Changed Items

These classes, enums, and interfaces are new or have changes.

ConnectApi (Connect in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Connect in Apex.

API: New and Changed Items

Access more data objects and metadata types in API version 63.0.

Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

IN THIS SECTION:

New and Changed Lightning Web Components

Build UI easily with these new and changed components.

[Changed Targets for Lightning Web Components](#)

Use Lightning web components in builders such as Lightning App Builder, Experience Builder, Flow Builder, and more.

[New and Changed Aura Components](#)

Build UI easily with these new and changed components.

New and Changed Lightning Web Components

Build UI easily with these new and changed components.

Changed Lightning Web Components

These components have changed.

lightning-button-menu

This attribute has changed.

- `variant`—The `bare` variant no longer displays with a border when you provide an `icon-name` value.

This accessibility behavior is new.

- The button menu with the `role="menu"` attribute renders with `aria-labelledby` to reference the assistive text `Show menu`.
- The button menu renders with the `role="menu"` attribute and `aria-labelledby` to reference the assistive text `Show menu`.

lightning-combobox

These accessibility behaviors are new.

- For options that specify `aria-checked="true"`, the `aria-selected` attribute specifies a value of `true`.
- When an option label is too long to fit in a single line, the label wraps and continues in a new line. If a long word in an option label isn't fully visible, scroll horizontally on the dropdown list to reveal the whole word.

lightning-input

These attributes are new.

- `date-aria-error-message`—A space-separated list of element IDs that provide error messages for the date input when `type="datetime"`.
- `time-aria-error-message`—A space-separated list of element IDs that provide error messages for the time input when `type='datetime'`.

This attribute has changed.

- `max-length`—When the maximum number of characters is reached, the `role="alert"` attribute is appended to an error message, which is then announced by screen readers.

These accessibility behaviors are new for the `color` type.

- The input field renders with the `aria-label` attribute set to `Enter Hexadecimal value`, which is announced by screen readers to present the purpose of the field.
- The color picker panel renders with `role="application"`, which enables you to choose a value on the panel using arrow keys.
- When the input field is marked `required`, the `aria-required` attribute is passed down with the `true` value.

This accessibility behavior is new for the `date`, `datetime`, and `time` types.

- If you provide a value for `aria-error-message` or `aria-errormessage`, the input field renders with `aria-errormessage`. Use the standard `aria-errormessage` HTML attribute to identify the element that provides an error message for the input field. The `aria-error-message` attribute maps to `aria-errormessage`.

lightning-input-field

The lookup field type is appended with the `slds-has-selection` class and renders the selected object with a border.

When you pass an empty string or a string with only spaces to `field-name`, the component isn't rendered. A warning is returned in the web console instead.

lightning-input-rich-text

These accessibility behaviors are new.

- For toolbar buttons that open a dialog, such as the link button, the button renders with `aria-haspopup="dialog"`. Toolbar buttons that open a dialog no longer render with `aria-pressed="false"`.
- For the overall toolbar, the disabled state now uses `Disabled Text Formatting` in the `aria-label` attribute, or `Text Formatting` otherwise. Previously, the disabled state used `disabled` on the `aria-label` attribute and an empty string when the toolbar is active.
- For the color button, the color picker panel renders with `role="application"`, which enables JAWS and NVDA keyboard users to choose a value on the panel using arrow keys.
- The remove formatting button no longer uses the `aria-pressed` attribute.
- The `aria-describedby` attribute is now associated with the element that renders with `role="textbox"` instead of the wrapping element. This change lets screen readers announce error messages during user input.
- `aria-describedby` is appended only when the component is in an invalid state.

lightning-record-picker

A selected record is appended with the `slds-has-selection` class and renders with a border.

lightning-rich-text-toolbar-button

This attribute is new.

- `aria-haspopup`—Specifies the value of the `aria-haspopup` attribute for the rendered toolbar button. Use this attribute to indicate the type of popup that your custom button opens.

lightning-tree-grid

This accessibility behavior is new.

- If the first column is type `url` and you pass in the `label` type attribute, the row toggle button now renders the `title` attribute and assistive text with the label value instead of the URL. For example, if `Account Name` is the label value, the assistive text is `Expand Account Name` instead of `Expand https://example.com`.

SEE ALSO:

Component Library

Changed Targets for Lightning Web Components

Use Lightning web components in builders such as Lightning App Builder, Experience Builder, Flow Builder, and more.

These targets have changed.

lightning__FlowScreen

Handle errors in a flow screen using `setCustomValidity(externalErrorMessage: string)` and `reportValidity()` in Flow Builder. See Design Component Errors for a Better Experience

New and Changed Aura Components

Build UI easily with these new and changed components.

Changed Aura Components

This component has changed.

lightning:combobox

These accessibility behaviors are new.

- For options that specify `aria-checked="true"`, the `aria-selected` attribute specifies a value of `true`.
- When an option label is too long to fit in a single line, the label wraps and continues in a new line. If a long word in an option label isn't fully visible, scroll horizontally on the dropdown list to reveal the whole word.

lightning:input

These attributes are new.

- `dateAriaErrorMessage`—A space-separated list of element IDs that provide error messages for the date input when `type="datetime"`.
- `timeAriaErrorMessage`—A space-separated list of element IDs that provide error messages for the time input when `type='datetime'`.

This attribute has changed.

- `maxLength`—When the maximum number of characters is reached, the `role="alert"` attribute is appended to an error message, which is then announced by screen readers.

These accessibility behaviors are new for the `color` type.

- The input field renders with the `aria-label` attribute set to `Enter Hexadecimal value`, which is announced by screen readers to present the purpose of the field.
- The color picker panel renders with `role="application"`, which enables you to choose a value on the panel using arrow keys.
- When the input field is marked `required`, the `aria-required` attribute is passed down with the `true` value.

This accessibility behavior is new for the `date`, `datetime`, and `time` types.

- If you provide a value for `ariaErrorMessage`, the input field renders with `aria-errormessage`. The `ariaErrorMessage` attribute maps to the standard `aria-errormessage` HTML attribute.

lightning:inputField

The lookup field type is appended with the `slds-has-selection` class and renders the selected object with a border.

When you pass an empty string or a string with only spaces to `fieldName`, the component isn't rendered. A warning is returned in the web console instead.

lightning:treeGrid

This accessibility behavior is new.

- If the first column is type `url` and you pass in the `label` type attribute, the row toggle button now renders the `title` attribute and assistive text with the label value instead of the URL. For example, if `Account Name` is the label value, the assistive text is `Expand Account Name` instead of `Expand https://example.com`.

SEE ALSO:

Component Library

Lightning Web Components Developer Guide

Lightning Aura Components Developer Guide

Lightning Components: New and Changed Items

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:

ConnectApi Namespace

The ConnectApi namespace (Connect in Apex) has new or changed classes, methods, or enums.

Messaging Namespace

The Messaging namespace has these new or changed classes.

QuickAction Namespace

The QuickActions namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

SEE ALSO:

Apex: New Features

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.

Messaging Namespace

The Messaging namespace has these new or changed classes.

New or Changed Methods in Existing Classes

Learn if an unsubscription mechanism is defined

Use the new method `getOneClickPost` in the SingleEmailMessage class to retrieve the value set in the `setOneClickPost` method.

Configure emails sent from Salesforce to contain unsubscribe functionality

Use the new method `setOneClickPost` in the SingleEmailMessage class to support unsubscribe functionality in emails sent from Salesforce. This method adds a List-Unsubscribe-Post header to emails.

Capture comments in the List-Unsubscribe email header

Use the new method `setUnsubscribeComment` in the SingleEmailMessage class to provide context for unsubscribing from email.

Configure HTTP addresses for unsubscribing recipients of email sent from Salesforce

Use the new method `setUnsubscribeUrls` in the SingleEmailMessage class to define the location of a mechanism to unsubscribe email recipients.

QuickAction Namespace

The QuickActions namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Store user utterances for use in agent quick actions

These are highlights of some methods in the new `DescribeQuickActionParameter` class. Use the `getParameterName` and `getParameterType` methods to retrieve user utterances, for use only in agent quick actions.

New or Changed Methods in Existing Classes

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Block client-side JavaScript from accessing a cookie

Use the new `isHttpOnly` parameter in the constructor `Cookie(name, value, path, maxAge, isSecure, SameSite, isHttpOnly)` for the existing `Cookie` class. Return the value of this attribute with the new `Cookie.isHttpOnly()` method.

Pause scheduled Apex jobs

Use the new `System.pauseJobByName(JobName)` and `System.pauseJobByJobId(JobId)` methods to pause a scheduled Apex job by specifying the job's name or cronTriggerId.

Resume scheduled Apex jobs

Use the new `System.resumeJobByName(JobName)` and `System.resumeJobByJobId(JobId)` methods to resume a scheduled Apex job by specifying the job's name or cronTriggerId.

ConnectApi (Connect in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Connect in Apex.

Many Connect REST API resource actions are exposed as static methods on Apex classes in the `ConnectApi` namespace. These methods use other `ConnectApi` classes to input and return information. The `ConnectApi` namespace is referred to as *Connect in Apex*.

IN THIS SECTION:

ConnectApi Rate Limit Changes

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.

New Connect in Apex Classes

These classes are new.

Changed Connect in Apex Input Classes

These input classes have changes.

Changed Connect in Apex Output Classes

These output classes have changes.

Changed Connect in Apex Enums

These enums have changes.

SEE ALSO:

Connect REST API

Apex Reference Guide: ConnectApi Namespace

Connect REST API Developer Guide

ConnectApi Rate Limit Changes

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 continue on a rolling basis. Migrations occur in the background without notification.

New Connect in Apex Classes

These classes are new.

Commerce

These new methods are in the `ConnectApi.CommerceCart` class.

Perform a complete cart calculation with custom fields

- `calculateCart(webstoreId, activeCartOrId, effectiveAccountId, calculateCartInput)`

New input class: `ConnectApi.CalculateCartInput`

Calculate shipping costs for a cart

- `evaluateShipping(webstoreId, activeCartOrId, effectiveAccountId, cartEvaluateShippingInput)`

New input class: `ConnectApi.CartEvaluateShippingInput`

Calculate taxes for a cart

- `evaluateTaxes(webstoreId, activeCartOrId, effectiveAccountId, cartEvaluateTaxInput)`

New input class: `ConnectApi.CartEvaluateTaxInput`

This new method is in the `ConnectApi.ExtendedCommerceDelivery` class.

Estimate the delivery date and time of a shipment

- `estimateDeliveryDate(estimateDeliveryDateInput, externalReference)`

New input class: `ConnectApi.DeliveryAddressInput`

New output class: `ConnectApi.EstimateDeliveryDateOutputRepresentation`

Salesforce CMS

These new methods are in the `ConnectApi.ManagedContent` class.

Get targets that a managed content space folder is shared with

- `getMCSFolderShares(folderId)`

New output class: `ConnectApi.MCSFolderShareCollection`

Update targets that a managed content space folder is shared with

- `patchMCSFolderShares(folderId, mcsFolderShareCollectionUpdateInput)`

New input class: `ConnectApi.MCSFolderShareCollectionUpdateInput`

New output class: `ConnectApi.MCSFolderShareCollection`

Get targets that a managed content space folder can be shared with

- `getMCSFolderShareTargets(folderId)`

New output class: `ConnectApi.MCSFolderShareTargetCollection`

These new methods are in the `ConnectApi.ManagedContentDelivery` class.

Get a page of collection items for a channel

- `getCollectionItemsForChannel(channelId, collectionKeyOrId, language, pageToken, pageSize)`

Get a page of collection items for an Experience Cloud site

- `getCollectionItemsForSite(siteId, collectionKeyOrId, language, pageToken, pageSize)`

Salesforce Flow

This new method is in the `ConnectApi.Orchestration` class.

Get details for an orchestration instance

- `getOrchestrationInstance(instanceId)`

Changed Connect in Apex Input Classes

These input classes have changes.

Commerce

`ConnectApi.ProductSearchGroupingInput`

This input class has these changed properties.

- `groupingOption`—This property now supports `BestMatch`, which groups search results by the best-match product of the variation group.
- `topProductType`—This property is no longer available.

Einstein

`ConnectApi.EinsteinPromptTemplateGenerationsInput`

This input class has a new property.

- `tags`—Map of wrapped values, such as free-form user feedback, that can be used to resolve a specified prompt template.

Named Credentials

`ConnectApi.ExternalAuthIdentityProviderInput`

This input class has these new properties.

- `clientAuthentication`—Client authentication method that describes how credentials are sent to the authorization server.
- `parameters`—List of custom request parameters to customize and extend requests to the identity provider's token endpoint.
- `standardExternalIdentityProvider`—Reference to a standard external auth identity provider.

Salesforce CMS

`ConnectApi.ManagedContentChannelCreateRepresentation`

This input class has this new property.

- `isDedicatedContentDelivery`—Specifies whether the channel has off-core dedicated content delivery enabled.

`ConnectApi.ManagedContentChannelUpdateRepresentation`

This input class has this new property.

- `isDedicatedContentDelivery`—Specifies whether the channel has off-core dedicated content delivery enabled.

`ConnectApi.ManagedContentVariantUpdateInput`

This input class has this new property.

- `apiName`—API name of the managed content variant.

Changed Connect in Apex Output Classes

These output classes have changes.

Chatter

`ConnectApi.EmailMessageCapability`

This output class has this new property.

- `automationType`—Automation type of the email message.

Commerce

`ConnectApi.CommerceProductSummary`

This output class has this new property.

- `productVariationInfo`—Product variation attributes, metadata, and mappings of attribute combinations to variation product IDs.

`ConnectApi.ProductAttributeInfo`

This output class has these new properties.

- `options`—List of product attribute value metadata.
- `viewType`—View type for product attributes.

Named Credentials

`ConnectApi.ExternalAuthIdentityProvider`

This output class has these new properties.

- `clientAuthentication`—Client authentication method that describes how credentials are sent to the authorization server.
- `parameters`—List of custom request parameters to customize and extend requests to the identity provider's token endpoint.
- `standardExternalIdentityProvider`—Reference to a standard external auth identity provider.

Salesforce CMS

`ConnectApi.ManagedContentChannel`

This output class has this new property.

- `isDedicatedContentDelivery`—Specifies whether the channel has off-core dedicated content delivery enabled.

`ConnectApi.ManagedContentCollectionItems`

This output class has these new properties.

- `currentPageUrl`—URL to the current page.
- `nextPageUrl`—URL to the next page.
- `previousPageUrl`—URL to the previous page.

`ConnectApi.ManagedContentDeliveryChannelRepresentation`

This output class has this new property.

- `isDedicatedContentDelivery`—Specifies whether the channel has off-core dedicated content delivery enabled.

`ConnectApi.ManagedContentSpace`

This output class has this new property.

- `fullyQualifiedName`—Fully qualified name of the managed content space.

`ConnectApi.ManagedContentVariant`

This output class has this new property.

- `apiName`—API name of the managed content variant.

Salesforce Flow

`ConnectApi.OrchestrationStageInstance`

This output class has this new property.

- `completionTime`—The duration of the stage in seconds.

`ConnectApi.OrchestrationStepInstance`

This output class has these new properties.

- `assignedTo`—The ID of the user, group, or queue that’s assigned to a work item.
- `assigneeType`—The assignee type associated with a work item.
- `comments`—The string stored in an output variable with the API name of Comments from a flow called by a completed orchestration step.
- `completedBy`—The ID of the user who completed the work item.
- `completionTime`—The duration of the step in seconds.
- `description`—The description associated with the orchestration step.

Changed Connect in Apex Enums

These enums have changes.

For information about these enums, see ConnectApi Enums in the *Apex Reference Guide*.

`ConnectApi.CommerceSearchGroupingOption`

This enum has this new value.

- `BestMatch`—Search results are grouped by the best-match product of the variation group.

API: New and Changed Items

Access more data objects and metadata types in API version 63.0.

IN THIS SECTION:

New and Changed Objects

Access more data through these new and changed standard objects.

New and Changed Standard Platform Events

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

Bulk API 2.0

These calls are new, changed, or deprecated in API version 63.0.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

CRM Analytics REST API

Using the CRM Analytics REST API, bulk add items to your analytics collections and specify tooltip styles in your dashboards.

Invocable Actions

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs.

Metadata API

Access more metadata through these new and changed metadata types.

SOAP API

These calls are new, changed, or deprecated in REST API version 63.0.

Tooling API New and Changed Objects

Access more metadata through these new and changed Tooling API objects.

User Interface API

Sort list views by multiple columns, and User Interface API supports more objects.

New and Changed Objects

Access more data through these new and changed standard objects.

Commerce

Store variation details for the product attribute item view

Use the new CustomFieldDisplayValue object.

Use a lookup for hierarchical bundle relationships

Use the new `MainFulfillmentOrderLineItemId` field on the existing FulfillmentOrderLineItem object.

Track the originating application and record for each payment

Use the new PaymentIntitiationSource object.

Determine the origin of the payment made from a payment link

Use the new `PaymentIntitiationSource` field on the existing PaymentLink object.

Get notified of Salesforce Payments platform events

Use the new `PaymentInitiationSourceApplication`, `PaymentInitiationSourceChannel`, `PaymentInitiationSourceId`, `PaymentInitiationSourceProcess`, `PaymentIntentGuid`, and `PaymentLinkId` fields on the existing PaymentGateway object.

Skip creating payment schedules and payment schedule items for subscription invoices

Use the new `ShouldExcludePayment` and `PaymentExclusionReason` fields on the Invoice object.

Specify the tax engine type and ID of the tax provider account for subscriptions

Use the new `Type` and `TaxPrvdAccountIndentifier` fields on the existing TaxEngine object.

BEHAVIOR CHANGE: Store a meta tag for a product category page

The `RecordId` field on the existing ObjectMetadataTag object is a polymorphic relationship field. It supports both Product2 and ProductCategory objects.

View the delivery service provisioning region

Use the new `ServiceRegion` field on the existing DeliveryEstimationSetup object.

BEHAVIOR CHANGE: Cart object fields are editable

Customize fields on these existing objects.

- CartDeliveryGroup
- CartItem
- CartItemPriceAdjustment
- CartTax
- CartValidationOutput
- WebCart
- WebCartAdjustmentBasis

- WebCartAdjustmentGroup

BEHAVIOR CHANGE: The order reference number is populated on WebCart instead of CartCheckoutSession

The `OrderReferenceNumber` field on the existing CartCheckoutSession object isn't populated upon checkout in LWR stores. Instead, the `InitialOrderReferenceNumber` field on the WebCart object is populated.

Customization

Enable the View All Fields object permission in a permission set

Use the new `PermissionsViewAllFields` field on the existing ObjectPermissions object.

Query more information about users

Use the new `EndDay`, `HasUserVerifiedEmail`, `HasUserVerifiedPhone`, `PasswordExpirationDate`, and `StartDay` fields on the existing User object.

Development

Create custom libraries for masking data in Data Mask

Use the new DataMaskCustomValueLibrary object.

Event Monitoring

Analyze API operational logs using human-readable names on the EventLogFile event

Use the new `CONNECTED_APP_NAME` and `USER_NAME` fields on the API Total Usage event type.

Monitor content security policy (CSP) violations

Use the new CSP Violation event type.

Get details about blocked redirections

Use the new Blocked Redirect event type.

DEPRECATED: The Insecure External Assets event type is deprecated

Because HTTPS connections are required to load external assets, Insecure External Assets events no longer apply. In Spring '25 and later, the Insecure External Assets event type captures no data.

Surface event data stored in standard objects

Use Event Log Objects, now generally available.

Experience Cloud

Create a content taxonomy or a hierarchy of terms that can be used to classify and organize content from Salesforce CMS

Use these new objects.

- ContentTaxonomy
- ContentTaxonomyTerm
- ContentTaxonomyRelatedTerm
- ContentTaxonomyTermRelatedTerm

Get information about the possible types of relationships between terms in a content taxonomy

Use the new ContentTaxonomyTermRelationshipType object.

Field Service

Identify and Manage Empty Appointment Bundles

Use the new `DoesDeleteEmptyBundles` and `EmptyBundleStatus` fields on the existing ApptBundleConfig object.

Build Data Capture Forms

Use the new DynamicDataCapture object.

Revenue

Get inventory levels for associated fulfillment order items and set the scaling method

Use the new `AssociatedFoItemInventory` and `AssociatedQuanScaleMethod` fields on the existing FulfillmentLineRel object.

Sales

Indicate the position of a forecasting dimension and the forecast type of the forecasting group

Use the new `DisplayPosition` and `ForecastingTypeId` fields on the existing ForecastingGroup object.

BEHAVIOR CHANGE: The SourceObject field on the ForecastingGroup object supports the Nillable

The `SourceObject` field on the ForecastingGroup object now supports the Nillable property.

BEHAVIOR CHANGE: The BuyerAttributes field on the Contact object supports the restricted picklist

The `BuyerAttributes` field on the Contact object now supports the Restricted picklist property.

Calculate the progress that a sales team makes toward an account plan objective's measurable goal

Use the new AccountPlanObjMeasCalcDef object.

Specify criteria for determining which records count toward completing an account plan objective's measurable goal

Use the new AccountPlanObjMeasCalcCond object.

Associate a calculation definition with an account plan objective's measurable goal

Use the new `AccountPlanObjMeasCalcDefId` field on the existing AccountPlanObjectiveMeasure object.

Track the date and time that the current value of an account plan objective's measurable goal was last updated

Use the new `CurrentValueTimestamp` field on the existing AccountPlanObjectiveMeasure object.

Specify that an action plan is a sales action plan

Use the new supported value `Sales` in the existing `ActionPlanType` field on the ActionPlan and ActionPlanTemplate objects.

Indicate the object that an action plan item is for

Use the new `ItemEntityType` field on the ActionPlanItem object.

Specify that an action plan template item is an event

Use the new supported value `Event` in the existing `ItemEntityType` field on the ActionPlanTemplateItem and ActionPlanTemplateItemValue objects.

Specify that a value on an action plan template item is for an event field

Use the new supported `Event` values in the existing `ItemEntityFieldName` field on the ActionPlanTemplateItemValue object.

Capture the details of the total contract value

Use the new FrcstCustmCatgRampRateSrc object.

Designate team members to administer specific territories

Use the new TerritoryAdminAssignment object to designate team members for administering territories and their descendants. Specify whether these team members can create, update, and delete territories. Also let designated team members assign other team members to descendant territories, and manage record assignments and rules.

View an instance of conversation data analyzed by AI, a group of analyzed insights aggregated into a topic, and an instance of call data from an analyzed set of insights.

Use the new ConvAnalysisSummary, ConvAnalysisTopic, and ConvAnalysisTopicEntry objects.

Salesforce Flow

DEPRECATED: The Environments field on the FlowDefinitionView object is being deprecated.

Instead, use the `SupportedEnvironments` field on the FlowDefinition object.

Get information about which environments a flow can run in.

Use the `SupportedEnvironments` field, which is on the FlowDefinitionView object. Introduced in API version 63.0, this field has been added to the Object Reference for the Salesforce Platform.

View the label of an orchestration instance

Use the new `OrchestrationLabel` field on the existing FlowOrchestrationInstance object.

View the description of an orchestration step

Use the new `Description` field on the existing FlowOrchestrationStepInstance object.

View the number of seconds that have passed since an assigned orchestration work item was created

Use the new `ElapsedTimeSinceCreationInSec` field on the existing FlowOrchestrationWorkItem object. This field has a value when the work item status is `Assigned`. When the orchestration work item status is `Completed`, this field has a null value.

View the number of seconds that have passed since an assigned orchestration work item was last assigned

Use the new `ElapsedTimeSinceAsgntInSec` field on the existing FlowOrchestrationWorkItem object. This field has a value when the work item status is `Assigned`. When the orchestration work item status is `Completed`, this field has a null value.

Determine whether flow metrics are logged to Data Cloud

Use the new `AreMetricsLoggedToDataCloud` field on the existing FlowDefinitionView, FlowRecord, FlowRecordVersion, and FlowVersionView objects.

Identity flows triggered by a change to a Data Cloud data graph

Use the new `DataGraphDataChange` value on the existing `TriggerType` field of the FlowDefinitionView object, the existing `Type` field of the FlowRecord object, and the `FlowType` field of the FlowRecordVersion object.

View the error description of the recurring flow interview

Use the new `ErrorDetail` field on the existing FlowDefinitionView, FlowVersionView, FlowRecord, and FlowRecordVersion objects.

View the running status of the recurring flow interview

Use the `ProgressStatus` field on the existing FlowRecordVersionOccurrence object. Introduced in API version 60.0, this field has been added to the *Object Reference for the Salesforce Platform*.

Track the progress of a record submitted for approval

Use the ApprovalSubmission object.

View the details of an approval submission

Use the ApprovalSubmissionDetail object.

View details about an approval work item associated with an approval step in a running approval orchestration

Use the ApprovalWorkItem object.

Security and Identity

Identify redirections that use a malformed URL

Use the new `MalformedUrl` value on the existing `ViolationType` field on the BrowserPolicyViolation object.

Trigger Flows with Privacy Job Sessions

Use the PrivacyJobSession object with Flow or Apex triggers.

Create and List Data Encryption Keys

Use the new DataEncryptionKey object to list data encryption keys (DEKs) and create new ones.

Configure headless user discovery for headless login flows

Use the new `IsUserDisambiguationAllowedUsernamePwd` field on the existing NetworkAuthApiSettings object.

Configure headless user discovery for headless forgot password flows

Use the new `IsUserDisambiguationAllowedForgotPwd` field on the existing NetworkAuthApiSettings object.

Store metric details related to public key certificate information

Use the new TenantSecurityCertificate object,

Store metric details related to Transaction Security Policy triggering events.

Use the new TenantSecurityTrigTransactionSecurityPol object.

BEHAVIOR CHANGE: Salesforce validates the syntax of the value in the `EndpointUrl` field on the CspTrustedSite object

When you pecify a value for the `EndpointUrl` field on the CspTrustedSite object, Salesforce performs a syntax check to validate that the URL isn't malformed.

BEHAVIOR CHANGE: Salesforce validates the syntax of the value in the `Url` field on the RedirectWhitelistUrl object

When you specify a value for the `Url` field on the RedirectWhitelistUrl object, Salesforce performs a syntax check to validate that the URL isn't malformed.

Service

Route work items through a single system with Unified Routing for Voice (Beta)

Use the new `CapabilitiesSupportsUnifiedRouting` field on the existing `ConversationVendorInfo` object to support unified routing.

> Note: Unified routing 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.

Support typing indicators and read and delivery receipts for inbound messages in Bring Your Own Channel

Use the new `IsInboundReceiptsEnabled` and `IsTypingIndicatorDisabled` fields on the existing ConversationChannelDefinition object.

Store admin choices for event-driven Messaging functionality in Bring Your Own Channel

Use the new CustomMsgChannel object.

Save partial responses for surveys

Use the new `IsPartialSaveEnabled` field on the Survey object.

Determine whether a survey is partially completed

Use the new supported value `PartiallyCompleted` in the existing `ResonseStatus` field on the SurveyInvitation object.

Specify whether the participant has partially completed the survey

Use the new supported value `PartiallyCompleted` in the existing `Status` field on the SurveyResponse object.

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.

Salesforce Overall

Be notified when an order is created or updated

Subscribe to PlaceOrderCompletedEvent to receive a notification when orders are created or updated by invoking the Place Order API or the Place Sales Transaction API.

Commerce

Be notified when a shopper abandons their shopping cart

Subscribe to WebCartAbandonedEvent to receive notifications related to abandoned carts.

Be notified when a first billing payment for a subscription product is in the recovery stage after a failed billing schedule creation

Use the new supported value `FirstBillingRecovery` in the existing `ProcessingStage` field on the FirstBillPaymentSetupEvent object.

Track when invoices without payments are generated from billing schedules for subscriptions

Subscribe to InvoiceProcPymtExclEvent to receive notifications when the first invoice without a payment schedule is generated for a subscription.

Sales

Notify subscribers whenever an Einstein Insight rule is triggered

Use the new ConversationInsightEvent platform event. Introduced in API version 60.0, this object has been added to the Platform Events Developer Guide.

Bulk API 2.0

These calls are new, changed, or deprecated in API version 63.0.

Changed Calls

Use a consistent URI and naming scheme across Bulk API 2.0 parallel query results and events

Bulk API 2.0 parallel query results and events now use the same URIs. Also, we renamed `resultLink` to `resultURL` and `resultChunks` to `resultPages` in Bulk API 2.0 parallel query results to match Bulk API 2.0 events.

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 continue on a rolling basis. Migrations occur in the background without notification.

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 for synchronous product imports has been removed in version 63.0. Use the asynchronous product import resource `/commerce/management/import/product/jobs` instead.

Perform a complete cart calculation with custom fields

Make a POST request to the existing `/commerce/webstores/`***`webstoreId`***`/carts/`***`activeCartOrId`***`/actions/calculate` resource.

New request body: Cart Calculate Input

Calculate shipping costs for a cart

Make a POST request to the new `/commerce/webstores/`***`webstoreId`***`/carts/`***`activeCartOrId`***`/actions/evaluate-shipping` resource.

New request body: Cart Evaluate Shipping Input

Calculate taxes for a cart

Make a POST request to the new `/commerce/webstores/`***`webstoreId`***`/carts/`***`activeCartOrId`***`/actions/evaluate-taxes` resource.

New request body: Cart Evaluate Tax Input

DEPRECATED: Commerce Webstore Checkout Coupons

The `/commerce/webstores/`***`webstoreId`***`/checkouts/`***`activeOrCheckoutId`***`/coupons` resource is deprecated. Make a POST request to the `/commerce/webstores/`***`webstoreId`***`/carts/`***`cartStateOrId`***`/cart-coupons` resource instead.

DEPRECATED: Commerce Webstore Checkout Coupons, Delete

The `/commerce/webstores/`***`webstoreId`***`/checkouts/`***`activeOrCheckoutId`***`/coupons/`***`cartCouponId`*** resource is deprecated. Make a DELETE request to the `/commerce/webstores/`***`webstoreId`***`/carts/`***`cartStateOrId`***`/cart-coupons/`***`cartCouponId`*** resource instead.

Get search results with product variation information

Make a GET request to the existing `/commerce/webstores/`***`webstoreId`***`/search/products` resource.

New request parameter: `includeProductVariationInfo`

Delete empty delivery groups

Make a GET request to the existing `/commerce/webstores/`***`webStoreId`***`/carts/`***`cartStateOrId`***`/delivery-groups/actions/arrange-items` resource.

New request parameter: `deleteEmptyDeliveryGroups`

Capture an authorized payment

Make a POST request to the new `/payments/payment-intents/`***`paymentIntentId`***`/capture` resource.

New request body: Capture Service Input

New response body: Capture Service Output

Refund a payment

Make a POST request to the new `/payments/payment-intents/`***`paymentIntentId`***`/refund` resource.

New request body: Refund Service Input

New response body: Refund Service Output

Forecast an expected delivery date and time based on delivery estimation settings and the selected shipping carrier method

Make a POST request to the new `/commerce/delivery/estimation-setup/`***`externalReference`***`/estimate/estimate-date` resource.

New request body: Estimate Delivery Date Input

New response body: Estimate Delivery Date

Upload and retrieve the status of a CSV inventory data file

Make a POST request to the existing `/commerce/oci/availability-records/uploads` resource. Previously, you could upload only JSON files.

Make a GET request to the existing `/commerce/oci/availability-records/uploads/`***`uploadId`*** resource. Previously, you could only retrieve the status of a JSON inventory availability upload job.

Create an invoice for an account, order, or a list of billing schedules for subscriptions

Make a POST request to the existing `/commerce/invoicing/invoices/collection/actions/generate` resource.

New request body: Invoice Input

New response body: Revenue Async Response

Create an invocie for a subscription order without a payment

Make a POST request to the existing `/commerce/invoicing/invoices/collection/actions/generate` resource.

New request parameter: `configurationOverrides`

Cancel an active Commerce subscription

Make a POST request to the new `/commerce/webstores/`***`webstoreId`***`/subscriptions/actions/initiate-cancellation` resource.

New request body: Commerce Subscription Cancel Input

New response body: Commerce Subscription Cancel Output

Retrieve a list of Commerce subscriptions

Make a GET request to the new `/commerce/webstores/`***`webstoreId`***`/subscriptions` resource.

New response body: Commerce Subscription Collection

Update the saved payment method for a Commerce subscription

Make a PATCH request to the new `/commerce/webstores/`***`webstoreId`***`/subscriptions/`***`subscriptionId`***`/saved-payment-methods` resource.

New request body: Commerce Subscription Saved Payment Method Input

New response body: Commerce Subscription Detail

Retrieve a list of child products associated with a parent product

Make a GET request to the existing `/commerce/webstores/`***`webstoreId`***`/products/`***`productId`***`/children` resource.

New request parameter: `includeProductSellingModels`

Get a list of products for a specific web store

Make a GET request to the existing `/commerce/webstores/`***`webstoreId`***`/products` resource.

New request parameters: `includeAttributeSetInfo`, `includegroupByAttributeVariationInfo`, `includeProductSellingModels`, and `includeQuantityRule`

View details of a specific order summary

Make a POST request to the existing `/commerce/webstores/`***`webstoreId`***`/order-summaries/actions/lookup` resource.

New request parameter: `excludePayments`

Content Taxonomy

Get terms for a content taxonomy

Make a GET request to the new `/connect/content-taxonomy/terms` resource.

Required request parameters: `depth`, `taxonomyId`

New response body: Content Taxonomy Term Collection

Search content taxonomy terms

Make a GET request to the new `/connect/content-taxonomy/terms/search` resource.

Required request parameters: `queryText`, `taxonomyIds`

New response body: Content Taxonomy Term Collection

Create a term within a content taxonomy

Make a POST request to the new `/connect/content-taxonomy/`***`taxonomyId`***`/terms` resource.

New request body: Content Taxonomy Term Input

New response body: Content Taxonomy Term

Get a term within a content taxonomy

Make a GET request to the new `/connect/content-taxonomy/`***`taxonomyId`***`/terms/`***`termId`*** resource.

New response body: Content Taxonomy Term

Update a term within a content taxonomy

Make a PATCH request to the new `/connect/content-taxonomy/`***`taxonomyId`***`/terms/`***`termId`*** resource.

New request body: Content Taxonomy Term Input

New response body: Content Taxonomy Term

Delete a term within a content taxonomy

Make a DELETE request to the new `/connect/content-taxonomy/`***`taxonomyId`***`/terms/`***`termId`*** resource.

Required request parameter: `deleteChildren`

Custom Domain

Get the ID for the custom domain associated with a domain name

Make a GET request to the new `/connect/custom-domain/domains/`***`domainName`***`/domainId` resource.

New response body: Custom Domain ID

Get values for the canonical name (CNAME) record that's used to verify ownership of a custom domain

Make a GET request to the new `/connect/custom-domain/domains/`***`domainName`***`/expected-cname` resource.

New response body: Custom Domain CNAME for Domain Verification

Get values for the canonical name (CNAME) record that's required for custom domains that use the Salesforce CDN

Make a GET request to the new `/connect/custom-domain/domains/sites/`***`storeOrSiteId`***`/custom-urls` resource.

New response body: Custom Domain CNAME for the Salesforce CDN

Get a list of custom URLs for a custom domain associated with a site or store

Make a GET request to the new `/connect/custom-domain/domains/sites/`***`storeOrSiteId`***`/custom-urls` resource.

Existing response body: Custom Domain Custom URL Collection

Data Cloud

Create, update, delete, or retrieve information about a data stream.

Make a POST, PATCH, DEL, or GET request to the `ssot/data-streams` resources. This resource is available starting in April 2024.

New request body: Data Streams Input

New response body: Data Streams Output

Create an activation target

Make a POST request to the `/ssot/activation-targets` resource. This resource is available starting in December 2024.

New request body: Activation Target Input

Updated response body: Activation Target Output

Update an activation target

Make a PATCH request to the `/ssot/activation-targets/`***`activationTargetId`*** resource. This resource is available starting in December 2024.

New request body: Activation Target Input

Updated response body: Activation Target Output

Create an activation

Make a POST request to the `/ssot/activations` resource. This resource is available starting in December 2024.

New request body: Activation Definition Input

Updated response body: Activation Output

Update an activation

Make a PUT request to the `/ssot/activations/`***`activationId`*** resource. This resource is available starting in December 2024.

New request body: Activation Definition Input

Updated response body: Activation Output

Validate your data transform logic before you create the transform

Make a POST request to the new `/ssot/data-transforms-validation` resource. This resource is available starting in December 2024.

Updated request body: Data Transform Input

New response body: Data Transform Validation Output

Get the run history of a data transform, such as the number of records processed and any errors that occurred

Make a GET request to the new `/ssot/data-transforms/`***`dataTransformNameOrId`***`/run-history` resource. This resource is available starting in December 2024.

New response body: Data Transform Run History Collection Representation

Salesforce CMS

Get a page of collection items for a channel

Make a GET request to the existing `/connect/cms/delivery/channels/`***`channelId`***`/collections/`***`collectionKeyOrId`*** resource.

New optional request parameters: `pageSize`, `pageToken`

Get a page of collection items for an Experience Cloud site

Make a GET request to the existing `/connect/sites/`***`siteId`***`/cms/delivery/collections/`***`collectionKeyOrId`*** resource.

New optional request parameters: `pageSize`, `pageToken`

Get the targets that a managed content space folder is shared with

Make a GET request to the new `/connect/cms/folders/`***`folderId`***`/shares` resource.

New response body: MCS Folder Share Collection

Update the targets that a managed content space folder is shared with

Make a PATCH request to the new `/connect/cms/folders/`***`folderId`***`/shares` resource.

New request body: MCS Folder Share Collection Update Input

New response body: MCS Folder Share Collection

Get the targets that a managed content space folder can be shared with

Make a GET request to the new `/connect/cms/folders/`***`folderId`***`/share-targets` resource.

New response body: MCS Folder Share Target Collection

Get the taxonomy terms associated with managed content

Make a GET request to the new `/connect/cms/contents/`***`contentKeyOrId`***`/taxonomy-terms` resource.

New response body: Managed Content Taxonomy Term Collection

Add or remove taxonomy term associations from managed content

Make a PATCH request to the new `/connect/cms/contents/`***`contentKeyOrId`***`/taxonomy-terms` resource.

New request body: Managed Content Taxonomy Terms Input

New response body: Managed Content Taxonomy Term Collection

Salesforce Flow

Get orchestration instance details

Make a GET request to the new `/connect/interaction/orchestration/instance/detail` resource.

Required request parameter: `instanceId`

Search

Search objects using keywords

Make a GET request to the new `/connect/search/sobjects/results` resource.

Required request parameter: `q`

New response body: Search Results

Search an object using keywords

Make a POST request to the new `/connect/search/sobjects/`***`objectApiName`***`/results` resource.

New request body: Search Request Input

New response body: Scoped Search Results

Changed Connect REST API Request Bodies

These request bodies have changes.

Commerce

Checkout Address Input

This request body has this new property.

- `shipToPhoneNumber`—Phone number of the contact.

Contact Information Input

This request body has this new property.

- `isoCountryCodeForPhoneNumber`—ISO code of the phone number country.

Product Search Grouping Input

This request body has these changed properties.

- `groupingOption`—This property now supports `BestMatch`, which groups search results by the best-match product of the variation group.
- `topProductType`—This property is no longer available.

Invoice Input

This request body has these changed properties.

- `accountId`—Specify invoice creation using an account record ID.
- `billingTransactionId`—Specify invoice creation using a billing transaction record ID.
- `configurationOverrides`—Specifies whether the generation of payment schedules and payment schedule items should be skipped in the case of billing for subscription products.

Cart Coupon Input

This request body has this new property.

- `customFields`—Array of sObjects and their associated custom fields.

Payment Intent Input

This request body has this new property.

- `applyDomainValidations`—Specifies whether to apply domain-specific validations on the payment intent request.

Einstein

Einstein Prompt Template Generations Input

This request body has this new property.

- `tags`—Map of wrapped values, such as free-form user feedback, that can be used to resolve a specified prompt template.

Data Cloud

Data Transform Input

This request body has this new property.

- `creationType`—The creation type of the data transform.

Create Calculated Insights

This request body has these new properties.

- `publishScheduleInterval`—How frequently the calculated insight is processed.
- `publishScheduleStartDateTime`—When the calculated insight is evaluated to be run.
- `publishScheduleEndDate`—The date and time after which the calculated insight is no longer run.

Named Credentials

External AuthI dentity Provider Input

This request body has these new properties.

- `clientAuthentication`—Client authentication method that describes how credentials are sent to the authorization server.
- `parameters`—List of custom request parameters to customize and extend requests to the identity provider's token endpoint.
- `standardExternalIdentityProvider`—Reference to a standard external auth identity provider.

Salesforce CMS

Managed Content Channel Create

This request body has this new property.

- `isDedicatedContentDelivery`—Specifies whether the channel has off-core dedicated content delivery enabled.

Managed Content Channel Update

This request body has this new property.

- `isDedicatedContentDelivery`—Specifies whether the channel has off-core dedicated content delivery enabled.

Managed Content Variant Update Input

This request body has this new property.

- `apiName`—API name of the managed content variant.

Changed Connect REST API Response Bodies

These response bodies have changes.

Chatter

Email Message Capability

This response body has this new property.

- `automationType`—Automation type of the email message.

Commerce

Checkout Address

This response body has this new property.

- `shipToPhoneNumber`—Phone number of the contact.

Commerce Product Summary

This response body has this new property.

- `productVariationInfo`—Product variation attributes, metadata, and mappings of attribute combinations to variation product IDs.

Delivery Group

This response body has this new property.

- `totalCartItemCount`—Number of cart items, including their quantities, of the type `Product` in the delivery group.

Product Attribute Info

This response body has these new properties.

- `options`—List of product attribute value metadata.
- `viewType`—View type for product attributes.

Application Context

This response body has this new property.

- `subscriptionConfig`—Commerce subscription configuration settings.

Cart Coupon

This response body has this new property.

- `customFields`—Array of sObjects and their associated custom fields.

Order Summary Lookup

This response body has these new properties.

- `adjustments`—Collection of adjustments for an order summary.
- `owner`—Buyer profile details for an order summary.
- `payments`—Payment details for an order summary.

Order Item Summary Lookup

This response body has these new properties.

- `processExceptions`—Process exceptions information for an order item summary.
- `productSellingModel`—Product selling model information for an order item summary.

Product Overview

This response body has these new properties.

- `name`—Name of a product.
- `productClass`—Class of a product.
- `productSellingModels`—Product selling models information for a product.
- `purchaseQuantityRule`—Purchase quantity rule information for a product.
- `urlName`—URL name of a product.
- `variationAttributeSet`—Variation attribute set information for a product.
- `variationInfo`—Variation attributes information for a product.

Custom Domain

Custom Domain Detail

This response body has these new properties.

- `domainStatus`—Custom domain status.
- `lastModifiedDate`—Date when the custom domain was last modified.

Custom Domain Custom URL Collection

This property changed for this response body.

- `CustomUrlList` was renamed to `CustomUrls`.

Custom URL Detail

This response body has these new properties.

- `lastModified`—Date when the custom URL was last modified.
- `status`—Custom URL status.

Data Cloud

Activation Target Output

This response body has these new properties.

- `connector`—Details about the connector that is used for this activation target.
- `isEnabled`—Indicates whether the activation target is enabled `(true)` or not `(false)`.
- `platformPrivacyType`—Platform privacy type for this activation target. Derived from Activation Platform.
- `organizationId`—Organization ID of the activation target.

Activation Output

This response body has these new properties.

- `activationDefinitionId`—ID of the activation definition.
- `activationPlatformCustomerFileSourceEnum`—Customer file source of the activation platform.
- `activationTargetId`—Activation target ID for the activation.
- `activationTargetName`—Activation target name for the activation.

- `activationTargetObjectPath`—Object path for the activation target.
- `activationTargetSubject`—Activation target subject for the activation.
- `attributesConfig`—Attributes for the activation.
- `contactPointsConfig`—Contact points for the activation.
- `curatedEntityApiName`—API name of the entity curated by the activation
- `curatedEntityId`—ID of the entity curated by the activation.
- `curatedEntityName`—Name of the entity curated by the activation.
- `dataSourcesConfig`—Data sources for the activation.
- `dataSpaceName`—Data space name for the activation.
- `dataspaceId`—Data space ID for the activation.
- `developerName`—Developer name for the activation.
- `directDmoFiltersConfig`—Direct DMO filters for the activation.
- `enabled`—Indicates if the activation is enabled `(true)` or not `(false)`.
- `relatedDmoFiltersConfig`—Related DMO filters for the activation.
- `segmentDefinitionId`—Definition ID for the activation segment.

Named Credentials

External Auth Identity Provider

This response body has these new properties.

- `clientAuthentication`—Client authentication method that describes how credentials are sent to the authorization server.
- `parameters`—List of custom request parameters to customize and extend requests to the identity provider's token endpoint.
- `standardExternalIdentityProvider`—Reference to a standard external auth identity provider.

Salesforce CMS

Managed Content Channel

This response body has this new property.

- `isDedicatedContentDelivery`—Specifies whether the channel has off-core dedicated content delivery enabled.

Managed Content Collection Items

This response body has these new properties.

- `currentPageUrl`—URL to the current page.
- `nextPageUrl`—URL to the next page.
- `previousPageUrl`—URL to the previous page.

Managed Content Delivery Channel

This response body has this new property.

- `isDedicatedContentDelivery`—Specifies whether the channel has off-core dedicated content delivery enabled.

Managed Content Space

This response body has this new property.

- `fullyQualifiedName`—Fully qualified name of the managed content space.

Managed Content Variant

This response body has this new property.

- `apiName`—API name of the managed content variant.

Salesforce Flow

Orchestration Stage Instance

This response body has this new property.

- `completionTime`—The duration of the stage in seconds.

Orchestration Step Instance

This response body has these new properties.

- `assignedTo`—The ID of the user, group, or queue that's assigned to a work item.
- `assigneeType`—The assignee type associated with a work item.
- `comments`—The string stored in an output variable with the API name of Comments from a flow called by a completed orchestration step.
- `completedBy`—The ID of the user who completed the work item.
- `completionTime`—The duration of the step in seconds.
- `description`—The description associated with the orchestration step.

CRM Analytics REST API

Using the CRM Analytics REST API, bulk add items to your analytics collections and specify tooltip styles in your dashboards.

IN THIS SECTION:

New and Changed CRM Analytics REST API Resources

These resources are new or have changes.

Changed CRM Analytics REST API Request Bodies

These request bodies have changes.

Changed CRM Analytics REST API Response Bodies

These response bodies have changes.

New and Changed CRM Analytics REST API Resources

These resources are new or have changes.

Add new items to an analytics collection in bulk

Make a POST request to the `/analytics/collections/`***`collectionId`***`/bulk-items` resource.

Request body includes the new Wave Collection Item Bulk Add Input representation.

Use the new tooltip style in dashboards

Make a GET request to the `/wave/dashboards/`***`dashboardIdOrApiName`*** resource.

Response body includes the new Tooltip Style representation

Changed CRM Analytics REST API Request Bodies

These request bodies have changes.

Grid Layout Widget Style Input

The request body has this new property.

- `tooltipStyle`—the tooltip style for the dashboard layout.

Changed CRM Analytics REST API Response Bodies

These response bodies have changes.

Grid Layout Widget Style

The response body has this new property.

- `tooltipStyle`—the tooltip style for the dashboard layout.

Invocable Actions

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs.

Invocable actions are available through REST API. The following action has changed:

Create subscription records for subscription products included a Commerce order summary

Use the new createSubscriptionRecords action.

For more information on invocable actions, see the Actions Developer's Guide.

Metadata API

Access more metadata through these new and changed metadata types.

Customization

Enable the View All Fields object permission in a permission set

Use the new `viewAllFields` field on the existing PermissionSet metadata type.

Enable the View All Fields object permission in a profile

Use the new `viewAllFields` field on the existing Profile metadata type.

Manage permission sets with an updated user interface

Use the new `enhancedPermSetList` field on the existing UserManagementSettings metadata type.

Manage roles with an updated user interface

Use the new `enhancedUserRoleListView` field on the existing UserManagementSettings metadata type.

Experience Cloud

DEPRECATED: The `enableGuestRecordReassignOrgPref` field on the CommunitySettings metadata type is deprecated in API version 63.0

The preference is now always turned on.

DEPRECATED: The `enableSitesRecordReassignOrgPref` field on the SiteSettings metadata type is deprecated in API version 63.0

The preference is now always turned on.

Marketing Cloud

Retrieve and deploy branding for marketing workspaces

Use the existing DigitalExperienceBundle type to retrieve and deploy branding for marketing workspaces.

Salesforce CMS

Retrieve and deploy general workspaces

Use the existing DigitalExperienceBundle metadata type to retrieve and deploy general workspaces.

Specify whether content created from a custom content type is converted to metadata

Use the new `isMetadataContent` field on the existing ManagedContentType metadata type.

Move custom content types between orgs with second-generation managed packages

Use the existing ManagedContentType metadata type to package custom content types.

Salesforce Flow

Create subscription records for subscription products included a Commerce order summary

Use the new `createSubscriptionRecords` value in the existing `actionType` field, which is on the existing FlowActionCall subtype of the Flow metadata type.

Create approval orchestrations with Flow Approval Processes

Use the new `ApprovalWorkflow` value in the `processType` field of the Flow metadata. For more information see Flow Approval Processes.

Specify that an approval orchestration send no email notifications to approvers

Use the new `SendNoApproverEmails` value for the existing `name` field of the FlowMetadataValue type and set the `value` field to a string that's either true or false.

BEHAVIOR CHANGE: The requiresAsyncProcessing field on the existing FlowStageStep metadata type is no longer used

Previously, this field indicated whether a background step called a flow that contained an asynchronous action or a Wait element, requiring asynchronous processing. A background step now automatically detects whether its associated flow runs synchronously or asynchronously.

Specify the translated label for a step in an orchestration

Use the new FlowOrchestrationStepTranslation subtype of the FlowTranslation type.

Trigger flows with more out-of-the-box automation events

Use these new values in the existing `actionType` field of the FlowActionCall subtype of the Flow metadata type: `trgrOnWebCartAbandoned`, `processWebStoreUserRgstr`, `trgrOnWhatsAppSubscription`, `trgrOnEmailOpenEngagement`, `trgrOnEmailLinkClickEngagement`, `trgrOnEmailBounceEngagement`, `trgrOnSmsLinkClickEngagement`, `trgrOnSmsDeliveryFailureEngagement`, `trgrOnSmsResponseEngagement`, `trgrOnWhatsAppResponseEngmt`, `trgrOnWhatsAppReadEngagement`, `trgrOnWhatsAppDeliveredEngagement`, `trgrOnWhatsAppLinkClickEngmt`, and `trgrOnWhatsAppDlvrFailureEngmt`

Trigger a flow when a field in a data graph changes

Use the new `DataGraphDataChange` value in the existing `triggerType` field and the new `triggeringDataGraph` and `triggeringDataModelObjectPath` fields in the existing FlowStart subtype of the Flow metadata type.

Reference an automation event in a Wait element

Use the new `automationEventName`and `automationEventType` fields in the existing FlowWaitEvent subtype of the Flow metadata type.

Specify the maximum number of records to store

Use the new `limit` field in the existing FlowRecordLookup subtype of the Flow metadata type.

Specify a template for a screen component (generally available)

Use the new `sourceTemplateApiName` and `sourceTemplateProviderType` fields on the existing FlowScreenField subtype, which is on the FlowScreen subtype of the Flow metadata type.

Show a progress indicator in a screen flow

Use the new `customProperties` field on the existing Flow metadata type.

Join source collections into a target collection in a flow

Use the new `complexValue` and `complexValueType` fields on the existing FlowElementReferenceOrValue subtype of the Flow metadata type. And use the new `InnerJoin` value, which is in the existing `transformType` field on the FlowTransformValueAction subtype of the Flow metadata type.

Security and Identity

Specify additional external auth identity provider types

Use these new values in the `parameterType` field to specify the type of external auth identity provider in the ExternalAuthIdentityProviderParameter type.

- `AuthorizeRequestQueryParameter`
- `ClientAuthentication`
- `IdentityProviderOptions`
- `RefreshRequestBodyParameter`
- `RefreshRequestHttpHeader`
- `RefreshRequestQueryParameter`
- `StandardExternalIdentityProvider`
- `TokenRequestBodyParameter`
- `TokenRequestHttpHeader`
- `TokenRequestQueryParameter`

Set the order of parameters when an external auth identity provider has more than one parameter

Use the ExternalAuthIdentityProviderParameter `sequenceNumber` field to order the parameters when an external auth identity provider has more than one parameter. Priority is from lower to higher numbers (for example, 1 is the highest priority).

Encrypt more data with manageable keys

Use the new `canEncryptTransactionalDatabase`, `canManageDataCloudKeys`, and `enableExternalKeyManagement` fields on the existing EncryptionKeySettings type.

Configure Salesforce as a SAML single sign-on identity provider with the external client application framework

Use the new ExtlClntAppSamlConfigurablePolicies metadata type.

Configure headless user discovery for headless login flows

Use the new `isUserDisambiguationAllowedUsernamePwd` field on the existing NetworkAuthApiSettings subtype of the Network metadata type.

Configure headless user discovery for headless forgot password flows

Use the new `isUserDisambiguationAllowedForgotPwd` field on the existing NetworkAuthApiSettings subtype of the Network metadata type.

REMOVED: The `Triple_Des` value is removed

The `Triple_Des` value in the `encryptionType` field on the ConnectedAppSamlConfig subtype of the ConnectedApp metadata type is removed. Instead, use the `AES_128` or `AES_256` values.

BEHAVIOR CHANGE: Salesforce validates the syntax of the value in the `endpointUrl` field on the CspTrustedSite metadata type

When you specify a value for the `endpointUrl` field on the CspTrustedSite metadata type, Salesforce performs a syntax check to validate that the URL isn't malformed.

BEHAVIOR CHANGE: Salesforce validates the syntax of the value in the `url` field on the RedirectWhitelistUrl metadata type

When you specify a value for the `url` field on the RedirectWhitelistUrl metadata type, Salesforce performs a syntax check to validate that the URL isn't malformed.

Service

Build customer trust by supporting typing indicators and read and delivery receipts for inbound messages in Bring Your Own Channel

Use the new `IsInboundReceiptsEnabled` and `IsTypingIndicatorDisabled` fields on the existing ConversationChannelDefinition type.

SOAP API

These calls are new, changed, or deprecated in REST API version 63.0.

Changed Calls

`describeLayout()`

View a layout item's behavior (`Edit`, `Required`, or `Readonly`) with the new field `uiBehavior` under DescribeLayoutItem in DescribeLayoutResult.

`queryMore()`

If blob objects are part of additional query results, `queryMore()` returns links to those objects. Previously, if a query had a blob field in its select list, `queryMore()` returned one record at a time.

`getDeleted()`

Objects without a delete field flag or that aren't written to the delete log now return an error even if they've been updated in the specified time period.

Tooling API New and Changed Objects

Access more metadata through these new and changed Tooling API objects.

Commerce

Get information about the view type assigned to product attribute custom fields

Use the new CustomFieldDisplay object.

Security and Identity

Specify additional external auth identity provider types

Use these new values in the `ParameterType` field to specify the type of external auth identity provider in the ExternalAuthIdentityProviderParameter type.

- `AuthorizeRequestQueryParameter`
- `ClientAuthentication`
- `IdentityProviderOptions`

- `RefreshRequestBodyParameter`
- `RefreshRequestHttpHeader`
- `RefreshRequestQueryParameter`
- `StandardExternalIdentityProvider`
- `TokenRequestBodyParameter`
- `TokenRequestHttpHeader`
- `TokenRequestQueryParameter`

Set the order of parameters when an external auth identity provider has more than one parameter

Use the ExternalAuthIdentityProviderParameter `SequenceNumber` field to order the parameters when an external auth identity provider has more than one parameter. Priority is from lower to higher numbers (for example, 1 is the highest priority).

Service

Build trust with customers by supporting typing indicators and read and delivery receipts for inbound messages in Bring Your Own Channel

Use the new `IsInboundReceiptsEnabled` and `IsTypingIndicatorDisabled` fields on the existing `ConversationChannelDefinition` object.

User Interface API

Sort list views by multiple columns, and User Interface API supports more objects.

IN THIS SECTION:

New and Changed User Interface API Resources
These resources are new or have changes.

Changed User Interface API Request Bodies
These request bodies have changes.

Changed User Interface API Response Bodies
These response bodies have changes.

Supported Objects
All new standard objects are auto-enabled for use with User Interface API.

SEE ALSO:

User Interface API Developer Guide

New and Changed User Interface API Resources

These resources are new or have changes.

Lists

Sort list views by multiple columns

These list view resources, with the specified request parameters or request body properties, support sorting by multiple fields.

- GET `/ui-api/list-records/${listViewId}` `sortBy` request parameter

- POST `/ui-api/list-records/${objectApiName}/${listViewApiName}`

  `sortBy` property in the List Records Input request body

- PATCH `/ui-api/list-preferences/${objectApiName}/${listViewApiName}`

  `orderedBy` property in the List Preferences Input request body

- GET `/ui-api/related-list-records/${parentRecordId}/${relatedListId}`

  `sortBy` request parameter

- POST `/ui-api/related-list-records/${parentRecordId}/${relatedListId}`

  `sortBy` property in the Related List Records Input request body

- GET `/ui-api/related-list-records/batch/${parentRecordId}/${relatedListIds}`

  `sortBy` request parameter

- POST `/ui-api/related-list-records/batch/${parentRecordId}/${relatedListIds}`

  `sortBy` property in the Related List Records Batch Input request body

- PATCH `/ui-api/related-list-info/${parentObjectApiName}/${relatedListId}`

  `orderedByInfo` property in the Related List User Preferences Input request body

Changed User Interface API Request Bodies

These request bodies have changes.

Lookups

Lookup Field Suggestion with POST

This request body has this new property.

- `orderBy`—Information describing how to order the results.

Changed User Interface API Response Bodies

These response bodies have changes.

Record Layouts

Record Layout Item

This response body has this new property.

- `uiBehavior`—Indicates the layout item behavior on the specified layout. The value doesn't reflect user-level or profile-level access. This property supports the `Edit`, `Required`, and `Readonly` values.

Record Layout Section

This response body has this new property.

- `tabOrder`—Indicates the tab order for the fields in the section in the edit view. This property supports the `LeftRight` and `TopDown` values.

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.

- EmailTemplate
- ExpressionSetView
- LoyaltyProgramPartnerLedger
- Network
- PermissionSet

These standard objects are already supported in User Interface API. They're newly supported for list views and most recently used list views.

- AppointmentInvitation
- AppointmentInvitee
- AppointmentTopicTimeSlot
- AssignedResource
- AuthApplicationAsset
- AuthApplicationPlace
- AuthorizationFormConsent
- BenefitSchedule
- BenefitSession
- BillingTreatmentItem
- ContactPointAddress
- Coupon
- CreditMemoAddressGroup
- CreditMemoInvApplication
- CreditMemoLine
- LoyaltyPartnerProduct
- LoyaltyPgmPtnrPrepaidPack
- LoyaltyProgramMbrPromotion
- LoyaltyProgramMemberCase
- MemberBenefit
- NetworkReferencedObject
- PriceAdjustmentSchedule
- ProductQuantityRule
- ProductSellingModelOption
- PromotionLoyaltyPtnrProdt
- PromotionMarketSegment
- PurchaseQuantityRule
- RevRecogTreatmentItemGroup
- RevenueDistributionMethod

- RevenueElement
- RevenueElementDistribution
- RevenueRecogTreatmentItem
- RevenueRecognitionPolicy
- RevenueRecognitionTreatment
- TimeSlot
- UserRole
- WorkTypeGroupMember

These standard objects are already supported in User Interface API and for list views. They're newly supported for most recently used list views.

- AssetStatePeriod
- TaxEngineProvider

SEE ALSO:

User Interface API Developer Guide: Supported Objects

Einstein

Supercharge your workforce efficiency with predictive and generative AI.

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IN THIS SECTION:

Einstein Features

Learn more about how Einstein can supercharge productivity across all Salesforce clouds. Einstein features are released as often as monthly, so check back again soon for the latest AI solutions. Features included in the January monthly release generally become available when Spring '25 rolls out to your org.

Einstein Platform

Build smart solutions for your business cases with generative AI, predictive AI, and everything in between. Learn about functionality, security, and performance improvements to AI at Salesforce. Einstein platform changes are released as often as monthly, so check back again soon for the latest and greatest.

Einstein Features

Learn more about how Einstein can supercharge productivity across all Salesforce clouds. Einstein features are released as often as monthly, so check back again soon for the latest AI solutions. Features included in the January monthly release generally become available when Spring '25 rolls out to your org.

Cloud	Feature	Release Note
	January '25	
Automation & Integration	Einstein for Flow: Formula Creation	Get Help Creating Flow Formulas with Einstein (Generally Available)

Cloud	Feature	Release Note
Automation & Integration	Flow Creation with Einstein	Get Help Building Flows Faster and More Accurately with Einstein (Generally Available)
Automation & Integration		Generate a Detailed Description of a Flow with Einstein
Commerce	Coupons	Create Coupons Using a Guided Workflow
Commerce	Product Variations	Create a Promotion Based on Specific Product Variations
Commerce	Search Suggestions	Offer Shoppers Relevant Search Suggestions
Communications	Service Level Objective Analysis Assistant	Track Service Level Objectives and Identify Potential Upsell Opportunities
Education Cloud	Data Cloud for Education: Holistic Student Insights	Gain Holistic Student Insights and Visualize Learner Progress
Education Cloud	Philanthropic Research Agent	Gain Meaningful Insights with the Philanthropic Research Agent
Education Cloud	Student Recruitment Agent	Autonomously Answer and Support Prospective Students
Einstein Search	Einstein Search Filters	Customize Explicit Filters in Search Manager
Energy and Utilities	Einstein Summaries: Generate Case and Engagement Summaries, Suggest Clean Energy Programs for Service Reps	Einstein Generative AI for Energy and Utilities Cloud Enhancements
Field Service	Agentforce in the Field Service Mobile App: Send images	Get Solutions Easily from Agentforce by Including Images
Field Service	Ask Field Service: Talk with Agentforce via Siri	Work Smarter by Using Siri to Communicate with Agentforce
Field Service	Filling Gaps for Service Resources	Boost Productivity and Resource Utilization by Easily Filling Schedule Gaps
Field Service	Pre-Work Brief: Read Aloud	Listen Safely to Pre-Work Briefs with a Tap of a Button
Financial Services Cloud	Boost Productivity with Financial Services Cloud Embedded AI for Agents	Boost Productivity with Financial Services Cloud Embedded AI for Agents
Health Cloud	Patient Services Agent	Automate Patient Services with an AI Agent
Health Cloud	Roster File Field Mapping with Einstein	Automate Field Mapping with Einstein
Industries	Writeback Mapping Suggestions with Einstein	Automate Your Field Mapping With Einstein
Marketing	Content Creation for Account Engagement	Generate Account Engagement Content in More Languages

Cloud	Feature	Release Note
Marketing	Generate More Marketing Content	Save Time with New AI Capabilities for Campaigns and Content
Marketing	Multi-Channel Campaign Designer	Create Campaigns with Agentforce Campaign Designer (Beta)
Platform	Data Mask	Use Einstein to Generate Data Mask Custom Libraries
Public Sector Solutions	Household Overview	Help Caseworkers Quickly Learn About a Household with Einstein
Revenue Cloud	Update Context Tags	Add Context Tags Automatically to Your Pricing Elements
Sales	Agentforce Sales Coach	Enhance Agentforce Sales Coach Responses with a Data Library
Sales	Einstein Conversation Insights	Use Generative AI in All Languages Supported by Einstein Conversation Insights
Sales		Use Call Explorer in Flows
Service	Agentforce for Service	Manage Your Workforce More Efficiently with Agentforce
Service	Agentforce Service Agent	Monitor Real-time Conversations Between Agentforce Service Agents and Customers (Release Update)
Service		Flag Supervisors to Help with Agentforce Service Agent Conversations
Service		Chat with Agentforce Service Agent in Japanese (Generally Available)
Service		Other Enhancements for Routing Work to Agentforce Service Agents
Service	Agentforce Service Planner	Get Case Resolution Assistance at the Click of a Button (Generally Available)
Service	Conversation Intelligence Service	Optimize Business Processes Based on the Sentiment and Intent of Real-Time Conversations (Pilot)
Service	Customer Experience Intelligence	Get a Comprehensive Summary of Customer Engagement, Experience, and Data
Service	Einstein Article Recommendations	Empower Reps to Resolve Cases Faster with Einstein Article Recommendations (Pilot)
Service	Einstein Conversation Mining, Einstein Service Replies	Einstein for Service
Service	Einstein Work Summaries	Get a Quick Overview of a Case and Ongoing Developments with Case Summaries (Beta)

Cloud	Feature	Release Note
Service		Customize Work Summaries for Case Using the Summarize Case Prompt Template

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.

Feature	Release Note
February '25	
Agentforce	Build, Test, and Troubleshoot Agents More Easily with Agent Versions Say Hello to Agent for Setup, Your Sidekick for Admin Tasks
Agentforce Data Library	Einstein Data Library Has a New Name: Introducing Agentforce Data Library on page 248
January '25	
Agentforce	Einstein Copilot for Salesforce is Now Agentforce Chat with Agentforce in Your Preferred Language (Beta) Batch Test with Agentforce Testing Center
Einstein Bots	Create Agentforce Service Agents Easily from Your Einstein Bots (Beta) Improve Bot Conversations with Disambiguation (Generally Available) Control Intent Recognition Enhancements for Enhanced Bots (Generally Available) Use Salesforce Records in Bot Conversations (Generally Available) Set Bot Variables to Custom Values in Bot Builder Get More Customer Responses to Static Option Messaging Components Einstein Bots Are Available in More Regions Transition to Generative Knowledge Answers and Data Cloud Get More Customer Responses to Static Option Messaging Components

Feature	Release Note
	Control Session Timeout for Bot Conversations (Beta) End Messaging for In-App and Web Conversations Thoughtfully New Connect REST API Resources for Einstein Bots (Beta) Input Recommender (Beta) Is Being Retired Legacy Chat is Being Retired
Einstein Development	Try Out New Recipes for the LLM Open Connector
Generative Canvas (Preview)	Get the Information You Need with One Question to Generative Canvas (Preview)
Other Changes	Add AI-Powered Quick Actions to Record Pages Track Generated Content Quality and Feedback in Flow Builder

SEE ALSO:

Salesforce Help: Einstein Generative AI

Agentforce

Bring the power of assistive and autonomous AI to your business with Agentforce.

IN THIS SECTION:

Einstein Copilot for Salesforce is Now Agentforce

As we grow our team of Agentforce agents, we've renamed the Einstein Copilot for Salesforce agent type to Agentforce with no changes in functionality. Permissions, UI elements, and Help documentation have been updated to reflect this change, with additional minor updates in progress. In Setup, you'll see Agentforce or Agentforce (Default) for the agent name and type. This change won't impact your implementations. Your agent is still available to help your Salesforce users with everyday business interactions, embedded right in the flow of work.

Batch Test with Agentforce Testing Center

Testing is critical to launching a trusted agent, but turn-by-turn testing of utterances is time consuming. With the Testing Center, you can now test at scale using batch testing in your sandbox, reducing the amount of testing time from days to minutes. We provide a CSV template to help you get your data in order and ready to go.

Build, Test, and Troubleshoot Agents More Easily with Agent Versions

Now you can create multiple versions of an agent, so you can iterate on, test, and troubleshoot your agents while minimizing downtime and risk. Create a version of an active agent to make and test changes without taking the active version out of production. Or create a version to save as a backup, so you can quickly revert to a previous version if your business strategy changes or you need to debug an issue. You can create up to 20 versions of a single agent. The number of concurrently active agents supported varies by agent type. For example, you can only have one active version of type Agentforce (Default).

Chat with Agentforce in Your Preferred Language (Beta)

In addition to English, Agentforce (Default) now supports French, German, Italian, Japanese, Portuguese, and Spanish in certain locales.

Say Hello to Agent for Setup, Your Sidekick for Admin Tasks

Until now, your sales and service reps have taken advantage of all that Agentforce has to offer. But what about you, the trusty admin? Now, you, too, can use Agentforce-smarts in your everyday admin tasks. Use Agent for Setup to troubleshoot user access issues, create report types, or find answers in Salesforce Help documentation, all from the agent panel in Setup. Agent for Setup helps you maximize your time when setting up your org for users.

New and Changed Standard Agent Topics and Actions

Quickly add powerful functionality to an agent with new and changed standard agent actions and topics.

Einstein Copilot for Salesforce is Now Agentforce

As we grow our team of Agentforce agents, we've renamed the Einstein Copilot for Salesforce agent type to Agentforce with no changes in functionality. Permissions, UI elements, and Help documentation have been updated to reflect this change, with additional minor updates in progress. In Setup, you'll see Agentforce or Agentforce (Default) for the agent name and type. This change won't impact your implementations. Your agent is still available to help your Salesforce users with everyday business interactions, embedded right in the flow of work.

Where: This change applies to Lightning Experience, the Salesforce mobile app for Android and iOS, the Field Service mobile app for Android and iOS, and Sales Cloud Everywhere in Enterprise, Performance, Unlimited, and Developer editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for AI agents is available on the desktop site.

When: This change is available starting January 2025.

SEE ALSO:

Salesforce Help: Agentforce Agents

Batch Test with Agentforce Testing Center

Testing is critical to launching a trusted agent, but turn-by-turn testing of utterances is time consuming. With the Testing Center, you can now test at scale using batch testing in your sandbox, reducing the amount of testing time from days to minutes. We provide a CSV template to help you get your data in order and ready to go.

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When: This change is available starting January 2025.

Build, Test, and Troubleshoot Agents More Easily with Agent Versions

Now you can create multiple versions of an agent, so you can iterate on, test, and troubleshoot your agents while minimizing downtime and risk. Create a version of an active agent to make and test changes without taking the active version out of production. Or create a version to save as a backup, so you can quickly revert to a previous version if your business strategy changes or you need to debug an issue. You can create up to 20 versions of a single agent. The number of concurrently active agents supported varies by agent type. For example, you can only have one active version of type Agentforce (Default).

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions for an additional cost. Required add-on licenses vary by agent type. Setup for AI agents is available on the desktop site.

When: This change is available starting early February 2025.

How: To create a version of an agent, from the Agents Setup page, click the dropdown menu next to the agent you want to create a new version of and select **Save As New Version**. You can also delete an agent version from the dropdown.

You can quickly switch between agent versions in the Agent Builder and on the Details page for your agent.

SEE ALSO:

Salesforce Help: Manage Agent Versions (can be outdated or unavailable during release preview)

Salesforce Help: Activate or Deactivate Your Agent (can be outdated or unavailable during release preview)

Chat with Agentforce in Your Preferred Language (Beta)

In addition to English, Agentforce (Default) now supports French, German, Italian, Japanese, Portuguese, and Spanish in certain locales.

Where: This change applies to Lightning Experience, the Salesforce mobile app, Salesforce Everywhere, Slack, the Field Service mobile app for iOS and Android, and Sales Cloud Everywhere in Enterprise, Performance, Unlimited, and Developer editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Setup for AI Agents is available on the desktop site.

Note: Enhanced language support for Agentforce (Default) 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 the Non-GA Credit Consumption, Non-GA Gen AI, and the Non-GA Open AI LLM Provider terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

When: This change is available starting in January 2025.

How: In Agent Builder, on the Language Settings tab, specify a default language and select additional languages.

These language and locale codes are available.

- English (en_US, en_GB, en_AU)
- French (fr_FR, fr_CA)
- German (de_DE)
- Italian (it_IT)
- Japanese (ja_JA)
- Portuguese (pt_PT, pt_BR)
- Spanish (es_ES, es_MX)

Some LLMs generate responses that are close variants but not exact matches for the requested locale.

SEE ALSO:

Salesforce Help: Update Language Settings

Say Hello to Agent for Setup, Your Sidekick for Admin Tasks

Until now, your sales and service reps have taken advantage of all that Agentforce has to offer. But what about you, the trusty admin? Now, you, too, can use Agentforce-smarts in your everyday admin tasks. Use Agent for Setup to troubleshoot user access issues, create report types, or find answers in Salesforce Help documentation, all from the agent panel in Setup. Agent for Setup helps you maximize your time when setting up your org for users.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Enterprise, Performance, and Unlimited editions.

When: This feature isn't part of the initial Spring '25 release and may be included at a later date.

How: When you enable Agentforce in your org, the Agent for Setup tile automatically shows up in Agent Builder. Customize your agent in Agent Builder by adding topics, actions, and system messages, and then take it for a spin. Activate it and then get ready to use the power of AI in setup.

New and Changed Standard Agent Topics and Actions

Quickly add powerful functionality to an agent with new and changed standard agent actions and topics.

Availability of standard agent topics, actions, and related prompt templates or flows can vary by edition and license.

February '25

New Topic: Agent for Setup: Connected App Migration

This topic has two new actions for admins in Agent for Setup.

- Summarize OAuth in Connected App: Generates a summary of the OAuth configurations for a connected app, including general information, OAuth configurations, and a description of OAuth Setting and Policy.
- Migrate Connected App: Identifies the configurations of a connected app and creates an external client app with identical configurations to replace it.

New Topic: Agent for Setup: Fallback

This topic has one new action for admins in Agent for Setup.

- Answer Questions with Salesforce Documentation: Answers a question from a user based on information from relevant Salesforce documentation, including links to source articles.

New Topic: Agent for Setup: Object Management

This topic has two new actions that enable admins to find objects and fields in Agent for Setup.

- Identify Object By Name: Interprets the user's input to search for objects and returns a list of matching objects in the Object Manager.
- Identify Field By Name: Interprets the user's input to determine if a field exists within an object.

January '25

New and changed agent topics and actions included in the January monthly release typically become available when Spring '25 rolls out to your org.

Updated Topic: Field Service Dispatcher Actions

This topic has two new actions to enable dispatchers to fill gaps in a service resource's schedule.

- Get Appointments to Fill Gaps for Field Service: Searches for gaps for a specific service resource on a specific date and returns a list of suitable appointments in ranked order, considering business rules and objectives.
- Assign Appointment to Service Resource for Field Service: Lets dispatchers select an appointment to fill the gap and assigns the appointment to the service resource.

New Topic: Customer Experience Intelligence

This topic has three new actions that enable Customer Experience Intelligence users to search interaction records, summarize key issues, and analyze feedback to identify top products and improve feature descriptions.

- Enhance Product Description: Analyzes product descriptions against customer reviews to identify discrepancies, align features with customer experiences, and suggest improvements.
- Find Similar Interactions: Searches interaction records by channel or related terms for an issue, topic, or contact reason, and creates an engagement summary for specified or all channels.
- Summarize Product Reviews: Summarizes customer reviews to identify top products from a specified list and displays sentiment as positive, negative, mixed, or neutral, ideal for product summary queries.

New Action: Update Omni-Channel User Configuration

Use this agent action to add or remove queue or skill assignments for Omni-Channel users.

Einstein Bots

Create AI agents from Einstein bots, set bot variables to custom values in the Bot Builder, add the Disambiguation dialog and Object Search action to your bots, and test your intent models with new Connect REST API resources. Also, Input Recommender (beta) is being retired.

IN THIS SECTION:

Create Agentforce Service Agents Easily from Your Einstein Bots (Beta)

Quickly build an Agentforce Service agent based on an Einstein bot. Agentforce generates agent topics and actions based on the bot's intents and dialogs. And, to help you adopt AI agents at your own pace, your bot stays active after you create an agent.

Improve Bot Conversations with Disambiguation (Generally Available)

Help bots that use a cross-lingual intent model understand customers better by turning on Disambiguation. When a bot with Disambiguation can't recognize a chatting customer's intent, it suggests the most probable dialogs to the customer. And, if the customer selects a suggested dialog, you can use that data to improve the bot's cross-lingual intent model. Previously, a bot moved immediately to the Confused dialog when it couldn't confidently determine an intent.

Control Intent Recognition Enhancements for Enhanced Bots (Generally Available)

Enhanced bots that use the cross-lingual intent model now recognize the intent of the first message a customer sends when you turn on the First Message Intent Recognition setting. Previously, only standard bots recognized the intent of the first message.

Use Salesforce Records in Bot Conversations (Generally Available)

Manage Salesforce records during customer conversations with the Object Search action. For example, your bot can show a customer their last three orders, update an upcoming appointment in a custom object, or create feedback records. Define the object search with conditional logic, and send up to three records in a message with merge field syntax.

Set Bot Variables to Custom Values in Bot Builder

Quickly customize bot behavior without leaving the Bot Builder. You can now set a bot variable to a custom value or another bot variable in the Bot Builder. Previously, you could set bot variables to a context variable with only flows or Apex.

Einstein Bots Are Available in More Regions

You can now use Einstein Bots in London, Montreal, São Paulo, Sydney, and Tokyo.

Transition to Generative Knowledge Answers and Data Cloud

Generative Knowledge Answers data sources and knowledge articles are now indexed in Data Cloud. To enable Generative Knowledge Answers for a bot, or edit a bot that currently uses Generative Knowledge Answers, you must set up Data Cloud. Also, Article Answers is now in maintenance mode. To ensure the best experience for your customers, consider transitioning your bots to Generative Knowledge Answers.

Get More Customer Responses to Static Option Messaging Components

Capture critical data from bot conversations consistently and effectively. Enhanced bots can now identify important information, such as dates, email addresses, and locations, in text responses to dialog steps that use static option messaging components. Previously, enhanced bots didn't process text responses to dialog steps that use static option messaging components. Bots now use named entity recognition to gather and store information from text responses in the dialog step output variable.

Control Session Timeout for Bot Conversations (Beta)

You can now specify the number of minutes that a bot waits for a customer response before ending a messaging session on an enhanced Messaging channel.

End Messaging for In-App and Web Conversations Thoughtfully

Enhanced bots on Messaging for In-App and Web channels now send a response that you specify in the End Chat system dialog, including post-chat URLs, and end the messaging session. Previously, the customer had to end the conversation to receive post-chat URLs, and a service rep had to end the messaging session.

New Connect REST API Resources for Einstein Bots (Beta)

Test the accuracy of an intent model and optimize your utterances with the Utterance Prediction API resources available with Einstein Bots.

Input Recommender (Beta) Is Being Retired

Input Recommender is retiring with Spring '25, and you can no longer use it. Utterances that you created by using Input Recommender and added to an intent model aren't impacted. We recommend transitioning to the cross-lingual model. You can train the cross-lingual model with just a minimum of one utterance per language.

Legacy Chat is Being Retired

Starting in February 2026, legacy chat is removed and you can't use standard bots on legacy chat channels. To avoid service interruptions, migrate to Messaging for In-App and Web and enhanced bots before that date.

Create Agentforce Service Agents Easily from Your Einstein Bots (Beta)

Quickly build an Agentforce Service agent based on an Einstein bot. Agentforce generates agent topics and actions based on the bot's intents and dialogs. And, to help you adopt AI agents at your own pace, your bot stays active after you create an agent.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on.

Note: Create Agent from Bot guided 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.

When: This change is available starting in January 2025.

Who: This feature is available to users with an Agentforce Service Agent license.

How: To use the Create Agent from Bot guided setup, contact Salesforce Customer Support.

Before you get started, set up Einstein generative AI and enable Agentforce (Default). Then, click **Create Agent from Bot (Beta)** from the bot's dropdown on the Einstein Bot Setup page. After creating the AI agent, you're taken to Agent Builder, where you can customize the agent's topics, actions, and other settings.

SEE ALSO:

Agentforce Service Agent

Salesforce Help: Create AI Agents From Einstein Bots (Beta)

Salesforce Help: Set Up Einstein Generative AI

Improve Bot Conversations with Disambiguation (Generally Available)

Help bots that use a cross-lingual intent model understand customers better by turning on Disambiguation. When a bot with Disambiguation can't recognize a chatting customer's intent, it suggests the most probable dialogs to the customer. And, if the customer selects a suggested dialog, you can use that data to improve the bot's cross-lingual intent model. Previously, a bot moved immediately to the Confused dialog when it couldn't confidently determine an intent.

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 Overview page for your bot. In the Intent Enhancements section of Settings, enable **Use the Cross-Lingual Intent Model with this bot** and **Use Disambiguation with this bot**. Save your changes and then rebuild your bot's model on the Model Management page.

SEE ALSO:

Salesforce Help: Turn on Disambiguation

Control Intent Recognition Enhancements for Enhanced Bots (Generally Available)

Enhanced bots that use the cross-lingual intent model now recognize the intent of the first message a customer sends when you turn on the First Message Intent Recognition setting. Previously, only standard bots recognized the intent of the first 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.

How: In the Bot Builder, go to the Bot Overview page for your bot. In the Intent Enhancements section of Settings, enable **Use First Message Intent Recognition with this bot**.

If you enabled First Message Intent Recognition before Spring '25, the feature remains enabled for all enhanced bots. You can't disable first message intent recognition for individual bots.

SEE ALSO:

Salesforce Help: Set Up Enhanced Bots

Use Salesforce Records in Bot Conversations (Generally Available)

Manage Salesforce records during customer conversations with the Object Search action. For example, your bot can show a customer their last three orders, update an upcoming appointment in a custom object, or create feedback records. Define the object search with conditional logic, and send up to three records in a message with merge field syntax.

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 Bot Builder, add an Action dialog step and then select **Object Search** as the action type. Object Search supports these standard objects: Account, Case, Contact, Contract, Knowledge, Lead, Opportunity, Order, Task.

SEE ALSO:

Salesforce Help: Add an Object Search Action

Set Bot Variables to Custom Values in Bot Builder

Quickly customize bot behavior without leaving the Bot Builder. You can now set a bot variable to a custom value or another bot variable in the Bot Builder. Previously, you could set bot variables to a context variable with only flows or Apex.

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 Step Properties panel for a Set Variable rule action, select **Value** or **Variable** from the Source dropdown. Then enter a custom value or select a source variable.

SEE ALSO:

Salesforce Help: Set Up a Dialog Rule Step

Einstein Bots Are Available in More Regions

You can now use Einstein Bots in London, Montreal, São Paulo, Sydney, and Tokyo.

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.

Transition to Generative Knowledge Answers and Data Cloud

Generative Knowledge Answers data sources and knowledge articles are now indexed in Data Cloud. To enable Generative Knowledge Answers for a bot, or edit a bot that currently uses Generative Knowledge Answers, you must set up Data Cloud. Also, Article Answers is now in maintenance mode. To ensure the best experience for your customers, consider transitioning your bots to Generative Knowledge Answers.

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: When you create a data library, the Einstein Data Library indexes the library's data sources in Data Cloud. Then, Data Cloud creates a search index and retriever for the library that your bot can use via the Generative Knowledge Answers feature.

When a customer asks a bot with Generative Knowledge Answers a question, the Agentforce generates a response using the assigned data library's search index and retriever and then sends that response to the bot.

SEE ALSO:

Salesforce Help: Answer Questions with Generative Knowledge Answers

Salesforce Help: Data Cloud Features and Learning Path

Get More Customer Responses to Static Option Messaging Components

Capture critical data from bot conversations consistently and effectively. Enhanced bots can now identify important information, such as dates, email addresses, and locations, in text responses to dialog steps that use static option messaging components. Previously, enhanced bots didn't process text responses to dialog steps that use static option messaging components. Bots now use named entity recognition to gather and store information from text responses in the dialog step output variable.

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: Ask a Question with Static Options with an Enhanced Bot

Control Session Timeout for Bot Conversations (Beta)

You can now specify the number of minutes that a bot waits for a customer response before ending a messaging session on an enhanced Messaging channel.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: To turn on this feature, contact Salesforce Customer Support.

End Messaging for In-App and Web Conversations Thoughtfully

Enhanced bots on Messaging for In-App and Web channels now send a response that you specify in the End Chat system dialog, including post-chat URLs, and end the messaging session. Previously, the customer had to end the conversation to receive post-chat URLs, and a service rep had to end the messaging session.

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 Bot Bot Builder, in the Dialogs panel, edit the End Chat dialog.

SEE ALSO:

Salesforce Help: Understand System Bot Dialogs

New Connect REST API Resources for Einstein Bots (Beta)

Test the accuracy of an intent model and optimize your utterances with the Utterance Prediction API resources available with Einstein Bots.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Note: Utterance Prediction API resources are pilot or beta services that are 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 these pilot or beta service is at the Customer's sole discretion.

Predict the associated intent of bot utterances

Make a POST request to the `/connect/bots/utterance-prediction/intent` resource.

New request bodies: Bot Utterance Collection Prediction Input, Utterance Prediction Input

New response bodies: Bot Utterance Collection Prediction, Utterance Prediction, Utterance Prediction Summary

Predict the associated intent of bot utterances based on the intent set and utterances

Make a POST request to the `/connect/bots/utterance-prediction/intentFromSet` resource.

New request body: Bot Utterance Collection Prediction From Set Input

Input Recommender (Beta) Is Being Retired

Input Recommender is retiring with Spring '25, and you can no longer use it. Utterances that you created by using Input Recommender and added to an intent model aren't impacted. We recommend transitioning to the cross-lingual model. You can train the cross-lingual model with just a minimum of one utterance per language.

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: Turn on the Cross-Lingual Intent Model

Legacy Chat is Being Retired

Starting in February 2026, legacy chat is removed and you can't use standard bots on legacy chat channels. To avoid service interruptions, migrate to Messaging for In-App and Web and enhanced bots before that date.

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

SEE ALSO:

Knowledge Article: Chat & Live Agent Retirement

Agentforce Data Library

Einstein Data Library is now Agentforce Data Library.

IN THIS SECTION:

Einstein Data Library Has a New Name: Introducing Agentforce Data Library

As we grow our suite of Agentforce features, we've renamed the Einstein Data Library to Agentforce Data Library with no changes in functionality. Permissions, UI elements, and Help documentation have been updated to reflect this change, with additional minor updates in progress. This change won't impact your implementations. Data libraries are still available to enhance generative AI features with your data, ensuring you get accurate and relevant results.

Einstein Data Library Has a New Name: Introducing Agentforce Data Library

As we grow our suite of Agentforce features, we've renamed the Einstein Data Library to Agentforce Data Library with no changes in functionality. Permissions, UI elements, and Help documentation have been updated to reflect this change, with additional minor updates in progress. This change won't impact your implementations. Data libraries are still available to enhance generative AI features with your data, ensuring you get accurate and relevant results.

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.

When: This change is available starting January 2024.

SEE ALSO:

Salesforce Help: Agentforce Data Library

Einstein Generative AI Platform

Einstein Development

Develop custom solutions with our suite of generative AI tools, including the Models API, Agentforce, Prompt Builder, and Einstein Studio.

IN THIS SECTION:

Try Out New Recipes for the LLM Open Connector

The new recipes on the Einstein Platform Cookbook site enable customers to extend Salesforce AI features with their own custom, pretrained models. The site features recipes for connecting model endpoints through platforms like Hugging Face and Mulesoft. The Hugging Face recipe covers the Serverless Inference API for all LLMs that support Chat Completion, as well as deploying the service to a Heroku app. The Mulesoft recipes cover connecting and deploying model endpoints to Mulesoft via Anypoint Studio and Anypoint Code Builder.

Try Out New Recipes for the LLM Open Connector

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Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with an Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. To purchase the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on, contact your Salesforce account executive.

When: This change is in effect starting the week of December 16, 2024.

Who: The LLM Open Connector is available to users with Data Cloud and Einstein Generative AI enabled.

Why: The LLM Open Connector is a developer option for connecting customer and partner LLMs using our existing Bring Your Own Large Language Model (BYOLLM) feature in Einstein Studio Model Builder.

How: Create an HTTP REST service with the LLM Open Connector OpenAPI specification and use the connection in Model Builder.

SEE ALSO:

External: LLM Open Connector + Hugging Face

External: LLM Open Connector + MuleSoft + Cerebras

External: LLM Open Connector + MuleSoft + Ollama

Generative Canvas (Preview)

Generative Canvas (Preview) is an AI tool that transforms how you can visualize, summarize, and interact with your data.

IN THIS SECTION:

Get the Information You Need with One Question to Generative Canvas (Preview)

Ask Generative Canvas to prepare an overview for your next meeting, show you a recap of the next steps for an opportunity, or analyze the details you need to complete a task. In return, you get an easy-to-understand visualization of the key information you need. Powered by Einstein and Large Language Models (LLMs), Generative Canvas gathers information across records and creates a canvas that displays the important details in one place.

Get the Information You Need with One Question to Generative Canvas (Preview)

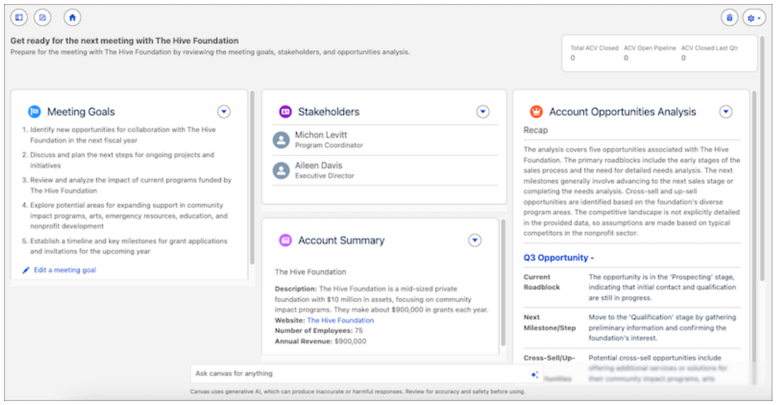
Ask Generative Canvas to prepare an overview for your next meeting, show you a recap of the next steps for an opportunity, or analyze the details you need to complete a task. In return, you get an easy-to-understand visualization of the key information you need. Powered by Einstein and Large Language Models (LLMs), Generative Canvas gathers information across records and creates a canvas that displays the important details in one place.

Where: This change applies to Lightning Experience in Starter and Pro Suite editions.

When: This feature is available starting January 2025.

Note: Generative Canvas is a preview service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by a Customer, and the Non-GA Gen AI, the Non-GA Open AI LLM Provider, and the Non-GA Credit Consumption terms in the Product Terms Directory. Use of this preview service is at the Customer's sole discretion.

How: Ask a question or make a request to Generative Canvas. Generative Canvas responds to your question or request with a canvas of key information.



SEE ALSO:

Salesforce Help: Visualize Your Data with Generative Canvas (Preview) (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Generative Canvas (Preview) (can be outdated or unavailable during release preview)

Other Changes

Enjoy expanded Einstein generative AI support for locales, models, and more.

IN THIS SECTION:

Add AI-Powered Quick Actions to Record Pages

Make the power of AI work for you with agent quick actions. Create these actions just as you would any quick action in Setup, and then add them to your record pages. With the addition of AI-backed quick actions on record pages, your users can quickly discover how helpful an agent can be in their day-to-day tasks.

Track Generated Content Quality and Feedback in Flow Builder

Stay proactive with real-time alerts when toxicity or negative feedback for any generative AI feature exceeds your set threshold, and keep an eye on retrieval augmented generation faithfulness scores that fall below the acceptable value. Use this feedback to continually enhance the quality of your content and refine generative AI responses across your features.

Add AI-Powered Quick Actions to Record Pages

Make the power of AI work for you with agent quick actions. Create these actions just as you would any quick action in Setup, and then add them to your record pages. With the addition of AI-backed quick actions on record pages, your users can quickly discover how helpful an agent can be in their day-to-day tasks.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Enterprise, Performance, and Unlimited editions. On mobile, agent quick actions are available on the record home page.

When: This feature isn't part of the initial Spring '25 release and may be included at a later date.

How: Create a quick action for an object in Object Manager in Setup, and select Agent Action as the action type. Add an utterance for what you want the action to do. For example, if your action is meant to summarize a contact, use “Summarize this contact” as the utterance and name the action Summarize. Then, add the action to your Lightning record page using the page layout editor. Users see an icon to show that the action is AI-powered. After a user clicks the AI-enhanced quick action, the action triggers the agent and works as though the user had typed the utterance in the agent panel. Expanding on the previous example, clicking a **Summarize** button works the same way as having a user enter "summarize this contact" in the agent panel.

Track Generated Content Quality and Feedback in Flow Builder

Stay proactive with real-time alerts when toxicity or negative feedback for any generative AI feature exceeds your set threshold, and keep an eye on retrieval augmented generation faithfulness scores that fall below the acceptable value. Use this feedback to continually enhance the quality of your content and refine generative AI responses across your features.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein Platform add-on. Einstein generative AI is available in Lightning Experience. To purchase the Einstein Platform add-on, contact your Salesforce account executive.

Who: To use these flows, users must turn on Einstein Generative AI. For Send Faithfulness Score Email flow, you must enable Einstein Monitoring and Observability.

How: In Flow Builder, select and clone a flow: Send Content Quality Email, Send Toxic Content Category Email, Send Negative Feedback Email, Send Negative Feedback Email for Feature, and Send Faithfulness Score Email.

SEE ALSO:

Salesforce Help: Flow Action: Generated Content Quality and Feedback

Experience Cloud

Enhanced LWR sites are now generally available. Create enhanced LWR sites and CMS workspaces, or upgrade existing sites to the enhanced framework. You can also customize your site URLs to remove the /s at the end. In security updates, use trusted sites while the content security provider is in strict mode, switch to single domain certificates for Salesforce CDN, and enjoy improvements to the identity experience. Upgrade your Aura record components to the LWR framework to see improved performance and style, and provide a seamless experience between apps by linking files from your LWR site to Salesforce.

IN THIS SECTION:

Aura and LWR Sites

Elevate the scalability and performance of your LWR site with Experience Delivery. A session timeout notification on LWR sites helps your authenticated users avoid unexpected logouts and gives them time to save their work. Work efficiently in Experience Builder with new user interface features.

Components in Experience Builder

Show data from Salesforce objects in a list view on your LWR site with the new Record List component (beta). Offer your LWR site visitors more intuitive picklist behavior with the updated Record Detail component. Upgrade the record components on your Aura site for improved accessibility and style updates. Use the new Biometric Login Button component to let users log in to your mobile publisher for Experience Cloud apps with one tap.

Developer Productivity

Upload files from your LWR site to Salesforce with the File Upload Lightning web component, now generally available. Develop Lightning web components for your LWR site more easily with local dev (beta).

Mobile for Experience Cloud

Good things have come to Mobile Publisher, and you can enjoy them in Experience Cloud. Here are a few of the changes to keep an eye on.

Security and Sharing

Add trusted sites and turn off Lightning Locker while CSP is in strict mode. Improve site security by switching to single domain certifications for Salesforce CDN. Enjoy new options for managing external users, and explore upgrades to your customer identity implementation.

Aura and LWR Sites

Elevate the scalability and performance of your LWR site with Experience Delivery. A session timeout notification on LWR sites helps your authenticated users avoid unexpected logouts and gives them time to save their work. Work efficiently in Experience Builder with new user interface features.

IN THIS SECTION:

Upgrade to Enhanced LWR Sites (Release Update)

Upgrade existing LWR sites to enhanced LWR sites to take advantage of the latest features, including partial deployment, enhanced CMS workspaces and channels, expression-based visibility, and more. This feature, now generally available, includes some changes since the last beta release, and is available as an update starting in Spring '25.

Update the URL of Your LWR Site

Some older LWR sites include `/s` at the end of the site's base URL, making it difficult to achieve a completely custom site URL. Now, you can remove this unwanted element and switch from `https://mycustomdomain.com/s` to a clutter-free `https://mycustomdomain.com`. Removing `/s` is also a prerequisite when upgrading to an enhanced LWR site.

Improve LWR Site Performance with Experience Delivery (Beta)

Use Experience Delivery, a powerful new infrastructure for hosting LWR sites, to boost the scalability and performance of sites created with the Build Your Own (LWR) template. Along with subsecond page load times, this new infrastructure provides improved security and search engine optimization. Experience Delivery includes some changes since the previous pilot release.

Work More Efficiently in Experience Builder with Usability Updates

Set the font family for all the text on your LWR site at one time with the Base Font Family field. Keep a record of the changes that you make to your Aura and LWR site each time that you publish, and see these details in your Change History panel. Dock the component property panel when you work on your Aura or LWR site so that you can see the entire site on the canvas. Find all the LWR components that are related to site headers in the new Site Headers section of the component palette.

Upgrade to Enhanced LWR Sites (Release Update)

Upgrade existing LWR sites to enhanced LWR sites to take advantage of the latest features, including partial deployment, enhanced CMS workspaces and channels, expression-based visibility, and more. This feature, now generally available, includes some changes since the last beta release, and is available as an update starting in Spring '25.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce enforces this release update in Spring '26. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

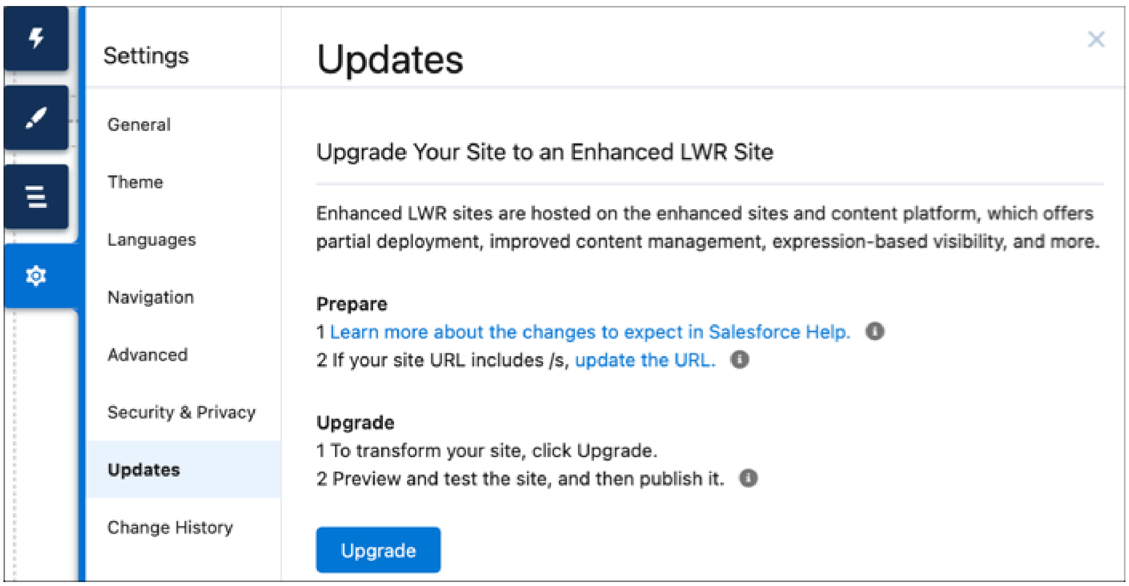
Why: The enhanced sites and content platform is a flexible system that brings together Salesforce CMS and LWR sites. Since Winter '23, enhanced LWR sites and enhanced CMS workspaces that you create are hosted together on this redesigned platform. Now, as part of the continued move to the enhanced platform, you can upgrade existing LWR sites to access 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 workspace sharing.

How: Previously, admins couldn't upgrade LWR sites that included `/s` in the site URL. Now you can update the site URL to remove `/s` before upgrading to an enhanced LWR site.

To upgrade an LWR site, in Experience Builder, select **Settings** > **Updates**, 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.



Note: Upgrading to an enhanced LWR site introduces new features, changes the metadata of your site, and affects the site deployment process. Before you upgrade the site, we recommend creating a backup copy of your non-enhanced LWR site and working in a sandbox environment to test any changes.

SEE ALSO:

Update the URL of Your LWR Site

Update the URL of Your LWR Site

Some older LWR sites include `/s` at the end of the site's base URL, making it difficult to achieve a completely custom site URL. Now, you can remove this unwanted element and switch from `https://mycustomdomain.com/s` to a clutter-free `https://mycustomdomain.com`. Removing `/s` is also a prerequisite when upgrading to an enhanced LWR site.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: You can update the URL in the URL Update area of the site's Administration workspace. When you update the URL, the change takes immediate effect on the live site. We automatically redirect the site's pages and update any custom URLs. However, if you use hard-coded URLs as part of your site implementation, you must update these references manually.

SEE ALSO:

Upgrade to Enhanced LWR Sites (Release Update)

Improve LWR Site Performance with Experience Delivery (Beta)

Use Experience Delivery, a powerful new infrastructure for hosting LWR sites, to boost the scalability and performance of sites created with the Build Your Own (LWR) template. Along with subsecond page load times, this new infrastructure provides improved security and search engine optimization. Experience Delivery includes some changes since the previous pilot 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: For sites created with the Build Your Own (LWR) template, 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.

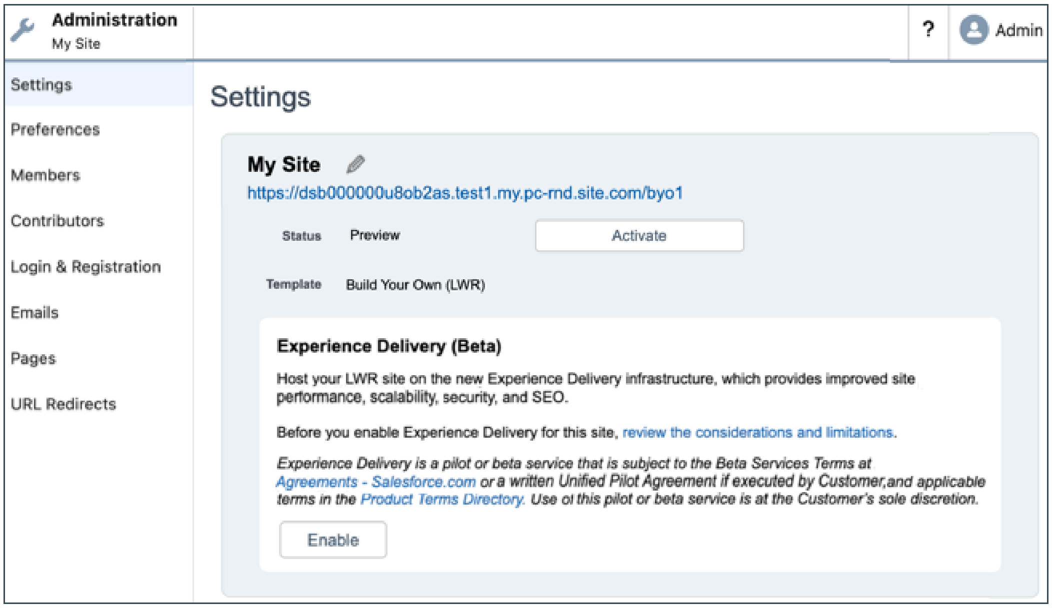
This release provides:

- Improved load-time performance for authenticated pages.
- Support for testing in sandbox before moving to production. Now you can create a custom domain in production that points to your sandbox.
- Access to customizable availability pages, such as the Too Many Requests and the Down for Maintenance pages.
- SSR support for additional components and various bug fixes.

How: Experience Delivery is supported in new and existing LWR and enhanced LWR sites that use the Build Your Own (LWR) template. This beta 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

You can enable Experience Delivery at the site level in the Settings tab of the site's Administration workspace.



Note: In D2C Commerce, Experience Delivery is generally available for new stores created by using the D2C Store template.

Work More Efficiently in Experience Builder with Usability Updates

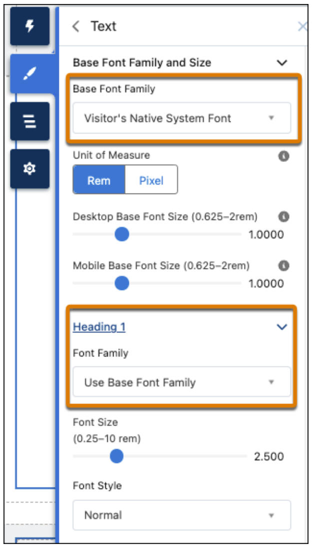
Set the font family for all the text on your LWR site at one time with the Base Font Family field. Keep a record of the changes that you make to your Aura and LWR site each time that you publish, and see these details in your Change History panel. Dock the component property panel when you work on your Aura or LWR site so that you can see the entire site on the canvas. Find all the LWR components that are related to site headers in the new Site Headers section of the component palette.

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.

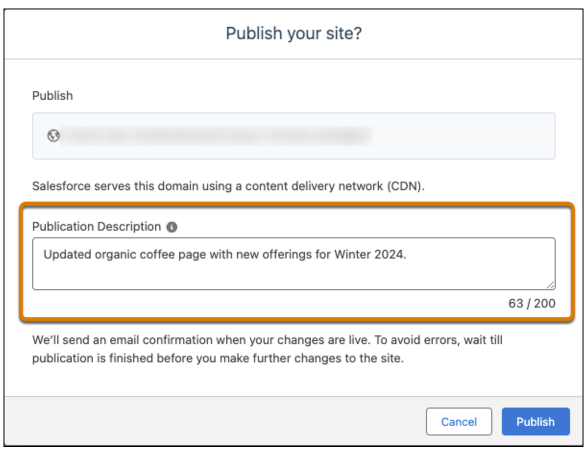
How: For LWR sites, in the Text section of the Theme panel, select a font family from the Base Font Family dropdown list.

- In LWR sites created in Spring '25 and later, the Base Font Family property defaults to Visitor's Native System Font. The Font Family picklist for each text element in the Text panel defaults to Use Base Font Family.
- For all LWR sites, the Font Family dropdown list for each individual text element now includes choices for Use Base Font Family and Visitor's Native System Font.

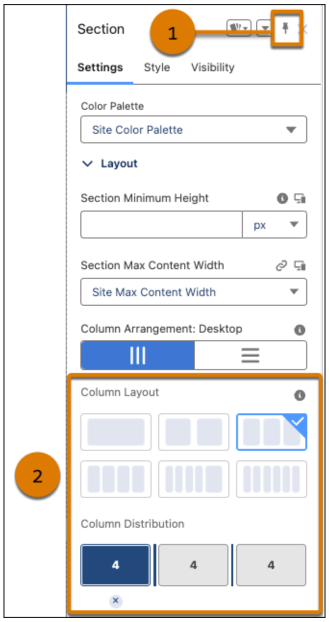
With the addition of the Base Font Family property for LWR sites, the Salesforce Sans font is no longer available on LWR sites created in Winter '25 and later.



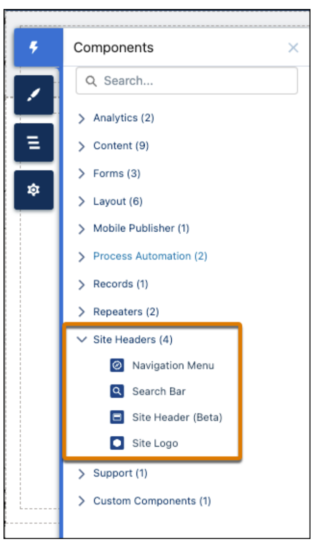
For Aura and LWR sites, the confirmation window for publishing the site now includes a Publication Description field where you can detail the changes that you're making to your site with that publication. These details appear in the Change History panel in Experience Builder Settings, keeping your site updates visible over time.



On Aura and LWR sites, click the pushpin icon (1) in any component property panel to dock the panel and ensure that the entire site page is visible on the canvas. Updates to the property panels for the Section component on Aura and LWR sites, and the Columns component for LWR sites, make the Column Layout and Column Distribution properties easier to see (2). The thumbnail layout images for Column Layout are a darker gray, and in the Column Distribution property, deselected columns are now gray. On Aura sites, the Section component is visible only on pages with a flexible page layout.



Also on LWR sites, the components related to site headers, such as Navigation Menu and Site Logo, are now gathered in the Site Headers section of the component palette.



Components in Experience Builder

Show data from Salesforce objects in a list view on your LWR site with the new Record List component (beta). Offer your LWR site visitors more intuitive picklist behavior with the updated Record Detail component. Upgrade the record components on your Aura site for improved accessibility and style updates. Use the new Biometric Login Button component to let users log in to your mobile publisher for Experience Cloud apps with one tap.

IN THIS SECTION:

Enable a Modernized Record Experience in Aura Sites (Release Update)

Starting in Winter '25, you can upgrade record components in your Aura sites and see improved accessibility and stylistic changes. Upgraded Create Record Form, Record Banner, and Record Detail components run on Lightning Web Component technology, which improves accessibility and performance. In Summer '25, the upgrade is enforced for all orgs. We strongly recommend that you test all customized record components before the update.

Help Your Site Visitors View Records More Easily with the New Record List Component (Beta)

The Record List component (beta) for LWR sites helps you to easily view data through list views for different objects. Select your desired object and list view in the property panel, and view live previews of records such as Accounts, Cases on the canvas. A built-in search feature makes it easy to navigate your data for your site visitors. New styling options include customizable header settings, record configuration, and pagination controls. New layout customization and component visibility options offer greater flexibility, allowing you to refine the look and feel of your website.

Give Experience Cloud App Users the Ability to Log In with One Tap

Use the new Biometric Login Button component to let your users securely log in to your Mobile Publisher for Experience Cloud app with face or fingerprint recognition. The component creates a button that brings up the face or fingerprint login prompt. App users can tap the button to retry biometric login if they initially dismiss the prompt, or if their previous attempt to log in with face or fingerprint recognition fails.

Enable a Modernized Record Experience in Aura Sites (Release Update)

Starting in Winter '25, you can upgrade record components in your Aura sites and see improved accessibility and stylistic changes. Upgraded Create Record Form, Record Banner, and Record Detail components run on Lightning Web Component technology, which improves accessibility and performance. In Summer '25, the upgrade is enforced for all orgs. We strongly recommend that you test all customized record components before the update.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce enforces this update in Summer '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 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. New Aura sites created after Summer '24 automatically include upgraded record components. Here are some potential changes.

- 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 toast messages can refer to Salesforce IDs.
- New icons appear next to various fields and certain icons remain visible without mouseover.
- Links appear in various places where they were previously not included.

How: From Experience Builder, open **Settings** > **Experience Management Settings** and select **Use Lightning web components on your record pages in Aura sites** to upgrade your components.

Help Your Site Visitors View Records More Easily with the New Record List Component (Beta)

The Record List component (beta) for LWR sites helps you to easily view data through list views for different objects. Select your desired object and list view in the property panel, and view live previews of records such as Accounts, Cases on the canvas. A built-in search feature makes it easy to navigate your data for your site visitors. New styling options include customizable header settings, record configuration, and pagination controls. New layout customization and component visibility options offer greater flexibility, allowing you to refine the look and feel of your website.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with active Experience Cloud licenses.

Note: Record List component (beta) for 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.

How: In Experience Builder, drag the Record List (beta) component to the canvas. Select your object and list view, and configure your settings. Create record detail pages to enable navigation within objects.

Give Experience Cloud App Users the Ability to Log In with One Tap

Use the new Biometric Login Button component to let your users securely log in to your Mobile Publisher for Experience Cloud app with face or fingerprint recognition. The component creates a button that brings up the face or fingerprint login prompt. App users can tap the button to retry biometric login if they initially dismiss the prompt, or if their previous attempt to log in with face or fingerprint recognition fails.

Where: This change applies to apps created with Mobile Publisher for Aura and LWR sites in Enterprise, Performance, Unlimited, and Developer editions. You must have at least one active community license in your org to use this feature. The Biometric Login Button component is supported only on Experience Cloud apps configured with User Opt-In Biometric Login.

How: Configure User Opt-In Biometric Login through your Experience Cloud app's connected app custom attributes. In Experience Builder, drag the Biometric Login Button component to your app's login screen and configure the button's properties.

SEE ALSO:

Salesforce Help: User Opt-In Biometric Login (can be outdated or unavailable during release preview)

Salesforce Help: Enable User Opt-In Biometric Login (can be outdated or unavailable during release preview)

Salesforce Help: Standard Components for LWR Templates (can be outdated or unavailable during release preview)

Salesforce Help: Which Components Can I Use with Each Aura Template (can be outdated or unavailable during release preview)

Developer Productivity

Upload files from your LWR site to Salesforce with the File Upload Lightning web component, now generally available. Develop Lightning web components for your LWR site more easily with local dev (beta).

IN THIS SECTION:

Link Files from Your LWR Site to Salesforce is Generally Available

Now you can use the File Upload Lightning web component setting to upload files from an LWR site or an enhanced LWR site to your Salesforce org. Previously, the File Upload component was available only for Aura sites.

Develop Lightning Web Components Faster in a Real-Time Preview of Your LWR Site (Beta)

Use Local Dev to develop Lightning web components in a real-time preview of your Lightning Web Runtime (LWR) site. Local Dev is beta for LWR sites in Spring '25. It detects changes in your source code and automatically updates your site preview so you don't have to redeploy code or manually refresh your browser.

Link Files from Your LWR Site to Salesforce is Generally Available

Now you can use the File Upload Lightning web component setting to upload files from an LWR site or 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.

How: This feature is on by default for all orgs, with the user setting Use the File Upload Lightning web component for LWR sites enabled by default for all orgs.

SEE ALSO:

Lightning Web Component Reference: File Upload (can be outdated or unavailable during release preview)

Develop Lightning Web Components Faster in a Real-Time Preview of Your LWR Site (Beta)

Use Local Dev to develop Lightning web components in a real-time preview of your Lightning Web Runtime (LWR) site. Local Dev is beta for LWR sites in Spring '25. It detects changes in your source code and automatically updates your site preview so you don't have to redeploy code or manually refresh your browser.

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. You must have at least one active community license in your org to use this feature.

Note: 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.

How: To use this feature, first install Salesforce CLI. To turn on Local Dev for your org, from Setup, in the Quick Find box, enter `Local Dev` and then select **Local Dev**. To turn on Local Dev for all org users, select **Enable Local Dev**. Then, to install the Local Dev plug-in, run the CLI command:

```
sf plugins install @salesforce/plugin-lightning-dev
```

SEE ALSO:

Lightning Web Components Developer Guide: Preview Components with Local Dev

Salesforce Developers Blog: Develop LWC at Lightning Speed with the New Local Dev Experience

Mobile for Experience Cloud

Good things have come to Mobile Publisher, and you can enjoy them in Experience Cloud. Here are a few of the changes to keep an eye on.

IN THIS SECTION:

Improve Your Experience Cloud App with the Latest Features from Mobile Publisher

With User Opt-In Biometric Login, which is now generally available, your app users can opt in to face or fingerprint recognition to log in easily and securely. Upgrade your app's biometric login experience with the new Biometric Login Button component in Experience Builder, which creates a button that brings up the face or fingerprint prompt. Customize the style of your app's Enhanced Mobile App Security alerts with new color and font settings in Setup for Mobile Publisher. Boost your app's download offerings with newly supported methods, including unauthenticated downloads and dynamic, third-party, Base64, or custom or standard object download links.

Improve Your Experience Cloud App with the Latest Features from Mobile Publisher

With User Opt-In Biometric Login, which is now generally available, your app users can opt in to face or fingerprint recognition to log in easily and securely. Upgrade your app's biometric login experience with the new Biometric Login Button component in Experience Builder, which creates a button that brings up the face or fingerprint prompt. Customize the style of your app's Enhanced Mobile App Security alerts with new color and font settings in Setup for Mobile Publisher. Boost your app's download offerings with newly supported methods, including unauthenticated downloads and dynamic, third-party, Base64, or custom or standard object download links.

Where: These changes apply to apps created with Mobile Publisher for Aura and LWR sites in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Give Experience Cloud Users the Ability to Log In with One Tap

Security and Sharing

Add trusted sites and turn off Lightning Locker while CSP is in strict mode. Improve site security by switching to single domain certifications for Salesforce CDN. Enjoy new options for managing external users, and explore upgrades to your customer identity implementation.

IN THIS SECTION:

Use Trusted Sites and Disable Lightning Locker When CSP Is in Strict Mode

Site security is now more flexible with the ability to decouple Lightning Locker from your content security policy (CSP) settings and allow trusted sites. You can add trusted sites regardless of mode, and choose whether you want to use Lightning Locker. Previously, you could only add trusted sites when the (CSP) was in relaxed mode. In strict mode, you were required to have Lightning Locker turned on.

Salesforce No Longer Supports Shared Domain Certificates for the Salesforce CDN

For improved security, all newly created Salesforce content delivery network (CDN) domains use single domain certificates. Salesforce no longer supports shared domain certificates for the Salesforce CDN. If you're using a shared certificate, update to a single certificate immediately to avoid site disruptions.

Increase the Security of Your Site with When Managing External Users

Assign the Manage External Users (Limited) permission, instead of the Manage External Users permission, for greater security when you grant users the ability to manage external users. Users with the Manage External Users (Limited) permission can manage only external users that they have read and write access to. The Manage External Users permission allows them to manage all external users.

Strengthen Your Customer Identity Implementation with New Features and Security Updates

Give users the ability to log in to headless apps with more options than just their username. Set up SAML single sign-on with the external client apps framework, the new generation of the connected apps framework. To avoid potential service interruptions, review security changes for integrations that use the `services/oauth2/singleaccess` endpoint. Also, the Triple DES SAML encryption algorithm is being deprecated.

Use Trusted Sites and Disable Lightning Locker When CSP Is in Strict Mode

Site security is now more flexible with the ability to decouple Lightning Locker from your content security policy (CSP) settings and allow trusted sites. You can add trusted sites regardless of mode, and choose whether you want to use Lightning Locker. Previously, you could only add trusted sites when the (CSP) was in relaxed mode. In strict mode, you were required to have Lightning Locker turned on.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: With these enhancements, you can isolate your site from third-party components and custom code when Lightning Locker is turned on. Or, allow third-party components and custom code to communicate with your site when Lightning Locker is off, all in strict CSP mode. And with the added ability to trust sites while in CSP strict mode, you can choose exactly which sites you want to allow while keeping your site secure.

How: To change your CSP settings, go to Experience Builder and open **Settings** > **Security & Privacy**. Then select **Strict CSP: Block Access to Inline Scripts and Permit Access to Allowed Hosts** and individually allow any trusted sites.

Salesforce No Longer Supports Shared Domain Certificates for the Salesforce CDN

For improved security, all newly created Salesforce content delivery network (CDN) domains use single domain certificates. Salesforce no longer supports shared domain certificates for the Salesforce CDN. If you're using a shared certificate, update to a single certificate immediately to avoid site disruptions.

Where: This change applies to Aura and LWR, sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: From Setup, in the Quick Find box, enter *`Domains`*, and then select **Domains**. For each domain with a shared certificate, select the domain and click **Edit a Domain**. To update your certificate selection for the CDN, select **Single certificate for Content Delivery Network (CDN)**. This option appears only on domains that are using shared domain certificates. If you don't have the option to switch domains, your domain is using a single certificate.

Increase the Security of Your Site with When Managing External Users

Assign the Manage External Users (Limited) permission, instead of the Manage External Users permission, for greater security when you grant users the ability to manage external users. Users with the Manage External Users (Limited) permission can manage only external users that they have read and write access to. The Manage External Users permission allows them to manage all external users.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Strengthen Your Customer Identity Implementation with New Features and Security Updates

Give users the ability to log in to headless apps with more options than just their username. Set up SAML single sign-on with the external client apps framework, the new generation of the connected apps framework. To avoid potential service interruptions, review security changes for integrations that use the `services/oauth2/singleaccess` endpoint. Also, the Triple DES SAML encryption algorithm is being deprecated.

Where: These changes apply to LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

How: For more information about these changes, see these release notes.

- Give Headless App Users More Ways to Log In
- Integrate Single Sign-On Service Providers with the External Client Apps Framework
- GET Requests with Access Tokens in the URL Query String Are Blocked for the Single Access Endpoint
- Triple DES Encryption Is No Longer Supported for SAML Single Sign-On

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.

Field Service Setup Home

Streamline, extend, and customize your Field Service setup.

Field Service Scheduling and Optimization

Explore the latest features to help dispatchers create, manage, and optimize your team's schedule.

Field Service Asset Management

Discover what's new to take asset management to the next level.

Field Service Operations

Optimize, expand, and personalize your Field Service operations.

Field Service Customer Engagement

Enhance and elevate your customer interactions with these new features.

Field Service Mobile

Explore what's new in Field Service mobile, designed to help mobile workers provide outstanding service.

Spotlight on Field Service Content

Discover high-impact content to help you get your Field Service work done.

Field Service Einstein

Discover innovative, AI-based features to help your teams deliver exceptional service.

IN THIS SECTION:

Boost Productivity and Resource Utilization by Easily Filling Schedule Gaps with Agentforce

Let dispatchers focus on strategic tasks by using Agentforce Field Service Actions to fill schedule gaps. Agentforce uses your business rules and objectives to recommend appointments for the gaps, and then schedules the appointment selected by the dispatcher.

Listen Safely to Pre-Work Briefs with a Tap of a Button

Take care of your mobile workers' safety by keeping their eyes away from their phones. In the Einstein generative AI Pre-Work Brief, mobile workers can now get the brief read aloud to them. For example, if a worker is at a busy job site and they want to prepare for the job while remaining aware of what's going on around them, they can listen to the brief.

Get Solutions Easily from Agentforce by Including Images

Mobile workers can now add images to their conversation with their AI agent in the Field Service mobile app. Agentforce analyzes the images to assist the mobile worker. Workers can add images from their gallery or take a picture directly with their camera. For example, instead of workers explaining an error code on an oven, they can add an image that shows the information.

Work Smarter by Using Siri to Communicate with Agentforce

Mobile workers can talk to Siri and have her request Agentforce to do something for them in the Field Service mobile app. When a mobile worker says to Siri, "Ask Field Service," followed by their request, the AI agent starts working its magic in the app. The AI agent can quickly complete any request it's been set up to do. For example, mobile workers can ask to draft a post-work summary, get information from knowledge articles, or schedule a follow-up appointment.

Boost Productivity and Resource Utilization by Easily Filling Schedule Gaps with Agentforce

Let dispatchers focus on strategic tasks by using Agentforce Field Service Actions to fill schedule gaps. Agentforce uses your business rules and objectives to recommend appointments for the gaps, and then schedules the appointment selected by the dispatcher.

Where: This feature is available in Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Field Service add-on. This feature is also available in Lightning Experience in Einstein 1 Field Service edition. This feature requires the Field Service managed package. Setup for Agentforce is available on the desktop site.

To purchase the Einstein for Field Service add-on, contact your Salesforce account executive.

Who: Agentforce is available to users with the Use Agentforce Default Agent for Salesforce user permission. Field Service agent topics and actions are available to users with the Access Agent Topics and Actions for Field Service user permission.

Why: Here's an example of how this feature works.

Sally, a dispatcher, just got a call from a customer who wants to cancel an appointment that was scheduled for tomorrow and assigned to Rob. She then receives another call asking to reschedule an appointment that was assigned to Rob for tomorrow. Rob now has some schedule gaps. Sally decides to use Agentforce to help her quickly find the best appointments to fill these gaps. She asks the agent to "Fill the gaps in Rob's schedule tomorrow."

Agentforce uses that utterance and the actions from the Field Service Dispatcher Actions topic to suggest the best appointments to fill the first gap. Sally selects the appointment that she thinks is the best fit and lets the agent schedule it for her. She can then click **Show Next Gap** to repeat the process.

How: This feature works in Agentforce through the Field Service Dispatcher Actions topic. Add the Field Service Dispatcher Actions topic from the asset library. Instruct your dispatchers to engage with the AI agent in the dispatcher console.

SEE ALSO:

Salesforce Help: Set Up Agentforce for Field Service (can be outdated or unavailable during release preview)

Salesforce Help: Fill Gaps in a Service Resource's Schedule (can be outdated or unavailable during release preview)

Salesforce Help: Agent Topic: Field Service Dispatcher Actions (can be outdated or unavailable during release preview)

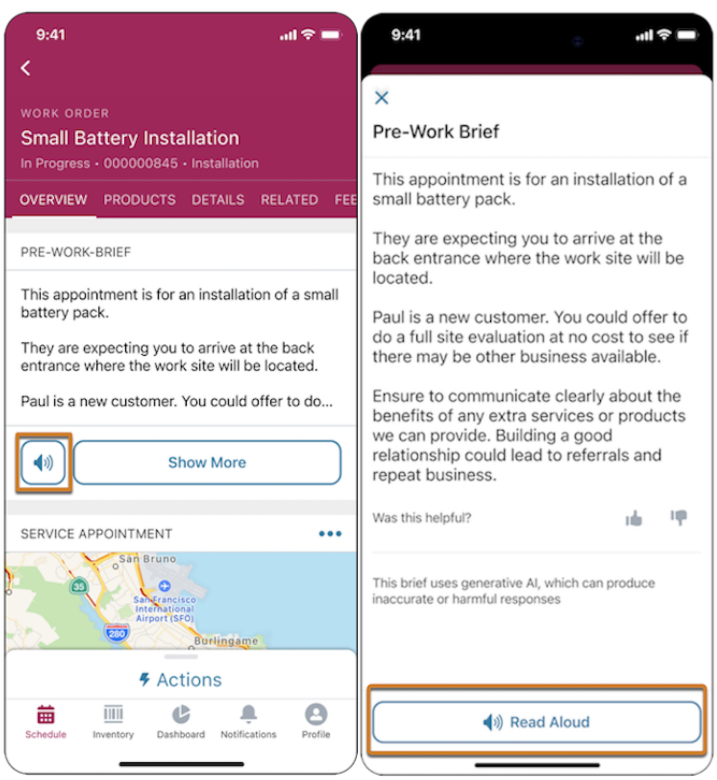
Listen Safely to Pre-Work Briefs with a Tap of a Button

Take care of your mobile workers' safety by keeping their eyes away from their phones. In the Einstein generative AI Pre-Work Brief, mobile workers can now get the brief read aloud to them. For example, if a worker is at a busy job site and they want to prepare for the job while remaining aware of what's going on around them, they can listen to the brief.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Field Service add-on. This change also applies to Lightning Experience in Einstein 1 Field Service edition. Einstein generative AI is available in Lightning Experience. The feature is available in the Field Service mobile app for Android and iOS.

To purchase the Einstein for Field Service add-on, contact your Salesforce account executive.

How: Instruct mobile workers to tap **Read Aloud** on the pre-work brief.



SEE ALSO:

Salesforce Help: Set Up Pre-Work Brief for Field Service Mobile Workers (can be outdated or unavailable during release preview)

Get Solutions Easily from Agentforce by Including Images

Mobile workers can now add images to their conversation with their AI agent in the Field Service mobile app. Agentforce analyzes the images to assist the mobile worker. Workers can add images from their gallery or take a picture directly with their camera. For example, instead of workers explaining an error code on an oven, they can add an image that shows the information.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Field Service add-on. This change also applies to Lightning Experience in Einstein 1 Field Service edition. The feature is available in the Field Service mobile app for Android and iOS. Setup for Agentforce is available on the desktop site.

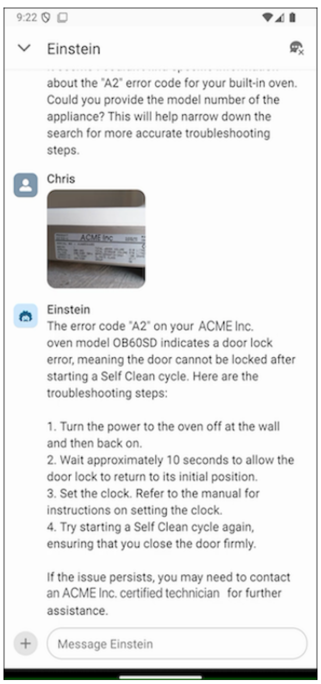
To purchase the Einstein for Field Service add-on, contact your Salesforce account executive.

When: This feature is available later in Spring '25.

Who: Agentforce is available to users with the Use Agentforce Default Agent user permission. Field Service agent actions are available to users with the Access Field Service Agent Actions user permission.

To use agent actions that execute prompt templates, users must have the Execute Prompt Templates user permission.

How: In a conversation with the AI agent, tap the + icon and add an image.



SEE ALSO:

Salesforce Help: Field Service Mobile App (can be outdated or unavailable during release preview)

Work Smarter by Using Siri to Communicate with Agentforce

Mobile workers can talk to Siri and have her request Agentforce to do something for them in the Field Service mobile app. When a mobile worker says to Siri, "Ask Field Service," followed by their request, the AI agent starts working its magic in the app. The AI agent can quickly complete any request it's been set up to do. For example, mobile workers can ask to draft a post-work summary, get information from knowledge articles, or schedule a follow-up appointment.

Where: This feature is available in Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Field Service add-on. This feature is also available in Lightning Experience in Einstein 1 Field Service edition. The feature is available in the Field Service mobile app for iOS only. Setup for Agentforce is available on the desktop site.

To purchase the Einstein for Field Service add-on, contact your Salesforce account executive.

Who: Agentforce is available to users with the Use Agentforce Default Agent user permission. Field Service agent actions are available to users with the Access Field Service Agent Actions user permission.

To use agent actions that execute prompt templates, users must have the Execute Prompt Templates user permission.

How: Instruct your iOS mobile workers to say, "Hey Siri, ask Field Service" or "Hey Siri, tell Field Service." Siri replies, "What's the request?" and the mobile worker states the request. The iOS shortcut opens your AI agent in the Field Service mobile app, and the conversation carries on from there. Mobile workers can also run the shortcut with the action button or add the shortcut to their home screen.

SEE ALSO:

Salesforce Help: Agentforce Agents (can be outdated or unavailable during release preview)

Salesforce Help: Field Service Mobile App (can be outdated or unavailable during release preview)

Apple Help: Run shortcuts with the Action button

Apple Help: Add a shortcut to the Home Screen on iPhone or iPad

Field Service Setup Home

Streamline, extend, and customize your Field Service setup.

IN THIS SECTION:

Accelerate Time to Value with Field Service Setup (Beta)

Get your Field Service solution up and running in a snap with our streamlined setup experience. With one click, you can activate Field Service, install the managed package, and create and assign the necessary permissions and profiles. Then you can use four wizards to create the key data required to start scheduling your first appointment. You can also discover features and see how Field Service delivers value to your business. The feature cards are enriched with dynamic videos, useful links, handy tips, and expert recommendations that aid in transformational guidance, such as creating maintenance plans and setting up the mobile application. This engaging, new experience is the first step in simplifying setup and tailoring your Field Service implementation to meet your needs.

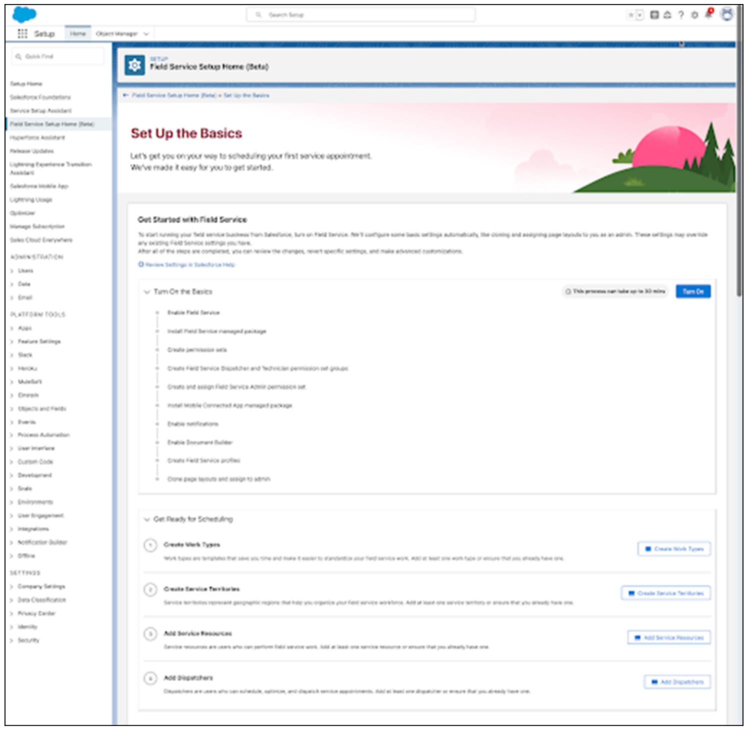
Accelerate Time to Value with Field Service Setup (Beta)

Get your Field Service solution up and running in a snap with our streamlined setup experience. With one click, you can activate Field Service, install the managed package, and create and assign the necessary permissions and profiles. Then you can use four wizards to create the key data required to start scheduling your first appointment. You can also discover features and see how Field Service delivers value to your business. The feature cards are enriched with dynamic videos, useful links, handy tips, and expert recommendations that aid in transformational guidance, such as creating maintenance plans and setting up the mobile application. This engaging, new experience is the first step in simplifying setup and tailoring your Field Service implementation to meet your needs.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Note: Field Service Setup Home 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 Setup Home and click **Turn On**.



Field Service Scheduling and Optimization

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.

[Gain Visibility into the Scheduling History of Service Appointments](#)

Track information on changes made to a service appointment and quickly resolve any related issues. Service Appointment Lifecycle captures changes to key service appointment properties related to scheduling, such as service resource, duration, and scheduled start and end times. This information shows on the service appointment record page, where dispatchers and Salesforce admins can easily spot and review issues. Each change is also saved to the new Field Service object change record page. From the object list view, Salesforce admins can identify and analyze patterns and trends and create reports to better manage the scheduling process. Previously, only the current scheduling information for service appointments was available.

[Renamed Field Service Agent Permission Set Name and Agent Persona](#)

We've updated the Field Service Agent permission set name and changed the persona name to Field Service Call Center Rep. This renaming makes it easy to distinguish between live experts and AI-powered assistants.

[Quickly Identify and Manage Empty Appointment Bundles](#)

Assign a dedicated status to appointment bundles with no remaining bundle members. Use the empty bundle status to keep track of these empty bundles for monitoring or reporting purposes.

Enhanced Scheduling and Optimization

Benefit from advanced features and better schedule quality with Enhanced Scheduling and Optimization.

IN THIS SECTION:

Increase Coverage with 24-Hour Availability for All Service Resources

Enable continuous round-the-clock availability for individual service resources to allow assigning appointments in specific scenarios, such as emergencies during on-call shifts. This enhancement supports scheduling across standard and extended working hours for a period that spans beyond 24 hours without breaking or requiring artificial gaps. Previously, only capacity-based resources were always available.

Enhance Scheduling Flexibility by Assigning Service Appointments to Individuals or Crews

Get more options when scheduling service appointments that require a crew size of one by assigning them to either an individual service resource or a crew. Previously, this functionality was available by default only when you're not using Enhanced Scheduling and Optimization. Now, with Enhanced Scheduling and Optimization, you can turn this functionality on or off with the Assign Service Appointments to Individuals and Crews checkbox.

Reduce Labor Costs and Increase Resource Productivity with Consecutive Appointment Scheduling

Avoid financial penalties from failing to comply with labor laws and improve resource efficiency by preferring to schedule service appointments continuously to prevent schedule gaps. Use the Minimize Gaps service objective for schedule, bulk schedule, in-day, and global optimization operations to make sure service resources have a continuous block of appointments rather than multiple idle times throughout the day. This objective, which targets mainly healthcare companies that have part-time employees, lets customers better manage employee schedules with back-to-back appointments for improved productivity and profitability.

Improve Scheduling in Japan with More Accurate Travel Time Predictions

Get better travel time estimates with enhanced map coverage in Japan. Work efficiently and maintain service levels with point-to-point predictive routing, which automatically considers time-of-day traffic calculations based on historical traffic patterns. Ensure timely arrivals and increased customer satisfaction across urban and metro areas with the best possible routes, determined by exact service appointment locations.

Increase Coverage with 24-Hour Availability for All Service Resources

Enable continuous round-the-clock availability for individual service resources to allow assigning appointments in specific scenarios, such as emergencies during on-call shifts. This enhancement supports scheduling across standard and extended working hours for a period that spans beyond 24 hours without breaking or requiring artificial gaps. Previously, only capacity-based resources were always available.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. To enable continuous 24-hour availability for specific scenarios like emergencies, use operating hours or shifts and set a recordset filter criteria to define the conditions. In the Service Resource Availability work rule, select **Overtime** to schedule service appointments during time slots or shifts of the Extended type.

SEE ALSO:

Salesforce Help: Enable 24-Hour Continuous Resource Availability for All Service Resources (can be outdated or unavailable during release preview)

Salesforce Help: Create Operating Hours for Field Service (can be outdated or unavailable during release preview)

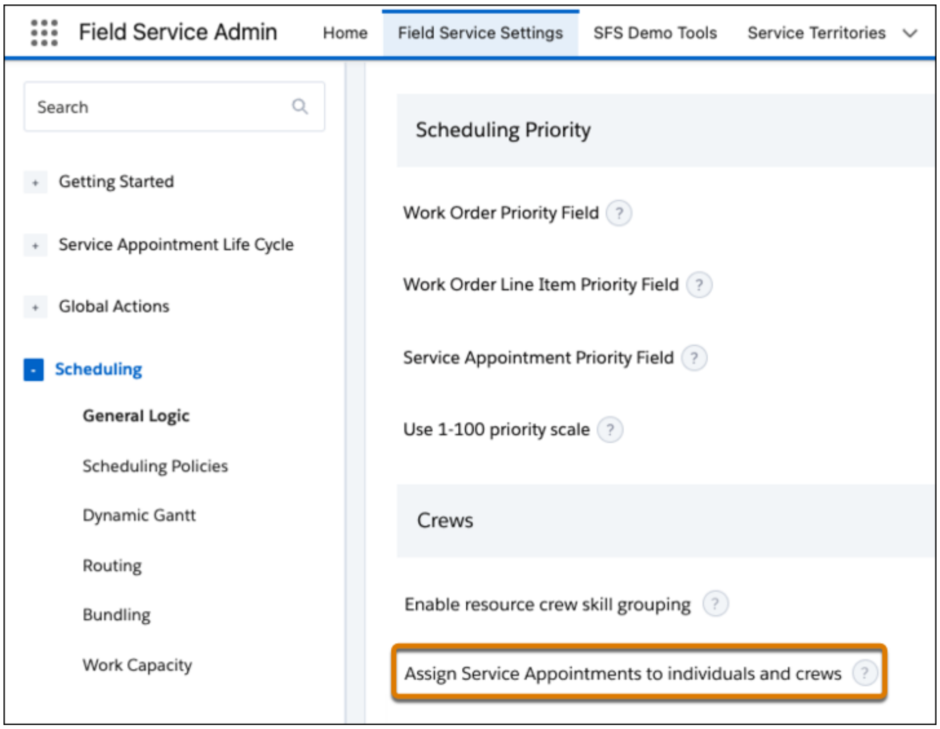
Salesforce Help: Create Flexible Work Shifts (can be outdated or unavailable during release preview)

Enhance Scheduling Flexibility by Assigning Service Appointments to Individuals or Crews

Get more options when scheduling service appointments that require a crew size of one by assigning them to either an individual service resource or a crew. Previously, this functionality was available by default only when you're not using Enhanced Scheduling and Optimization. Now, with Enhanced Scheduling and Optimization, you can turn this functionality on or off with the Assign Service Appointments to Individuals and Crews checkbox.

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. Then, select **Scheduling**, and under the Crews section enable Assign Service Appointments to individuals and crews.



SEE ALSO:

Salesforce Help: Work Rule Type: Service Crew Resources Availability (can be outdated or unavailable during release preview)

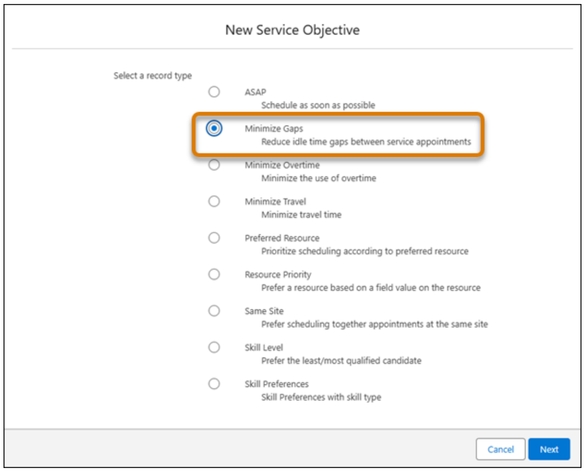
Salesforce Help: Work Type Fields for Field Service (can be outdated or unavailable during release preview)

Reduce Labor Costs and Increase Resource Productivity with Consecutive Appointment Scheduling

Avoid financial penalties from failing to comply with labor laws and improve resource efficiency by preferring to schedule service appointments continuously to prevent schedule gaps. Use the Minimize Gaps service objective for schedule, bulk schedule, in-day, and global optimization operations to make sure service resources have a continuous block of appointments rather than multiple idle times throughout the day. This objective, which targets mainly healthcare companies that have part-time employees, lets customers better manage employee schedules with back-to-back appointments for improved productivity and profitability.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. Add the Minimize Gaps service objective to your scheduling policy from the Customize Scheduling Policies page in Guided Setup or the Scheduling Policy Objectives related list on a policy.



SEE ALSO:

Salesforce Help: Minimize Gaps Service Objective (can be outdated or unavailable during release preview)

Salesforce Help: Create and Manage Field Service Scheduling Policies (can be outdated or unavailable during release preview)

Improve Scheduling in Japan with More Accurate Travel Time Predictions

Get better travel time estimates with enhanced map coverage in Japan. Work efficiently and maintain service levels with point-to-point predictive routing, which automatically considers time-of-day traffic calculations based on historical traffic patterns. Ensure timely arrivals and increased customer satisfaction across urban and metro areas with the best possible routes, determined by exact service appointment locations.

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.

SEE ALSO:

Salesforce Help: Set Up Routing for Travel Time Calculations (can be outdated or unavailable during release preview)

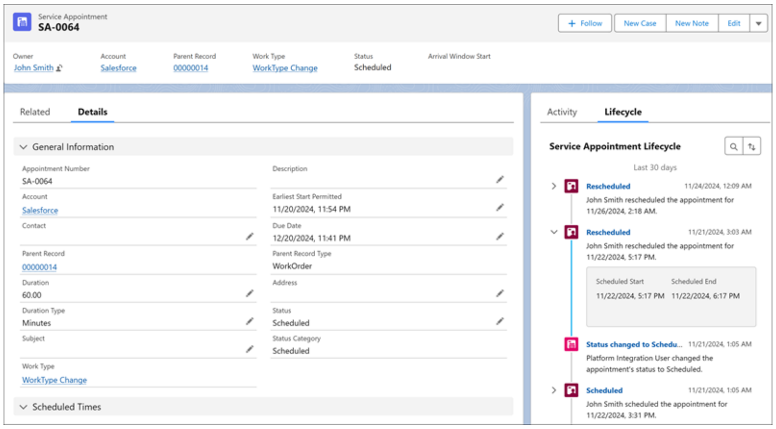
Gain Visibility into the Scheduling History of Service Appointments

Track information on changes made to a service appointment and quickly resolve any related issues. Service Appointment Lifecycle captures changes to key service appointment properties related to scheduling, such as service resource, duration, and scheduled start and end times. This information shows on the service appointment record page, where dispatchers and Salesforce admins can easily spot and review issues. Each change is also saved to the new Field Service object change record page. From the object list view, Salesforce admins can identify and analyze patterns and trends and create reports to better manage the scheduling process. Previously, only the current scheduling information for service appointments was available.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

When: The Service Appointment Lifecycle feature is available starting on February 3, 2025.

How: From the object management settings for service appointments, use the Lightning App Builder to add the Service Appointment Lifecycle Lightning web component to the service appointment record page. If you customized the layout of the service appointment record page, you must add the Service Appointment Lifecycle component. If you didn't customize the layout, the component is available by default.



SEE ALSO:

Salesforce Help: Monitor Scheduling History in Field Service with Service Appointment Lifecycle (can be outdated or unavailable during release preview)

Renamed Field Service Agent Permission Set Name and Agent Persona

We've updated the Field Service Agent permission set name and changed the persona name to Field Service Call Center Rep. This renaming makes it easy to distinguish between live experts and AI-powered assistants.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: This change is reflected under Field Service Settings, in the Getting Started section.

Quickly Identify and Manage Empty Appointment Bundles

Assign a dedicated status to appointment bundles with no remaining bundle members. Use the empty bundle status to keep track of these empty bundles for monitoring or reporting purposes.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

When: This feature is available later in Spring '25.

How: In Appointment Bundle Config, deselect **Delete empty bundles**. Then, in Empty Bundle Status, select a status from the Canceled category. A bundle service appointment changes to this status if it has no remaining bundle members but still appears in the appointment list.

SEE ALSO:

Salesforce Help: Create an Appointment Bundle Config (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:

View and Manage Asset Components in Real Time with the Asset Service Lifecycle Management Add-On

Get oriented with key asset information, troubleshoot effectively, and replace and relocate assets in one place. Asset Interactive Hierarchy gives a real-time view of current, installed, and maintained views, including installation date, maintenance history, and current status. Detailed asset information helps technicians efficiently manage and maintain assets during field operations.

Foresee Future Fixes with the Connected Assets Add-On

Say goodbye to uncertainty about future maintenance needs. Asset Service Prediction (ASP) analyzes your field service repairs and finds patterns of work completed for a group of assets. Based on how often repairs are done together, ASP predicts the likelihood of future work for the asset. The result is actionable insights that empower technicians to fix current and expected problems in one visit. This one-and-done approach to maintenance reduces truck rolls, improves customer experience, and makes sure your assets are always up and running.

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.

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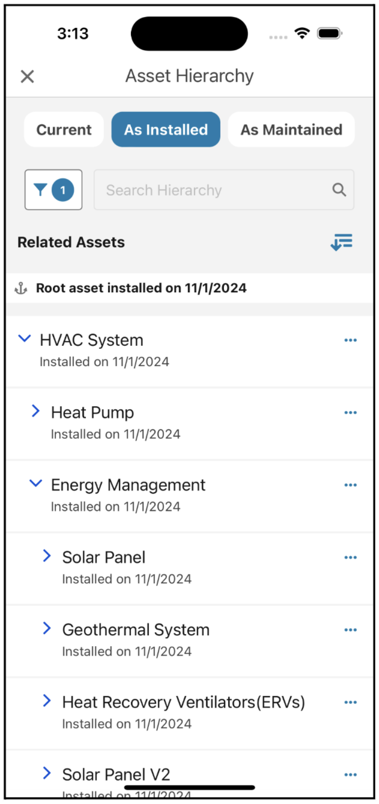
Where: This feature is available in Lightning Experience in Asset Service Lifecycle Management with Field Service enabled. The feature is available in the Field Service mobile app for Android and iOS. To purchase the Asset Service Lifecycle Management add-on license, contact your Salesforce account executive.

How: Go to the asset hierarchy from the asset or work order page. Click the Current, As Installed, or As Maintained view for asset information.



SEE ALSO:

Salesforce Help: Asset Interactive Hierarchy (can be outdated or unavailable during release preview)

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Where: This feature is available in Lightning Experience Lightning Experience in Connected Assets with Field Service enabled. The feature is available in the Field Service mobile app for Android and iOS. To purchase the Connected Assets add-on license, contact your Salesforce account executive.

How: In Setup, go to Field Service, and then select **Asset Service Prediction**.

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.

Field Service Operations

Optimize, expand, and personalize your Field Service operations.

IN THIS SECTION:

Monitor Field Service Operations with New Dashboards (Beta)

Determine if you're meeting your field service goals with the new Field Service Intelligence dashboards. The new dashboards help your field service team improve operations and reduce costs with customer data, easy-to-understand visualizations, and key performance indicators enhanced with Einstein. This app includes Work Order dashboards to help you understand where your orders come from, and Service Appointment dashboards that help you understand trends, such as appointment duration and the first-time fix rate.

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Where: This feature is available in Lightning experience in Einstein 1. Einstein 1 access includes the necessary permissions to customize dashboards. This feature is also available in Lightning Experience in the Unlimited Edition. If you want to customize dashboards in Unlimited Edition, contact your Salesforce Account Representative to purchase Tableau +.

Note: Field Service Intelligence is a 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 Field Service Intelligence dashboards, you need the Tableau Einstein Included App Business User permission set. To manage the Field Service Intelligence dashboards, you need the Tableau Included App Manager permission set.

How: To enable Field Service Intelligence, from Setup, in the Quick Find box, enter `Field Service Operations`, and then select **Field Service Operations**. Follow the setup steps and enable Tableau Einstein.

Field Service Customer Engagement

Enhance and elevate your customer interactions with these new features.

IN THIS SECTION:

Promote Your Brand During Visual Remote Assistant Sessions

Create a personalized customer experience by customizing the mobile web browser screens shown before, during, and after each Visual Remote Assistant session. Upload and integrate your brand assets to align each customer interaction with your brand identity for enhanced recognition, trust, and engagement.

Find Available Slots More Efficiently When Booking Appointments with Appointment Assistant

Booking appointments is easier than ever with the simplified Appointment Assistant experience. Customers can now see a more focused single-day view of available appointment slots, making it easier to find a time that works for them. No more sifting through a list of the full-week's schedule. If no slots are available for the selected week, customers can tap the option to move to the next week and continue their search.

Promote Your Brand During Visual Remote Assistant Sessions

Create a personalized customer experience by customizing the mobile web browser screens shown before, during, and after each Visual Remote Assistant session. Upload and integrate your brand assets to align each customer interaction with your brand identity for enhanced recognition, trust, and engagement.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Go to App Launcher and search for Visual Remote Assistant Configuration. In the Mobile Web Branding section, upload your brand assets, such as a logo and spinner.

SEE ALSO:

Salesforce Help: Set Up Visual Remote Assistant for Field Service (can be outdated or unavailable during release preview)

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Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package and the Field Service Appointment Assistant managed package installed.

SEE ALSO:

Salesforce Help: Set Up Field Service Appointment Assistant (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:

Field Service Mobile App Device Deprecations

As of the Winter '25 release, the following devices are deprecated: Android 9 and any devices using iOS 16.

Data Capture

Discover what's new for Data Capture and Discovery Framework Based Data Capture.

Automatically Unlock a Suite of Advanced Features with Lightning Data Service

Experience the power of Salesforce with the auto-enablement of Lightning Data Service for all new orgs and sandbox environments. Features include Data Capture and Document Builder, which leverage the capabilities of Lightning Web Components. By integrating these tools, your organization can streamline data collection, enhance document management, and ultimately drive greater business efficiency and productivity.

Address Asset Issues Proactively with Asset Service Predictions (Generally Available)

Boost uptime and lower costs with asset service predictions. These predictions use the asset's service history while predicting about a service appointment to help mobile workers plan for maintenance and repairs before a problem occurs.

Manage Service Records Automatically On the Go

Manage service records offline when mobile workers arrive or leave an area. Geolocation-based actions with mobile screen flows run in the background as workers engage with the app. Previously, mobile workers had to go back online for the action's data to be synced and for the record-triggered flow to launch.

Get Notified When Mobile Workers Arrive at the Office or Pass by a Work Facility

To monitor mobile worker safety and automate check-ins, use geolocation-based actions with new support for service territory and service territory members. You can trigger actions when mobile workers come in, out, or through the area. These enhancements lead to streamlined operations, better resource management, and ultimately, higher customer satisfaction by making sure that services are delivered more efficiently and safely. Previously, only service appointments were supported, not the service territory and service territory members.

Update Field Service Records Quickly and Easily

Edit record pages like work order, service appointment, resource absence or other objects on the Field Service mobile app with improved performance and user experience. As we migrate the record edit experience to be natively built in iOS and Android, you can enjoy better performance and a more intuitive user experience.

Minimize Work Disruptions with Seamless Updates

Keep users current with essential Lightning web component (LWC) updates while avoiding disruptions to their workflow. Users receive a notification when an important update is available. They can stay productive and update at their convenience, without logging out or worrying about unstable connections. Previously, users had to log out or clear their cache to update LWC.

Update Service Appointment's En Route Status On the Go

Customize the service appointment's en route status value used by the Field Service mobile widget. When the mobile worker taps the option that indicates they're on the way, the service appointment status is updated. Previously, the mobile worker had to select a status manually.

Field Service Mobile App Device Deprecations

As of the Winter '25 release, the following devices are deprecated: Android 9 and any devices using iOS 16.

Where: This feature is available in the Field Service mobile app in iOS and Android.

SEE ALSO:

Salesforce Help: Field Service Mobile App Requirements (can be outdated or unavailable during release preview)

Data Capture

Discover what's new for Data Capture and Discovery Framework Based Data Capture.

IN THIS SECTION:

Simplify Mobile Forms with Data Capture Flow (Generally Available)

Create dynamic, responsive forms in Flow Builder with the Data Capture flow type. Data Capture is the Salesforce Field Service solution for forms for everything from pre-work tasks like safety protocol to environmental assessments. With Data Capture, build forms that use conditional logic to simplify the mobile experience, respond to mobile users' input, 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 seamlessly integrated with the Salesforce platform and are tailored to the task.

Empower Mobile Workers with Data Capture Forms (Generally Available)

Get the job done faster, online or offline, with smart, dynamic Data Capture forms. Launch Data Capture forms from the Forms tab on Work Order Overview or directly from a service appointment or work order line item from the Forms related list. Navigate freely throughout Data Capture forms without missing a beat. Data Capture flows are auto-saved, so you don't have to worry about losing your work. From asset maintenance to environmental assessment, the conditional logic of Data Capture tailors data collection to the task at hand, freeing mobile workers to focus on what matters and complete work faster.

Build Dynamic Forms with Discovery Framework Data Capture Flow (Generally Available)

Create dynamic, responsive forms in Flow Builder with the Discovery Framework Data Capture Flow type. Use Discovery Framework's assessment questions to build mobile-friendly forms that work even in poor connectivity areas. Add conditional logic and parent-child questions to ensure that your mobile workers see only the necessary questions. Maintain a clear audit trail by reusing and versioning questions across multiple forms.

Improve Mobile Worker Productivity with Discovery Framework Data Capture Forms (Generally Available)

Your Field Service mobile workers can collect information quickly, online or offline, with Discovery Framework Based Data Capture forms. Launch the forms directly from a service appointment or work order line item from the Forms related list. From onboarding new customers to capturing information during site visits, responses to the form questions are automatically saved in both online and offline connectivity scenarios. Help your workers focus on important work and complete their tasks faster without worrying about losing their work.

Gather All the Answers with the Assessment Variable for Discovery Framework Data Capture

Collect responses to all questions within a Discovery Framework Data Capture flow more easily. Create the new assessment variable available in a Discovery Framework Data Capture flow. When the flow generates responses to assessment questions, this record variable stores values to create the parent assessment for those responses. Previously, you created a variable and added logic in the flow to store values for the parent assessment.

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Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

How: Select the new Data Capture flow type in Flow Builder.

SEE ALSO:

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

Salesforce Help: Flow Builder Tour (can be outdated or unavailable during release preview)

Empower Mobile Workers with Data Capture Forms (Generally Available)

Get the job done faster, online or offline, with smart, dynamic Data Capture forms. Launch Data Capture forms from the Forms tab on Work Order Overview or directly from a service appointment or work order line item from the Forms related list. Navigate freely throughout Data Capture forms without missing a beat. Data Capture flows are auto-saved, so you don't have to worry about losing your work. From asset maintenance to environmental assessment, the conditional logic of Data Capture tailors data collection to the task at hand, freeing mobile workers to focus on what matters and complete work faster.

Where: This feature is available in the Field Service mobile app for Android and iOS.

SEE ALSO:

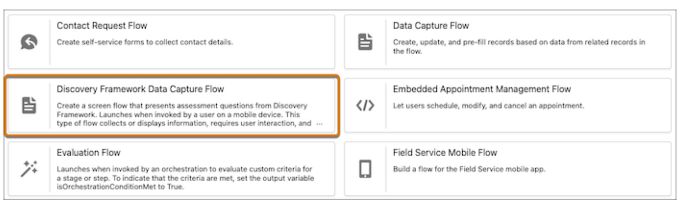
Salesforce Help: Data Capture (can be outdated or unavailable during release preview)

Build Dynamic Forms with Discovery Framework Data Capture Flow (Generally Available)

Create dynamic, responsive forms in Flow Builder with the Discovery Framework Data Capture Flow type. Use Discovery Framework's assessment questions to build mobile-friendly forms that work even in poor connectivity areas. Add conditional logic and parent-child questions to ensure that your mobile workers see only the necessary questions. Maintain a clear audit trail by reusing and versioning questions across multiple forms.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions where Field Service, Discovery Framework, Discovery Framework Import or Export, and Discovery Framework Data Capture Flow are enabled.

How: In Flow Builder, select the Discovery Framework Data Capture Flow process type.



SEE ALSO:

Salesforce Help: Build a Discovery Framework Data Capture Flow (Generally Available) (can be outdated or unavailable during release preview)

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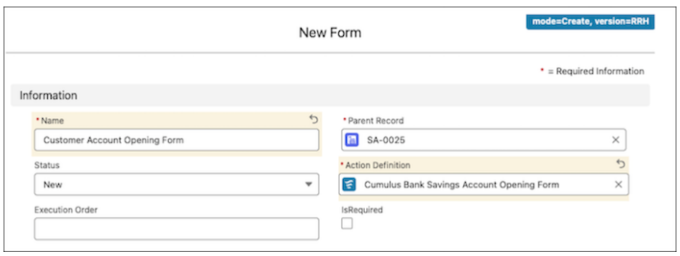
Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions where Field Service, Discovery Framework, Discovery Framework Import or Export, and Discovery Framework Data Capture Flow are enabled.

How: Create assessment questions in Discovery Framework, then create a flow by using the Discovery Framework Data Capture Flow process type in Flow Builder, and then add the necessary assessment questions to the flow.

Next, create a service appointment record for the field service agent. On the Related tab of the service appointment record, create a form.

For the form's Action Definition, select the Discovery Framework Data Capture Flow that you created.



As a Field Service mobile worker, in the Field Service mobile app, launch the Discovery Framework Data Capture form from the Related tab on a service appointment record.

SEE ALSO:

Salesforce Help: About Discovery Framework Based Data Capture with Field Service Mobile App (Generally Available) (can be outdated or unavailable during release preview)

Salesforce Help: Discovery Framework and Assessments

Salesforce Help: Create Questions

Gather All the Answers with the Assessment Variable for Discovery Framework Data Capture

Collect responses to all questions within a Discovery Framework Data Capture flow more easily. Create the new assessment variable available in a Discovery Framework Data Capture flow. When the flow generates responses to assessment questions, this record variable stores values to create the parent assessment for those responses. Previously, you created a variable and added logic in the flow to store values for the parent assessment.

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

How: In a Discovery Framework flow, create a collection variable that uses the assessment API name, the Record data type, and the Assessment object.

SEE ALSO:

Build Dynamic Forms with Discovery Framework Data Capture Flow (Generally Available)

Salesforce Help: Manage Every Aspect of Questionnaire-Driven Information Collection (can be outdated or unavailable during release preview)

Automatically Unlock a Suite of Advanced Features with Lightning Data Service

Experience the power of Salesforce with the auto-enablement of Lightning Data Service for all new orgs and sandbox environments. Features include Data Capture and Document Builder, which leverage the capabilities of Lightning Web Components. By integrating these tools, your organization can streamline data collection, enhance document management, and ultimately drive greater business efficiency and productivity.

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

When: As of November 4, 2024.

SEE ALSO:

Salesforce Help: Move to Lightning Data Service for Field Service ((can be outdated or unavailable during release preview)

Address Asset Issues Proactively with Asset Service Predictions (Generally Available)

Boost uptime and lower costs with asset service predictions. These predictions use the asset's service history while predicting about a service appointment to help mobile workers plan for maintenance and repairs before a problem occurs.

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 Android and iOS. To purchase the Connected Assets add-on license, contact your Salesforce account executive.

SEE ALSO:

Foresee Future Fixes with Asset Service Prediction with the Connected Assets Add-On (can be outdated or unavailable during release preview)

Manage Service Records Automatically On the Go

Manage service records offline when mobile workers arrive or leave an area. Geolocation-based actions with mobile screen flows run in the background as workers engage with the app. Previously, mobile workers had to go back online for the action's data to be synced and for the record-triggered flow to launch.

Where: This change applies to the Field Service mobile app for Android and iOS.

How: Create a quick action that triggers a mobile screen flow without a screen element. Create a geolocation-based action. For Action Type, select **Platform Alert**. For Action Data, enter the quick action in json format. For example, `{"quickAction": "Global.LogACall"}`.

SEE ALSO:

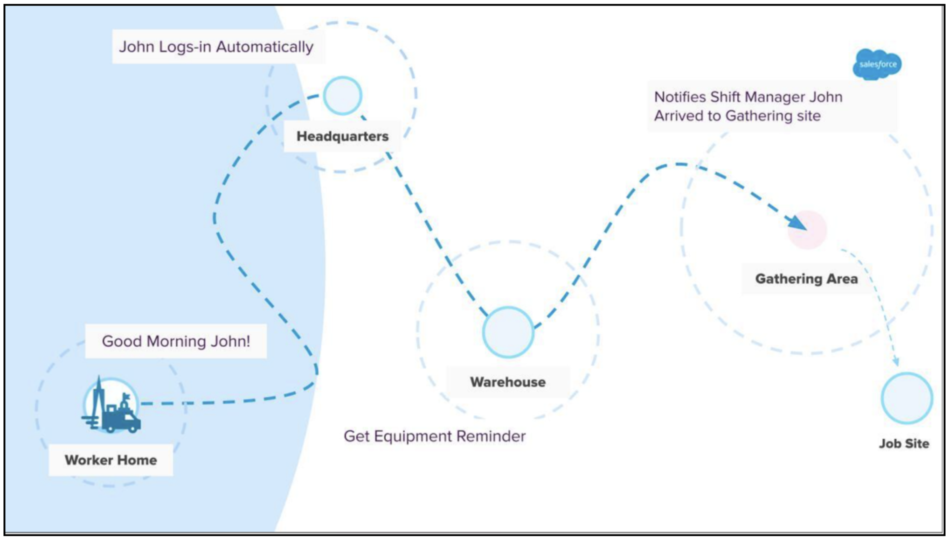
Salesforce Help: Geolocation-Based Actions (can be outdated or unavailable during release preview)

Get Notified When Mobile Workers Arrive at the Office or Pass by a Work Facility

To monitor mobile worker safety and automate check-ins, use geolocation-based actions with new support for service territory and service territory members. You can trigger actions when mobile workers come in, out, or through the area. These enhancements lead to streamlined operations, better resource management, and ultimately, higher customer satisfaction by making sure that services are delivered more efficiently and safely. Previously, only service appointments were supported, not the service territory and service territory members.

Where: This change applies to the Field Service mobile app for Android and iOS.

How: For example, first, they arrive at headquarters, and the app clocks them in. Next, they're near a warehouse, so they're notified about missing spare parts. Then, the shift manager is notified when they arrive at the gathering area. Lastly, a message notifies the manager after the worker returns from servicing a high-risk area.



SEE ALSO:

Salesforce Help: Geolocation-Based Actions (can be outdated or unavailable during release preview)

Update Field Service Records Quickly and Easily

Edit record pages like work order, service appointment, resource absence or other objects on the Field Service mobile app with improved performance and user experience. As we migrate the record edit experience to be natively built in iOS and Android, you can enjoy better performance and a more intuitive user experience.

Where: This change applies to the Field Service mobile app for Android and iOS.

SEE ALSO:

Salesforce Help: Set Up Custom Actions in the Field Service Mobile App (can be outdated or unavailable during release preview)

Minimize Work Disruptions with Seamless Updates

Keep users current with essential Lightning web component (LWC) updates while avoiding disruptions to their workflow. Users receive a notification when an important update is available. They can stay productive and update at their convenience, without logging out or worrying about unstable connections. Previously, users had to log out or clear their cache to update LWC.

Where: This feature is available in the Field Servcie Mobile app for Android and iOS.

How: The mobile worker is notified that an update is available. They can click **Update Now** or **Remind Me Later**.

Update Service Appointment's En Route Status On the Go

Customize the service appointment's en route status value used by the Field Service mobile widget. When the mobile worker taps the option that indicates they're on the way, the service appointment status is updated. Previously, the mobile worker had to select a status manually.

Where: This change applies to the Field Service mobile app for iOS.

How: Go to Field Service Settings in Setup, and in the Mobile Widget section, select the status that indicates that the mobile worker is en route.

SEE ALSO:

Salesforce Help: Add the Field Service Mobile Widget (can be outdated or unavailable during release preview)

Salesforce Help: Set Up the Field Service Mobile Widget (can be outdated or unavailable during release preview)

Spotlight on Field Service Content

Discover high-impact content to help you get your Field Service work done.

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, you get insights into feature configurations, capabilities, and limitations. You also get more details about tools for scheduling automation and optimization, such as how to manage your service objectives and how to optimize appointments by using priorities. Learn about the differences between the optimization engines and the advantages of transitioning to Enhanced Scheduling and Optimization.

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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: Considerations for Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)

Salesforce Help: Create and Manage Field Service Objectives (can be outdated or unavailable during release preview)

Salesforce Help: Create and Manage Field Service Scheduling Policies (can be outdated or unavailable during release preview)

Salesforce Help: Fine-Tune the Scheduling Policy (can be outdated or unavailable during release preview)

Salesforce Help: Optimize Field Service Appointments by Using Priorities (can be outdated or unavailable during release preview)

Salesforce Help: Adopt and Implement Field Service Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)

Hyperforce

Hyperforce is now available in more regions, including Israel and Osaka, Japan, expanding global data residency options. Hyperforce Assistant's instructions for automated pre-upgrade checks are clearer. Access to Hyperforce outbound IP addresses has been made more convenient. Hyperforce Premium products offer new capabilities. Out of Region Disaster Recovery provides additional data protection and business continuity. The Scale Test feature allows for high-traffic scenario simulations in sandbox environments. The Swiss Operating Zone offers a new avenue to address Swiss data residency requirements.

IN THIS SECTION:

Access Salesforce in More Regions with Hyperforce

Hyperforce is now available in 17 countries, giving you more choice and control over data residency. We opened new Hyperforce regions in Israel, as of June 2024, and in Osaka, Japan, as of October 2024.

Improved Instructions in Hyperforce Assistant

We've clarified the instructions in Hyperforce Assistant that explain how to use Optimizer to find hard-coded references. We've also clarified instructions regarding MyDomain, and alternatives to IP allowlisting.

Access Hyperforce Outbound IP Lists

Keep your allowlists up to date with easier access to Hyperforce egress IPs.

Salesforce Out Of Region Disaster Recovery

Get extra peace of mind with a geographically remote disaster recovery (DR) solution for your orgs on Hyperforce.

Scale Test

Book scale test days on your sandbox instance calendar to get enhanced, production-like scale on your existing test environment. The scale test process is ideal for simulating high-traffic scenarios to ensure that your implementations can scale optimally at peak usage.

Swiss Operating Zone

Tackle Swiss data privacy requirements with a tailored set of policy, process, and architectural standards that keep customer data in Switzerland, and in-region support in the EU.

Access Salesforce in More Regions with Hyperforce

Hyperforce is now available in 17 countries, giving you more choice and control over data residency. We opened new Hyperforce regions in Israel, as of June 2024, and in Osaka, Japan, as of October 2024.

Where: Delivery via Hyperforce of the Salesforce Customer 360 application suite, including Sales Cloud, Service Cloud, B2B Commerce, Platform, and Industries Cloud is automatically available in Australia, Brazil, Canada, France, Germany, India, Indonesia, Israel, Italy, Japan, Singapore, South Korea, Sweden, Switzerland, the United States, the United Arab Emirates, and the United Kingdom. For the most up-to-date list of products and regions, see Salesforce Trust and Compliance Documentation and the Hyperforce Security, Privacy and Architecture documents.

These clouds and products recently became available on Hyperforce.

Cloud	Product or Feature	Description	Available In
Commerce	B2C Commerce	Commerce Cloud powers commerce everywhere with AI + Data + CRM, with the most innovative, flexible storefronts	United States

Cloud	Product or Feature	Description	Available In
		that give you the choice of the right tool for every job. Learn more in B2C Commerce Hyperforce FAQ	
Marketing	Data Cloud	Salesforce Data Cloud can help keep you centered with a single source of truth, providing more intelligent, actionable, and trusted data.	Now available in Brazil, Canada, Japan, and the United Kingdom Also available in Germany, India, and the United States
Marketing	Marketing Cloud Engagement	Marketing Cloud Engagement helps build customer relationships efficiently with personalized marketing messages and automated journeys.	Now available in Canada. Also available in Australia, India, and Japan
MuleSoft	MuleSoft Anypoint Platform	Anypoint Platform is a comprehensive integration platform designed to connect applications, data, and devices across on-premises and cloud environments. It enables you to create seamless, agile, and scalable integrations, facilitating faster innovation and improved customer experiences.	Canada and Japan
Tableau	Tableau Cloud	Tableau Cloud is a fully-hosted, cloud-based, enterprise-grade analytics solution designed to empower organizations with intelligent tools and insights where people already work. Learn more in Introducing Tableau on Hyperforce - General Information and FAQ.	Canada, Germany, United Kingdom, United States

Improved Instructions in Hyperforce Assistant

We've clarified the instructions in Hyperforce Assistant that explain how to use Optimizer to find hard-coded references. We've also clarified instructions regarding MyDomain, and alternatives to IP allowlisting.

Where: Hyperforce Assistant is available in Lightning Experience, in all editions.

Who: To run Hyperforce Assistant, you need the Customize Application, Manage Users, and Modify All Data user permissions.

How: From Setup, in the Quick Find Box, enter `Hyperforce Assistant`, and then select **Hyperforce Assistant**.

Access Hyperforce Outbound IP Lists

Keep your allowlists up to date with easier access to Hyperforce egress IPs.

For customers who use allowlists, Salesforce provides Hyperforce IPs for connections from Salesforce to the customer network, for products built on the Salesforce platform, including Sales, Service, Industries, and Tableau clouds. The IPs are now available in JSON format at the URL: https://ip-ranges.salesforce.com/ip-ranges.json. Authentication isn't required. New IPs are added 30 days before being used in production. To avoid missing new additions, check for updates every two weeks. Learn more in Hyperforce IPs to Allow - Sales, Service, Industries, and Tableau Clouds.

These IPs aren't for Marketing Cloud, Commerce Cloud, Slack, or MuleSoft products. Government Cloud Plus customers, see the knowledge article IP Addresses to Allow for Government Cloud Plus.

Salesforce Out Of Region Disaster Recovery

Get extra peace of mind with a geographically remote disaster recovery (DR) solution for your orgs on Hyperforce.

Salesforce Out of Region Disaster Recovery (OORDR) is a Hyperforce premium product offering that delivers business continuity during extraordinary regional catastrophes. Salesforce Out of Region Disaster Recovery provides data backup in a global region that's geographically remote from the primary Hyperforce region. The secondary region can be used to run the business during a disaster and as a source of data recovery to the primary region.

Where: Salesforce Out of Region Disaster Recovery is only available to orgs hosted on Hyperforce. To get Salesforce OORDR, contact your account representative.

Who: Salesforce Out of Region Disaster Recovery (OORDR) is available for customers with Hyperforce commercial orgs in the United States and Japan. OORDR isn't available for GovCloud orgs.

SEE ALSO:

Salesforce Out of Region Disaster Recovery - General Information and FAQ

Scale Test

Book scale test days on your sandbox instance calendar to get enhanced, production-like scale on your existing test environment. The scale test process is ideal for simulating high-traffic scenarios to ensure that your implementations can scale optimally at peak usage.

Where: Scale Test applies to Lightning Experience in all editions. To get access, contact your customer success representative or account executive.

Who: Scale Test is available to customers with a Full sandbox in all Hyperforce regions, except Singapore.

How: From Setup, in the Quick Find box, enter `Scale`, and then click **Scale Test**.

SEE ALSO:

Salesforce Help: Scale Test

Your App Shouldn't Panic in Rush Hour Traffic – Here's How to Prepare

Swiss Operating Zone

Tackle Swiss data privacy requirements with a tailored set of policy, process, and architectural standards that keep customer data in Switzerland, and in-region support in the EU.

Swiss Operating Zone (OZ) is a seamless integration of Salesforce services, advanced privacy controls, and dedicated EU-based support that provides an additional layer of data protection. You can leverage Swiss OZ to reduce your regulatory risk associated with compliance with Switzerland's data-residency requirements.

Where: Contact your account executive to ask about Swiss OZ.

When: Swiss OZ is available in the first half of 2025.

Industries

Salesforce introduces a range of enhancements to streamline operations and improve productivity across industries. Einstein Generative AI simplifies daily tasks across various sectors, including clean energy program suggestions in Energy and Utilities Cloud and benefit applicant household overviews in Public Sector Solutions. Asset Management helps streamline inventory processes and orchestrate real-time actions on assets. Automotive Cloud simplifies vehicle appraisals and loan negotiations, while Consumer Goods Cloud enhances field operations with advanced geofencing and VS Code-based app customization. Financial Services Cloud brings significant enhancements to business relationship plans, portfolio management, and wealth management, and Global Promotions Management introduces coupon codes and milestone-based promotions. Health Cloud improves financial management, scheduling, provider searches, and request processing, and Life Sciences Cloud streamlines pharmacy benefits verification and enrollments in financial assistance programs. Manufacturing Cloud enhances run-rate business with revenue management features, while Net Zero Cloud aligns disclosures and compliance workflows with CSRD guidelines. Salesforce for Education drives student engagement with Agentforce. We also bring exciting changes in Insurance, Media Cloud, Nonprofit Cloud, Communications Cloud, and other industry-specific features.

IN THIS SECTION:

Asset Management

Maximize asset uptime, unlock hidden value from installed assets, and boost your service team's productivity. Manage the entire lifecycle of asset service operations and streamline inventory processes by using the Asset Service Lifecycle Management features. Orchestrate real-time actions on assets and predict potential asset issues before they become critical by using the Connected Assets features.

Automotive Cloud

Manage trade-in appraisals and valuations of vehicles with Appraisal Management guided flows. Get prebuilt actionable event orchestration experiences for asset registration and appointment scheduling, and help users quickly create orchestrations from templates. Help dealers and customers effectively negotiate the terms and conditions of vehicle loan and lease proposals with application rehashing capabilities. Streamline operational tasks with prebuilt service processes and get additional data streams in the Automotive data kit.

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).

Consumer Goods Cloud

Tour drivers can deliver preordered products, generate invoices, and handle returns with delivery documents. Optimize field operations and GPS data compliance with enhanced geofencing and time tracking for visits. Implement custom sharing of visits and their related records because the Share visits feature is retired. Boost brand visibility by adding your company logo to the Consumer Goods offline mobile app. Customize the offline mobile app by using Visual Studio Code based Modeler, because the Windows Server based Modeler is retiring. Key account managers can now copy manual inputs for tactics, and new integration APIs enable retrieval and auditing of manual inputs for account plans. Simplify upgrades with new Trade Promotion Management (TPM) permission sets in the Consumer Goods managed package.

Energy and Utilities Cloud

The Energy and Utilities Cloud now features enhanced Einstein Generative AI capabilities in the Agent Console, boosting service rep efficiency. When creating cases, reps have easy access to related information such as billing account and service point.

Financial Services Cloud

Closely monitor business relationship planning with Objective Tracking Metrics. Use a guided flow to efficiently create account plan objectives, and effectively implement them with action plans. Enhance the self-service loan application experience by giving guest users access to your product catalog, and streamline the loan estimation process with the Loan Calculator tool. Help financial advisors and wealth managers get a complete financial picture of a consumer's financial health with data-driven alerts and actionable insights. Align your client's asset portfolio with their investment strategy with the new asset allocation visualization component for accounts. Get real-time household financial data for managed package objects with the enhanced Household API setup.

Health Cloud

Protect communities proactively by tracking and managing diseases with the help of Disease Surveillance. Enhance financial and operational management with Home Health's comprehensive quoting, funding, and budgeting. Easily schedule recurring appointments and incorporate business rules, such as patient prerequisites, into the Intelligent Appointment Management scheduling workflow. Use Provider Search's conversational AI agent to help patients find the most suitable provider. Process provider requests faster with Utilization Management's FHIR-aligned Coverage Requirement Discovery (CRD), Documentation Templates and Rules (DTR), and Prior Authorization Support (PAS).

Insurance

Give users greater control over their data and enable seamless integrations with an enhanced Insurance data model. Streamline and manage policy transactions, product configuration, pricing, and quoting workflows with ease. The enhancements to Insurance (Managed Package) support multi-root policies by using new services.

Life Sciences Cloud

Simplify the financial assistance program enrollment process by allowing appeals for rejected applications, saving time and effort. Enhance participant management with improved search settings, accessibility features, configuration experience, and recruitment workflow. Help patient services representatives to verify patients' pharmacy benefits through electronic verification requests. Speed up the selection and activation of sites and investigators by using advanced search, assessment creation, and scoring tools.

Loyalty Management

Increase member engagement by offering members rewards for reaching activity-driven milestones. Accurately calculate program and promotion liability by tracing the usage of points even when the member points balance is negative. Gather rich insights about customers and members with the enhanced data kit. Empower customers and sales reps to select the promotion they want to apply for carts by using coupons. Design promotions quickly with enhanced product search and exclusion capabilities. Run targeted promotions for account-based campaigns and automatically check whether promotions are eligible for stores and store groups.

Manufacturing Cloud

Modernize your commercial operations by deeply unifying your pricing, product catalog, product configuration, sales, and run-rate business operations by using Revenue Cloud features in Manufacturing Cloud. Drive more run-rate business by using revenue management features for Sales Agreements. Introduce flexibility in your actuals calculation processes and get greater visibility into cost and quantity metrics by using enhanced Sales Agreement Foundations features. Streamline your inventory operations with Inventory Count and Inventory Replenishment.

Media Cloud

Use the Media Cloud application suite to manage subscribers and subscriptions, create and manage ad campaigns, and perform other key tasks, through community self-service interfaces or an agent console.

Net Zero Cloud

Improve the efficiency, auditability, and transparency of disclosure responses by using the new features and enhancements to Net Zero Cloud and Disclosure and Compliance Hub. Create disclosure reports directly in Google Docs by using the Salesforce Disclosure and Compliance Hub add-in. Manage and report on environmental, social, and governance (ESG)-related topics for materiality assessments in accordance with the Corporate Sustainability Reporting Directive (CSRD) framework. Create, manage, and score Impacts and Risks and Opportunities (IROs) according to the CSRD framework. Streamline your ESG reporting with the improved CSRD report template, now available directly in Net Zero Cloud. Meet the regulatory compliance requirements for CSRD by working with trusted eXtensible Business Reporting Language (XBRL) tagging partners listed on Net Zero Marketplace. Allocate the final scorecard emissions based on the ratio of the procurement item's spent amount and the total spent amount.

Public Sector Solutions

Use Einstein to help caseworkers quickly get an overview of a benefit applicant's household. Build flexible job applications in which applicants can skip optional sections and complete required sections in their preferred sequence. Give supervisors a guided workflow to easily create tailored plans for employees on the Employee Experience portal. More easily migrate Dynamic Assessments across Salesforce orgs by using Metadata API.

Referral Marketing

Maximize the reach and impact of your referral promotions with WhatsApp messages. Gather insights about advocates and their referred friends with a prebuilt data kit.

Salesforce for Education

Use the power of Agentforce to answer prospective students' questions and to enhance the work of relationship officers and advancement researchers. Manage student information with the enhanced data model that supports Student Information System (SIS) functionality, including course scheduling and a unified student profile. Strengthen your advancement efforts with new objects for prospect research and new fields on Fundraising objects for advancement-specific data processing. Understand student needs better with Einstein academic insights, enhancements to Pulse Checks, and an improved appointment-scheduling workflow. Streamline the application review process by using rubrics and scoring for admissions decisions and Stage Management for application reviews.

Salesforce for Nonprofits

Customize Nonprofit Cloud with the improved Fundraising, Grantmaking, and Program and Case Management features. Leverage the enhancements to gift entry, outreach source code generation, rollups, scoring frameworks, and the Business Process API in Fundraising. Streamline grantmaking by batch assigning reviews and using the new stage management feature. Create multiple indicator results and custom care plan goals, as well as clone care plan templates in Program and Case Management.

Vlocity Contract Lifecycle Management

Ensure compatibility with the new document generation infrastructure and add greater flexibility to the workflows. Transition from retired Visualforce-based Omniscripts to Lightning Web Component-based Omniscripts. Prepare for the retirement of Document Generation 1.0 by upgrading to Document Generation 2.0, which introduces features like custom font configuration, a document previewer, and hybrid client-side processing.

Industries Common Features

Some Salesforce Industries products share features, and we've enhanced efficiency and scalability across industries. Business Rules Engine offers greater flexibility with transient attributes and context-based expression sets, while Collections helps minimize delinquencies and optimize debt collection. Cross-Object Field History tracks related record changes in a single view, and Data Processing Engine leverages Einstein Generative AI for field mapping suggestions. Group Membership and Households features simplify member management, while Industries CPQ improves catalog management and promotional strategies. MuleSoft integration apps now run in private spaces, and Omnistudio Document Generation 2.0 elevates document generation processes. Program and Case Management introduces care plan templates and client-specific goal-setting. Record Rollup Definitions allow aggregation and deletion of unused definitions, while Stage Management tracks stage transitions and progress toward key milestones. We've also made enhancements to action launcher, context services, decision table, record rollup definitions, and stage management features.

Asset Management

Maximize asset uptime, unlock hidden value from installed assets, and boost your service team's productivity. Manage the entire lifecycle of asset service operations and streamline inventory processes by using the Asset Service Lifecycle Management features. Orchestrate real-time actions on assets and predict potential asset issues before they become critical by using the Connected Assets features.

IN THIS SECTION:

Asset Service Lifecycle Management

Get greater control over and predictability for your inventory operations and maximize the revenue from aftermarket asset services by using the Asset Service Lifecycle Management features. With Work Order Estimation, estimate installation work for products in quotes, orders, and field service work. Book service appointments independently as a standalone feature to enhance your operational efficiency. With Inventory Count, streamline your inventory counting processes and identify inventory discrepancies. With Inventory Replenishment, prevent stockouts by automating replenishment when inventories reach predefined thresholds. Boost your supervisor's efficiency with a supervisor's experience of Timesheet Management and Labor Cost Optimization.

Connected Assets

Accelerate your Connected Assets implementation and build touchless processes to take actions based on actionable asset events. Reduce implementation effort by using or extending a predefined context definition for asset event details. Build actionable event orchestrations without significant rework by easily creating, distributing, and using orchestration templates. Automatically register assets and schedule asset service appointments based on telematics events by using predefined actionable event orchestration templates, context definitions, flows, and event types.

Asset Service Lifecycle Management

Get greater control over and predictability for your inventory operations and maximize the revenue from aftermarket asset services by using the Asset Service Lifecycle Management features. With Work Order Estimation, estimate installation work for products in quotes, orders, and field service work. Book service appointments independently as a standalone feature to enhance your operational efficiency. With Inventory Count, streamline your inventory counting processes and identify inventory discrepancies. With Inventory Replenishment, prevent stockouts by automating replenishment when inventories reach predefined thresholds. Boost your supervisor's efficiency with a supervisor's experience of Timesheet Management and Labor Cost Optimization.

IN THIS SECTION:

Work Order Estimation

Estimate installation work for products and field service from various sources.

Service Appointment Booking

Book service appointments independently.

Inventory Count

Manage inventory count processes to get an accurate picture of your inventory and identify the discrepancies between physical and system stocks. Inventory managers can schedule cycle and ad hoc counts for multiple products by creating comprehensive count plans. Inventory count performers can count serialized and non-serialized products and take notes at inventory locations by using the Salesforce Field Service mobile app.

Inventory Replenishment

Avoid stockouts and improve inventory turnover with Inventory Replenishment. Inventory managers and service managers can design detailed replenishment policies that define how product items are replenished when their quantities fall below specified thresholds. Run an automated process that identifies product items that require replenishment, matches product items with their replenishment policies, and creates product requests. Easily identify the applicable replenishment policy out of all eligible policies for product items.

Timesheets and Labor Cost Optimization Enhancements

Boost your supervisor's efficiency with the enhanced desktop experience for Timesheets and Labor Cost Optimization. Enable supervisors, time clerks, and crew leads to bulk edit and approve timesheets. Gain insights into operations and costs with a unified view using data from Enterprise Resource Planning systems, fleet management systems, labor union rules, and projects. View meal equivalents earned with approved timesheets, implement custom validation rules for your labor unions, and improve timesheet compliance using Business Rules Engine. Boost mobile worker efficiency with enhancements in the Salesforce Field Service Mobile app.

Work Order Estimation

Estimate installation work for products and field service from various sources.

IN THIS SECTION:

Estimate Work Orders for Installations

Your service reps can now estimate the installation work for products in quotes and orders, in addition to the existing capability of estimating field service work for assets. Launch work order estimations from various sources, including Accounts, Assets, Quotes, Orders, and Work Type Groups, and even with no context. Streamline your entire workflow and ensure flexibility, consistency, and improved communication by leveraging Omnistudio Document Generation to generate documents and send email proposals seamlessly. This feature is now modular for easier customization, available out-of-the-box (OOTB) on Flows, and it can be integrated into an Omniscript.

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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.

Service Appointment Booking

Book service appointments independently.

IN THIS SECTION:

Book a Service Appointment Independently

Experience the convenience of booking service appointments as a standalone feature in Core, now independent of Work Order Estimation. Easily invoke or embed this feature within other functionalities, with separate user permissions.

Book a Service Appointment Independently

Experience the convenience of booking service appointments as a standalone feature in Core, now independent of Work Order Estimation. Easily invoke or embed this feature within other functionalities, with separate user permissions.

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 Book Service Appointment Experience User permission set.

Inventory Count

Manage inventory count processes to get an accurate picture of your inventory and identify the discrepancies between physical and system stocks. Inventory managers can schedule cycle and ad hoc counts for multiple products by creating comprehensive count plans. Inventory count performers can count serialized and non-serialized products and take notes at inventory locations by using the Salesforce Field Service mobile app.

IN THIS SECTION:

Efficiently Schedule Inventory Counts for Products and Parts

Create cycle and ad hoc inventory count plans for different inventory locations. Schedule counts for a cycle count plan by specifying the plan duration, the count frequency, and the count window. Easily add product items to count plans and assign inventory count performers to count the product items. Give assignees a single view of the product items to be counted on specific days at designated locations by using inventory count assessments.

Perform Inventory Counts on the Go

Capture the count details at inventory locations without hassle by using the Salesforce Field Service mobile app. Save time and reduce data entry errors in counting serialized products by scanning their barcodes. Note relevant observations and reasons for discrepancies. Save the count details intermittently, and continue your progress anytime during the count window. After you perform counts, review the count details to detect potential errors and make sure that your count data is accurate.

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Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud, and in Field Service with Asset Service Lifecycle Management.

Who: This feature is available to users with the Inventory Count Manager permission set.

How: Create an inventory count plan record, and specify the necessary details. Then, from a product items list, select the product items that you want to add to the plan, and click **Add to Inventory Count Plan**. Specify the plan, an assignee, and other details.

Perform Inventory Counts on the Go

Capture the count details at inventory locations without hassle by using the Salesforce Field Service mobile app. Save time and reduce data entry errors in counting serialized products by scanning their barcodes. Note relevant observations and reasons for discrepancies. Save the count details intermittently, and continue your progress anytime during the count window. After you perform counts, review the count details to detect potential errors and make sure that your count data is accurate.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud, and in Field Service with Asset Service Lifecycle Management.

Who: This feature is available to users with the Inventory Count User permission set.

How: Add the Inventory Count Assessment list view to a Salesforce Field Service app configuration by using the Field Service Mobile App Builder.

On the Salesforce Field Service mobile app, inventory count performers open an inventory count assessment. Then, open a related inventory count product item, and tap **Perform Count**. Specify the count details.

Inventory Replenishment

Avoid stockouts and improve inventory turnover with Inventory Replenishment. Inventory managers and service managers can design detailed replenishment policies that define how product items are replenished when their quantities fall below specified thresholds. Run an automated process that identifies product items that require replenishment, matches product items with their replenishment policies, and creates product requests. Easily identify the applicable replenishment policy out of all eligible policies for product items.

IN THIS SECTION:

Design Inventory Replenishment Policies with Nuanced Structures

Establish inventory replenishment policies that cover product items for specific products or product categories at all locations or specific locations. Inventory managers and service managers can design time-bound policies that define how product items are replenished when they reach a minimum stock level. Define the minimum stock level at which replenishment is triggered and the maximum level until which the stock is replenished. Determine how the replenishment source locations are derived.

Minimize Stockouts with an Automated Replenishment Process

Avoid manual inventory checks and make inventory processes more predictable with automated replenishment of product items based on applicable replenishment policies. Periodically run an automated process that identifies the product items that require replenishment when they reach predefined stock thresholds. The process automatically determines the applicable policies for the product items and creates product requests based on the policy specifications.

Easily Track Replenishment Policies for Product Items

Quickly identify the applicable replenishment policy out of all eligible policies for a product item in the Applicable Inventory Replenishment Policy related list on the product item record page. Inventory managers and service managers create replenishment policies for a combination of products, product categories, and locations. Save time in searching for policies and minimize errors in policy creation by quickly identifying the most relevant, specific policies that apply to product items.

Design Inventory Replenishment Policies with Nuanced Structures

Establish inventory replenishment policies that cover product items for specific products or product categories at all locations or specific locations. Inventory managers and service managers can design time-bound policies that define how product items are replenished when they reach a minimum stock level. Define the minimum stock level at which replenishment is triggered and the maximum level until which the stock is replenished. Determine how the replenishment source locations are derived.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud, and in Field Service with Asset Service Lifecycle Management.

Who: This feature is available to users with the Inventory Replenishment permission set.

Why: Companies have diverse approaches to defining inventory replenishment policies. Some create policies for the stock of each product at each inventory location, while others create policies for combinations of products, product categories, locations, and parent locations. With Inventory Replenishment, inventory managers and service managers gain the flexibility to define policies at both a granular level, such as individual products at specific locations, and at a broader level, such as product categories across all locations.

How: Create an inventory replenishment policy record, and specify the necessary details.

Minimize Stockouts with an Automated Replenishment Process

Avoid manual inventory checks and make inventory processes more predictable with automated replenishment of product items based on applicable replenishment policies. Periodically run an automated process that identifies the product items that require replenishment when they reach predefined stock thresholds. The process automatically determines the applicable policies for the product items and creates product requests based on the policy specifications.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud, and in Field Service with Asset Service Lifecycle Management.

Who: This feature is available to users with the Inventory Replenishment permission set.

How: Create a schedule-triggered flow to periodically run the Replenish Inventory batch job definition or manually run the Replenish Inventory flow.

Easily Track Replenishment Policies for Product Items

Quickly identify the applicable replenishment policy out of all eligible policies for a product item in the Applicable Inventory Replenishment Policy related list on the product item record page. Inventory managers and service managers create replenishment policies for a combination of products, product categories, and locations. Save time in searching for policies and minimize errors in policy creation by quickly identifying the most relevant, specific policies that apply to product items.

Where: This change applies to Lightning Experience in Automotive Cloud, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud, and in Field Service with Asset Service Lifecycle Management.

Who: This feature is available to users with the Inventory Replenishment permission set.

Timesheets and Labor Cost Optimization Enhancements

Boost your supervisor's efficiency with the enhanced desktop experience for Timesheets and Labor Cost Optimization. Enable supervisors, time clerks, and crew leads to bulk edit and approve timesheets. Gain insights into operations and costs with a unified view using data from Enterprise Resource Planning systems, fleet management systems, labor union rules, and projects. View meal equivalents earned with approved timesheets, implement custom validation rules for your labor unions, and improve timesheet compliance using Business Rules Engine. Boost mobile worker efficiency with enhancements in the Salesforce Field Service Mobile app.

IN THIS SECTION:

Validate and Approve Timesheets Quickly

Enhance accuracy and efficiency of your timesheet approval process with the new Timesheets and Labor Cost Optimization desktop experience. Implement custom validation rules for your labor unions using Business Rules Engine. Enable supervisors, time clerks, and crew leads to bulk edit and approve timesheets. They can also quickly view the timesheets that were submitted the previous day. During the approval process, supervisors can quickly identify and correct any errors highlighted by the compliance flags and ensure that timesheets are accurate and complete.

Boost Mobile Worker Efficiency with Salesforce Field Service Mobile App

Speed up timesheet and shift submissions and ensure accurate payments for mobile workers. Improve timesheet compliance by using automatic daily time summarizations and automatic time rounding of shift hours to the operating hours set for a mobile worker. Your mobile workers can create, edit, and view their timesheets and shift details. They can also add up to three shifts in a workday and view the absence schedules for upcoming vacations.

View Meals Earned When a Timesheet Is Approved

Mobile workers can now view the meals and meal equivalents earned every time a timesheet is approved. Meal equivalents can be in the form of meal vouchers, allowances, or other forms of compensation and are calculated based on Labor Union agreement rules.

Updated Objects

The enhanced objects support the Timesheets and Labor Cost Optimization app.

SEE ALSO:

Get an Energy and Utilities Cloud Trial Org

Validate and Approve Timesheets Quickly

Enhance accuracy and efficiency of your timesheet approval process with the new Timesheets and Labor Cost Optimization desktop experience. Implement custom validation rules for your labor unions using Business Rules Engine. Enable supervisors, time clerks, and crew leads to bulk edit and approve timesheets. They can also quickly view the timesheets that were submitted the previous day. During the approval process, supervisors can quickly identify and correct any errors highlighted by the compliance flags and ensure that timesheets are accurate and complete.

Where: This change applies to Lightning Experience for all editions of Field Service Plus for Energy & Utilities and all editions of Asset Service Lifecycle Management.

Who: To configure the Timesheets and Labor Cost Optimization app, you must be a Salesforce admin with the Labor Cost Optimization Admin permission set. To validate and approve timesheets, you need the Labor Cost Optimization Supervisor permission set.

How: From Setup, enable the Timesheets and Labor Cost Optimization features. To access the app, go to App Launcher, and then find and select **Timesheet Management**.

SEE ALSO:

About Timesheet Management and Labor Cost Optimization

Get an Energy and Utilities Cloud Trial Org

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Where: This feature is available in the mobile app for all editions of Field Service Plus for Energy & Utilities, and all editions of Asset Service Lifecycle Management.

Who: To configure the Timesheets and Labor Cost Optimization in the Salesforce Field Service Mobile app, you must be a Salesforce admin with the Labor Cost Optimization Admin permission set. To create, edit, and view timesheets in the Salesforce Field Service Mobile App, you need the Labor Cost Optimization Resource and FieldServiceMobileStandardPermSet permission sets.

How: Timesheets and Labor Cost Optimization is available as an app for mobile workers in the Field Service Mobile app. You can also access the data model objects via the Salesforce Org desktop experience.

SEE ALSO:

About Timesheet Management and Labor Cost Optimization

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View Meals Earned When a Timesheet Is Approved

Mobile workers can now view the meals and meal equivalents earned every time a timesheet is approved. Meal equivalents can be in the form of meal vouchers, allowances, or other forms of compensation and are calculated based on Labor Union agreement rules.

Where: This feature is available in the mobile app for all editions of Field Service Plus for Energy & Utilities, and all editions of Asset Service Lifecycle Management.

Who: Salesforce admins with the Labor Cost Optimization Admin permission set can configure the Timesheets and Labor Cost Optimization app. Field service technicians with the Labor Cost Optimization Resource permission set can view meals and meal equivalents in the Field Service Mobile App.

How: Timesheets and Labor Cost Optimization is available as an app for mobile workers in the Field Service Mobile App. You can also access the data model objects via the Salesforce Org desktop experience.

SEE ALSO:

About Timesheet Management and Labor Cost Optimization

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Updated Objects

The enhanced objects support the Timesheets and Labor Cost Optimization app.

Store your labor cost optimization data

Use up to 15 new fields in each of these existing objects: Time Sheet Wage Type Summary, Time Sheet, Time Sheet Entry, Time Sheet Entry Item, Service Resource Cost Rule, Pay Type, Resource Absence.

Set Time Hours in Time Sheet Wage Type Summary

Regular Time Hours, Double Time Hours, and Time and a Half Hours are now double fields. You can enter decimal numbers instead of integer values to these fields in the Time Sheet Wage Type Summary object.

SEE ALSO:

Energy and Utilities Cloud Standard Objects

About Timesheet Management and Labor Cost Optimization

Connected Assets

Accelerate your Connected Assets implementation and build touchless processes to take actions based on actionable asset events. Reduce implementation effort by using or extending a predefined context definition for asset event details. Build actionable event orchestrations without significant rework by easily creating, distributing, and using orchestration templates. Automatically register assets and schedule asset service appointments based on telematics events by using predefined actionable event orchestration templates, context definitions, flows, and event types.

IN THIS SECTION:

Represent Asset Events by Using a Predefined Context Definition

Efficiently retrieve and use asset event data in actionable event orchestrations by using the predefined Asset Event Details context definition. The context definition includes nodes and attributes to represent a typical asset event's data, including asset location, energy consumption, environmental condition, and performance. Build actionable event orchestrations for assets by using the context definition's predefined context tags as input and output variables.

Accelerate Actionable Event Orchestration Implementation with Templates

Get faster time-to-value for implementing orchestrations by using templates as they are or by modifying the orchestrations based on your business processes. Users can save actionable event orchestration records as templates and use expression set templates or flow templates directly as execution procedures for an orchestration. Consultants, partners, and admins can create and distribute templates to share orchestrations for standardized processes and build similar orchestrations with minimal rework.

Streamline Asset Registration Based on Telematics Events

Automatically bring up-to-date asset service and entitlement data to Salesforce when you onboard connected assets by using a touchless orchestration process. Use prebuilt actionable event orchestration templates, flows, event types, and context definitions to automatically create or update the asset, warranty, milestone, and entitlement records based on asset telematics events shared from external systems. For example, when an event is triggered after a customer uses an asset for the first time, the process creates an Asset Registered milestone, adds a support entitlement, and adds a standard product warranty for the Asset record.

Schedule Asset Service Appointments Based on Telematics Events

Automatically create service appointments for faulty assets based on real-time asset fault codes by using a touchless orchestration process. Use the prebuilt Service Appointment for Faults actionable event orchestration template to get the list of eligible distributors and available technicians near an asset's location. The orchestration schedules a service appointment based on the specific repair or maintenance work type at the earliest available slot.

Represent Asset Events by Using a Predefined Context Definition

Efficiently retrieve and use asset event data in actionable event orchestrations by using the predefined Asset Event Details context definition. The context definition includes nodes and attributes to represent a typical asset event's data, including asset location, energy consumption, environmental condition, and performance. Build actionable event orchestrations for assets by using the context definition's predefined context tags as input and output variables.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Connected Assets and Context Service.

Who: To use the Asset Event Details context definition, users must have the Actionable Event Orchestration Designer and Context Service Admin permission sets.

Accelerate Actionable Event Orchestration Implementation with Templates

Get faster time-to-value for implementing orchestrations by using templates as they are or by modifying the orchestrations based on your business processes. Users can save actionable event orchestration records as templates and use expression set templates or flow templates directly as execution procedures for an orchestration. Consultants, partners, and admins can create and distribute templates to share orchestrations for standardized processes and build similar orchestrations with minimal rework.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Connected Assets.

Who: To create actionable event orchestration templates, users must have the Create Actionable Event Orchestration Templates user permission.

Why: Admins can use templates to build orchestrations for similar business scenarios with less effort. For example, clone an actionable event orchestration template that automatically creates record alerts when an asset completes 10,000 hours of usage to create an orchestration that creates alerts when the asset completes 20,000 hours of usage with minimal rework.

Streamline Asset Registration Based on Telematics Events

Automatically bring up-to-date asset service and entitlement data to Salesforce when you onboard connected assets by using a touchless orchestration process. Use prebuilt actionable event orchestration templates, flows, event types, and context definitions to automatically create or update the asset, warranty, milestone, and entitlement records based on asset telematics events shared from external systems. For example, when an event is triggered after a customer uses an asset for the first time, the process creates an Asset Registered milestone, adds a support entitlement, and adds a standard product warranty for the Asset record.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Connected Assets.

Who: To use the prebuilt orchestration, flow, context definition, and event types, users must have the Actionable Event Orchestration Designer and Context Service Admin permission sets and the Manage Flows user permission.

How: Use the Create Records for Asset Registration actionable event orchestration template to create the milestones, entitlements, and warranties for first-time registration.

Use the Update Records for Asset Registration actionable event orchestration template for record updates such as upgrading the warranties, modifying the support entitlements, and updating the milestone status.

Extend and customize the templates based on your needs.

Schedule Asset Service Appointments Based on Telematics Events

Automatically create service appointments for faulty assets based on real-time asset fault codes by using a touchless orchestration process. Use the prebuilt Service Appointment for Faults actionable event orchestration template to get the list of eligible distributors and available technicians near an asset's location. The orchestration schedules a service appointment based on the specific repair or maintenance work type at the earliest available slot.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Connected Assets and Salesforce Scheduler.

Who: To use the prebuilt orchestration, flow, context definition, and event types, users must have the Actionable Event Orchestration Designer and Context Service Admin permission sets and the Manage Flows user permission.

Why: Offer proactive, real-time service scheduling for connected assets based on fault code information. Optimize technician schedules and offer timely assistance to customers by efficiently matching service needs with available resources. The prebuilt actionable event orchestration searches for all service territories within 20 miles of the asset's current latitude and longitude coordinates. The orchestration matches the fault type with the type of service required and finds the technicians and time slots available for an appointment. Companies can extend and customize this template based on their requirements.

Automotive Cloud

Manage trade-in appraisals and valuations of vehicles with Appraisal Management guided flows. Get prebuilt actionable event orchestration experiences for asset registration and appointment scheduling, and help users quickly create orchestrations from templates. Help dealers and customers effectively negotiate the terms and conditions of vehicle loan and lease proposals with application rehashing capabilities. Streamline operational tasks with prebuilt service processes and get additional data streams in the Automotive data kit.

IN THIS SECTION:

Trade-In Appraisal Management (Generally Available)

Sales agents can streamline vehicle appraisals with Trade-In Appraisal Management. Create appraisals for vehicles by initiating a simple guided flow. Capture detailed information about your customer's vehicle for trade-in, valuation, or sales. Easily integrate external systems such as vehicle valuation providers and automotive research companies, to get accurate valuation estimates within the appraisal process. Sales reps can adjust appraisal prices based on thorough vehicle inspections and valuations requested by customers. You can also extend the predefined flow for other assets.

Connected Vehicle Enhancements

Give your users a head start on designing actionable event orchestrations for different types of vehicle telematics events. Create and distribute easy-to-use templates for orchestrations that users can clone and customize for similar use cases. Get access to touchless orchestrations for automatically registering vehicles and assets, and scheduling vehicle service appointments based on critical events. For the predefined actionable event orchestrations, the related flows, context definitions, and event types are also automatically available.

Vehicle and Asset Lending Enhancements

Dealers or customers can easily revise a vehicle loan or lease application from an Experience Cloud site during the application post-intake process. Previously, dealers could either accept or reject a proposal selected by underwriters, with no scope for negotiation. Dealers can now efficiently rehash and update proposals based on the needs of customers. They can choose a new payment structure and a different vehicle to create a revised proposal. Dealers can share the revised proposal with the underwriters for further review.

Easily Visualize Vehicle Inventory Search Results with a Card-Based View

Help inventory managers view vehicle inventory search results in a simplified card-based format. Access search results faster and compare vehicles with preset Flexcards that show attribute values such as stock code, vehicle registration number, exterior color, market price, make and model name. Quickly access the vehicle record by using the hyperlinks on the search result cards.

Sync Financial Account Data by Using Prebuilt Data Streams

Send your customers' financial data from Automotive Cloud to Data Cloud by using the data streams in the Automotive data kit to build actionable insights, perform calculations, and create segments. Bring back the transformed data into Automotive Cloud to help sales and service teams at captive finance organizations to create personalized loan offers, sell lease extensions, and improve customer retention. Regularly sync the data streams to send the most current data related to financial accounts, addresses, balances, fees, statements, and transactions to Data Cloud.

Keep Your Financial Data Updated with Prebuilt Service Processes

Your service reps can efficiently collect data for various service requests by using intuitive intake forms. Create service processes by using these prebuilt templates and easily customize the Omniscripts to meet your specific business needs. Launch these processes from the Action Launcher for Automotive apps. Customers can also launch these actions in Experience Cloud for self-service.

Trade-In Appraisal Management (Generally Available)

Sales agents can streamline vehicle appraisals with Trade-In Appraisal Management. Create appraisals for vehicles by initiating a simple guided flow. Capture detailed information about your customer's vehicle for trade-in, valuation, or sales. Easily integrate external systems such as vehicle valuation providers and automotive research companies, to get accurate valuation estimates within the appraisal process. Sales reps can adjust appraisal prices based on thorough vehicle inspections and valuations requested by customers. You can also extend the predefined flow for other assets.

IN THIS SECTION:

Quickly Initiate Appraisals for Customers and Prospects

Quickly initiate appraisals from Lead, Opportunity, and Account record pages during engagements with customers and prospects. Sales reps can increase revenue and improve customer satisfaction during the presales process by helping customers determine the optimum value of their vehicle. Sales reps can also create appraisals from Case and Financial Account record pages. Use Flexcards to create appraisal records with a single click.

Easily Capture Granular Vehicle Details for Appraisal

Sales reps can process vehicle appraisals and easily specify details of vehicles by using the vehicle appraisal workflow. Initiate appraisals from lead, opportunity, or account pages for trade-in, valuation, or sales. Easily search for a vehicle by its vehicle identification number (VIN), make and model, or license plate number. Derive the valuation by specifying details such as the trim, mileage, and condition of a vehicle. Specify the ownership status of the vehicle and the customer's asking price based on their initial assessment. Customize the appraisal experience to capture attributes such as color, location, or purchase date.

Enhance Valuation Accuracy with Vehicle Customization Details

Customizations made to a vehicle can significantly alter appraisal valuations compared to the original vehicle prices. During an appraisal process, sales agents can capture the additional parts and accessories that are installed in the vehicle. Include details of any modifications made to a vehicle, such as upgraded sound systems, leather upholstery, or custom interior designs.

Integrate External Sources for Better Vehicle Valuation

Receive vehicle valuations from external systems based on vehicle attributes. Compare valuations from market sources such as JD Power, Kelly Blue Book (KBB), and Edmunds. Establish the baselines for vehicle valuations by classifying the vehicle condition as average, clean, or rough. Store the valuation sources, prices, and dates for vehicle appraisals for future review.

Efficiently Adjust and Approve the Final Appraisal Value

Perform adjustments on appraisal valuations, such as discounts or markups, for specific items or at the overall appraisal level. Based on inspection visits and customer requested prices, sales agents can adjust the appraisal price. Get the adjustments reviewed by approval authorities.

View Appraisals Related to a Vehicle in a Single List

Easily identify trade-in vehicles from the vehicle page by viewing all related appraisals on a related list. When a sales rep initiates an appraisal by using an existing vehicle identification number (VIN), the corresponding vehicle page stores and shows the vehicle appraisal item details.

Quickly Initiate Appraisals for Customers and Prospects

Quickly initiate appraisals from Lead, Opportunity, and Account record pages during engagements with customers and prospects. Sales reps can increase revenue and improve customer satisfaction during the presales process by helping customers determine the optimum value of their vehicle. Sales reps can also create appraisals from Case and Financial Account record pages. Use Flexcards to create appraisal records with a single click.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Automotive, Appraisal Management, and Automotive Components for Appraisal Management enabled.

Who: To use this feature, users need the Manage Appraisals and Valuations user permission.

How: On a record page, on the Request An Appraisal Flexcard, click **Create Appraisal**.

Easily Capture Granular Vehicle Details for Appraisal

Sales reps can process vehicle appraisals and easily specify details of vehicles by using the vehicle appraisal workflow. Initiate appraisals from lead, opportunity, or account pages for trade-in, valuation, or sales. Easily search for a vehicle by its vehicle identification number (VIN), make and model, or license plate number. Derive the valuation by specifying details such as the trim, mileage, and condition of a vehicle. Specify the ownership status of the vehicle and the customer's asking price based on their initial assessment. Customize the appraisal experience to capture attributes such as color, location, or purchase date.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Automotive, Appraisal Management, and Automotive Components for Appraisal Management enabled.

Who: To use this feature, users need the Manage Appraisals and Valuations user permission.

How: On a Lead, Opportunity, or Account record page, on the Request An Appraisal Flexcard, click **Create Appraisal**. On the Appraisal record page, on the Get Valuation for an Item Flexcard, click **Add Appraisal Item**.

Enhance Valuation Accuracy with Vehicle Customization Details

Customizations made to a vehicle can significantly alter appraisal valuations compared to the original vehicle prices. During an appraisal process, sales agents can capture the additional parts and accessories that are installed in the vehicle. Include details of any modifications made to a vehicle, such as upgraded sound systems, leather upholstery, or custom interior designs.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Automotive, Appraisal Management, and Automotive Components for Appraisal Management enabled.

Who: To use this feature, users need the Manage Appraisals and Valuations user permission.

Integrate External Sources for Better Vehicle Valuation

Receive vehicle valuations from external systems based on vehicle attributes. Compare valuations from market sources such as JD Power, Kelly Blue Book (KBB), and Edmunds. Establish the baselines for vehicle valuations by classifying the vehicle condition as average, clean, or rough. Store the valuation sources, prices, and dates for vehicle appraisals for future review.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Automotive, Appraisal Management, and Automotive Components for Appraisal Management enabled.

Who: To use this feature, users need the Manage Appraisals and Valuations user permission.

Efficiently Adjust and Approve the Final Appraisal Value

Perform adjustments on appraisal valuations, such as discounts or markups, for specific items or at the overall appraisal level. Based on inspection visits and customer requested prices, sales agents can adjust the appraisal price. Get the adjustments reviewed by approval authorities.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Automotive, Appraisal Management, and Automotive Components for Appraisal Management enabled.

Who: To use this feature, users need the Manage Appraisals and Valuations user permission.

View Appraisals Related to a Vehicle in a Single List

Easily identify trade-in vehicles from the vehicle page by viewing all related appraisals on a related list. When a sales rep initiates an appraisal by using an existing vehicle identification number (VIN), the corresponding vehicle page stores and shows the vehicle appraisal item details.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Automotive, Appraisal Management, and Automotive Components for Appraisal Management enabled.

Who: To use this feature, users need the Manage Appraisals and Valuations user permission.

Connected Vehicle Enhancements

Give your users a head start on designing actionable event orchestrations for different types of vehicle telematics events. Create and distribute easy-to-use templates for orchestrations that users can clone and customize for similar use cases. Get access to touchless orchestrations for automatically registering vehicles and assets, and scheduling vehicle service appointments based on critical events. For the predefined actionable event orchestrations, the related flows, context definitions, and event types are also automatically available.

IN THIS SECTION:

Create Actionable Event Orchestrations Faster

Reduce effort in creating actionable event orchestrations based on different event types by directly using templates, or cloning and modifying the templates for your requirements. Users can save actionable event orchestration records as templates and use expression set templates or flow templates directly as execution procedures for an orchestration.

Automatically Register Vehicles and Assets Based on Telematics Events

When connected vehicles are onboarded to Salesforce, easily register the vehicles by automatically creating or updating the related warranties, entitlements, and milestone records. Use the prebuilt actionable event orchestration templates to automatically create or update records for vehicle registration based on external telematics events. For example, after a customer uses a vehicle for the first time, create an Asset Registered milestone, add web-based support entitlement, and add an asset warranty based on a standard product warranty for the Vehicle record in Automotive Cloud.

Automatically Schedule Vehicle Service Appointments Based On Telematics Events

Quickly and easily schedule appointments based on diagnostic trouble codes (DTC). Suggest services to drivers while they're on the go based on real-time telematics events. Get a list of dealers and technicians closest to the vehicle's location and schedule appointments for specific repairs at the earliest available time.

Create Actionable Event Orchestrations Faster

Reduce effort in creating actionable event orchestrations based on different event types by directly using templates, or cloning and modifying the templates for your requirements. Users can save actionable event orchestration records as templates and use expression set templates or flow templates directly as execution procedures for an orchestration.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive and Actionable Event Orchestration are enabled.

Who: To use this feature, users need the Create Actionable Event Orchestration Templates user permission.

Why: Consultants, partners, and admins can create and distribute templates for faster time-to-value implementation of actionable event orchestrations. For example, an actionable event orchestration template that automatically creates record alerts when a vehicle completes 10,000 miles can be cloned and used with minimum rework for creating alerts when the vehicle completes 20,000 miles.

Automatically Register Vehicles and Assets Based on Telematics Events

When connected vehicles are onboarded to Salesforce, easily register the vehicles by automatically creating or updating the related warranties, entitlements, and milestone records. Use the prebuilt actionable event orchestration templates to automatically create or update records for vehicle registration based on external telematics events. For example, after a customer uses a vehicle for the first time, create an Asset Registered milestone, add web-based support entitlement, and add an asset warranty based on a standard product warranty for the Vehicle record in Automotive Cloud.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive, Connected Vehicle Services, and Actionable Event Orchestration are enabled.

Who: To use this feature, users need the Actionable Event Orchestration Designer and Context Service Admin permission sets, and the Manage Flows user permission.

Why: Use the Create Records for Asset Registration actionable event orchestration template to create milestones, entitlements, and warranties for first-time registration. Use the Update Records for Asset Registration actionable event orchestration template to modify the records such as upgrading the warranties, modifying the support entitlements, and updating the milestone status. Companies can also extend and customize the templates.

Automatically Schedule Vehicle Service Appointments Based On Telematics Events

Quickly and easily schedule appointments based on diagnostic trouble codes (DTC). Suggest services to drivers while they're on the go based on real-time telematics events. Get a list of dealers and technicians closest to the vehicle's location and schedule appointments for specific repairs at the earliest available time.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive, Automotive Scheduler, Connected Vehicle Services, and Actionable Event Orchestration are enabled.

Who: To use this feature, users need the Actionable Event Orchestration Designer and Context Service Admin permission sets, and the Manage Flows user permission.

Why: The prebuilt actionable event orchestration searches for all service territories within 20 miles of the vehicle's current latitude and longitude coordinates, matches the fault type with the type of service required, and finds the list of time slots and technicians available for an appointment. Companies can extend and customize this template for their own requirements.

Vehicle and Asset Lending Enhancements

Dealers or customers can easily revise a vehicle loan or lease application from an Experience Cloud site during the application post-intake process. Previously, dealers could either accept or reject a proposal selected by underwriters, with no scope for negotiation. Dealers can now efficiently rehash and update proposals based on the needs of customers. They can choose a new payment structure and a different vehicle to create a revised proposal. Dealers can share the revised proposal with the underwriters for further review.

IN THIS SECTION:

Find a Different Vehicle for Your Vehicle Loan or Lease Application

Dealers or customers can use Criteria-Based Search and Filter to change their vehicle of choice on the active proposal selected by the underwriter. During the decisioning process, customers can request for a different vehicle that they need a loan for, or select a lower-priced vehicle to improve the terms of their loan or lease. Dealers can search vehicles by attributes such as model name, make name, model year, trim type, and retail price to compare vehicle prices and find the vehicle that best suits the customer's preferences.

Update the Application Payment Structure to Generate Better Offers

Dealers or customers can dynamically adjust the requested loan or lease amount, estimated interest amount, and the interest rate for the active proposal selected by the underwriter. They can revise product attributes such as the loan or lease term, and the down payment amount to align with the stipulations. Dealers can generate better payment terms for a loan or lease by updating the price-impacting fields based on a preconfigured pricing procedure.

Easily Track Proposals During Various Stages of Decisioning

Dealers and underwriters can view all the proposals and their statuses in a single list for an application form product. During application decisioning, dealers and underwriters have a unified view of all proposals and they can prioritize the proposals based on the status, stage, and selection type. Proposals are classified based on the stakeholder that selects them.

Find a Different Vehicle for Your Vehicle Loan or Lease Application

Dealers or customers can use Criteria-Based Search and Filter to change their vehicle of choice on the active proposal selected by the underwriter. During the decisioning process, customers can request for a different vehicle that they need a loan for, or select a lower-priced vehicle to improve the terms of their loan or lease. Dealers can search vehicles by attributes such as model name, make name, model year, trim type, and retail price to compare vehicle prices and find the vehicle that best suits the customer's preferences.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending, Vehicle and Asset Lending, and Criteria-Based Search and Filter enabled.

Who: To use this feature, users need the Vehicle and Asset Lending for Partners permission set.

How:

Design a search experience using the Vehicle Definition Searchable Field object as the basis for the search that maps data from Vehicle Definition, Product, and Pricebook. Extend the search configuration to combine fields from other source objects.

As a dealer user, log in to Experience Cloud. Go to an Application Form Product record. On the active, final proposal shared by the underwriter, click **Rehash Proposal**. In the Change the Vehicle section of the rehashed proposal, click **Change Vehicle**.

Update the Application Payment Structure to Generate Better Offers

Dealers or customers can dynamically adjust the requested loan or lease amount, estimated interest amount, and the interest rate for the active proposal selected by the underwriter. They can revise product attributes such as the loan or lease term, and the down payment amount to align with the stipulations. Dealers can generate better payment terms for a loan or lease by updating the price-impacting fields based on a preconfigured pricing procedure.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Digital Lending, Vehicle and Asset Lending, and Salesforce Pricing are enabled.

Who: To use this feature, users need the Vehicle and Asset Lending for Partners permission set.

How: As a dealer user, log in to Experience Cloud. Go to an Application Form Product record. On the active final proposal shared by the underwriter, click **Rehash Proposal**. To finalize your selections and to update the price impacting attributes based on the pricing procedure, click **Apply Changes**. To create and activate the rehashed proposal, click **Calculate**. To modify the application, click **Update Application**.

Easily Track Proposals During Various Stages of Decisioning

Dealers and underwriters can view all the proposals and their statuses in a single list for an application form product. During application decisioning, dealers and underwriters have a unified view of all proposals and they can prioritize the proposals based on the status, stage, and selection type. Proposals are classified based on the stakeholder that selects them.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Digital Lending and Vehicle and Asset Lending are enabled.

Who: To use this feature, dealers need the Vehicle and Asset Lending for Partners permission set. Underwriters need the Use Vehicle and Asset Lending Underwriter Console user permission.

How:

Here's how proposals are classified based on their status and stage.

- When a customer selects a proposal during the intake process, it's marked as Applicant Selected and set to active status.
- When underwriters share an active proposal with dealers for further negotiations, it's marked as Lender Selected and is in the final stage.
- When dealers rehash a proposal, it's marked as Applicant Revised and is in active status.
- Finally, when dealers accept an active final proposal that's also selected by the underwriter, it's marked as Applicant and Lender Selected.

Easily Visualize Vehicle Inventory Search Results with a Card-Based View

Help inventory managers view vehicle inventory search results in a simplified card-based format. Access search results faster and compare vehicles with preset Flexcards that show attribute values such as stock code, vehicle registration number, exterior color, market price, make and model name. Quickly access the vehicle record by using the hyperlinks on the search result cards.

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: To use this feature, users need the Automotive Foundation User and Criteria-Based Search and Filter permission sets.

Why: The card-based format offers a simpler and more intuitive navigation than the list view.

- Users don't have to go through long columns of a result list that shows irrelevant attributes.
- The card-based Flexcard shows key attributes in a compact layout with better scope for more precise comparison between different vehicles.
- Unlike the list view, the card-based view also shows images of the vehicles.

Sync Financial Account Data by Using Prebuilt Data Streams

Send your customers' financial data from Automotive Cloud to Data Cloud by using the data streams in the Automotive data kit to build actionable insights, perform calculations, and create segments. Bring back the transformed data into Automotive Cloud to help sales and service teams at captive finance organizations to create personalized loan offers, sell lease extensions, and improve customer retention. Regularly sync the data streams to send the most current data related to financial accounts, addresses, balances, fees, statements, and transactions to Data Cloud.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Data Cloud and Automotive are enabled.

Who: To use this feature, users need access to the objects and fields for the data streams included in the Automotive Data Kit bundle.

How: In Data Cloud, on the Data Streams tab, go to the All list view. Select a data stream, such as Financial Account Statement or Financial Account Transaction.

Keep Your Financial Data Updated with Prebuilt Service Processes

Your service reps can efficiently collect data for various service requests by using intuitive intake forms. Create service processes by using these prebuilt templates and easily customize the Omniscripts to meet your specific business needs. Launch these processes from the Action Launcher for Automotive apps. Customers can also launch these actions in Experience Cloud for self-service.

Where: This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions with Automotive Cloud.

Why: The prebuilt service processes, which include Omniscript-based guided flows, intake forms, and email templates, streamline your service requests.

The service processes that you can deploy include:

- Address Update: Customers can keep their address information updated to ensure they receive timely and accurate communication related to loans and leases.
- Fee Reversal: Customers can reverse any charges that are incorrectly placed on their account.
- Update Email or Phone: Customers can maintain accurate contact information, and enhance security through proper and timely communication.

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

Automatically assign quote member field values to product attributes, and apply bulk price adjustments to multiple quote line items. Use predefined codes for easy pricing, and increase asset-to-quote limits for large projects. Improve cart performance with level-based item retrieval. Easily search for and apply discounts. Support multiple languages. Keep product bundles organized with sequencing and up to date by managing expired items.

Communications Cloud Agent Console

Quickly resolve service issues by using consistent troubleshooting and diagnostic tools for a better customer experience.

Einstein for Communications

Boost your users' efficiency with Einstein generative AI in Communications Cloud.

Track Service Level Objectives and Identify Potential Upsell Opportunities

Leverage Data Cloud to track Service Level Objectives (SLOs) and proactively prevent service degradation. Monitor any bandwidth shortages by tracking and analyzing performance metrics such as bandwidth, latency, and packet loss against predefined benchmarks. Automatically detect SLO breaches and send email notifications suggesting service upgrades to configured receivers. Employ generative AI capabilities to gain deeper insights into customer queries.

Communications Cloud Sales

Introducing Communications Cloud Sales, your comprehensive solution for effective and consistent customer management, built on the powerful Salesforce Platform. Access Communications Cloud Sales directly from the App Launcher in your Salesforce org with the appropriate licenses. Leverage standard Salesforce objects and a rich portfolio of Revenue Cloud functionalities. Your sales reps can seamlessly create location-based quotes for new and existing customers and enjoy flexible location data management. Ensure efficiency and accuracy by establishing qualification rules so your sales reps can view qualified and disqualified products for selected locations.

Asset Service Lifecycle Management

Get greater control over and predictability for your inventory operations and maximize the revenue from aftermarket asset services by using the Asset Service Lifecycle Management features. With Inventory Count, streamline your inventory counting processes and identify inventory discrepancies. With Inventory Replenishment, prevent stockouts by automating replenishment when inventories reach predefined thresholds. Estimate installation work for products in quotes, orders, and field service work. Book service appointments independently as a standalone feature to enhance your operational efficiency.

Enterprise Sales Management

Automatically assign quote member field values to product attributes, and apply bulk price adjustments to multiple quote line items. Use predefined codes for easy pricing, and increase asset-to-quote limits for large projects. Improve cart performance with level-based item retrieval. Easily search for and apply discounts. Support multiple languages. Keep product bundles organized with sequencing and up to date by managing expired items.

IN THIS SECTION:

Tailor Quotes with Automatic Member Field Mapping

Enhance your quoting process by using automatic assignment of quote member field values to product attributes through a decision table in the Business Rules Engine (BRE). Sales reps can create site-specific or subscriber-specific configurations, enabling them to precisely tailor offers to each customer's unique needs.

Streamline Pricing with Bulk Price Adjustments in Enterprise Sales Management

Select multiple quote line items and apply price adjustments in one go. You can also include child product line items when you apply bulk price adjustments.

Simplify Pricing with Predefined Adjustment Codes

Enhance your pricing adjustments in Enterprise Sales Management by using predefined adjustment codes from Enterprise Product Catalog. Easily apply these codes to both one-time and recurring prices for a more streamlined and efficient process.

Increase Asset-to-Quote Limit in Enterprise Sales Management Asset Viewer

Enable better handling of large volumes of data in high-scale B2B scenarios by raising the asset-to-quote limit beyond the current cap of six. Configure thresholds to decide if processing must be synchronous or asynchronous. Receive in-app notifications to stay updated on the start and completion of the asset-to-quote process.

Improve Performance with Level-Based Item Retrieval in Enterprise Sales Management Configuration Cart

Reduce delays and prevent potential errors through a faster and more efficient process when you manage large bundles. Retrieve and show bundle items one level at a time instead of fetching and showing all items at once.

Simplify Discount Management with Advanced Search and Flexible Bundle Selection

Quickly search for products within your quote or across the entire catalog when you apply custom discounts. Select entire product bundles in one go, including all related child products. Add or remove products as needed. You can also include child product line items when you apply custom discounts.

Enhance Global Reach with Multilingual Support in Enterprise Sales Management

Leverage multilingual labels on the product catalog page and attributes. Show product information, promotions, and attributes in multiple locales, adapting to each user's profile settings. Provide a seamless and consistent experience for our global customers across different regions.

Optimize Bundle Management with Accurate Product and Attribute Sequencing

Experience an improved product bundle display in Enterprise Sales Management. Make your catalog management and working cart operations smoother and more efficient by showing all products within a bundle, including their attributes, in the correct sequence.

Keep Your Catalog and Cart Fresh

Keep your Enterprise Sales Management product catalog and configuration cart up to date by notifying reps when products expire or reach the end of their selling period. Improve the overall user experience by making sure that only the current and available items are included in transactions.

Tailor Quotes with Automatic Member Field Mapping

Enhance your quoting process by using automatic assignment of quote member field values to product attributes through a decision table in the Business Rules Engine (BRE). Sales reps can create site-specific or subscriber-specific configurations, enabling them to precisely tailor offers to each customer's unique needs.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

Streamline Pricing with Bulk Price Adjustments in Enterprise Sales Management

Select multiple quote line items and apply price adjustments in one go. You can also include child product line items when you apply bulk price adjustments.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

How: This change is automatically enabled.

Simplify Pricing with Predefined Adjustment Codes

Enhance your pricing adjustments in Enterprise Sales Management by using predefined adjustment codes from Enterprise Product Catalog. Easily apply these codes to both one-time and recurring prices for a more streamlined and efficient process.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

How: This change is automatically enabled.

Increase Asset-to-Quote Limit in Enterprise Sales Management Asset Viewer

Enable better handling of large volumes of data in high-scale B2B scenarios by raising the asset-to-quote limit beyond the current cap of six. Configure thresholds to decide if processing must be synchronous or asynchronous. Receive in-app notifications to stay updated on the start and completion of the asset-to-quote process.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

Who: To use this feature, users must have access to the Enterprise Sales Management Asset Viewer.

How: This change is automatically enabled.

Improve Performance with Level-Based Item Retrieval in Enterprise Sales Management Configuration Cart

Reduce delays and prevent potential errors through a faster and more efficient process when you manage large bundles. Retrieve and show bundle items one level at a time instead of fetching and showing all items at once.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

Who: This feature is available to all users with access to the Enterprise Sales Management configuration cart.

Simplify Discount Management with Advanced Search and Flexible Bundle Selection

Quickly search for products within your quote or across the entire catalog when you apply custom discounts. Select entire product bundles in one go, including all related child products. Add or remove products as needed. You can also include child product line items when you apply custom discounts.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

How: This change is automatically enabled.

Enhance Global Reach with Multilingual Support in Enterprise Sales Management

Leverage multilingual labels on the product catalog page and attributes. Show product information, promotions, and attributes in multiple locales, adapting to each user's profile settings. Provide a seamless and consistent experience for our global customers across different regions.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

How: This change is automatically enabled.

Optimize Bundle Management with Accurate Product and Attribute Sequencing

Experience an improved product bundle display in Enterprise Sales Management. Make your catalog management and working cart operations smoother and more efficient by showing all products within a bundle, including their attributes, in the correct sequence.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

Who: This feature is available to all users with access to the ESM product catalog.

How: This change is automatically enabled.

Keep Your Catalog and Cart Fresh

Keep your Enterprise Sales Management product catalog and configuration cart up to date by notifying reps when products expire or reach the end of their selling period. Improve the overall user experience by making sure that only the current and available items are included in transactions.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

Who: To use this feature, users must have access to the ESM product catalog and working cart.

How: This change is automatically enabled.

Communications Cloud Agent Console

Quickly resolve service issues by using consistent troubleshooting and diagnostic tools for a better customer experience.

IN THIS SECTION:

[Streamline Customer Support for Service Issues](#)
Quickly analyze and resolve customer service issues by identifying the underlying account, service, or network problems. Provide your customer support reps with a consistent and service-aware approach to troubleshooting, reducing the need to access multiple network-facing systems. With Service Troubleshooting, simplify the end-to-end process, and provide diagnostic tools to achieve faster resolutions and ensure a better customer experience.

Streamline Customer Support for Service Issues

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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.

Einstein for Communications

Boost your users' efficiency with Einstein generative AI in Communications Cloud.

IN THIS SECTION:

Easily Enable Einstein for Communications from Setup
Get access to the existing and new generative AI features for Communications Cloud.

Easily Enable Einstein for Communications from Setup

Get access to the existing and new generative AI features for Communications Cloud.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions. Einstein generative AI is available in Lightning Experience.

Who: To enable services in a Communications Cloud org, you need the Communications Cloud Advanced Admin Permission Set Group.

How: From Setup, in the Quick Find box, enter `Einstein Setup` and select it. Turn on Einstein. Next, from Setup, in the Quick Find box, enter `Communications Cloud`, and then select **Services Setup**. Turn on Enable Service Console, and then turn on Einstein for Communications.

SEE ALSO:

Salesforce Help: Enable Einstein for Communications and Service Console (can be outdated or unavailable during release preview)
Salesforce Help: *Einstein Generative AI*

Track Service Level Objectives and Identify Potential Upsell Opportunities

Leverage Data Cloud to track Service Level Objectives (SLOs) and proactively prevent service degradation. Monitor any bandwidth shortages by tracking and analyzing performance metrics such as bandwidth, latency, and packet loss against predefined benchmarks. Automatically detect SLO breaches and send email notifications suggesting service upgrades to configured receivers. Employ generative AI capabilities to gain deeper insights into customer queries.

IN THIS SECTION:

Use Data Cloud to Proactively Track Service Level Objectives

Leverage Data Cloud for real-time data streaming, active monitoring, and in-depth reporting. Automate the process of sending SLO breach emails by using the Process Asset SLO Breach Tasks flow. Ensure comprehensive SLO analysis by customizing metrics through the Get Service Level Objective and Network Data flow.

Analyze Service Level Objectives and Identify Opportunities for Upsell

Your service reps can use Einstein generative AI to analyze the data obtained from Data Cloud. When customers contact your service reps about service degradation, the reps can employ generative AI for Service Level Objective (SLO) analysis. Your reps can choose between a summarized or detailed analysis. They can also identify opportunities to recommend plan upgrades to customers to prevent service performance issues.

Use Data Cloud to Proactively Track Service Level Objectives

Leverage Data Cloud for real-time data streaming, active monitoring, and in-depth reporting. Automate the process of sending SLO breach emails by using the Process Asset SLO Breach Tasks flow. Ensure comprehensive SLO analysis by customizing metrics through the Get Service Level Objective and Network Data flow.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: To use Salesforce Data Cloud for Communications Cloud, you need the Communications Cloud Admin license and the Data Cloud Admin or Data Cloud User license.

How: Set up Data Cloud for Communications Cloud. Use the Calculated Insights object to trigger a flow to send email notifications to users. Modify the email notification template to include relevant information about the service level objective breach. Customize the Get Service Level Objective and Network Data flow to make sure that your prompt includes all the fields needed to perform an SLO analysis.

SEE ALSO:

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

Salesforce Help: *Licenses Required to Use Service Level Objective Analysis Assistant Feature* (can be outdated or unavailable during release preview)

Salesforce Help: *Customize Service Level Objective* (can be outdated or unavailable during release preview)

Salesforce Help: *Create a Calculated Insight Object in Data Cloud* (can be outdated or unavailable during release preview)

Salesforce Help: *Use a Calculated Insight Object to Trigger Service Level Objective Notification Flow* (can be outdated or unavailable during release preview)

Salesforce Help: *Customize Service Level Objective Data Fields* (can be outdated or unavailable during release preview)

Salesforce Help: *Customize Network Usage Data Fields* (can be outdated or unavailable during release preview)

Salesforce Help: Enable Einstein for Communications and Service Console (can be outdated or unavailable during release preview)

Salesforce Help: *Industries Common Resources Developer Guide: Engagement Data Model* (can be outdated or unavailable during release preview)

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Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: To use Salesforce Data Cloud for Communications Cloud, you need the Communications Cloud Admin license and the Data Cloud Admin or Data Cloud User license.

How: To use SLO Analysis Assistant, enable Einstein for Communications, and set up Data Cloud for Communications Cloud.

SEE ALSO:

Salesforce Help: Using Generative AI Capabilities to Gain Deeper Insights into Service Level Objective Customer Queries (can be outdated or unavailable during release preview)

Salesforce Help: Enable Einstein for Communications and Service Console (can be outdated or unavailable during release preview)

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

Salesforce Help: *Licenses Required to Use Service Level Objective Analysis Assistant Feature* (can be outdated or unavailable during release preview)

Communications Cloud Sales

Introducing Communications Cloud Sales, your comprehensive solution for effective and consistent customer management, built on the powerful Salesforce Platform. Access Communications Cloud Sales directly from the App Launcher in your Salesforce org with the appropriate licenses. Leverage standard Salesforce objects and a rich portfolio of Revenue Cloud functionalities. Your sales reps can seamlessly create location-based quotes for new and existing customers and enjoy flexible location data management. Ensure efficiency and accuracy by establishing qualification rules so your sales reps can view qualified and disqualified products for selected locations.

Note: You need additional licenses to use Communications Cloud Sales. To enable these licenses, please contact Salesforce for assistance.

IN THIS SECTION:

Create Quotes for New and Existing Customers with the Onboard Customer Flow

When a customer contacts your sales rep, the sales rep can search for the customer's account by using the customer's account name. If they don't find any account, they can easily capture the new customer's details and quote information. The sales rep can then review and edit the customer's site as needed. Finally, they can browse catalogs, add products, and save the quote. They can also provide billing details for the quote.

Easily Add Multiple Locations to Quotes and Orders

Your sales reps can go to the Locations tab of a quote and upload a CSV file with the location data. Salesforce automatically maps the file columns, and your sales reps can also manually map the columns from the uploaded file to the expected fields in the Quote Line Item Recipient or Order Product Recipient entities. Alternatively, they can add locations by selecting service accounts, or by manually entering new location details.

Browse Product Catalogs and Assign Products to Locations

After your sales reps add locations to a quote, they can explore product catalogs. Based on the location selections that your sales reps make on the Edit Locations window, they can see qualified and disqualified products. Your sales reps can also review and edit the selected locations. To streamline the process of assigning products to locations, they can organize locations by their fields, such as broadband connection type. After the products are added to the quote, the products are priced based on the locations that they are assigned to.

Manage Your MultiSite Customer Assets

Your sales reps can amend or cancel assets for multiple locations. When an amendment quote or order is created, service accounts are converted to quote line item recipients or order product recipients.

New Objects in Communications Cloud

Do more with the new objects in Communications Cloud that represent the entities that services are quoted or ordered for.

Create Quotes for New and Existing Customers with the Onboard Customer Flow

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Where: This feature is available in Lightning Experience in Personal, Professional, Enterprise, Performance, Unlimited, and Developer editions with Communications Cloud Sales.

Who: To use this feature, you need the licenses required for Revenue Cloud—RevenueLifecycleManagementAddOn or RevenueCloudPlusAddOn. You also need the CommsCloudRLMAddOn license.

How: Enable Revenue Settings. Customize the Onboard Customer flow and the associated flow screen components. Set up qualification rules.

SEE ALSO:

Salesforce Help:Get Ready for Your Revenue Cloud Implementation

Salesforce Help: *Enable Revenue Settings*

Salesforce Help: *New Objects in Communications Cloud*

Salesforce Help: *Get Started with your Communications Cloud Sales Implementation*

Salesforce Help: *Use Communications Cloud Sales as a Sales Rep*

Salesforce Help: *Components in Communications Cloud Sales*

Easily Add Multiple Locations to Quotes and Orders

Your sales reps can go to the Locations tab of a quote and upload a CSV file with the location data. Salesforce automatically maps the file columns, and your sales reps can also manually map the columns from the uploaded file to the expected fields in the Quote Line Item Recipient or Order Product Recipient entities. Alternatively, they can add locations by selecting service accounts, or by manually entering new location details.

Where: This feature is available in Lightning Experience in Personal, Professional, Enterprise, Performance, Unlimited, and Developer editions with Communications Cloud Sales.

Who: To use this feature, you need the Revenue Cloud license—RevenueLifecycleManagementAddOn or RevenueCloudPlusAddOn. You also need the CommsCloudRLMAddOn and CSVImportLicenseAddOn licenses.

How: Enable Revenue Settings. Edit the Quote record page to include the Locations tab. Customize the Import Locations flow and the associated flow screen components to customize how your sales reps upload a file with location data.

SEE ALSO:

Salesforce Help: *New Objects in Communications Cloud*

Salesforce Help: *Enable Revenue Settings*

Salesforce Help: *Get Started with your Communications Cloud Sales Implementation*

Salesforce Help: *Use Communications Cloud Sales as a Sales Rep*

Salesforce Help: *Add Multiple Locations to New and Existing Quotes and Orders*

Salesforce Help: *Components in Communications Cloud Sales*

Browse Product Catalogs and Assign Products to Locations

After your sales reps add locations to a quote, they can explore product catalogs. Based on the location selections that your sales reps make on the Edit Locations window, they can see qualified and disqualified products. Your sales reps can also review and edit the selected locations. To streamline the process of assigning products to locations, they can organize locations by their fields, such as broadband connection type. After the products are added to the quote, the products are priced based on the locations that they are assigned to.

Where: This feature is available in Lightning Experience in Personal, Professional, Enterprise, Performance, Unlimited, and Developer editions with Communications Cloud Sales.

Who: To use this feature, you need the licenses required for Revenue Cloud—RevenueLifecycleManagementAddOn or RevenueCloudPlusAddOn. You also need the CommsCloudRLMAddOn license.

How: Enable Revenue Settings. Configure the Product Discovery Settings to include the Communications: Discover Products flow. Modify the flow and the associated flow screen components to customize how available catalogs are retrieved for selected locations. Set up location based pricing.

SEE ALSO:

Salesforce Help: *Salesforce Pricing*

Salesforce Help: *Enable Revenue Settings*

Salesforce Help: *Get Started with your Communications Cloud Sales Implementation*

Salesforce Help: *Browse Catalogs and Assign Products to Locations*

Manage Your MultiSite Customer Assets

Your sales reps can amend or cancel assets for multiple locations. When an amendment quote or order is created, service accounts are converted to quote line item recipients or order product recipients.

Where: This feature is available in Lightning Experience in Personal, Professional, Enterprise, Performance, Unlimited, and Developer editions with Communications Cloud Sales.

Who: To use this feature, you need the Revenue Cloud license—RevenueLifecycleManagementAddOn or RevenueCloudPlusAddOn. You also need the CommsCloudRLMAddOn license.

How: Enable Revenue Settings. Set up a flow to amend or cancel products. Edit the display columns of the Assets tab of the Account record page to include the Current Service Account column.

SEE ALSO:

Salesforce Help: *Amend, Renew, and Cancel Assets in Revenue Cloud*

Salesforce Help: *Enable Revenue Settings*

Salesforce Help: *Get Started with your Communications Cloud Sales Implementation*

New Objects in Communications Cloud

Do more with the new objects in Communications Cloud that represent the entities that services are quoted or ordered for.

Store information about sites, employees, or other entities that services are quoted for
Use the Quote Line Item Recipient object.

Store information about sites, employees, or other entities that services are ordered for
Use the Order Product Recipient object.

Asset Service Lifecycle Management

Get greater control over and predictability for your inventory operations and maximize the revenue from aftermarket asset services by using the Asset Service Lifecycle Management features. With Inventory Count, streamline your inventory counting processes and identify inventory discrepancies. With Inventory Replenishment, prevent stockouts by automating replenishment when inventories reach predefined thresholds. Estimate installation work for products in quotes, orders, and field service work. Book service appointments independently as a standalone feature to enhance your operational efficiency.

SEE ALSO:

Asset Service Lifecycle Management

Consumer Goods Cloud

Tour drivers can deliver preordered products, generate invoices, and handle returns with delivery documents. Optimize field operations and GPS data compliance with enhanced geofencing and time tracking for visits. Implement custom sharing of visits and their related records because the Share visits feature is retired. Boost brand visibility by adding your company logo to the Consumer Goods offline mobile app. Customize the offline mobile app by using Visual Studio Code based Modeler, because the Windows Server based Modeler is retiring. Key account managers can now copy manual inputs for tactics, and new integration APIs enable retrieval and auditing of manual inputs for account plans. Simplify upgrades with new Trade Promotion Management (TPM) permission sets in the Consumer Goods managed package.

IN THIS SECTION:

Retail Execution

For Direct Store Delivery, use delivery documents to deliver preordered products from the truck's inventory. Improve field operations and visit compliance with enhanced geofencing and time tracking. To share visits and access related records, implement custom sharing. Enhance brand visibility by showcasing your company logo in the Consumer Goods Cloud offline mobile app.

Plan for Windows Server Based Modeler's Retirement

The Windows Server based Modeler is scheduled for retirement in late 2025, and will be in maintenance mode until then. We recommend that you transition to Visual Studio (VS) Code based Modeler. VS Code based Modeler offers similar modeling capabilities without the need for a separate Windows server and database. VS Code based Modeler includes the Consumer Goods Cloud Modeler command line interface (CLI) plugin that's fully integrated into the Salesforce CLI. Use the Modeler CLI plugin to perform various Modeler operations, such as validate contracts, build custom apps, run a simulation of your custom CG Cloud offline mobile app directly on your machine, and create deployment packages.

Trade Promotion Management

Enable Key account managers (KAMs) to copy the manual inputs for a tactic to a new tactic when they copy tactics. Easily retrieve and compare manual inputs for account plans with the new Get Manual Inputs integration API. Avoid managing permission sets during every upgrade by using the new permission sets included in the Consumer Goods Managed package.

New and Changed Metadata Types in Consumer Goods Cloud

Make the most of the new and changed metadata types in Consumer Goods Cloud.

New and Changed APIs in Trade Promotion Management

Learn about the new and changed APIs for Trade Promotion Management in Spring '25.

Retail Execution

For Direct Store Delivery, use delivery documents to deliver preordered products from the truck's inventory. Improve field operations and visit compliance with enhanced geofencing and time tracking. To share visits and access related records, implement custom sharing. Enhance brand visibility by showcasing your company logo in the Consumer Goods Cloud offline mobile app.

IN THIS SECTION:

Streamline Delivery Execution and Efficiently Complete Tours

With convenient access to delivery documents, tour drivers can swiftly deliver preordered products, obtain signatures, generate invoices, and handle returns. After deliveries are done, tour drivers can complete end-of-tour tasks by easily checking in the remaining products and recording the vehicle's mileage or status. After finishing the end-of-tour activities, drivers can complete the tour and track the time spent.

Ensure Visit Integrity with Geofencing and Time Tracking

Implement explicit start visit to make sure sales reps and tour drivers begin a visit before its execution in the Consumer Goods Cloud offline mobile app. By using geofencing and time tracking, oversee visits, reduce the risk of fraudulent visits, and make visit execution accurate and reliable. Make sure the sales reps or tour drivers are physically at the stores during the visit by letting them start or finish a visit only within the defined radius and by limiting the number of in-progress visits to one.

Boost Brand Visibilty by Adding Your Company Logo on Consumer Goods Cloud Offline Mobile App

Make your brand more visible and meet the different needs of different markets, places, and business groups with company logos in the Consumer Goods Cloud offline mobile app. Showcase a unique logo for each sales organization on the Summary card of the Your Day page.

Share Visits Is Retired

Starting Spring '25, you can no longer enable the Share visits setting under Retail Execution Settings and only the owner of the visit has access to the visit. For your users to share visits and access related records, implement custom sharing using any of Salesforce platform sharing capabilities. If you're an existing customer and haven't turned off the Share visits setting, you must first implement platform-based visit sharing and then manually turn off the setting before upgrading to Consumer Goods Cloud Spring '25. Complete this step to prevent unexpected results while sharing visits on the Consumer Goods Cloud Managed package.

Usability Improvements for Desktop Orders

Learn about the layout changes for desktop orders in Spring '25.

Other Improvements in Retail Execution

Delete completed visits, add more promotions, customize the signature area, and ensure system compatibility with Consumer Goods Cloud.

New and Changed Objects for Retail Execution

Do more with the new and updated Retail Execution objects.

Streamline Delivery Execution and Efficiently Complete Tours

With convenient access to delivery documents, tour drivers can swiftly deliver preordered products, obtain signatures, generate invoices, and handle returns. After deliveries are done, tour drivers can complete end-of-tour tasks by easily checking in the remaining products and recording the vehicle's mileage or status. After finishing the end-of-tour activities, drivers can complete the tour and track the time spent.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

Who: To set up delivery, product check-in, and end-tour activities through 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, your users need the CGCloud Tour Driver permission set, OR CGCloud Retail Tour Driver AND CGCloud Retail User permission sets.

How: On the Consumer Goods Cloud desktop app, configure the settings for tour, tour template, and their related object templates such as visit, order, and order items.

Tour drivers can use the Delivery Documents card on the Delivery Cockpit on the Consumer Goods Cloud offline mobile app for completing deliveries. Tour drivers can access the Delivery Cockpit by selecting a visit from the Tour Cockpit. By using the End Tour Activities card on the Driver Cockpit, tour drivers can finish the end-of-tour activities.

SEE ALSO:

Salesforce Help: Delivery Execution with Delivery Documents (can be outdated or unavailable during release preview)

Salesforce Help: Configurations for Delivery Documents on the Consumer Goods Cloud Desktop App (can be outdated or unavailable during release preview)

Salesforce Help: Configurations for End of Tour Activities on the Consumer Goods Cloud Desktop App (can be outdated or unavailable during release preview)

Ensure Visit Integrity with Geofencing and Time Tracking

Implement explicit start visit to make sure sales reps and tour drivers begin a visit before its execution in the Consumer Goods Cloud offline mobile app. By using geofencing and time tracking, oversee visits, reduce the risk of fraudulent visits, and make visit execution accurate and reliable. Make sure the sales reps or tour drivers are physically at the stores during the visit by letting them start or finish a visit only within the defined radius and by limiting the number of in-progress visits to one.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

How: Configure the settings in Visit Template to implement explicit start visit and set a geofencing range. Use the fields in a visit to easily identify visits that are started or completed outside the set radius. See New and Changed Objects for Retail Execution.

For Retail Execution visits, to work with geolocation validation, turn on both geolocation and explicit start visit settings.

SEE ALSO:

Salesforce Help: Enhanced Geofencing and Time Tracking for Consumer Goods Cloud Visits (can be outdated or unavailable during release preview)

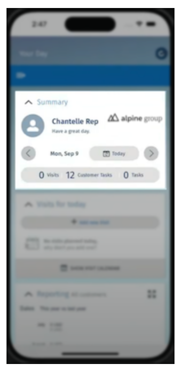
Boost Brand Visibilty by Adding Your Company Logo on Consumer Goods Cloud Offline Mobile App

Make your brand more visible and meet the different needs of different markets, places, and business groups with company logos in the Consumer Goods Cloud offline mobile app. Showcase a unique logo for each sales organization on the Summary card of the Your Day page.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: To upload the company logo in PNG or JPG format, set up the file upload capability in the appropriate sales organization object. Then, in Visual Studio Code based Modeler, customize the contracts to define the company logo on the user cockpit page. Then, deploy the changes to the Consumer Goods Cloud offline mobile app.

When sales reps log in to the offline app and complete the sync, the company logo appears next to the sales rep's name on the Summary card of the Your Day page.



SEE ALSO:

Add Company Logo to the Summary Card in Consumer Goods Cloud Offline Mobile App (can be outdated or unavailable during release preview)

Share Visits Is Retired

Starting Spring '25, you can no longer enable the Share visits setting under Retail Execution Settings and only the owner of the visit has access to the visit. For your users to share visits and access related records, implement custom sharing using any of Salesforce platform sharing capabilities. If you're an existing customer and haven't turned off the Share visits setting, you must first implement platform-based visit sharing and then manually turn off the setting before upgrading to Consumer Goods Cloud Spring '25. Complete this step to prevent unexpected results while sharing visits on the Consumer Goods Cloud Managed package.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

Why: Implement platform-based visit sharing because supervisor and sales rep visits are inaccessible to other sales reps and substitutes. Also, to avoid sync issues if shared visits are uploaded on the Consumer Goods Cloud offline mobile app.

How: If you're an existing customer, in Setup, find and select Retail Execution Settings, and disable the Share visits setting.

SEE ALSO:

Salesforce Help: Sharing and Record Access Feature

Salesforce Apex Developer Guide: Understanding Apex Managed Sharing

Usability Improvements for Desktop Orders

Learn about the layout changes for desktop orders in Spring '25.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

Why: Retail Execution offers these layout enhancements for orders placed through the Consumer Goods Cloud desktop app.

- **Configurable default tab for Orders:** By default, the All Items tab is shown as the default tab. Configure the default tab as Basket with the defaultTab attribute in Custom JSON for Order Items.
- **Easy management of product quantities:** Starting Spring '25
  - On the Add products page in Advanced Orders, you can now directly add products with quantities.
  - To add multiple products with the same quantities, change the quantity for a product. Use the context menu of the Quantity field to update the quantity for all products that are filtered and selected.
  - You can further modify the product quantities in the Basket or the Order Items tab.
  - The quantity is added to Custom JSON for Add Items by default. In existing projects and templates, for Quantity to be shown on the Product List grid, you must add the Quantity field to Custom JSON for Add Items on Order Template.
- **Layout improvements for the desktop order Lightning Web Component:** Font size and padding for the product grids have been enhanced for readability. The tables now align with the Salesforce Lightning Design System.
- **Search bar for simplified search:** Search for an assessment task definition by using the search bar in the Assessment Task Definitions list view.

Other Improvements in Retail Execution

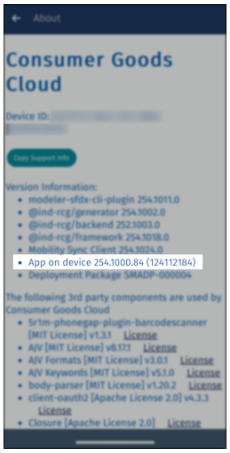
Delete completed visits, add more promotions, customize the signature area, and ensure system compatibility with Consumer Goods Cloud.

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 for an admin user.

- **Deletion of completed visits:** Use the new Delete_Completed_Visit and Age_of_Visit custom system settings to turn on the deletion on the Consumer Goods Cloud desktop app or through the API. By default, the app prevents the deletion of completed visits.
- **Increased promotion limit:** Add up to 49,000 accounts per promotion.
- **Consumer Goods Cloud batch process changes:** Starting Spring '25
  - In Progress visits are marked with Distribution Relevant as False when the start date isn't between the current date (Today) and Distribution Relevant CutOff Date.
  - AggregatePromotionBatch considers only the promotions that are of the Sellable Promotion record type. To consider all types of promotions, use the PromotionAggregationForAllPromotions custom system setting.
- **Direct Store Delivery Sync Rule Change:** Extension of sync rule to include assortments not only for customers whose orders are linked to tours but also for customers whose orders or visits are linked to tours.

- **Sharing for Substitution:** Starting Spring '25, if the OvrideSharingForSubstTeamMbr setting is enabled, a user can activate account substitution for a period, which is valid for the current date without sufficient privileges to add team members to the substituted account. Until Spring '25, the activation of account substitution for a period which is valid for the current date fails if the user didn't have sufficient privileges to add team members to the substituted account.
- **Granular versioning details for troubleshooting:** Find your installed app version and Salesforce build number on the Consumer Goods Cloud offline mobile app. Use this information when you contact Salesforce to report an issue. This information is available on the Device Status Overview page in the Sync Management app.



- **Enhanced signing experience:** Customize your signature area with the new buttons and labels that align with the Salesforce theme. To style the signature area, configure the default Salesforce mobile theme or implement a custom theme.
- **Package compatibility validation:** Ensure compatibility of Consumer Goods Cloud with version validation checks for these components:
  - Consumer Goods Cloud offline mobile app, during the installation of deployment package
  - Consumer Goods Cloud managed package in Salesforce, during the assignment of deployment package
  - Deployment package, during the addition of a deployment package in the deployment package assignment process
  - Visual Studio Code based Modeler simulator app, during the implementation of a customization project

SEE ALSO:

Salesforce Help: Create Custom System Settings for the Deletion of Retail Visit (can be outdated or unavailable during release preview)

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

Salesforce Help: AggregatePromotionBatch

Salesforce Help: CallOrderDistributionReOrgBatch

New and Changed Objects for Retail Execution

Do more with the new and updated Retail Execution objects.

Direct Store Delivery Execution

Indicate whether the vehicle details are reviewed during the end tour activities

Use the new `cgcloud__Has_End_Tour_Veh_Details_Rvw__c` field on the cgcloud__Tour__c object.

Generate invoices for delivery documents

Use the existing CashInvoice, CreditInvoice picklist values in the cgcloud__Document_Transaction_Type__c field on the cgcloud__Order_Template__c object.

Define the invoice type for a delivery document in Account Extension

Use the existing CashInvoice, CreditInvoice picklist values in the cgcloud__Payer_Role_Document_Transaction_Type__c field on the cgcloud__Account_Extension__c object.

Enhanced Geofencing and Time Tracking

Capture the user's GPS location at visit completion

Use the new cgcloud__Loc_Capture_During_Complete__c field on the cgcloud__Visit_Template__c object.

Capture the user's GPS location during visit cancellation

Use the new cgcloud__Loc_Capture_During_Cancel__c field on the cgcloud__Visit_Template__c object.

Capture the start and end time of a visit

Use the new cgcloud__Capture_Proceeding_Time__c field on the cgcloud__Visit_Template__c object.

Set the geofencing validation type when a user starts a visit

Use the new cgcloud__Start_Vst_Geolc_Validation__c field on the cgcloud__Visit_Template__c object.

Specify the geofencing validation type when a user starts a visit

Use the new None, Error, and Warning picklist values in the cgcloud__Start_Vst_Geolc_Validation__c field object.

Set the geofencing validation type when a user completes a visit

Use the new cgcloud__Cmpl_Vst_Geolc_Validation__c field on the cgcloud__Visit_Template__c object.

Specify the geofencing validation type when a user completes a visit

Use the new None, Error, and Warning picklist values in the cgcloud__Cmpl_Vst_Geolc_Validation__c field object.

Indicate whether the visit is started outside the allowed radius

Use the new cgcloud__Is_Vst_Start_Osid_Range__c field on the Visit object.

Indicate whether the visit is completed outside the allowed radius

Use the new cgcloud__Is_Vst_Cmpl_Osid_Range__c field on the Visit object.

Indicate whether starting a visit before visit execution is mandatory

Use the new cgcloud__Is_Start_Visit_Rqr_To_Check_In__c field on the cgcloud__Visit_Template__c object.

Specify whether an information message is shown to indicate that the visit hasn't started

Use the new cgcloud__Does_Show_Read_Only_Visit_Info__c field on the cgcloud__Visit_Template__c object.

Prevent users from executing multiple visits in parallel

Use the new cgcloud__Limit_To_One_Visit_In_Progress__c field on the cgcloud__Visit_Template__c object.

Track visits with In Progress status

Use the new In Progress picklist value in the Visit object.

SEE ALSO:

Salesforce Developer Guide: Consumer Goods Cloud Developer Guide

Plan for Windows Server Based Modeler's Retirement

The Windows Server based Modeler is scheduled for retirement in late 2025, and will be in maintenance mode until then. We recommend that you transition to Visual Studio (VS) Code based Modeler. VS Code based Modeler offers similar modeling capabilities without the need for a separate Windows server and database. VS Code based Modeler includes the Consumer Goods Cloud Modeler command line interface (CLI) plugin that's fully integrated into the Salesforce CLI. Use the Modeler CLI plugin to perform various Modeler operations, such as validate contracts, build custom apps, run a simulation of your custom CG Cloud offline mobile app directly on your machine, and create deployment packages.

How: As part of this product retirement, the Modeler Contract Packages (MCP), Modeler Update Packages (MUP), and Framework Update Packages (FUP) for this product will become unavailable. To get new Modeler features and better support for your customization projects, migrate to Visual Studio (VS) Code based Modeler for Consumer Goods Cloud. To learn more, see Migrate Windows Server Based Modeler Contracts to Visual Studio Code Based Modeler or contact Salesforce for assistance.

SEE ALSO:

Salesforce Help: Visual Studio Code based Modeler

Trade Promotion Management

Enable Key account managers (KAMs) to copy the manual inputs for a tactic to a new tactic when they copy tactics. Easily retrieve and compare manual inputs for account plans with the new Get Manual Inputs integration API. Avoid managing permission sets during every upgrade by using the new permission sets included in the Consumer Goods Managed package.

IN THIS SECTION:

Reduce Time and Effort by Copying Manual Inputs for Tactics

Give key account managers (KAMs) the option to copy the manual inputs of a tactic when they copy a tactic. Previously, when KAMs copied a tactic, they couldn't copy the tactic's manual inputs.

Retrieve and Audit Account Plan Manual Inputs

With the new Get Manual Inputs integration API, you can now retrieve the manual inputs for an account plan recorded as session data in Consumer Goods Processing Services. If multiple changes are made to the account plan, the changes made at different times and by different users are recorded as separate sessions. Use the Get Comparison integration API to retrieve the manual inputs recorded in two separate sessions.

Manage TPM Permission Sets Efficiently

The Consumer Goods managed package now has new permission sets, such as TPM Standard Object Admin and TPM Master Data Admin. 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.

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.

New and Changed Objects for Trade Promotion Management

Do more with the new and updated Trade Promotion Management objects.

Reduce Time and Effort by Copying Manual Inputs for Tactics

Give key account managers (KAMs) the option to copy the manual inputs of a tactic when they copy a tactic. Previously, when KAMs copied a tactic, they couldn't copy the tactic's manual inputs.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

How: In a tactic template, select **Copy Manual Input**.

SEE ALSO:

Salesforce Help: Enable Copying Manual Inputs

Retrieve and Audit Account Plan Manual Inputs

With the new Get Manual Inputs integration API, you can now retrieve the manual inputs for an account plan recorded as session data in Consumer Goods Processing Services. If multiple changes are made to the account plan, the changes made at different times and by different users are recorded as separate sessions. Use the Get Comparison integration API to retrieve the manual inputs recorded in two separate sessions.

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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

How: Based on their role, assign the new permission sets to relevant users and delete the older assignments.

SEE ALSO:

Salesforce Help: Permission Sets

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: Sandbox Testing Recommendations for Consume Goods Processing Service in Spring ’25

New and Changed Objects for Trade Promotion Management

Do more with the new and updated Trade Promotion Management objects.

Copy manual inputs of a tactic when you copy the tactic

Use the new `Duplicate_manual_inputs` field on the tactic_template object.

New and Changed Metadata Types in Consumer Goods Cloud

Make the most of the new and changed metadata types in Consumer Goods Cloud.

Where: This feature applies to the Consumer Goods app in Developer, Enterprise, Performance, and Professional editions.

Settings

Regulate the sObject fields to synchronize between Salesfoce and the Consumer Good Cloud offline mobile app.

Use the new Custom Metadata Type `cgcloud_Sync_Ignored_Field__mdt` to specify the sObject fields to ignore during data synchronization.

New and Changed APIs in Trade Promotion Management

Learn about the new and changed APIs for Trade Promotion Management in Spring '25.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

Why: Trade Promotion Management users can use these new enhancements.

- Use the DELETE Actuals API to delete incorrect KPI values for promotions and tactics.
- With the GET Actuals API, you can query the actual KPI values for promotion tactics.
- For proactive monitoring, you can use the Rejection Log API to get a list of transactions registered to the Consumer Goods processing services during a period. This generated log gives visibility on all the transactions that happened within the period, including their success or failure status.
- You can now remove actual values for a specific day or week for a measure code for a product within a promotion or tactic. Integration APIs can now send NULL updates for incorrect integrated records.

Changed APIs

Get Promotions Within a Sales Org

- /api/v63.0/promotions: This API fetches the list of promotions within a salesorg that are available in a specific time period. In this release, new query parameters such as datefrom and datethru are added. The new query parameters enable you to filter the response body as per your requirement, for example, list of promotions in the Committed phase or promotions between two dates.

New APIs

Get Promotion Actuals

- /api/v63.0/volumes/promotions/daily/<measure>: This API fetches the promotion actuals on a daily basis. Actual data, for example, shipments or 3rd party providers, can be loaded to conduct post-event analysis on a promotion.
- /api/v63.0/volumes/promotions/weekly/<measure>: This API fetches the promotion actuals on a weekly basis. Actual data, for example, shipments or 3rd party providers, can be loaded to conduct post-event analysis on a promotion.

Get a List of Transactions

- /api/v63.0/transaction: This API fetches the list of transactions that were registered in a specific time period.

Delete Promotion or Tactic Actual Data

Daily

- /api/v63.0/volumes/promotions/daily/bulk/{{measure}}: Reorganize or cleanup promotion and tactic actual data for a measure code. The actual data is deleted for a set of days.
- /api/v63.0/volumes/promotions/daily/{{measure}}: Delete promotion and tactic actual data related to a measure code and salesorg at daily levels. The actual data is filtered through query parameters such as product, promotion, and tactics that are provided in the API endpoint URL and then the data is deleted only for a single day.

Weekly

- /api/v63.0/volumes/promotions/week/bulk/{{measure}}: Reorganize or cleanup promotion and tactic actual data for a measure code. The actual data is deleted for a set of weeks.
- /api/v63.0/volumes/promotions/week/{{measure}}: Delete promotion and tactic actual data related to a measure code and salesorg at weekly levels. The actual data is filtered through query parameters such as product, promotion, and tactics that are provided in the API endpoint URL and then the data is deleted only for a single week.

Energy and Utilities Cloud

The Energy and Utilities Cloud now features enhanced Einstein Generative AI capabilities in the Agent Console, boosting service rep efficiency. When creating cases, reps have easy access to related information such as billing account and service point.

IN THIS SECTION:

Einstein Generative AI for Energy and Utilities Cloud Enhancements

Boost the efficiency of your service reps with Einstein generative AI features. Expand the existing generative AI capabilities of Agent Console to include engagement summaries, clean energy program suggestions, and case summaries.

Improve Case Management with Easy Access to Case Details

Help your contact center reps make informed decisions with related object fields in cases. When creating a case in Agent Console, reps can quickly draw relevant insights with easy access to details of the related billing account, service point, location record and more.

Timesheets and Labor Cost Optimization Enhancements

Validate and approve timesheets quickly, boost mobile worker efficience, view meals earned by field service reps and more with Timesheets and Labor Cost Optimization.

SEE ALSO:

Timesheets and Labor Cost Optimization Enhancements

Einstein Generative AI for Energy and Utilities Cloud Enhancements

Boost the efficiency of your service reps with Einstein generative AI features. Expand the existing generative AI capabilities of Agent Console to include engagement summaries, clean energy program suggestions, and case summaries.

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

Who: Salesforce admins and service agents need the permission set licenses for Energy & Utilities Cloud, Energy & Utilities Cloud Billing Account, and Energy & Utilities Other Features.

Why: Use Einstein to help your service reps:

- Summarize the last five engagement interactions of an account to get your service agents up to speed and reduce the time to value for the customer. The summary is developed from data in Energy and Utilities objects.
- Identify the clean energy programs available for a customer by location. The suggestion is generated from clean energy programs data in Energy and Utilities objects.
- Summarize the last five cases for an account to gather the customer inquiries, issue details, and resolution steps. The summary is generated using data in Energy and Utilities objects.

Note: This tool uses generative AI, which can produce inaccurate or harmful responses. Before you use Einstein Generative AI, review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

How: After setting up the Agent Console, go to Setup and turn on Einstein and Einstein Generative AI for Energy and Utilities.

From the Einstein Summary section on the account page, you can generate a summary of the last five engagement interactions, a summary of recent cases, or suggested programs for a customer.

To see a sneak-peak of this feature during the sandbox preview window, sign up for a pre-release trial org.

SEE ALSO:

Set Up the Agent Console
About Einstein Generative AI
Prompt Builder
Get an Energy and Utilities Cloud Trial Org

Improve Case Management with Easy Access to Case Details

Help your contact center reps make informed decisions with related object fields in cases. When creating a case in Agent Console, reps can quickly draw relevant insights with easy access to details of the related billing account, service point, location record and more.

Where: This change is available in Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions with Agent Console.

Who: Salesforce admins and service reps with access to the Agent Console can use this feature.

To see a sneak-peak of this feature during the sandbox preview window, sign up for a pre-release trial org.

SEE ALSO:

Agent Console
Get an Energy and Utilities Cloud Trial Org

Timesheets and Labor Cost Optimization Enhancements

Validate and approve timesheets quickly, boost mobile worker efficience, view meals earned by field service reps and more with Timesheets and Labor Cost Optimization.

Where: This change applies to Lightning Experience for all editions of Field Service Plus for Energy & Utilities and all editions of Asset Service Lifecycle Management.

Who: To configure the Timesheets and Labor Cost Optimization app, you must be a Salesforce admin with the Labor Cost Optimization Admin permission set. To validate and approve timesheets, you need the Labor Cost Optimization Supervisor permission set.

To see a sneak-peak of this feature during the sandbox preview window, sign up for a pre-release trial org.

SEE ALSO:

Timesheets and Labor Cost Optimization Enhancements

Get an Energy and Utilities Cloud Trial Org

Financial Services Cloud

Closely monitor business relationship planning with Objective Tracking Metrics. Use a guided flow to efficiently create account plan objectives, and effectively implement them with action plans. Enhance the self-service loan application experience by giving guest users access to your product catalog, and streamline the loan estimation process with the Loan Calculator tool. Help financial advisors and wealth managers get a complete financial picture of a consumer's financial health with data-driven alerts and actionable insights. Align your client's asset portfolio with their investment strategy with the new asset allocation visualization component for accounts. Get real-time household financial data for managed package objects with the enhanced Household API setup.

IN THIS SECTION:

Business Relationship Plan

Track business relationship plans by using detailed tracking metrics that provide insights into the account plan objective progress at both broad and granular levels. Effectively manage the execution of objectives with well-defined action plans. Evaluate the objective progress by creating measures in the context of an objective, and associate related records with each measure within a single guided flow.

Data Cloud for Financial Services Cloud

Get the benefits of both Data Cloud and Financial Services Cloud to get a complete financial picture of consumers' financial health.

Portfolio Management

Review client investment strategy in the new asset allocation visualization component for accounts.

Digital Lending—India

Reduce the risk of errors in a loan approval workflow by automating loan origination services through new integration templates.

Service Process Automation

Prebuilt service process templates help you get started quicker.

Wealth Management

View a summary of client financial health and show up-to-date household financial data for managed package objects.

Improve Readability and Clarity of Financial Account Party Record Names

The prefix for financial account party record names is changed from FAR to FAP. Enhance the clarity and consistency in record naming, and easily identify and manage financial account party records. To ensure continued functionality and accuracy of the records, review and update any object records, custom queries, Apex class queries, and report filters that currently use the FAR prefix to the new FAP prefix.

Get Started Faster with Guided Setups

Discover the new guided setups in Financial Services Cloud.

New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

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.

- Collections

  Banks and financial institutions can streamline their collection processes, and achieve operational efficiency. Reduce delinquencies and maintain positive customer relationships.

- Group Membership and Households

  Easily add the correct members to your party relationship groups with the help of email IDs. Receive change event notifications for more objects.

- Record Rollup Definitions

  Aggregate tasks and events at a household or group level. Edit and delete record rollup definitions.

Business Relationship Plan

Track business relationship plans by using detailed tracking metrics that provide insights into the account plan objective progress at both broad and granular levels. Effectively manage the execution of objectives with well-defined action plans. Evaluate the objective progress by creating measures in the context of an objective, and associate related records with each measure within a single guided flow.

IN THIS SECTION:

Closely Monitor Business Relationship Planning with Objective Tracking Metrics

Help your relationship teams promptly address discrepancies by capturing deviations at both the account plan and objective levels. The Objectives component now provides comprehensive tracking metrics, showing progress updates at both summarized and detailed objective levels. At the broader level, view the total number of objectives, measures with no updates, and the number of overdue tasks. At the granular level, see the count of completed measures, completed tasks, inactive measures, and overdue tasks associated with a specific objective. Streamline the monitoring process to enhance efficiency and facilitate prompt interventions through better performance tracking.

Effectively Implement Objectives with Action Plans

Use action plans to effectively complete the tasks required for business processes tied to account plan objectives. Your relationship teams can now create tasks by using action plans from the Tasks Flexcard component on the account plan objective record page. View an aggregated count of the tasks that are directly associated with objectives, whether they are created individually or through action plans. Clearly visualize the distribution of tasks based on their progress by using a task distribution pie chart. Ensure timely follow-up by receiving alerts for the overdue tasks associated with action plans. Provide better visibility into the progress of business relationship plans by improving the overall task management for account plan objectives.

Efficiently Create Measures for Account Plan Objectives By Using a Guided Flow

Your relationship teams can now use a single guided flow to set target metrics for account plan objectives. Define measures for an objective and link related records all at once, maintaining context throughout. Easily associate relevant opportunities, cases, and financial deals as related records to the measures for the objectives that your relationship managers own. Visualize the progress of each measure by using progress ring indicators. Reduce administrative overhead with an efficient, unified workflow that minimizes clicks, saving objective owners time and effort.

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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the FSC Sales & Service license or the FSC Sales license.

How: From the App Launcher, find and select the **Commercial Banking** app, go to the Objectives tab on the Prebuilt Account Plan Lightning page, and then create objectives.

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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the FSC Sales & Service license or the FSC Sales license.

How: In the Tasks component on the account plan objective record page, click the down arrow next to the refresh icon and select **New Action Plan**. To create tasks without action plans, go to Tasks from the App Launcher, and then create a task and associate it with the account plan objective record.

Efficiently Create Measures for Account Plan Objectives By Using a Guided Flow

Your relationship teams can now use a single guided flow to set target metrics for account plan objectives. Define measures for an objective and link related records all at once, maintaining context throughout. Easily associate relevant opportunities, cases, and financial deals as related records to the measures for the objectives that your relationship managers own. Visualize the progress of each measure by using progress ring indicators. Reduce administrative overhead with an efficient, unified workflow that minimizes clicks, saving objective owners time and effort.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the FSC Sales & Service license or the FSC Sales license.

How: In the Commercial Banking app, on the Objectives tab on the Account Plan Lightning page, create objectives. To create measures through a guided path, click **Add Measure**. To add a measure from the Account Plan Objective Lightning page, in the Measures component, click **New**.

Data Cloud for Financial Services Cloud

Get the benefits of both Data Cloud and Financial Services Cloud to get a complete financial picture of consumers' financial health.

IN THIS SECTION:

Keep Client Financial Goals on Track with Contextual Alerts and Actions

Help financial advisors and wealth managers proactively manage client financial goals with data-driven alerts and actionable insights. They get a holistic view of their clients' financial health by using data from Data Cloud and Financial Services Cloud.

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Help financial advisors and wealth managers proactively manage client financial goals with data-driven alerts and actionable insights. They get a holistic view of their clients' financial health by using data from Data Cloud and Financial Services 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 Financial Services Cloud Extension. They must also purchase Financial Services Cloud Contextual Alerts.

Why: Advisors can boost customer satisfaction and loyalty by giving timely and insightful guidance based on the financial data. The alerts help you stay on top of upcoming milestones, off-track goals, and allocation changes. You can include actions such as creating or reviewing a goal. These actions and alerts help advisors have personalized conversations with clients about what they want to do or improve.

How: If you previously set up Contextual Alerts:

- Uninstall the Financial Service Cloud data kit.
- Install the new version to get new calculated insights that feed contextual alerts.
- Delete the context definition, expression set, and actionable event orchestration records.
- In Setup, go to the Contextual Alerts Guided Setup. Expand Set Up an Event Orchestration, and then click **Create Actionable Event Orchestration**. This creates context definition, expression set, and actionable event orchestration records.

Portfolio Management

Review client investment strategy in the new asset allocation visualization component for accounts.

IN THIS SECTION:

Quickly Compare Actual and Target Allocations

Align your client's asset portfolio with their investment strategy and give advice on rebalancing if the portfolio deviates from the target allocations. Review the charts of your client's current allocation by using the new asset allocation visualization component for accounts.

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Align your client's asset portfolio with their investment strategy and give advice on rebalancing if the portfolio deviates from the target allocations. Review the charts of your client's current allocation by using the new asset allocation visualization component for accounts.

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 View Asset Allocation permission from the FSC Sales permission set.

Digital Lending—India

Reduce the risk of errors in a loan approval workflow by automating loan origination services through new integration templates.

IN THIS SECTION:

[Increase the Efficiency of Your Loan Approval Workflow](#)

Help your users perform purposeful loan-related verifications by connecting to their preferred external services through the new integration templates. With the automated loan origination services, improve the efficiency and accuracy and reduce the manual effort in verifying that applicants meet the loan approval criteria.

Increase the Efficiency of Your Loan Approval Workflow

Help your users perform purposeful loan-related verifications by connecting to their preferred external services through the new integration templates. With the automated loan origination services, improve the efficiency and accuracy and reduce the manual effort in verifying that applicants meet the loan approval criteria.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Digital Lending—India.

Who: To use this feature, your users need the Digital Lending India Admin User permission.

Why: Use the integration templates to build integrations for these loan origination services.

KYC OCR for Aadhaar
Confirm that a structurally valid Aadhaar card is uploaded and then return the document with the masked Aadhaar number.

Aadhaar OTP Authentication
Verify the applicant's Aadhaar by sending a one-time password (OTP) to the applicant's phone number. This integration also downloads and stores the masked Aadhaar image.

Send for ESign
Generate and send a unique link to the applicant by email or SMS to e-sign the uploaded document.

Send for EStamp
Generate and send a unique link to the applicant by email or SMS to e-stamp the document.

Get Status for ESign
Get the status of the document that was sent for ESign.

Get Status for EStamp
Get the status of the document that was sent for EStamp.

Pan Profile Detailed
Get the applicant's profile details from the uploaded PAN document.

Cheque OCR
Extract the bank account and owner details from the copy of the post-dated cheque uploaded during the disbursement operations process.

Employer Search
Search for an employer by name to find out their Employee Provident Fund registration and exemption status.

Employee Search
Search for an employee by name to confirm their employment with the employer in the last three months.

Form 16 Authentication
Authenticate the Form-16 document issued by the employer for tax deduction.

Service Process Automation

Prebuilt service process templates help you get started quicker.

IN THIS SECTION:

[Accelerate Retail Banking Service Process Setup with Prebuilt Templates]

Prebuilt service process templates streamline the setup of retail management processes by providing ready-made process attributes, intake forms, and fulfillment flows. Clone these templates to quickly obtain the necessary API endpoints, reducing development time. These templates are designed for both assisted and self-service channels, enabling faster and more efficient service delivery.

[Accelerate Wealth Banking Service Process Setup with Prebuilt Templates]

Prebuilt service process templates simplify the setup of wealth management processes by providing ready-made process attributes, intake forms, and fulfillment flows. Clone these templates to quickly obtain the necessary API endpoints, thereby reducing development time. These templates are designed for both assisted and self-service channels, enabling faster and more efficient service delivery.

Accelerate Retail Banking Service Process Setup with Prebuilt Templates

Prebuilt service process templates streamline the setup of retail management processes by providing ready-made process attributes, intake forms, and fulfillment flows. Clone these templates to quickly obtain the necessary API endpoints, reducing development time. These templates are designed for both assisted and self-service channels, enabling faster and more efficient service delivery.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

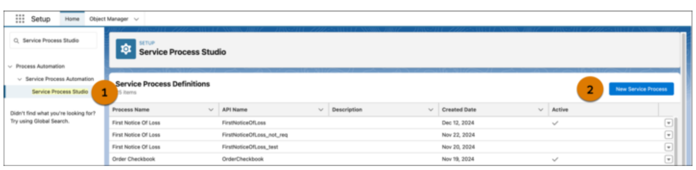
Who: To use the prebuilt service process templates, users need these permission sets and permission set licenses:

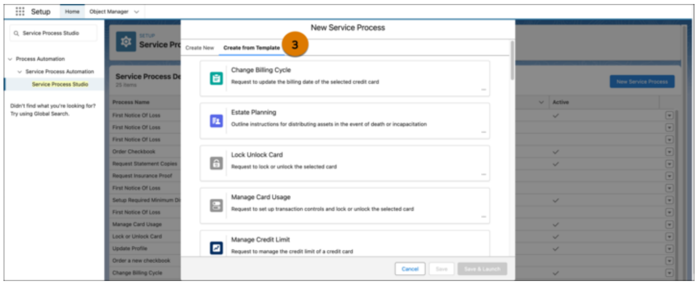
- Industries Service Process permission set
- Omnistudio User permission set
- Industry Service Excellence permission set
- Financial Services Cloud Extension, Financial Services Cloud Basic, Financial Services Cloud Service, or Financial Services Cloud Standard permission set license

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 retail banking service processes you can easily create from the templates:

- **Change Billing Cycle:** Request to update the billing date of the selected credit card.
- **Initiate Vehicle First Notice of Loss:** Request to report a vehicle incident to initiate the first notice of loss.
- **Lock Unlock Card:** Request to lock or unlock the selected card.
- **Manage Beneficiaries:** Request to add or modify beneficiaries.
- **Manage Card Usage:** Request to manage the credit limit of a credit card.
- **Manage Credit Limit:** Request to update the billing date of the selected credit card.
- **Notify Travel Plans:** Request to notify travel plans to avoid card-related issues.
- **Request Loan Payoff Statement:** Request a loan payoff statement to view the settlement details.
- **Reset PIN:** Request to reset the PIN for the selected card.

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:

[Salesforce Help: Standard Retail Banking Service Processes for Financial Services Cloud]

Accelerate Wealth Banking Service Process Setup with Prebuilt Templates

Prebuilt service process templates simplify the setup of wealth management processes by providing ready-made process attributes, intake forms, and fulfillment flows. Clone these templates to quickly obtain the necessary API endpoints, thereby reducing development time. These templates are designed for both assisted and self-service channels, enabling faster and more efficient service delivery.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

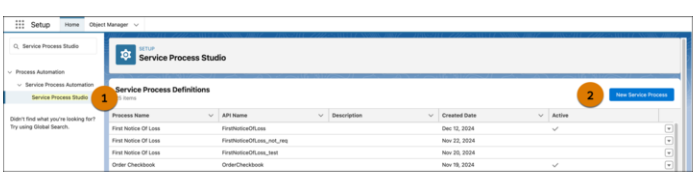
Who: To use the prebuilt service process templates, users need these permission sets and permission set licenses:

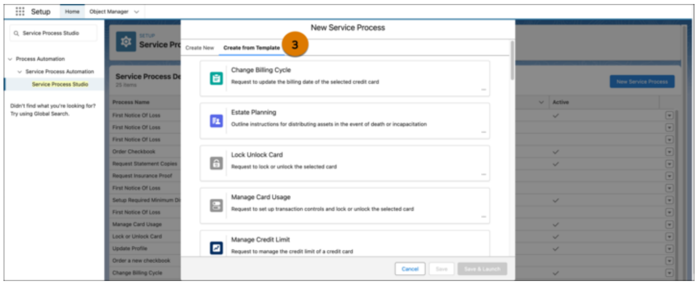
- Industries Service Process permission set
- Omnistudio User permission set
- Industry Service Excellence permission set
- Financial Services Cloud Extension, Financial Services Cloud Basic, Financial Services Cloud Service, or Financial Services Cloud Standard permission set license

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 wealth banking service processes that you can easily create from the templates:

- **Estate Planning for Wealth:** Outline instructions for notifying the death of an individual and initiating the process of managing their financial accounts.
- **Initiate Automated Account Transfer for Wealth (ACAT):** Request to transfer securities between trading accounts.
- **Manage Beneficiaries for Wealth:** Request to add or modify beneficiaries for the selected investment account.
- **Manage Standing Instructions for Wealth:** Request to set up recurring, on-time payments for the selected investment account.
- **Set Up Required Minimum Distribution for Wealth (RMD):** Request the required minimum distribution for the selected retirement account.
- **Update Profile for Wealth:** Request to update profile 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.





Wealth Management

View a summary of client financial health and show up-to-date household financial data for managed package objects.

IN THIS SECTION:

Boost Productivity with Financial Services Cloud Embedded AI for Agents
Generate a summary that incorporates details of the financial health of the client including asset allocation, portfolio performance, and progress on financial goals. Advisors use this information to determine the next steps.

Boost Productivity with Financial Services Cloud Embedded AI for Agents

Generate a summary that incorporates details of the financial health of the client including asset allocation, portfolio performance, and progress on financial goals. Advisors use this information to determine the next steps.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: 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.

Improve Readability and Clarity of Financial Account Party Record Names

The prefix for financial account party record names is changed from FAR to FAP. Enhance the clarity and consistency in record naming, and easily identify and manage financial account party records. To ensure continued functionality and accuracy of the records, review and update any object records, custom queries, Apex class queries, and report filters that currently use the FAR prefix to the new FAP prefix.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need the Industry Service Excellence, and Financial Services Cloud Extension or FSC Service or FSC Foundation permission sets.

Get Started Faster with Guided Setups

Discover the new guided setups in Financial Services Cloud.

IN THIS SECTION:

Configure Business Relationship Plans with Ease by Using Guided Setup

Get up and running quickly with the Business Relationship Plan guided setup. Use the guided setup to complete all the tasks required to configure, use, and manage the Business Relationship Plan features.

Configure Business Relationship Plans with Ease by Using Guided Setup

Get up and running quickly with the Business Relationship Plan guided setup. Use the guided setup to complete all the tasks required to configure, use, and manage the Business Relationship Plan features.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where the FSC Sales & Service license or the FSC Sales license is enabled.

How: From Setup, in the Quick Find box, enter *`Business Relationship Plans`*, and then under Guided Setup, select **Business Relationship Plans**.

New and Changed Financial Services Cloud Object Fields

Do more with new and updated Financial Services Cloud objects.

Financial Account Management Standard Objects

You can now use Financial Account and related objects without having to install the Financial Services Cloud managed package. Let your users gain greater control and flexibility over their data models, enabling seamless integration and decreased dependencies by using these standard objects. Enable the Financial Account Management Standard Objects setting and start using the Financial Account and related standard objects, which help you to model financial accounts and related information for your users.

Store information about different financial accounts, such as investment accounts, bank accounts, or credit cards

Use the new `FinancialAccount` object.

Store information about the role assumed by a person or organization involved with a financial account, such as a beneficiary or a trustee

Use the new `FinancialAccountParty` object.

Store information about the financial account balance

Use the new `FinancialAccountBalance` object.

Store information about each financial account transaction

Use the new `FinancialAccountTransaction` object.

Store information about each address related to a financial account, such as a communication address, a billing address, or a statement address

Use the new `FinancialAccountAddress` object.

Store information about a financial account statement

Use the new `FinancialAccountStatement` object.

Store information about the additional owner of an asset

Use the new `PartyFinclAssetAddlOwner` object.

Store information about the financial asset owned by an individual or account

Use the new `PartyFinancialAsset` object.

Store information about a party asset associated with a financial account

Use the new `FinclAcctPtyFinclAsset` object.

Store information about a financial liability held by a party

Use the new `PartyFinancialLiability` object.

Store information about an additional party associated with a financial liability

Use the new `PartyFinclLiabAddlBrwr` object.

Store information about the card issued to a customer, such as a debit card, credit card, prepaid card, gift card, or any other card type

Use the new `IssuedCard` object.

Store information about the fee that's levied on the financial account for various requests, such as request for stop payment, duplicate card, and more

Use the new `FinancialAccountFee` object.

Store information about a financial security instrument, such as a stock or bond

Use the new `FinancialSecurity` object.

Store information about the securities held for an asset or liability

Use the new `Securities Holding` object.

Data Cloud for Digital Lending

Data Cloud Data Model Objects (DMO) are used in the Data Cloud implementation for Digital Lending. The DMOs listed below live in Data Cloud.

Represents the terms attached to a scheme to sanction the loan.

Use the new `FinancialApplicationItemProposal` data model object.

Represents a junction between an application form product and a deviation.

Use the new `FinancialApplicationItem` data model object.

Represents information about the individual or group that are applying.

Use the new `Applicant` data model object.

Represents the high level information of an application that's submitted for the product.

Use the new `FinancialApplication` data model object.

Health Cloud

Protect communities proactively by tracking and managing diseases with the help of Disease Surveillance. Enhance financial and operational management with Home Health's comprehensive quoting, funding, and budgeting. Easily schedule recurring appointments and incorporate business rules, such as patient prerequisites, into the Intelligent Appointment Management scheduling workflow. Use Provider Search's conversational AI agent to help patients find the most suitable provider. Process provider requests faster with Utilization Management's FHIR-aligned Coverage Requirement Discovery (CRD), Documentation Templates and Rules (DTR), and Prior Authorization Support (PAS).

IN THIS SECTION:

Disease Surveillance

Define diseases, track cases, and manage patient records effectively. Customize definitions, analyze trends, and perform on-site inspections to support proactive public health actions.

Financial Assistance Program Enhancements

Streamline the enrollment process for a financial assistance program by using appeals. Save time by filing an appeal against a rejected application instead of submitting a new application.

Home Health Enhancements

Promote effective financial management, boost operational efficiency, and prioritize patient-centric care through Home Health's holistic approach to quoting, funding, and budgeting of home healthcare services. Optimize operations by using the enhanced guided setup for configuring quoting and budgeting in your org.

Intelligent Appointment Management Enhancements

Ensure compliance with medical and operational requirements by verifying patient prerequisites and respecting provider capacity limits. Enable schedulers to book recurring appointments. Expand self-scheduling to include assets such as clinics and labs. Enhance appointment guidance flows with advanced scheduling options.

Pharmacy Benefits Verification Enhancements

Streamline the pharmacy benefits verification process by enabling patient services representatives to create an electronic verification request to verify patients' pharmacy benefits.

Provider Network Management Enhancements

Streamline provider network management with enhanced roster file submission and automated field mapping recommendation. Upload and track roster files through your provider portal by using automatic case creation for processing. With Einstein generative AI, simplify field mapping through automated suggestions to save time and ensure accuracy.

Provider Search Enhancements

Boost your call center's productivity by using an autonomous Patient Services agent.

Site Management (Pilot)

Streamline the process of selecting and activating clinical research study sites and investigators through the enhanced search, assessment creation, and scoring capabilities of Salesforce.

Utilization Management Enhancements

Utilization Management now supports Coverage Requirement Discovery (CRD) and Documentation Templates and Rules (DTR) for payer organizations. The new FHIR-aligned processes offer a smooth and refined workflow for managing requests for coverage information and documentation requirements. Quickly process incoming requests and return responses in a matter of seconds. Reduce administrative burdens and manual errors, ensure proper documentation for audits and regulatory compliance, and minimize costs by using the automated end-to-end workflows.

Expedite Your Health Cloud Setup

Use the new steps included in Health Cloud's guided setup to create personalized and connected experiences for customers, partners, and employees by using portals, websites, and Salesforce mobile apps integrated with Salesforce CRM. Customize Health Cloud for your unique requirements on the Additional Setup tab. Configure security and permissions for data privacy, create and manage code set and code set bundle records for healthcare data, and tailor Experience sites to create engaging portals, all from one place.

New and Changed Objects in Health Cloud

Store and access more data with these new and changed Health Cloud objects.

New and Enhanced Common Features for Industries

Health Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Health Cloud based on your business needs.

- Action Launcher

  Contact center agents can now find recommended actions based on semantic search.

- Action Plans

  Increase convenience of the users when working with action plans for their business processes. Enhance the user experience by automating updates for the action plans as the user completes the task action plan items.

- Business Rules Engine

  Monitor and manage the usage of Business Rules Engine components with the new Guardrail Connect API. Use transient attributes to temporarily store interim calculation results in an expression set. Activate and save expression sets in one step when copying them from templates. Create context-based expression sets easily, without marking steps as output. Retrieve datetime information in CSV decision tables by using the date/time data type. Track the CSV upload status for decision tables.

- Data Processing Engine

  Simplify field mapping in writeback nodes by using Einstein generative AI. Use the append and hierarchy nodes in Data Cloud to run batch transformations on large volumes of org data that you can later use for analytics and reporting. Ensure data integrity by using the composite writeback feature to group related records at run time, and write them back to the core. Download the failed records file and use it to debug the issues in composite writeback or CSV file ingestion when the Data Processing Engine definition run fails.

- Group Membership and Households

  Receive change events for more objects. Effortlessly add the right Members to your party relationship groups.

- Integration Solutions with Mulesoft

  Save and reuse the configuration details when you enable an integration to connect your Salesforce org to an external system.

- Omnistudio Document Generation

  Ensure compatibility with the new document generation infrastructure and add flexibility to document generation workflows. Get increased hourly and daily limits for batch server-side document generation requests. Plan for the retirement of Document Generation 1.0 by switching to Document Generation 2.0. The enhancements in Document Generation 2.0 include a new custom fonts configuration, document previewer, and hybrid client-side processing. Use dynamic image tokens in document templates for server-side document generation.

Disease Surveillance

Define diseases, track cases, and manage patient records effectively. Customize definitions, analyze trends, and perform on-site inspections to support proactive public health actions.

IN THIS SECTION:

Track Public Health Information with the Disease Surveillance Data Model

Define diseases, track cases, and manage investigation records using the Disease Surveillance data model. Track patient records, including medication administration and their demographic details to ensure a comprehensive view of patient interactions. Leverage Salesforce's inspection feature to support on-site inspection visits as needed, ensuring a thorough approach to disease investigation. With Disease Surveillance, public health organizations can effectively manage disease related data and respond quickly to protect communities.

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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud with the Health Cloud Add-on license.

Who: This feature is available to users with the Disease Surveillance, Industries Licensing, Permitting, and Inspections (LPI) User, Dynamic Assessment Access, Omnistudio User, Action Plans, Industries visit, and Industries Assesement permission sets.

How: On the Public Health Settings page in Setup, turn on Disease Surveillance. Next, on the Industries Licensing, Permitting, and Inspections (LPI) Settings page, turn on Inspections.

Financial Assistance Program Enhancements

Streamline the enrollment process for a financial assistance program by using appeals. Save time by filing an appeal against a rejected application instead of submitting a new application.

SEE ALSO:

Salesforce Help: Financial Assistance Program

Salesforce Release Notes: Financial Assistance Program

Home Health Enhancements

Promote effective financial management, boost operational efficiency, and prioritize patient-centric care through Home Health's holistic approach to quoting, funding, and budgeting of home healthcare services. Optimize operations by using the enhanced guided setup for configuring quoting and budgeting in your org.

IN THIS SECTION:

Streamline Home Healthcare with Integrated Quoting and Budgeting Capabilities

Care coordinators can effortlessly generate accurate quotes for home visits, finalize budgets, and obtain patient approval through a single, unified process. Schedulers can subsequently initiate home visit scheduling with details automatically filled from the approved quotes. Elevate operational effectiveness, promote care continuity, accelerate on-time payments, and reduce claim denials by using this comprehensive, transparent, and time-saving solution for quoting, budgeting, and scheduling.

Expedite Your Home Health Setup

Use the new steps included in Home Health's guided setup for configuring the quoting and budgeting workflow for home visits. Reduce implementation time by following the simple, clear steps for tasks such as prerequisite checks and process setups, all from one place. Stay focused and on track by using links to in-app setup pages and detailed help articles.

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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 Quote, DocGen User, DocGen Runtime User, DocGen Designer, Health Cloud Utilization Management, and Health Cloud Foundation permission sets.

How: From Setup, go to the Context Service Settings page, and turn on Context Definitions. From Setup, go to the Revenue Settings page and set up Revenue Lifecycle Management. Then, from Setup, go to the General Settings page for Document Generation and turn on Document Templates Export and Design Document Templates in Salesforce. Next, from Setup, go to Flows, and clone and activate the Send Home Visit Budget Document flow.

SEE ALSO:

Salesforce Help: Set Up Home Health

Expedite Your Home Health Setup

Use the new steps included in Home Health's guided setup for configuring the quoting and budgeting workflow for home visits. Reduce implementation time by following the simple, clear steps for tasks such as prerequisite checks and process setups, all from one place. Stay focused and on track by using 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

Ensure compliance with medical and operational requirements by verifying patient prerequisites and respecting provider capacity limits. Enable schedulers to book recurring appointments. Expand self-scheduling to include assets such as clinics and labs. Enhance appointment guidance flows with advanced scheduling options.

IN THIS SECTION:

Verify Prerequisites for Appointments

Ensure that patients receive the most appropriate care based on prerequisites such as their age and medical history. A prerequisite check in the scheduling workflow alerts schedulers and can prevent them from booking appointments if the patient doesn't meet the required criteria.

Optimize Resource Use with Capacity-Based Scheduling

Manage workload more effectively and improve service quality by defining resource capacity in Salesforce Scheduler. Based on the resource capacity, Intelligent Appointment Management limits the number of appointments a scheduler can book for a given shift and type of work. For example, you can set a cap on the number of new patients a scheduler can book with a provider or at a clinic per day.

Schedule Ongoing Care with Recurring Appointments

With Salesforce Scheduler set up as your back-end scheduling system, create a series of appointments that take place at a regular frequency. For example, schedule physical therapy, mental health counseling, or chronic disease management appointments that occur every Wednesday for 12 weeks. Set the number of appointment occurrences and adjust individual occurrences before booking the appointment series. Modify or cancel an occurrence later, or cancel the entire series if needed.

Give Patients the Ability to Book Assets

Enhance your Experience Cloud site with a configurable self-scheduling workflow that enables patients to schedule appointments with resources such as clinics and labs as well as providers.

Simplify Scheduling with Enhanced Appointment Guidance

Improve your call center effectiveness by incorporating advanced scheduling features into your appointment guidance flow. Make it easier for schedulers to book a series of related appointments, ongoing care, and appointments with assets and providers.

Verify Prerequisites for Appointments

Ensure that patients receive the most appropriate care based on prerequisites such as their age and medical history. A prerequisite check in the scheduling workflow alerts schedulers and can prevent them from booking appointments if the patient doesn't meet the required 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. To create and edit a flow, users need the Manage Flow permission. To schedule appointments with prerequisite checks, users need the Run Flow permission.

How: Clone and customize a prebuilt Check Appointment Prerequisites flow or create a flow from scratch that determines a patient's eligibility for a visit type. To build the flow, from Setup, find and select **Flows**. To link your flow to a visit type, in a work type code set bundle, select **Prerequisites Check** and specify your flow. To update a work type code set bundle, from the App Launcher, find and select **Work Type Code Set Bundles**.

SEE ALSO:

Salesforce Help: Verify Prerequisites for Appointments (can be outdated or unavailable during release preview)

Optimize Resource Use with Capacity-Based Scheduling

Manage workload more effectively and improve service quality by defining resource capacity in Salesforce Scheduler. Based on the resource capacity, Intelligent Appointment Management limits the number of appointments a scheduler can book for a given shift and type of work. For example, you can set a cap on the number of new patients a scheduler can book with a provider or at a clinic per day.

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: In Setup, if you haven't already done so, complete the Salesforce Scheduler prerequisites for Capacity-Based Scheduling, including running a script that updates existing shift work topics. In Salesforce Scheduler Settings, enable Capacity-Based Scheduling. For each shift, set the number of appointments that can be booked for a particular work type. Then set the maximum or achievable capacity limit for service territories, and add the shift capacity component to pages.

Note: Capacity-based scheduling is supported for Salesforce Scheduler only, not external EHR systems.

SEE ALSO:

Salesforce Help: Set Up Capacity-Based Scheduling for Intelligent Appointment Management (can be outdated or unavailable during release preview)

Schedule Ongoing Care with Recurring Appointments

With Salesforce Scheduler set up as your back-end scheduling system, create a series of appointments that take place at a regular frequency. For example, schedule physical therapy, mental health counseling, or chronic disease management appointments that occur every Wednesday for 12 weeks. Set the number of appointment occurrences and adjust individual occurrences before booking the appointment series. Modify or cancel an occurrence later, or cancel the entire series if needed.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Appointment Management permission set.

How: To add recurring scheduling to the Intelligent Appointment Management home page, edit a Lightning page with the Intelligent Appointment Management console, such as a person account. In the Healthcare Appointment Scheduler component on that page, make sure a home page Omniscript such as healthCloudIAM_HomePage_multiLanguage is specified. Then select **Show recurring scheduling**.

To add recurring scheduling to your appointment guidance flow, set the SchedulingOption output variable to Recurring.

Note: Capacity-based scheduling is supported for Salesforce Scheduler only, not external EHR systems.

SEE ALSO:

Salesforce Help: Set Up Recurring Scheduling for Intelligent Appointment Management (can be outdated or unavailable during release preview)

Salesforce Help: Schedule a Recurring Appointment (can be outdated or unavailable during release preview)

Give Patients the Ability to Book Assets

Enhance your Experience Cloud site with a configurable self-scheduling workflow that enables patients to schedule appointments with resources such as clinics and labs as well as providers.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud, the Health Cloud For Community add-on license, and the Customer Community or Customer Community Plus add-on license.

Who: This feature is available to users with the Health Cloud Appointment Management permission set. To customize an Experience Cloud site, users need the Create and Set Up Experiences permission or the View Setup and Configuration permission. To configure Omniscripts, users need the Omnistudio Admin permission set.

How: From Setup, go to the Appointment Reason object in Object Manager and add the Resource Type field to the Appointment Reason page layout. On the Experience Cloud Site that patients and caregivers use for self-scheduling, create a page for scheduling providers and assets. Drag the Omniscript component to the page, and in Omniscript properties, select the `selfScheduleProvidersAndAssets` flow.

SEE ALSO:

Salesforce Help: Enable Patients to Schedule Their Own Appointments

Simplify Scheduling with Enhanced Appointment Guidance

Improve your call center effectiveness by incorporating advanced scheduling features into your appointment guidance flow. Make it easier for schedulers to book a series of related appointments, ongoing care, and appointments with assets and providers.

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. To create and edit a flow, users need the Manage Flow permission. To specify the appointment guidance flow in the Intelligent Appointment Management console, users need the Customize Application permission. To use appointment guidance, users need the Run Flow permission.

How: From Setup, find and select **Flows**, and then click your appointment guidance flow. To add a variable, from the toolbox, click New Resource. Then add input and output variables for multi-step scheduling, multi-resource scheduling, recurring appointments, and asset scheduling.

SEE ALSO:

Salesforce Help: Create an Appointment Guidance Flow

Pharmacy Benefits Verification Enhancements

Streamline the pharmacy benefits verification process by enabling patient services representatives to create an electronic verification request to verify patients' pharmacy benefits.

SEE ALSO:

Salesforce Release Notes: Pharmacy Benefits Verification

Salesforce Help: Pharmacy Benefits Verification

Provider Network Management Enhancements

Streamline provider network management with enhanced roster file submission and automated field mapping recommendation. Upload and track roster files through your provider portal by using automatic case creation for processing. With Einstein generative AI, simplify field mapping through automated suggestions to save time and ensure accuracy.

IN THIS SECTION:

Streamline Roster File Submission with Provider Portal Enhancements

Submit roster files directly through an authenticated Experience Cloud portal. Upload multiple files at once, access detailed file information, and download sample templates for guidance. Track file status and view past submissions with timestamps.

Automate Field Mapping with Einstein

Use Roster File Mapping with Einstein generative AI to simplify field mapping in Provider Network Management. Automate the mapping process when you create a writeback node, with Einstein providing field mapping suggestions and confidence scores. Review, accept, or reject these suggestions before you add them to the target object. Save time, improve accuracy, and reduce manual efforts with this enhanced automation capability.

Streamline Roster File Submission with Provider Portal Enhancements

Submit roster files directly through an authenticated Experience Cloud portal. Upload multiple files at once, access detailed file information, and download sample templates for guidance. Track file status and view past submissions with timestamps.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of Health Cloud with the Health Cloud Provider Network Management Add-On license.

Who: This feature is available to users with the Customer Community or Customer Community Plus and the Health Cloud for Experience Cloud Sites permission set licenses.

Automate Field Mapping with Einstein

Use Roster File Mapping with Einstein generative AI to simplify field mapping in Provider Network Management. Automate the mapping process when you create a writeback node, with Einstein providing field mapping suggestions and confidence scores. Review, accept, or reject these suggestions before you add them to the target object. Save time, improve accuracy, and reduce manual efforts with this enhanced automation capability.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the EinsteinGPTFeedbackAddOn, EinsteinGPTPlatformAddOn, EinsteinGPTPromptBuilderAddOn, EinsteinGPTTrustAddOn, and EinsteinServices licenses.

For more information, see Automate Your Field Mapping with Einstein.

SEE ALSO:

Salesforce Help: Set Up Einstein Generative AI (can be outdated or unavailable during release preview)

Salesforce Help: Map Related Fields using Einstein (can be outdated or unavailable during release preview)

Provider Search Enhancements

Boost your call center's productivity by using an autonomous Patient Services agent.

IN THIS SECTION:

Automate Patient Services with an AI Agent

Help patients and caregivers connect with the most suitable providers faster and more efficiently. Create an AI agent that engages in conversations with a patient to identify preferences such as provider location, specialty, and gender. After independently crosschecking patient preferences against known providers, the AI agent suggests a list of potential matches. While the AI agent responds to routine requests from authenticated and guest users on your Experience Cloud site, your call center representatives can focus on more complex scheduling needs.

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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Agentforce Service Agent User permission set. To create and edit a flow, users need the Manage Flow permission. To customize an Experience Cloud site, users need the Create and Set Up Experiences permission or the View Setup and Configuration permission.

How: From Setup, in Einstein Setup, enable Turn On Einstein, and in Health Cloud, enable Einstein for Health Cloud. Create a Patient Services agent that performs Provider Matching. Assign permissions to the Patient Services agent. From Setup, configure Messaging Settings and create and configure an embedded service deployment for your Experience Cloud site.

SEE ALSO:

Salesforce Help: Patient Services Agent for Health Cloud (can be outdated or unavailable during release preview)

Site Management (Pilot)

Streamline the process of selecting and activating clinical research study sites and investigators through the enhanced search, assessment creation, and scoring capabilities of Salesforce.

SEE ALSO:

Salesforce Release Notes: Site Management (Pilot)

Utilization Management Enhancements

Utilization Management now supports Coverage Requirement Discovery (CRD) and Documentation Templates and Rules (DTR) for payer organizations. The new FHIR-aligned processes offer a smooth and refined workflow for managing requests for coverage information and documentation requirements. Quickly process incoming requests and return responses in a matter of seconds. Reduce administrative burdens and manual errors, ensure proper documentation for audits and regulatory compliance, and minimize costs by using the automated end-to-end workflows.

IN THIS SECTION:

Make Coverage Requirements Easily Accessible for Providers

Ensure a smooth and efficient collaboration with providers by quickly processing requests for Coverage Requirement Discovery (CRD). Providers can now access member and coverage-related information in real time, directly from their Electronic Health Records (EHR) system by using Clinical Decision Support (CDS) hooks. Reduce the time spent on administrative tasks, improve the chances of coverage approval, and reduce human errors through the automation of coverage requirement discovery.

Ensure Submission of Required Documentation for Prior Authorization Requests

Communicate documentation requirements to providers in real time by using the new Da Vinci Documentation Templates and Rules (DTR) for Utilization Management. Fast-track the exchange of critical information by helping providers access accurate and up-to-date documentation requirements directly from their EHR systems or SMART on FHIR apps. Make sure that prior authorization requests meet requirements the first time, reduce delays, and improve patient outcomes.

Author FHIR-Aligned Questionnaires Using the Enhanced Discovery Framework Designer

Easily create questionnaires that follow FHIR standards as part of Da Vinci Documentation Templates and Rules (DTR). When you select the FHIR-Aligned Questionnaire usage type in Discovery Framework Designer, the updated component displays a section where you can add additional details to the Omniscript such as purpose, performer type, and display type. After you build the Omniscript, you can also add review details such as the last reviewed date, approval date, and publisher.

Capture Metrics for Coverage Requirement Discovery, Documentation Templates and Rules, and Prior Authorization Requests

Capture critical details of Coverage Requirement Discovery, Documentation Templates and Rules, and Prior Authorization requests such as the request date, response date, and response status code by using the enhanced data models. Insightful metrics help to reduce time spent on manual preparation for audits and boost confidence in regulatory compliance.

Make Coverage Requirements Easily Accessible for Providers

Ensure a smooth and efficient collaboration with providers by quickly processing requests for Coverage Requirement Discovery (CRD). Providers can now access member and coverage-related information in real time, directly from their Electronic Health Records (EHR) system by using Clinical Decision Support (CDS) hooks. Reduce the time spent on administrative tasks, improve the chances of coverage approval, and reduce human errors through the automation of coverage requirement discovery.

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 Utilization Management, Omnistudio Admin, and Omnistudio User permission sets. Users also need the Rule Engine Runtime and Rule Engine Designer permission sets.

Why: Coverage requirement discovery is a complex and time-consuming process that requires multiple back and forth communications between payers and providers. With this new update, providers can now easily access the list of clinical decision support services that you provide and check coverage requirements for members within seconds.

How: Turn on Clinical Decision Support in Setup. Define a decision matrix to determine coverage requirements, and reference the decision matrix from the prebuilt expression set template. Then, clone and configure the prebuilt HlsClinicalDecisionSupportProcessOrderEcho integration procedure for each clinical decision support service that you provide.

SEE ALSO:

Salesforce Help: Coverage Requirement Discovery for Payers

Ensure Submission of Required Documentation for Prior Authorization Requests

Communicate documentation requirements to providers in real time by using the new Da Vinci Documentation Templates and Rules (DTR) for Utilization Management. Fast-track the exchange of critical information by helping providers access accurate and up-to-date documentation requirements directly from their EHR systems or SMART on FHIR apps. Make sure that prior authorization requests meet requirements the first time, reduce delays, and improve patient outcomes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud and Discovery Framework.

Who: This feature is available to users with the Health Cloud Utilization Management, Omnistudio Admin, and Omnistudio User permission sets.

How: In Setup, turn on Documentation Templates and Rules. Set up a custom entity with fields that look up to Plan Type and Code Set, and reference the fields in the prebuilt HlsDTRQuestionnaireMapping data mapper.

SEE ALSO:

Salesforce Help: Documentation Templates and Rules for Payers

Author FHIR-Aligned Questionnaires Using the Enhanced Discovery Framework Designer

Easily create questionnaires that follow FHIR standards as part of Da Vinci Documentation Templates and Rules (DTR). When you select the FHIR-Aligned Questionnaire usage type in Discovery Framework Designer, the updated component displays a section where you can add additional details to the Omniscript such as purpose, performer type, and display type. After you build the Omniscript, you can also add review details such as the last reviewed date, approval date, and publisher.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud and Discovery Framework.

Who: This feature is available to users with the Health Cloud Utilization Management, Omnistudio Admin, and Omnistudio User permission sets.

How: Turn on Documentation Templates and Rules in Setup.

SEE ALSO:

Salesforce Help: Author FHIR-Aligned Questionnaires

Capture Metrics for Coverage Requirement Discovery, Documentation Templates and Rules, and Prior Authorization Requests

Capture critical details of Coverage Requirement Discovery, Documentation Templates and Rules, and Prior Authorization requests such as the request date, response date, and response status code by using the enhanced data models. Insightful metrics help to reduce time spent on manual preparation for audits and boost confidence in regulatory compliance.

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 Utilization Management and Hls Clinical Decision Support permission sets.

How: Turn on Clinical Decision Support and Documentation Templates and Rules in Setup.

SEE ALSO:

Salesforce Help: Coverage Requirement Discovery for Payers

Salesforce Help: Documentation Templates and Rules for Payers

Salesforce Developer Guide: Coverage Requirement Discovery

Salesforce Developer Guide: Documentation Templates and Rules

Expedite Your Health Cloud Setup

Use the new steps included in Health Cloud's guided setup to create personalized and connected experiences for customers, partners, and employees by using portals, websites, and Salesforce mobile apps integrated with Salesforce CRM. Customize Health Cloud for your unique requirements on the Additional Setup tab. Configure security and permissions for data privacy, create and manage code set and code set bundle records for healthcare data, and tailor Experience sites to create engaging portals, all from one place.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud.

How: To find the updated guided setup, go to Feature Settings in Setup, and select **Health Cloud Setup** under Health Cloud.

New and Changed Objects in Health Cloud

Store and access more data with these new and changed Health Cloud objects.

Assessments

Represents the definition of an assessment including details such as the last revised date and purpose
Use the new `AssessmentDefinition` object.

Represents the reasons for an assessment such as the associated coverage information
Use the new `AssessmentReason` field on the ServiceAppointmentGroup object.

Specify the date and time when the assessment was completed
Use the new `CompletedDateTime` field on the Assessment object.

Specify the person who carried out the assessment and recorded the responses
Use the new `Assessor` field on the Assessment object.

Specify the unique identifier of a completed or partially completed assessment in the source system
Use the new `Identifier` field on the Assessment object.

Specify the category of the display text when the data type is Text Block
Use the new `DisplayTextCategory` field on the AssessmentQuestion object.

Specify the category of the display text when the data type is Text Block
Use the new `DisplayTextCategory` field on the AssessmentQuestionVersion object.

Specify the origin of the assessment question response
Use the new `OriginType` field on the AssessmentQuestionResponse object.

Specify the role of the person who reviewed and edited the response
Use the new `ReviewerRole` field on the AssessmentQuestionResponse object.

Specify the person who reviewed and edited the response
Use the new `Reviewer` field on the AssessmentQuestionResponse object.

Home Health

Specify additional notes such as comments from the party or the recurrence pattern of appointments associated with the appointment request

Use the new `AdditionalNotes` field on the PartyAppointmentRequest object.

Specify the count of recurring appointments associated with the appointment request

Use the new `RecurringAppointmentCount` field on the PartyAppointmentRequest object.

Intelligent Appointment Management

Specify the type of resource associated with the appointment

Use the new `ResourceType` field on the AppointmentReason object.

Specify the type of appointment group associated with the service appointment group

Use the new `AppointmentGroupType` field on the ServiceAppointmentGroup object.

Indicate whether the flow associated with the work type code set bundle checks prerequisites or not

Use the new `HasPrerequisitesCheckInFlow` field on the WorkTypeCodeSetBundle object.

Utilization Management

Represents details about a service information request, such as the date and time when the request was submitted and the type of service requested

Use the new `ServiceInformationRequest` object.

Represent additional details about a service information request, such as the detail type and detail code

Use the new `ServiceInfoRequestDetail` object.

Represent a response to a service information request

Use the new `ServiceInformationResponse` object.

Represent coverage details about a service information response. For example, if additional information or documentation is required for the coverage to be provided

Use the new `ServiceInfoResponseCoverage` object.

Represents additional coverage details about a service information response

Use the new `SvcInfoRespCoverageDetail` object.

Represent suggestions in a service information response. For example, suggesting a change in medication dosage

Use the new `ServiceInfoRespSuggestion` object.

Represent actions to be performed as suggested by a service information response

Use the new `ServiceInfoResponseAction` object.

Represent the URLs of resources relevant to a service information response

Use the new `ServiceInfoRespResourceUrl` object.

Represent the possible reasons for overriding a service information response

Use the new `ServiceInfoRespOvrideOpt` object.

Represent the questionnaire associated with a service information request or service information response coverage

Use the new `SvcInfoRelatedQuestionnaire` object.

Represent the system operation performed for a service information request such as a session launch or a questionnaire package operation

Use the new `ServiceInfoRequestOperation` object.

Represent the outcome of a service information request operation
Use the new `ServiceInfoRqstOpOutcome` object.

Represent details about supporting content of a care request such as assessments or content documents
Use the new `CareRequestSupportingCntnt` object.

Represent information about a care request exchange
Use the new `CareRequestExchangeInfo` object.

Specify the type of plan the member is covered by
Use the new `CoveragePlanType` field on the CareRequestExtension object.

Specify the URL of supporting documentation of a care request such as a questionnaire
Use the new `SupportingDocUrl` field on the CareRequestExtension object.

Specify an identifier of the client's source system that sent the care request
Use the new `ClientSourceSysIdentifier` field on the CareRequestExtension object.

Specify the code of the action taken by the reviewer for the requested drug
Use the new `StatusCode` field on the CareRequestDrug object.

Specify the transaction number assigned to the drug request
Use the new `TransactionNumber` field on the CareRequestDrug object.

Specify the unique identifier of the coverage assertion
Use the new `AssertionIdentifier` field on the CareRequestDrug object.

Specify the date and time when the drug request was submitted
Use the new `SubmittedDateTime` field on the CareRequestDrug object.

Specify the date and time when the response was sent for the drug request
Use the new `ResponseDateTime` field on the CareRequestDrug object.

Specify the number of responses required for the requested drug
Use the new `RequiredResponseCount` field on the CareRequestDrug object.

Specify the service information response associated with the drug request
Use the new `ServiceInformationResponse` field on the CareRequestDrug object.

Specify the code of the action taken by the reviewer for the requested item
Use the new `StatusCode` field on the CareRequestItem object.

Specify the transaction number assigned to the item request
Use the new `TransactionNumber` field on the CareRequestItem object.

Specify the unique identifier of the requested item in the coverage information
Use the new `AssertionIdentifier` field on the CareRequestItem object.

Specify the date and time when the item request was submitted
Use the new `SubmittedDateTime` field on the CareRequestItem object.

Specify the date and time when the response was sent for the requested item
Use the new `ResponseDateTime` field on the CareRequestItem object.

Specify the number of responses required for the requested item
Use the new `RequiredResponseCount` field on the CareRequestItem object.

Specify the service information response associated with the requested item

Use the new `ServiceInformationResponse` field on the CareRequestItem object.

SEE ALSO:

Salesforce Developer Guide: Home Health

Salesforce Developer Guide: Coverage Requirement Discovery

Salesforce Developer Guide: Documentation Templates and Rules

Salesforce Developer Guide: Discovery Framework Standard Objects

Insurance

Give users greater control over their data and enable seamless integrations with an enhanced Insurance data model. Streamline and manage policy transactions, product configuration, pricing, and quoting workflows with ease. The enhancements to Insurance (Managed Package) support multi-root policies by using new services.

IN THIS SECTION:

Insurance

Simplify insurance quote and policy management with new APIs and invocable actions. Gain granular control over product and quote pricing by using pricing procedures and procedure plans. Create products, attributes, and rules quickly in Product Catalog Management.

Insurance (Managed Package)

Use new managed package services to issue multi-root policies and create endorsement quotes.

Insurance

Simplify insurance quote and policy management with new APIs and invocable actions. Gain granular control over product and quote pricing by using pricing procedures and procedure plans. Create products, attributes, and rules quickly in Product Catalog Management.

IN THIS SECTION:

Policy Management

Streamline policy transactions such as issuance, endorsement, renewal, and cancellation for short-term, annual, or multi-year policies, by using APIs and invocable actions. Calculate premiums, taxes, and prorated amounts for terms with greater efficiency and accuracy. Enhance productivity by providing insurance reps with immediate access to comprehensive policy details through the Insurance Policy Lightning web component.

Products

Build new products, attributes, and rules faster by using Product Catalog Management. Save time and reduce errors by using product extended attributes to retrieve field values from other objects for use in Products.

Pricing

Tailor pricing formulas to provide your customers with a smooth pricing experience by using pricing procedures. Price quotes and products more accurately by defining pricing procedures at the quote or product level.

Quoting

Streamline quoting for external users with invocable actions, and use APIs to enhance quote generation. Internal users can use the quote configurator to customize, create, update, and price quotes with ease.

[Rules](#)

Define criteria for displaying accurate products, minimizing configuration errors, and managing the progression of quotes through the sales stages.

[New Connect REST APIs in Insurance](#)

Learn more about the new Connect REST APIs in Insurance.

[New Invocable Actions in Insurance](#)

Use the new invocable actions for Insurance.

Policy Management

Streamline policy transactions such as issuance, endorsement, renewal, and cancellation for short-term, annual, or multi-year policies, by using APIs and invocable actions. Calculate premiums, taxes, and prorated amounts for terms with greater efficiency and accuracy. Enhance productivity by providing insurance reps with immediate access to comprehensive policy details through the Insurance Policy Lightning web component.

IN THIS SECTION:

Manage Policies with Policy APIs and Invocable Actions

Use policy APIs and invocable actions to perform the issuance, endorsement, renewal, and cancellation of policies. Reduce manual effort and minimize errors by using these capabilities that enhance workflow efficiency and integrate seamlessly with Salesforce flows and Omniscripts.

View Policy Information at a Glance

Show insurance reps policy details and related attributes in a single location by using the Insurance Policy Lightning web component. They can review the policy hierarchy—which includes insured assets, participants, coverages—and evaluate premiums, taxes, and fees. You can also configure the side panel to provide insurance reps more details and attributes for each policy line item.

Manage Policies with Policy APIs and Invocable Actions

Use policy APIs and invocable actions to perform the issuance, endorsement, renewal, and cancellation of policies. Reduce manual effort and minimize errors by using these capabilities that enhance workflow efficiency and integrate seamlessly with Salesforce flows and Omniscripts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the DigitalInsuranceProductAdministrationAddOn, DigitalInsurancePolicyAdministrationAddOn, DigitalInsuranceProductRuntimeCCAddOn, and DigitalInsuranceProductRuntimePCAddOn licenses.

Who: This feature is available to users with the DigitalInsuranceProductAdmin, DigitalInsuranceProductAdminRunTime, DigitalInsurancePolicyAdmin, and FSCInsurance permission sets.

SEE ALSO:

Salesforce Help: Insurance APIs

Salesforce Help: Insurance Invocable Actions

View Policy Information at a Glance

Show insurance reps policy details and related attributes in a single location by using the Insurance Policy Lightning web component. They can review the policy hierarchy—which includes insured assets, participants, coverages—and evaluate premiums, taxes, and fees. You can also configure the side panel to provide insurance reps more details and attributes for each policy line item.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the DigitalInsuranceProductAdministrationAddOn and the DigitalInsurancePolicyAdministrationAddOn licenses.

Who: To configure Insurance Policy Lightning web component, users need DigitalInsuranceProductAdmin, DigitalInsuranceProductAdminRunTime, DigitalInsurancePolicyAdmin, and FSCInsurance permission sets.

How: Add the Insurance Policy component to the Insurance Policy page via Lightning App Builder.

SEE ALSO:

Salesforce Help: Insurance Policy Lightning Web Component

Products

Build new products, attributes, and rules faster by using Product Catalog Management. Save time and reduce errors by using product extended attributes to retrieve field values from other objects for use in Products.

IN THIS SECTION:

Create and Manage Insurance Products with Ease

Quickly design and manage an entire product portfolio with Product Catalog Management for Insurance. Components such as attributes, product classifications, and rules streamline your product building workflow so that you can focus on delivering exceptional products to the market quickly and easily.

Reduce Data Duplication by Using Extended Attributes

Keep customer data centralized and prevent duplication by using product extended attributes to retrieve field values from other objects. Save time and effort by configuring an extended attribute to fetch specific field values from existing records.

Create and Manage Insurance Products with Ease

Quickly design and manage an entire product portfolio with Product Catalog Management for Insurance. Components such as attributes, product classifications, and rules streamline your product building workflow so that you can focus on delivering exceptional products to the market quickly and easily.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Digital Insurance Platform where Digital Insurance Product Administration and Product Catalog Management are enabled.

Who: This feature is available to users with the Manage Product Catalog permission set.

How: From the App Launcher, find and select **Product Catalog Management**.

SEE ALSO:

Salesforce Help: Product Catalog Management

Salesforce Help: Set Up Insurance Products

Reduce Data Duplication by Using Extended Attributes

Keep customer data centralized and prevent duplication by using product extended attributes to retrieve field values from other objects. Save time and effort by configuring an extended attribute to fetch specific field values from existing records.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Digital Insurance Platform where Digital Insurance Product Administration and Product Catalog Management are enabled.

Who: This feature is available to users with the Manage Product Catalog permission set.

How: From the Product Catalog Management app's home page, click **Attributes**. Create an attribute, and then assign it to a product classification.

SEE ALSO:

Salesforce Help: Dynamic Attributes

Salesforce Help: Create Extended Attributes

Pricing

Tailor pricing formulas to provide your customers with a smooth pricing experience by using pricing procedures. Price quotes and products more accurately by defining pricing procedures at the quote or product level.

IN THIS SECTION:

Accurately Calculate Insurance Prices with Precise Pricing Formulas

Calculate the final net price of your insurance products and services by using pricing procedures.

Offer Precise Product and Quote Pricing to Customers

Calculate prices more accurately for insurance products by defining pricing procedures at the product and quote levels instead of at the org level.

Accurately Calculate Insurance Prices with Precise Pricing Formulas

Calculate the final net price of your insurance products and services by using pricing procedures.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Digital Insurance Platform where Digital Insurance Product Administration and Salesforce Pricing are enabled.

Who: This feature is available to users with the Customize Application and Salesforce Pricing Design Time permissions.

How: From the App Launcher, find and select **Pricing Procedures**. Create a pricing procedure, and then use Pricing Procedure Builder to add pricing elements.

SEE ALSO:

Salesforce Help: Pricing Procedures

Salesforce Help: Set Up Insurance Pricing

Offer Precise Product and Quote Pricing to Customers

Calculate prices more accurately for insurance products by defining pricing procedures at the product and quote levels instead of at the org level.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Digital Insurance Platform where Digital Insurance Product Administration and Salesforce Pricing are enabled.

Who: This feature is available to users with the Procedure Plan Access and Salesforce Pricing Design Time permissions.

How: From Setup, find and select **Procedure Plan Setup**. Create a procedure plan and map pricing procedures to specific product or transaction types for quotes.

SEE ALSO:

Salesforce Help: Procedure Plan Framework

Salesforce Help: Assign a Specific Pricing Procedure to a Product

Salesforce Help: Setup for Insurance Quoting

Quoting

Streamline quoting for external users with invocable actions, and use APIs to enhance quote generation. Internal users can use the quote configurator to customize, create, update, and price quotes with ease.

IN THIS SECTION:

Facilitate Quote Management with New Quoting Invocable Actions and APIs

Automate quote generation by using new quoting APIs and invocable actions to create or modify quotes and line items. Guide users through quoting processes with APIs and invocable actions designed to integrate with Salesforce Flows or Omniscripts.

Simplify Quote Management with Quote Configurator

Streamline quote management processes for internal users by using the quote configurator. Use an intuitive user interface to help internal users customize, create, update, and price quotes.

Facilitate Quote Management with New Quoting Invocable Actions and APIs

Automate quote generation by using new quoting APIs and invocable actions to create or modify quotes and line items. Guide users through quoting processes with APIs and invocable actions designed to integrate with Salesforce Flows or Omniscripts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Digital Insurance Platform.

SEE ALSO:

Salesforce Help: Insurance Quoting APIs and Invocable Actions

Salesforce Help: Insurance Invocable Actions

Salesforce Help: Insurance APIs

Simplify Quote Management with Quote Configurator

Streamline quote management processes for internal users by using the quote configurator. Use an intuitive user interface to help internal users customize, create, update, and price quotes.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Digital Insurance Platform.

SEE ALSO:

Salesforce Help: Insurance Quote Configurator

Rules

Define criteria for displaying accurate products, minimizing configuration errors, and managing the progression of quotes through the sales stages.

IN THIS SECTION:

Automate Quote-Related Business Decisions with Product Underwriting Rules

Use predefined conditions to determine whether a quote progresses to the next state. You can set rules for state transition and define action for when conditions are met and not met. For example, you can define a rule to move a quote from Submitted state to Underwriter Review state if the Risk Category is High.

Capture Quotes Accurately with Configuration and Qualification Rules

Define product behavior when users configure quotes. Implement qualification rules to define customer eligibility for products, so that users see only specific products in the product catalog. Simplify configuration experience and reduce configuration errors with configuration rules.

Automate Quote-Related Business Decisions with Product Underwriting Rules

Use predefined conditions to determine whether a quote progresses to the next state. You can set rules for state transition and define action for when conditions are met and not met. For example, you can define a rule to move a quote from Submitted state to Underwriter Review state if the Risk Category is High.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Digital Insurance Platform where Digital Insurance Product Administration, Stage Management Design User, and Stage Management User Add-ons are enabled.

How: From Stage Management, create a stage definition for the Quote object and then configure stage transitions for each stage in the Quote. In the Lightning App Builder, add the Underwriting Rules Lightning web component to the insurance product page. Use that component in the product record to create new rules.

SEE ALSO:

Salesforce Help: Insurance Product Underwriting Rules

Capture Quotes Accurately with Configuration and Qualification Rules

Define product behavior when users configure quotes. Implement qualification rules to define customer eligibility for products, so that users see only specific products in the product catalog. Simplify configuration experience and reduce configuration errors with configuration rules.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Digital Insurance Platform where Product Configuration is enabled with the Revenue Lifecycle Management Add-on.

How: To create new qualification rules, from the Product Catalog Management home page, click **Qualification Rules** and select **New**. To create new configuration rules, from the Product Catalog Management home page, click **Configuration Rules** and select **New**.

SEE ALSO:

Salesforce Help: Insurance Product Configuration Rules

Salesfoce Help: Insurance Product Qualification Rules

New Connect REST APIs in Insurance

Learn more about the new Connect REST APIs in Insurance.

Issue Insurance Policy

Create an insurance policy.

Endorse Insurance Policy

Create an endorsed version of an insurance policy.

Cancel Insurance Policy
Cancel insurance policy versions.

Get Insurance Policy Details
Retrieve insurance policy details, including the list of participants, coverages, and assets, along with their attributes.

Create Insurance Quote
Create an insurance quote.

Update Insurance Quote
Update an insurance quote by adding, updating, or deleting quote line items.

Renew Insurance Policy
Renew an insurance policy.

Insurance Product Rating
Rate products for use in quoting processes.

Insurance Underwriting Rules
Create an underwriting rule for a root product based on the selected state definition, transition, and object name.

Insurance Underwriting Rules (Invoke)
Invoke underwriting rules for different object records during run time.

Insurance Underwriting Rule
Update or fetch an underwriting rule for a root product.

Insurance Product Surcharge
Create one or more product surcharges to associate with a root product.

Insurance Product Surcharges
Update or fetch one or more product surcharges to associate with a root product.

Insurance Get Quote Detail
Retrieve quote and quote line item details from a quote record, along with their attributes.

SEE ALSO:

Salesforce Help: Insurance APIs

New Invocable Actions in Insurance

Use the new invocable actions for Insurance.

Issue an insurance policy
Use the issueInsurancePolicy action.

Endorse an insurance policy
Use the endorseInsurancePolicy action.

Renew an insurance policy
Use the renewInsurancePolicy action.

Cancel an insurance policy
Use the cancelInsurancePolicy action.

Get the details of an insurance policy
Use the getInsurancePolicy action.

Create an insurance quote
Use the createInsuranceQuote action.

Recalculate the price of insurance products

Use the repriceInsuranceProduct action.

Get the details of an insurance quote

Use the getInsuranceQuoteDetails action.

SEE ALSO:

Salesforce Help: Insurance Invocable Actions

Insurance (Managed Package)

Use new managed package services to issue multi-root policies and create endorsement quotes.

IN THIS SECTION:

Transform Insurance Offerings with Multi-Root Policy Services

Facilitate insurance carriers in bundling multiple products such as auto and home insurance, into one unified policy by using multi-root policy services. Easily manage policies, reduce administrative hassle, and save money by creating, endorsing, and processing transactions for multi-root policies. Boost customer retention and meet the demand for bundled products by using these comprehensive packages.

Ensure Precision in Pending Payment Calculations

Exclude specific claim payment statuses from pending payment calculations by configuring the ExcludeStatusesForPayment custom setting. This setting ensures accurate pending values in the Policy Terms Standing chart for Claim Coverage Payment Detail records. For example, excluding the Approved for Payment status makes sure that payments already made aren't counted as pending, even if the claim status changes from Paid to Approved for Payment.

New Services in Insurance

Use the new services for Insurance.

Transform Insurance Offerings with Multi-Root Policy Services

Facilitate insurance carriers in bundling multiple products such as auto and home insurance, into one unified policy by using multi-root policy services. Easily manage policies, reduce administrative hassle, and save money by creating, endorsing, and processing transactions for multi-root policies. Boost customer retention and meet the demand for bundled products by using these comprehensive packages.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with the Insurance Industries managed package.

SEE ALSO:

Salesforce Help: Managing Multiroot Policies

Salesforce Help: InsPolicyService:createMultiRootPolicy

Salesforce Help: InsPolicyService:createMultiRootPolicyVersion

Salesforce Help: InsQuoteService:createEndorsementQuote

Salesforce Help: InsPolicyService:getPolicyAsyncJobStatus

Ensure Precision in Pending Payment Calculations

Exclude specific claim payment statuses from pending payment calculations by configuring the ExcludeStatusesForPayment custom setting. This setting ensures accurate pending values in the Policy Terms Standing chart for Claim Coverage Payment Detail records. For example, excluding the Approved for Payment status makes sure that payments already made aren't counted as pending, even if the claim status changes from Paid to Approved for Payment.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with the Insurance Industries and the Insurance Industries Extension managed packages.

How: From Setup, select **Custom Settings**. Open Insurance Configuration Setup and edit ExcludeStatusesForPayment. In the Setup Value field, enter the payment detail statuses to exclude from the pending amount calculation.

SEE ALSO:

Salesforce Help: Exempt Statuses from Pending Payment Calculation

New Services in Insurance

Use the new services for Insurance.

Issue a multi-root policy from a quote
Use the InsPolicyService:createMultiRootPolicy service.

Endorse a multi-root policy from an endorsed quote
Use the InsPolicyService:createMultiRootPolicyVersion service.

Create an endorsement quote with quote line items for single-root and multi-root policies
Use the InsQuoteService:createEndorsementQuote service.

Retrieve the status of asynchronous batch jobs
Use the InsPolicyService:getPolicyAsyncJobStatus service.

SEE ALSO:

Salesforce Help: InsPolicyService:createMultiRootPolicy

Salesforce Help: InsPolicyService:createMultiRootPolicyVersion

Salesforce Help: InsQuoteService:createEndorsementQuote

Salesforce Help: InsPolicyService:getPolicyAsyncJobStatus

Life Sciences Cloud

Simplify the financial assistance program enrollment process by allowing appeals for rejected applications, saving time and effort. Enhance participant management with improved search settings, accessibility features, configuration experience, and recruitment workflow. Help patient services representatives to verify patients' pharmacy benefits through electronic verification requests. Speed up the selection and activation of sites and investigators by using advanced search, assessment creation, and scoring tools.

IN THIS SECTION:

Financial Assistance Program Enhancements

Streamline the enrollment process for a financial assistance program by using appeals. Save time by filing an appeal against a rejected application instead of submitting a new application.

Participant Management Enhancements

Improve the accuracy of clinical trial search by configuring range types to filter the results. Save time and effort and ensure a seamless configuration experience by using a new toggle. Enhance the recruitment efficiency by using a unified flow that helps users capture the assessment responses of registered candidates. Provide an Omni-Channel experience to candidates by making the recruitment journey accessible on mobile and tablet browsers.

Pharmacy Benefits Verification Enhancements

Streamline the pharmacy benefits verification process by enabling patient services representatives to create an electronic verification request to verify patients' pharmacy benefits.

Site Management (Pilot)

Streamline the process of selecting and activating clinical research study sites and investigators through the enhanced search, assessment creation, and scoring capabilities of Salesforce. Configure the search settings and use Criteria-Based Search and Filter (CBSF) to identify the sites and investigators that fulfill the clinical trial requirements. Manage and track the overall lifecycle of the identified sites by creating care program sites.

New and Changed Objects in Life Sciences Cloud

Store and access more data with the new and changed Life Sciences Cloud objects.

Financial Assistance Program Enhancements

Streamline the enrollment process for a financial assistance program by using appeals. Save time by filing an appeal against a rejected application instead of submitting a new application.

IN THIS SECTION:

Manage Appeals for Financial Assistance Program

Enable your patient services representatives to file an appeal for a rejected application on behalf of a care program enrollee. After an appeal is filed, another representative can approve or reject the appeal by verifying whether the issues leading to the initial rejection were resolved.

View the Appeals History of a Rejected Application

Track a rejected application's journey by reviewing the appeals history of the application along with the reasons for the rejection.

Manage Appeals for Financial Assistance Program

Enable your patient services representatives to file an appeal for a rejected application on behalf of a care program enrollee. After an appeal is filed, another representative can approve or reject the appeal by verifying whether the issues leading to the initial rejection were resolved.

Where: This feature applies to Lightning Experience in Enterprise and Unlimited editions with the Life Sciences Cloud or Health Cloud license.

Who: This feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud), Industry Service Excellence, OmniStudio Admin, OmniStudio User, Rule Engine Runtime, Rule Engine Designer and Manage Financial Assistance Program permission sets.

How: Add the FinancialAssistanceProgramContainer Flexcard to the Care Program Enrollee record page. To file an appeal, under Financial Assistance Programs on any care program enrollee record page, go to the Applications tab, and click **File Appeal**.

SEE ALSO:

Salesforce Help: Financial Assistance Program

Salesforce Help: File an Appeal for a Financial Assistance Program

View the Appeals History of a Rejected Application

Track a rejected application's journey by reviewing the appeals history of the application along with the reasons for the rejection.

Where: This feature applies to Lightning Experience in Enterprise and Unlimited editions with the Life Sciences Cloud or Health Cloud license.

Who: This feature is available to users with Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud), Industry Service Excellence, OmniStudio Admin, OmniStudio User, Rule Engine Runtime, Rule Engine Designer and Manage Financial Assistance Program permission sets.

How: Add the FinancialAssistanceProgramContainer Flexcard to the Care Program Enrollee record page. To file an appeal, under Financial Assistance Programs on any care program enrollee record page, go to the Applications tab, and click **Appeals History**.

SEE ALSO:

Salesforce Help: Financial Assistance Program

Salesforce Help: Approve or Reject an Appeal

Participant Management Enhancements

Improve the accuracy of clinical trial search by configuring range types to filter the results. Save time and effort and ensure a seamless configuration experience by using a new toggle. Enhance the recruitment efficiency by using a unified flow that helps users capture the assessment responses of registered candidates. Provide an Omni-Channel experience to candidates by making the recruitment journey accessible on mobile and tablet browsers.

IN THIS SECTION:

Access Recruitment Features on Mobile or Tablet Devices

Reduce recruitment time and costs and deliver an Omni-Channel experience to the candidates by making the entire recruitment journey more responsive and easily accessible. Candidates can securely engage with the recruitment process from the convenience of their mobile phone or tablet (not a Salesforce app). Previously, they accessed the recruitment activities only on the web browser.

Configure Criteria-Based Search and Filter Automatically with a Toggle

Save time and effort and ensure a seamless configuration experience with a new toggle in the Participant Management settings.

Merge Prescreening and Registration Omniscripts for a Unified Flow

Enhance recruitment efficiency by introducing a unified flow that helps users to seamlessly capture the assessment responses of registered candidates. They can capture and use the assessment responses for future evaluations by using the newly merged Omniscript.

Refine Search Results by Using Range-Based Filtering Options

Improve the accuracy of clinical trial search results for number and date fields by configuring range types to filter results in Criteria-Based Search and Filter. Configure the In-Range and Range Overlap range types, and users can filter the results based on the configuration you select.

Access Recruitment Features on Mobile or Tablet Devices

Reduce recruitment time and costs and deliver an Omni-Channel experience to the candidates by making the entire recruitment journey more responsive and easily accessible. Candidates can securely engage with the recruitment process from the convenience of their mobile phone or tablet (not a Salesforce app). Previously, they accessed the recruitment activities only on the web browser.

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 Health Cloud Starter, Criteria-Based Search and Filter, and Criteria-Based Search and Filter Experience Cloud User permission set licenses.

Configure Criteria-Based Search and Filter Automatically with a Toggle

Save time and effort and ensure a seamless configuration experience with a new toggle in the Participant Management settings.

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 Criteria-Based Search and Filter and Clinical Trial Manager permission set licenses.

How: In Setup, find and select **Participant Management Settings**. Turn on Participant Recruitment and Enrollment. Under Set Up Participant Recruitment, turn on Enable Criteria-Based Search and Filter Default Configuration.

Merge Prescreening and Registration Omniscripts for a Unified Flow

Enhance recruitment efficiency by introducing a unified flow that helps users to seamlessly capture the assessment responses of registered candidates. They can capture and use the assessment responses for future evaluations by using the newly merged Omniscript.

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 Health Cloud Starter, Omnistudio Admin, and Omnistudio User permission set licenses.

How: From Setup, enable the Prefill Assessment Questions, Omnistudio Settings, Participant Recruitment and Enrollment, Data Pipelines, and Criteria-Based Search and Filter org preferences. Add the Authorization Form Text record details and Person Account record ID to the TrialManagement_candidateEligibiltiyAndRegistration Omniscript. Add the reCAPTCHA to the Omniscript, and configure the duplicate rules.

Refine Search Results by Using Range-Based Filtering Options

Improve the accuracy of clinical trial search results for number and date fields by configuring range types to filter results in Criteria-Based Search and Filter. Configure the In-Range and Range Overlap range types, and users can filter the results based on the configuration you select.

Where: This change applies to Enterprise and Unlimited editions with Health Cloud or Life Sciences Cloud and the Participant Enrollment add-on license.

Who: Users with the Criteria-Based Search and Filter system permission can configure and use the criteria-based search and filter capabilities. To select or configure an Omnistudio Flexcard for the card view, users need the Omnistudio Admin permission set.

Why: Range type configuration helps users tailor the search results based on the number and date fields. Consider the example of a search for clinical trials based on the participant's age.

- In-Range: You set the age range to 25–35 years. When you use the In-Range type, the results include only the trials where the candidate's age falls within the range, such as 26, 30, and 35. It excludes the trials where the participant's age is outside the specified range, such as 24 and 36.

- Range Overlap: You set the age range to 25–35 years. When you use the Range Overlap type, the results include the trials where the age range extends into or overlaps with the specified range, such as age ranges of 20–30 and 30–40.

How: In Setup, find and select **Criteria-Based Search and Filter**. On the setup page, turn on Criteria-Based Search and Filter. On the Search Configuration tab, click **New**.

Pharmacy Benefits Verification Enhancements

Streamline the pharmacy benefits verification process by enabling patient services representatives to create an electronic verification request to verify patients' pharmacy benefits.

IN THIS SECTION:

Boost Representative's Productivity with Electronic Verification

Streamline the process of verifying a patient's pharmacy benefits by using electronic verification, eliminating the need for multiple manual interactions with payors. Patient services representatives can engage more with patients, gain deeper insights into patients' needs, and deliver enhanced support in patients' healthcare journeys. Your representatives can electronically verify an existing manual verification request too.

Boost Representative's Productivity with Electronic Verification

Streamline the process of verifying a patient's pharmacy benefits by using electronic verification, eliminating the need for multiple manual interactions with payors. Patient services representatives can engage more with patients, gain deeper insights into patients' needs, and deliver enhanced support in patients' healthcare journeys. Your representatives can electronically verify an existing manual verification request too.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Life Sciences Cloud or Health Cloud license.

Who: This feature is available to users with the OmniStudio Admin, OmniStudio User, Manage Pharmacy Benefits Verification, and Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set.

How: Add the PharmacyBenefitsVerification Flexcard to the Care Program Enrollee record page. To verify the pharmacy benefits electronically, under Pharmacy Benefits Verification on any care program enrollee record page, click **New Electronic Request**.

SEE ALSO:

Salesforce Help: Pharmacy Benefits Verification

Salesforce Help: Electronic Verification Request

Salesforce Help: Initiate a Manual or Electronic Verification Request

Site Management (Pilot)

Streamline the process of selecting and activating clinical research study sites and investigators through the enhanced search, assessment creation, and scoring capabilities of Salesforce. Configure the search settings and use Criteria-Based Search and Filter (CBSF) to identify the sites and investigators that fulfill the clinical trial requirements. Manage and track the overall lifecycle of the identified sites by creating care program sites.

Send site feasibility questionnaires to the care program sites to assess the suitability of the sites and investigators from their responses. Enable faster site selection by using the assessment scoring feature that automatically scores the overall response for an assessment based on the scores assigned to individual responses to objective questions. Easily find the assessment responses with higher scores from the assessment score dashboard. For quicker turnaround of the site selection process in the future, assign tags to the sites and investigators based on the therapeutic areas and other important features. The investigators can review and respond to the assessments on the Experience Cloud portal. For questions that have the prefill option enabled, investigators can review their responses from the earlier questionnaires. They can also review and update the details of their own profiles and the profiles of their sites.

Note: Site Management 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.

IN THIS SECTION:

Identify Investigators and Sites for Clinical Trials by Using Enhanced Search Capabilities (Pilot)

Study managers can use a customized search to obtain a comprehensive list of the suitable sites and investigators for conducting a clinical research study. With Criteria-Based Search and Filter (CBSF), they can map fields from the relevant objects and configure searchable objects and actions. They can also convert these sites into care program sites for effective management and tracking.

Create and Deploy Site Feasibility Assessments (Pilot)

Identify the sites that match the research study requirements by using site feasibility assessments. Study managers can create and deploy a questionnaire or use a previously used questionnaire. Enable the built-in generative AI and Industries AI capabilities to create questionnaires that are tailored to the specific study requirements. Configure the prefill assessment settings to enable study managers to use assessment responses from a previous assessment questionnaire. In the assessment score dashboard, they can easily view and analyze the responses from the sites and investigators.

Assign Scores to the Investigators and Sites for Effective and Faster Site Selection (Pilot)

Generate a weighted investigator or a site score by considering attributes such as clinical trial experience, trial performance cycle times, and compliance. Use the site score to understand the feasibility of the site for conducting specific studies.

Accelerate the Site Feasibility Assessment Process (Pilot)

Assign scores to the responses received from the sites and use the scores to generate a priority list that's specific to the investigator or site. Study managers can add scoring rules such as base score and weightage, and then assign a score value to each option. The scoring feature uses the inbuilt formula question capabilities of the discovery framework.

Tag the Sites and Investigators for Future Site Selection Efforts (Pilot)

Configure the Interest Tagging feature for research study sites and investigators to help Study Managers categorize the sites and investigators based on tags. Organize your interest tags in up to three levels of categories. Study Managers can check the tags in the future to identify the suitable sites and investigators for conducting a specific study.

Accelerate Your Site Management Configurations with a Guided Setup (Pilot)

Use the guided setup to easily and quickly set up the Site Management feature. Follow the guided setup to go to the setup page for each configuration task and complete the task.

Identify Investigators and Sites for Clinical Trials by Using Enhanced Search Capabilities (Pilot)

Study managers can use a customized search to obtain a comprehensive list of the suitable sites and investigators for conducting a clinical research study. With Criteria-Based Search and Filter (CBSF), they can map fields from the relevant objects and configure searchable objects and actions. They can also convert these sites into care program sites for effective management and tracking.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud license.

Note: Site Management 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 feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set.

How: In Setup, find and select **Site Management Settings**. On the setup page, turn on Site Management, and follow the guided setup to configure the feature. To set up a search, go to Set Up Site Investigator Search.

Create and Deploy Site Feasibility Assessments (Pilot)

Identify the sites that match the research study requirements by using site feasibility assessments. Study managers can create and deploy a questionnaire or use a previously used questionnaire. Enable the built-in generative AI and Industries AI capabilities to create questionnaires that are tailored to the specific study requirements. Configure the prefill assessment settings to enable study managers to use assessment responses from a previous assessment questionnaire. In the assessment score dashboard, they can easily view and analyze the responses from the sites and investigators.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Einstein GPT Platform and the Omnistudio Designer licenses, and the Industries Generative AI platform license. The Site Management (Pilot) org permission must be enabled with Life Sciences Cloud or Health Cloud license.

Note: Site Management 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 feature is available to users with the Study Manager and Health Cloud Starter (for Life Sciences Cloud) permission sets or the Health Cloud Foundation (for Health Cloud) permission set. Users also require the Generative AI Assessment Questions, NLP Service, and Scoring Framework licenses.

How: In Setup, find and select **Site Management Settings**. On the setup page, turn on Site Management to use the guided setup. To set up assessments in your org, go to Get Your Org Ready for Assessments. To enable the assessment generation using the built-in AI capabilities, go to Enable Generative AI Assessment Generation. To set up your Experience Cloud portal, go to Configure Digital Experiences.

Warning: Generative AI can produce inaccurate or harmful responses. Review the output for accuracy and safety. You assume responsibility for how the outcomes of Einstein are applied to your organization.

Assign Scores to the Investigators and Sites for Effective and Faster Site Selection (Pilot)

Generate a weighted investigator or a site score by considering attributes such as clinical trial experience, trial performance cycle times, and compliance. Use the site score to understand the feasibility of the site for conducting specific studies.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Site Management (Pilot) org permission enabled with Life Sciences Cloud or Health Cloud license.

Note: Site Management 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 feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission sets.

How: In Setup, find and select **Site Management Settings**. On the setup page, turn on Site Management to use the guided setup. To set up scores for site investigators, in the Set Up Site Investigator Search section, click **Go to Setup** next to Set Up Site Investigator Scoring.

Accelerate the Site Feasibility Assessment Process (Pilot)

Assign scores to the responses received from the sites and use the scores to generate a priority list that's specific to the investigator or site. Study managers can add scoring rules such as base score and weightage, and then assign a score value to each option. The scoring feature uses the inbuilt formula question capabilities of the discovery framework.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Site Management (Pilot) org permission enabled with Life Sciences Cloud or Health Cloud license.

Note: Site Management 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 feature is available to users with the OmniStudio Admin and Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set.

How: In Setup, find and select **Site Management Settings**. On the setup page, turn on Site Management to use the guided setup. To set up scores for sites, go to Configure Site Feasibility Score.

Tag the Sites and Investigators for Future Site Selection Efforts (Pilot)

Configure the Interest Tagging feature for research study sites and investigators to help Study Managers categorize the sites and investigators based on tags. Organize your interest tags in up to three levels of categories. Study Managers can check the tags in the future to identify the suitable sites and investigators for conducting a specific study.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Site Management (Pilot) org permission enabled with Life Sciences Cloud or Health Cloud license.

Note: Site Management 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 feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set.

How: In Setup, find and select **Site Management Settings**. On the setup page, turn on Site Management and follow the guided setup to configure the feature. To set up interest tags, go to Set Up Interest Tagging.

Accelerate Your Site Management Configurations with a Guided Setup (Pilot)

Use the guided setup to easily and quickly set up the Site Management feature. Follow the guided setup to go to the setup page for each configuration task and complete the task.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Site Management (Pilot) org permission enabled with Life Sciences Cloud or Health Cloud license.

Note: Site Management 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 feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission set.

How: In Setup, find and select **Site Management Settings**. On the setup page, turn on Site Management and use the guided setup.

New and Changed Objects in Life Sciences Cloud

Store and access more data with the new and changed Life Sciences Cloud objects.

Site Management (Pilot)

Represent information about the clinical trial investigator associated with a site
Use the new Care Site Investigator Searchable Field object.

Represent the association of a care program site and a contract
Use the new Care Program Site Contract object.

Represent the details of a party's publication
Use the new Party Publication object.

Represent the details of the research study protocol document
Use the new Research Study Protocol Information object.

Represent the healthcare facility associated with the accreditation
Use the new `HealthcareFacility` field on the Accreditation object.

Indicate the investigator who is responsible for conducting the research study at the healthcare facility.
Use the new `Investigator` field on the CareProgramSite object.

Indicate the turnaround time for the preparation of the regulatory documents for IRB or the ethics committee submission
Use the new `RegulatoryDocTurnaroundDrtn` field on the CareProgramSite object.

Indicate the number of days between the start of the site activation process and the release of the investigational product at the site
Use the new `InvtglProductReleaseDrtn` field on the CareProgramSite object.

Indicate the number of days between the site qualification visit and the site initiation visit
Use the new `QualVstToInitVstDrtn` field on the CareProgramSite object.

Indicate the number of days between the site activation and the first participant visit to the site
Use the new `SiteActvToFirstPtcpDrtn` field on the CareProgramSite object.

Indicate the number of days between the site activation and the last participant visit to the site
Use the new `SiteActvToLastPtcpDrtn` field on the CareProgramSite object.

Indicate the projected number of days to enroll participants at the site
Use the new `ProjectedPtcpEnrlDrtn` field on the CareProgramSite object.

Indicate the actual number of days spent enrolling participants at the site
Use the new `ActualPtcpEnrollmentDrtn` field on the CareProgramSite object.

Indicate the number of participants that are expected to enroll for the research study at the site
Use the new `ProjectedPtcpEnrlCount` field on the CareProgramSite object.

Indicate the actual number of participants that are enrolled for the research study at the site
Use the new `ActualPtcpEnrollmentCount` field on the CareProgramSite object.

Indicate the number of participants screened for the research study at the site
Use the new `ScreenedParticipantCount` field on the CareProgramSite object.

Indicate the number of participants randomly assigned to different study groups at the site
Use the new `RandomizedParticipantCount` field on the CareProgramSite object.

Indicate the number of participants who completed the research study at the site
Use the new `RsrchStudyCmplPtcpCount` field on the CareProgramSite object.

Indicate the number of protocol deviations reported during the research study at the site
Use the new `ProtocolDeviationCount` field on the CareProgramSite object.

Indicate the number of serious adverse events reported during the research study at the site
Use the new `SeriousAdverseEventCount` field on the CareProgramSite object.

Indicate the representative of the sponsor for the site during the research study
Use the new `SponsorRepresentative` field on the CareProgramSite object.

Indicate the time taken to execute the clinical trial agreement
Use the new `ClnclTrialAgreeTrnarndDrtn` field on the CareProgramSite object.

Indicate the healthcare facility associated with the specialty
Use the new `HealthCareFacility` field on the CareProviderFacilitySpecialty object.

Indicate the count of research studies completed by the care provider for the specialty
Use the new `CompletedResearchStudyCount` field on the CareProviderFacilitySpecialty object.

Indicate the count of active research studies that are performed by the care provider for the specialty
Use the new `ActiveResearchStudyCount` field on the CareProviderFacilitySpecialty object.

Specify the classification of the healthcare provider, such as Previous Partner, Key Opinion Leader, and Novice Member
Use the new `Classification` field on the HealthcareProvider object.

Indicate whether the healthcare provider participates in research studies or not
Use the new `DoesParticipateInRsrchStudy` field on the HealthcareProvider object.

Specify the research study phase that the healthcare provider has experience with
Use the new `ResearchStudyPhase` field on the HealthcareProviderSpecialty object.

Specify the research study type that the healthcare provider has experience with
Use the new `ResearchStudyType` field on the HealthcareProviderSpecialty object.

Indicate the count of research studies completed by the healthcare provider for the specialty
Use the new `CompletedResearchStudyCount` field on the HealthcareProviderSpecialty object.

Indicate the count of active research studies that are performed by the healthcare provider for the specialty
Use the new `ActiveResearchStudyCount` field on the HealthcareProviderSpecialty object.

Indicate the healthcare provider associated with the taxonomy
Use the new `HealthcareProvider` field on the HealthcareProviderTaxonomy object.

Indicate whether the healthcare facility is affiliated to the site management organization
Use the new `IsAfflWithSiteMgmtOrg` field on the HealthcareFacility object.

Indicate whether the healthcare facility is a satellite site of another healthcare facility or not
Use the new `IsSatelliteSite` field on the HealthcareFacility object.

Indicate the start year of the research study at the healthcare facility
Use the new `ResearchStudyStartYear` field on the HealthcareFacility object.

Specify the age range of the patients at the healthcare facility
Use the new `PatientAgeRange` field on the HealthcareFacility object.

Indicate the average count of the patients that visit the OPD at the healthcare facility
Use the new `AverageOpdPatientCount` field on the HealthcareFacility object.

Indicate the average count of the patients that visit the OPD at the healthcare facility
Use the new `AverageOpdPatientCount` field on the HealthcareFacility object.

Specify the phases under which the study is conducted
Use the new `ResearchStudyPhase` field on the HealthcareFacility object.

Specify the type of research study conducted at the healthcare facility
Use the new `ResearchStudyType` field on the HealthcareFacility object.

Specify the type of investigational product available at the healthcare facility
Use the new `InvestigationalProductType` field on the HealthcareFacility object.

Specify the method of conducting the study at the healthcare facility
Use the new `ResearchStudyMethod` field on the HealthcareFacility object.

Specify the type of clinical trial agreement that can be done with the healthcare facility
Use the new `ClinicalTrialAgreementType` field on the HealthcareFacility object.

Indicate the average time taken to execute the clinical trial agreement
Use the new `AvgClnclTrialAgreeDrtn` field on the HealthcareFacility object.

Indicate whether a dedicated room is available at the healthcare facility to conduct the research study
Use the new `IsDedResearchStudyRoomAvl` field on the HealthcareFacility object.

Indicate whether a dedicated room is available at the healthcare facility to monitor the research study
Use the new `IsDedRsrchStdyMntrRmAvl` field on the HealthcareFacility object.

Indicate whether a store is available at the healthcare facility to keep the research study materials, such as laboratory kits
Use the new `IsRsrchStudyMtrlStoreAvl` field on the HealthcareFacility object.

Indicate whether PKPD specimen collection and storage is available at the healthcare facility
Use the new `IsPkpdSpcmnCollStrgAvl` field on the HealthcareFacility object.

Indicate whether pharmacogenomic specimen collection is available at the healthcare facility
Use the new `IsPgxSpcmnCollAvl` field on the HealthcareFacility object.

Specify the features of the investigational product store available at the healthcare facility
Use the new `InvtglProductStorageCpbl` field on the HealthcareFacility object.

Specify the type of Investigational product disposal capability
Use the new `InvtglProdtDestructionCpbl` field on the HealthcareFacility object.

Specify the list of handling equipment available at the facility for the investigational product
Use the new `InvtglProdtPreparationCpbl` field on the HealthcareFacility object.

Indicate whether any training is provided to the research staff at the healthcare facility
Use the new `IsTrainingProvided` field on the HealthcareFacility object.

Indicate whether good clinical practice training is provided at the healthcare facility
Use the new `IsGoodClnclPracTrnPrvd` field on the HealthcareFacility object.

Indicate whether the facility supports the regulatory document submission to the Institutional Review Board (IRB) or Ethics Committee (EC)
Use the new `IsRsrchEthicalRvwSbmsSupp` field on the HealthcareFacility object.

Specify the average duration required for an approval for the clinical trial at the healthcare facility from the Institutional Review Board (IRB) or Ethics Committee (EC)
Use the new `AvgRsrchEthicalReviewDrtn` field on the HealthcareFacility object.

Specify the type of the Institutional Review Board (IRB) or Ethics Committee (EC)
Use the new `RsrchEthicalRvwComteType` field on the HealthcareFacility object.

Indicate the average turnaround time for the preparation of the regulatory documents for Institutional Review Board (IRB) or the Ethics Committee (EC) submission
Use the new `AvgRegltyDocTrnarndDrtn` field on the HealthcareFacility object.

Indicate the average number of days between the start of the site activation process and the release of the investigational product at the site
Use the new `AvgInvtglProductReleaseDrtn` field on the HealthcareFacility object.

Indicate the average number of days between the site qualification visit and site initiation visit
Use the new `AvgQualVstToInitVstDrtn` field on the HealthcareFacility object.

Indicate the average number of days between the site activation and the first participant visit to the site
Use the new `AvgSiteActvToFstPtcpDrtn` field on the HealthcareFacility object.

Indicate the average number of days between the site activation and the last participant visit to the site
Use the new `AvgSiteActvToLastPtcpDrtn` field on the HealthcareFacility object.

Indicate the average projected number of days to enroll participants at the site
Use the new `AvgProjectedPtcpEnrlDrtn` field on the HealthcareFacility object.

Indicate the average actual number of days spent enrolling participants at the site
Use the new `AverageActualPtcpEnrlDrtn` field on the HealthcareFacility object.

Indicate the average number of participants that are expected to enroll for the research study at the site
Use the new `AvgProjectedPtcpEnrlCount` field on the HealthcareFacility object.

Indicate the average actual number of participants that are enrolled for the research study at the site
Use the new `AvgActualPtcpEnrlCount` field on the HealthcareFacility object.

Indicate the number of regulatory violations reported during the research study at the site
Use the new `RegulatoryViolationCount` field on the HealthcareFacility object.

Indicate the average number of protocol deviations reported during the research study at the site
Use the new `AvgProtocolDeviationCount` field on the HealthcareFacility object.

Indicate the healthcare provider associated with the facility
Use the new `HealthcareProvider` field on the HealthcareFacility object.

Specify the classification of the healthcare facility, such as Previous Partner, Key Opinion Leader, and Novice Member
Use the new `Classification` field on the HealthcareFacility object.

Indicate whether research studies are conducted in the healthcare facility or not
Use the new `AreResearchStudiesConducted` field on the HealthcareFacility object.

Financial Assistance Program

Notifies subscribers of changes to the status of an appeal filed against a financial assistance program
Use the new Application Form Appeal Status Change Event object.

Specifies the mode of verification used in the care benefit verify request
Use the new `Verification Mode` field on the Care Benefit Verify Request object.

Loyalty Management

Increase member engagement by offering members rewards for reaching activity-driven milestones. Accurately calculate program and promotion liability by tracing the usage of points even when the member points balance is negative. Gather rich insights about customers and members with the enhanced data kit. Empower customers and sales reps to select the promotion they want to apply for carts by using coupons. Design promotions quickly with enhanced product search and exclusion capabilities. Run targeted promotions for account-based campaigns and automatically check whether promotions are eligible for stores and store groups.

IN THIS SECTION:

[Gamify Member Engagement with Milestone-Based Promotions]

Incentivize members for reaching activity-driven milestones. Use the Engagement Trail promotion template to quickly set up milestone-based promotions. Track long-term member behavior with varied milestones such as referring three friends or buying five units of a product.

Report Liability Accurately by Tracing Negative Points Usage

Get a granular account of how members have spent their points over time, even when members' point balance is negative. You can track the specific transactions that led to a negative point balance. When members with a negative point balance accrue points, the related loyalty ledger traceability record's action type is set to Credit for Arrears. For redemptions, the action type is Debit with Arrears.

Effectively Track Promotional Points by Using Currency Subtype

Get a holistic view of the points credited by promotions and improve promotion liability accounting. Use currency subtypes to trace the points that promotions credit to members.

Gather Richer Customer Insights with the Enhanced Data Kit

Get a comprehensive view of members with the refreshed Loyalty Management data kit. The data kit comes with data bundles based on your Loyalty Management license. The data bundles include data streams for all Loyalty Management and Global Promotion Management objects available in your org.

Global Promotions Management

Provide customers and sales reps the flexibility to choose the promotion for a cart by using coupons. Quickly search for promotion products by using codes or SKUs. Easily exclude products and categories from promotion rules. Run promotions for account-based campaigns and add stores to existing store groups without promotion downtime.

New and Changed Objects in Loyalty Management

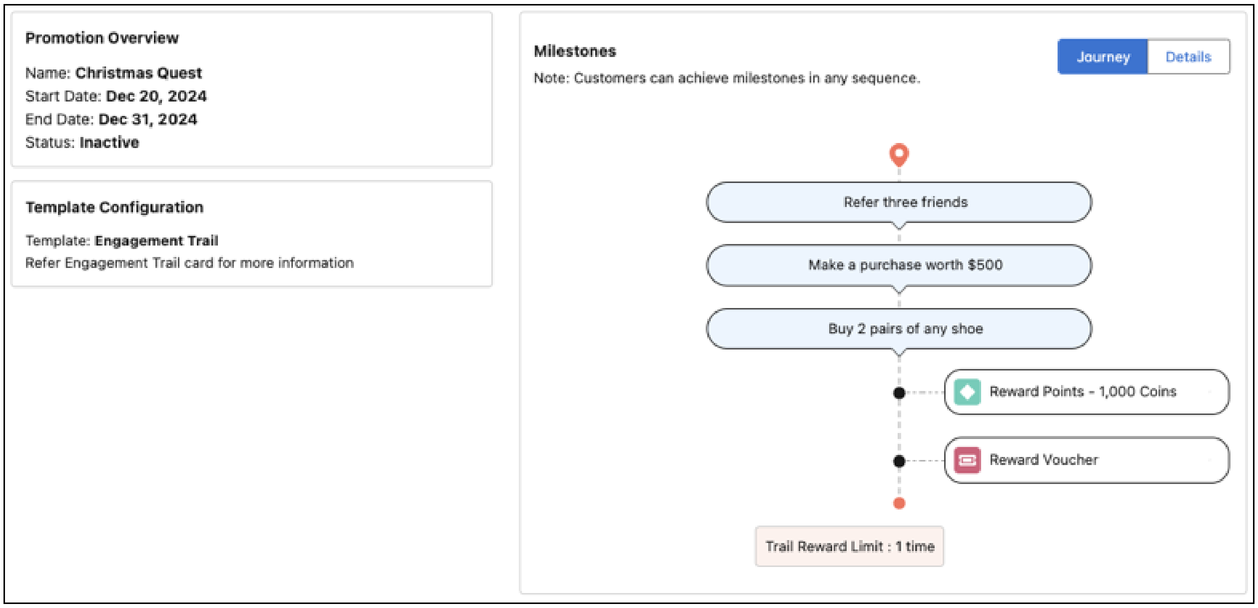
Do more with the new and updated Loyalty Management objects.

Gamify Member Engagement with Milestone-Based Promotions

Incentivize members for reaching activity-driven milestones. Use the Engagement Trail promotion template to quickly set up milestone-based promotions. Track long-term member behavior with varied milestones such as referring three friends or buying five units of a product.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management - Growth or Loyalty Management - Advanced.

How: On the Select Promotion Template step in the Quick Promotion guided setup, select **Engagement Trail**.



SEE ALSO:

Salesforce Help: Engagement Trail (can be outdated or unavailable during release preview)

Report Liability Accurately by Tracing Negative Points Usage

Get a granular account of how members have spent their points over time, even when members' point balance is negative. You can track the specific transactions that led to a negative point balance. When members with a negative point balance accrue points, the related loyalty ledger traceability record's action type is set to Credit for Arrears. For redemptions, the action type is Debit with Arrears.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available.

How: On the Loyalty Management Settings page in Setup, turn on Trace Usage of Points and Members Can Have a Negative Point Balance.

SEE ALSO:

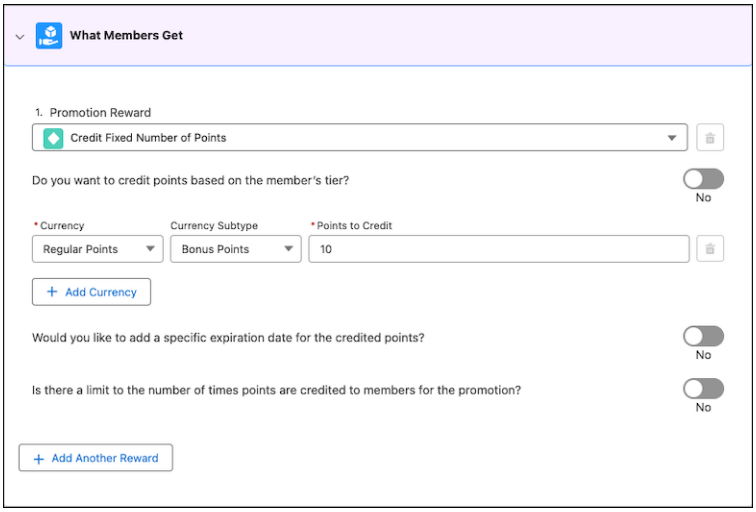
Salesforce Help: Points Accounting with Traceability (can be outdated or unavailable during release preview)

Effectively Track Promotional Points by Using Currency Subtype

Get a holistic view of the points credited by promotions and improve promotion liability accounting. Use currency subtypes to trace the points that promotions credit to members.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available.

How: On the Select Promotion Template step in the Quick Promotions guided flow, select a Loyalty Promotions type template. Click **Next**. When you add a reward that credits non-qualifying points to members, select the currency subtype.



SEE ALSO:

Salesforce Help: Rule Configuration with Loyalty Promotion Template (can be outdated or unavailable during release preview)

Gather Richer Customer Insights with the Enhanced Data Kit

Get a comprehensive view of members with the refreshed Loyalty Management data kit. The data kit comes with data bundles based on your Loyalty Management license. The data bundles include data streams for all Loyalty Management and Global Promotion Management objects available in your org.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Loyalty Management and Data Cloud.

SEE ALSO:

Salesforce Help: Data Kit for Loyalty Management (can be outdated or unavailable during release preview)

Global Promotions Management

Provide customers and sales reps the flexibility to choose the promotion for a cart by using coupons. Quickly search for promotion products by using codes or SKUs. Easily exclude products and categories from promotion rules. Run promotions for account-based campaigns and add stores to existing store groups without promotion downtime.

IN THIS SECTION:

Empower Customers and Sales Reps to Select Promotions by Using Coupons

Customers can use coupons to decide which eligible promotion they want to apply for their cart. During assisted sales, sales reps can offer customers the promotion that best fits their needs. Sales reps also have the power to not apply promotions for carts when customers' don't require it. Companies can collaborate with other brands and run promotions with personalized coupons.

Accurately Search for Products Using Enhanced Search Options

Marketing managers can search for products with SKU and code to quickly find and select the exact products they're looking for. The search results show the product's SKU and code, along with the product name.

Exclude Ineligible Products and Categories Efficiently

Simplify the process of designing and adjusting promotions by focusing on a smaller list of exclusions. Marketing managers can easily filter ineligible products or categories from promotion rules.

Simplify the Evaluation of In-Store Promotions

The updated promotion context definition enables the Eligible Promotions API to automatically check whether customer carts are eligible for in-store promotions. Continue running promotions when stores are added to a promotion's store group. Previously, marketing managers were required to deactivate a promotion when stores were added to a store group.

Easily List Accounts Eligible for Promotions with Campaigns

Run promotions targeted towards accounts that are members of a campaign. Offer accounts promotion rewards such as discounts, vouchers, and games.

Easily Select All Eligible Products for a Promotion Rule

Include all eligible products of a promotion in a rule with a single click.

Automate Promotion Data Sync with Prebuilt Data Streams

Simplify the process of syncing promotion data in Data Cloud with the new Global Promotions Management data stream bundle. The bundle comes with data streams for most Global Promotions Management objects.

Decide How Customers' Data Cloud Segment is Verified

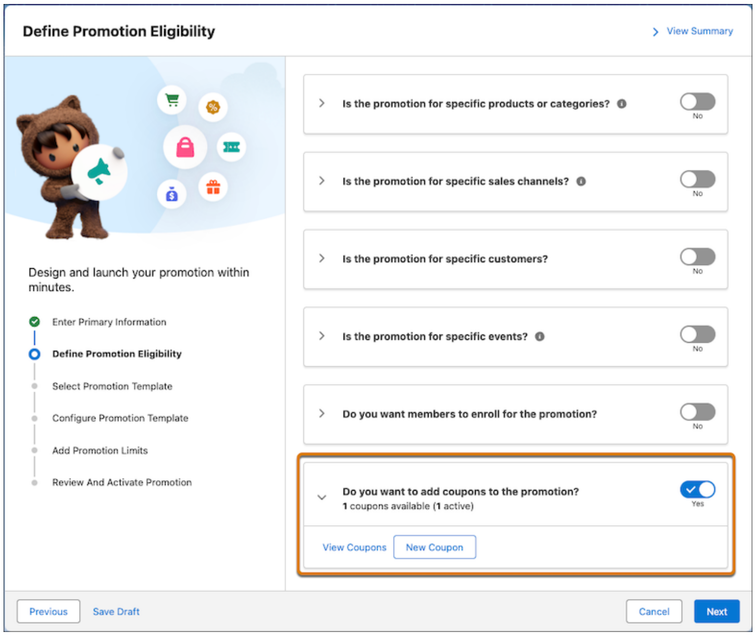
Choose whether the Eligible Promotions API uses the Query API or data graphs to determine if customers belong to the Data Cloud segments associated with promotions. Previously, the Eligible Promotions API used the Query API by default with an option to switch to data graphs.

Empower Customers and Sales Reps to Select Promotions by Using Coupons

Customers can use coupons to decide which eligible promotion they want to apply for their cart. During assisted sales, sales reps can offer customers the promotion that best fits their needs. Sales reps also have the power to not apply promotions for carts when customers' don't require it. Companies can collaborate with other brands and run promotions with personalized coupons.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available and Global Promotions Management is enabled.

How: On the Define Promotion Eligibility step in the Quick Promotions guided flow, create coupons for the promotion.



SEE ALSO:

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

Salesforce Help: Run Pricing Promotions (can be outdated or unavailable during release preview)

Accurately Search for Products Using Enhanced Search Options

Marketing managers can search for products with SKU and code to quickly find and select the exact products they're looking for. The search results show the product's SKU and code, along with the product name.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available and Global Promotions Management is enabled.

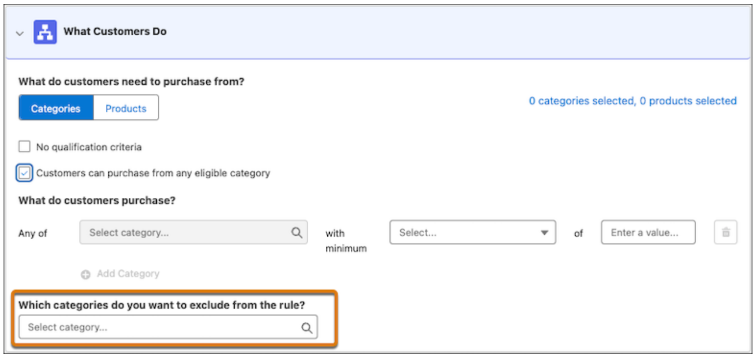
Exclude Ineligible Products and Categories Efficiently

Simplify the process of designing and adjusting promotions by focusing on a smaller list of exclusions. Marketing managers can easily filter ineligible products or categories from promotion rules.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available and Global Promotions Management is enabled.

How: On the Configure Promotion Template step in the Quick Promotion guided flow, select the Products tab or the Categories tab.

- To exclude categories, select **Customers can purchase from any eligible category**, and select the categories that you want to exclude from the rule.
- To exclude products, select **Customers can purchase from any eligible product**, and select the products that you want to exclude from the rule.



SEE ALSO:

Salesforce Help: Plan Your Promotion’s Design (can be outdated or unavailable during release preview)

Salesforce Help: Rule Configuration with Pricing Promotion Templates (can be outdated or unavailable during release preview)

Simplify the Evaluation of In-Store Promotions

The updated promotion context definition enables the Eligible Promotions API to automatically check whether customer carts are eligible for in-store promotions. Continue running promotions when stores are added to a promotion’s store group. Previously, marketing managers were required to deactivate a promotion when stores were added to a store group.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available and Global Promotions Management is enabled.

SEE ALSO:

Salesforce Help: Extend Standard Context Definition (can be outdated or unavailable during release preview)

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

Easily List Accounts Eligible for Promotions with Campaigns

Run promotions targeted towards accounts that are members of a campaign. Offer accounts promotion rewards such as discounts, vouchers, and games.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available and Global Promotions Management is enabled.

SEE ALSO:

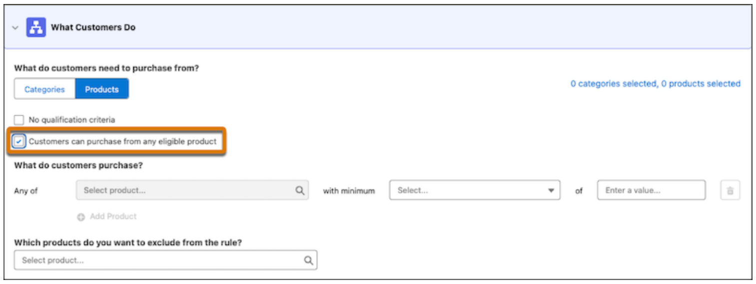
Salesforce Help: Define Promotion Eligibility (can be outdated or unavailable during release preview)

Easily Select All Eligible Products for a Promotion Rule

Include all eligible products of a promotion in a rule with a single click.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available and Global Promotions Management is enabled.

How: On the Configure Promotion Template step in the Quick Promotion guided flow, on the Products tab, select **Customers can purchase from any eligible product**.



SEE ALSO:

Salesforce Help: Rule Configuration with Pricing Promotion Templates (can be outdated or unavailable during release preview)

Automate Promotion Data Sync with Prebuilt Data Streams

Simplify the process of syncing promotion data in Data Cloud with the new Global Promotions Management data stream bundle. The bundle comes with data streams for most Global Promotions Management objects.

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.

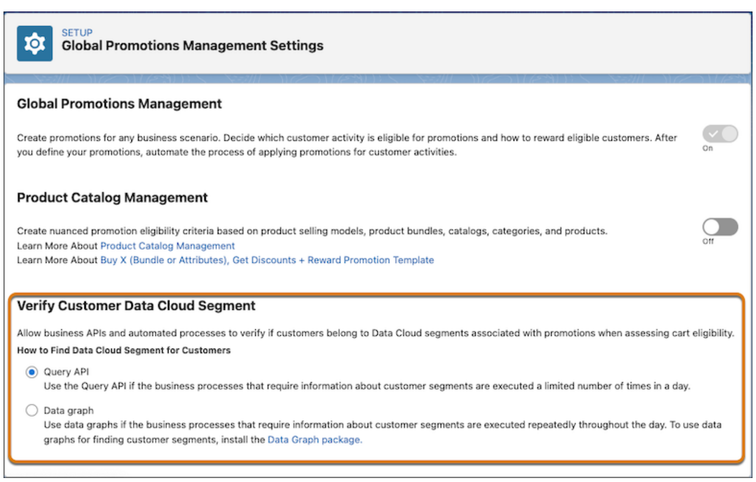
SEE ALSO:

Salesforce Help: Data Kit for Global Promotions Management (can be outdated or unavailable during release preview)

Decide How Customers' Data Cloud Segment is Verified

Choose whether the Eligible Promotions API uses the Query API or data graphs to determine if customers belong to the Data Cloud segments associated with promotions. Previously, the Eligible Promotions API used the Query API by default with an option to switch to data graphs.

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.



SEE ALSO:

Salesforce Help: Enable Customer Segment Verification (can be outdated or unavailable during release preview)

New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

Add coupons for promotions

Use the Coupon object.

Track the redemption of coupons by members

Use the CouponCodeRedemption object.

Track members' negative point balance changes

Use the new `CreditForArrears` and `DebitWithArrears` values on the existing `ActionType` field on the LoyaltyLedgerTraceability object.

Manufacturing Cloud

Modernize your commercial operations by deeply unifying your pricing, product catalog, product configuration, sales, and run-rate business operations by using Revenue Cloud features in Manufacturing Cloud. Drive more run-rate business by using revenue management features for Sales Agreements. Introduce flexibility in your actuals calculation processes and get greater visibility into cost and quantity metrics by using enhanced Sales Agreement Foundations features. Streamline your inventory operations with Inventory Count and Inventory Replenishment.

IN THIS SECTION:

Revenue Management Features for Sales Agreements

Modernize your run-rate business processes and win more business by using revenue management features for Sales Agreements. Easily identify the right products for your customers from your product portfolio. Personalize deals by configuring product attributes for sales agreements based on customer preferences. Add the same product multiple times to a sales agreement by configuring different combinations of attributes. Optimally price deals with dynamic, rules-driven prices in sales agreements. Track the planned and actual values of products with attributes in sales agreements. Easily check the attributes of the products in a side panel in the sales agreement table. Manage the entire lifecycle of sales agreements that contain products with attributes—from inception to renewal.

Sales Agreements Foundations Enhancements

Calculate the actuals for sales agreements based on your business needs by using a data processing engine definition. Calculate the actuals for current and future schedules for a sales agreement, getting a peek into the actuals calculations for future schedules. Get clear insights into the actuals calculation for a specific number of future schedules, based on orders. Calculate margins by adding the cost price to the sales agreement.

Streamline Your Inventory Counting Processes

Compare physical and system inventory stocks, schedule inventory counts at scale, and easily capture count details by using Inventory Count. Inventory managers can efficiently schedule cycle and ad hoc inventory counts for products and parts by creating inventory count plans. Inventory count performers can easily capture product counts at inventory locations and record observations and instructions by using the Salesforce Field Service mobile app.

Minimize Stockouts with Automated Inventory Replenishment

Use Inventory Replenishment to automate the replenishment of product items when they reach predefined stock levels. Inventory managers and service managers can design nuanced inventory replenishment policies at both a granular level, such as individual products at specific locations, and at a broader level, such as product categories across all locations. Automate the process to identify product items that require replenishments, find their applicable policies, and create product requests. Promptly address inventory needs and easily identify the applicable policy for each product item to avoid tedious policy searches.

Revenue Management Features for Sales Agreements

Modernize your run-rate business processes and win more business by using revenue management features for Sales Agreements. Easily identify the right products for your customers from your product portfolio. Personalize deals by configuring product attributes for sales agreements based on customer preferences. Add the same product multiple times to a sales agreement by configuring different combinations of attributes. Optimally price deals with dynamic, rules-driven prices in sales agreements. Track the planned and actual values of products with attributes in sales agreements. Easily check the attributes of the products in a side panel in the sales agreement table. Manage the entire lifecycle of sales agreements that contain products with attributes—from inception to renewal.

IN THIS SECTION:

Identify Perfect Products for Sales Agreements from Expansive Catalogs

Easily find and add suitable products to sales agreements by browsing through product catalogs. Key account managers can find the right products the way they prefer: navigating through category hierarchies, performing keyword searches, sorting product lists, or filtering the list by qualified products. Select the products to be added, and specify the quantity of each product to sell across the entire duration of a sales agreement. Before you add products to sales agreements, quickly review a summary of product selections to prevent mistakes.

Drive Sales by Tailoring Product Configurations to Customer Preferences

Personalize offers and accurately reflect customer choices by adding products with custom attributes in sales agreements. Key account managers can easily select the most suitable combination of attributes for products by using an intuitive product configurator. Make informed negotiations and evaluate the revenue implications by getting the latest, rules-driven price for products based on their configurations. Configure existing products in sales agreements to rectify incorrect product specifications, reflect updated negotiations, or accommodate customer requests. Add the same product multiple times to a sales agreement by configuring different combinations of attributes.

Maximize Your Margins with Rules-Driven Pricing in Sales Agreements

Set optimal, finely tuned prices for products in a sales agreement by using rules-based pricing features. Pricing teams can use Salesforce Pricing to establish price and discount calculation rules for products based on factors such as product volume and quantity sold. Key account managers can get the latest, rules-based prices before, during, and after product configuration, and adjust the final sales prices. Key account managers can also examine the reasons for discounts and price adjustments by using price waterfalls.

Easily Compare Committed and Fulfilled Sales of Products with Attributes in Sales Agreements

Track revenue for complex product configurations and monitor customer compliance by comparing planned and actual metrics of products with attributes in the sales agreements table. Monitor actuals that are automatically derived from orders and contracts of products with attributes. Recalculate actuals anytime to make sure that agreement terms reflect the latest sales.

Check Product Specifications for Sales Agreements Without Switching Pages

View the attribute, pricing, and other key details of products in sales agreements on a pane that opens when you click a product name in a sales agreements table. Key account managers can quickly review customers' preferred product configurations and differentiate between the same products with different attributes in an agreement. They can also track critical quantity and revenue for products and categories in the pane.

Renew Sales Agreements with Same Products and Attributes

Continue long-run business relationships with partners and customers without any friction by renewing sales agreements that contain products with attributes. Key account managers can renew sales agreements with a new start date and the same agreement terms, including the same product and attribute combinations and initial total quantities.

Identify Perfect Products for Sales Agreements from Expansive Catalogs

Easily find and add suitable products to sales agreements by browsing through product catalogs. Key account managers can find the right products the way they prefer: navigating through category hierarchies, performing keyword searches, sorting product lists, or filtering the list by qualified products. Select the products to be added, and specify the quantity of each product to sell across the entire duration of a sales agreement. Before you add products to sales agreements, quickly review a summary of product selections to prevent mistakes.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Revenue Cloud.

Who: This feature is available to users with the Manufacturing Sales Agreements, Pricing Features for Sales Agreements, Product Catalog Features for Sales Agreements, Salesforce Pricing Run Time User, Product Discovery User, Context Service Runtime, Product Catalog Management Viewer, and Product Configuration permission sets.

How: On a sales agreement record page, click **Browse Catalog**. Select a catalog, and add the products to the sales agreement.

Drive Sales by Tailoring Product Configurations to Customer Preferences

Personalize offers and accurately reflect customer choices by adding products with custom attributes in sales agreements. Key account managers can easily select the most suitable combination of attributes for products by using an intuitive product configurator. Make informed negotiations and evaluate the revenue implications by getting the latest, rules-driven price for products based on their configurations. Configure existing products in sales agreements to rectify incorrect product specifications, reflect updated negotiations, or accommodate customer requests. Add the same product multiple times to a sales agreement by configuring different combinations of attributes.

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Who: This feature is available to users with the Manufacturing Sales Agreements, Pricing Features for Sales Agreements, Product Catalog Features for Sales Agreements, Salesforce Pricing Run Time User, Product Discovery User, Context Service Runtime, Product Catalog Management Viewer, and Product Configuration permission sets.

How: To view the product details on a pane, open the Lightning App Builder for a sales agreement record page. Click the Agreement Terms component on the page, and in the properties pane for the component, select **Show side panel when users click a record link**. Click **Select**, and then select the fields that you want to show on the side panel.

Renew Sales Agreements with Same Products and Attributes

Continue long-run business relationships with partners and customers without any friction by renewing sales agreements that contain products with attributes. Key account managers can renew sales agreements with a new start date and the same agreement terms, including the same product and attribute combinations and initial total quantities.

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Who: This feature is available to users with the Manufacturing Sales Agreements, Pricing Features for Sales Agreements, Product Catalog Features for Sales Agreements, Salesforce Pricing Run Time User, Product Discovery User, Context Service Runtime, Product Catalog Management Viewer, and Product Configuration permission sets.

How: Open a sales agreement record that's active, under revision, or expired, and is within its renewal period. Click **Renew**.

Sales Agreements Foundations Enhancements

Calculate the actuals for sales agreements based on your business needs by using a data processing engine definition. Calculate the actuals for current and future schedules for a sales agreement, getting a peek into the actuals calculations for future schedules. Get clear insights into the actuals calculation for a specific number of future schedules, based on orders. Calculate margins by adding the cost price to the sales agreement.

IN THIS SECTION:

Calculate Sales Agreement Actuals by Using Data Processing Engine

Calculate the actual revenue and quantity for sales agreements based on the sales data that's stored in order records, transaction journal records, or custom object records. Easily schedule to periodically run the new data processing engine (DPE) template, Calculate Actual Metrics for Products. Use the DPE to transform data from multiple data sources. Extend the calculation logic in the data processing engine to include custom fields or modify the calculation logic based on your business requirements.

[Maximize Sales Agreement Profitability with Cost Visibility]

Set up costs for products by using the cost book. Add the new Cost Price and margin metrics to a sales agreement to view the cost price for products.

[Recalculate Actuals for Future Schedules]

Get visibility into your business by gaining an insight into the future schedules for actuals calculations on sales agreements. Plan your work better with increased visibility into your confirmed orders for future schedules. For example, you can plan the number of units of a product you must manufacture in the next six months.

[Add Multiple Instances of the Same Product to a Sales Agreement]

Use unique display names to add any number of duplicate products to a sales agreement. Previously, you added a product to a sales agreement only once.

[Easily View the Unallocated Quantity for a Product]

View the total unallocated quantity for a product in a sales agreement at a glance. Easily allocate this remaining quantity across schedules. For example, if the initial planned quantity value is 1200 batteries, and you allocate 300 units to one schedule, the total unallocated planned quantity is immediately adjusted to 900 units to reflect this change.

Calculate Sales Agreement Actuals by Using Data Processing Engine

Calculate the actual revenue and quantity for sales agreements based on the sales data that's stored in order records, transaction journal records, or custom object records. Easily schedule to periodically run the new data processing engine (DPE) template, Calculate Actual Metrics for Products. Use the DPE to transform data from multiple data sources. Extend the calculation logic in the data processing engine to include custom fields or modify the calculation logic based on your business requirements.

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: On the Sales Agreements page in Setup, select **Using a Data Processing Engine Definition** as the default actuals calculation mode.

Maximize Sales Agreement Profitability with Cost Visibility

Set up costs for products by using the cost book. Add the new Cost Price and margin metrics to a sales agreement to view the cost price for products.

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: Here's an example of how the cost price is used to calculate the planned margin percentage. For a planned quantity of 10 generators, the wholesale price is US$110 per unit and the cost price is $100 per unit. Then the planned margin percentage ({Planned Margin Amount/Planned Amount}*100) is 9.09%.

How: Add the cost price to a sales agreement metric group.

Recalculate Actuals for Future Schedules

Get visibility into your business by gaining an insight into the future schedules for actuals calculations on sales agreements. Plan your work better with increased visibility into your confirmed orders for future schedules. For example, you can plan the number of units of a product you must manufacture in the next six months.

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: On the Sales Agreements page in Setup, specify the number of future schedules for future actuals calculation schedules. You can select up to 24 future schedules in a weekly, monthly, or quarterly format.

To recalculate the actuals for future schedules for a sales agreement, select **Recalculate Actuals**, and then select **Current and future schedules**. The nightly job also considers the new option on the Setup page.

Add Multiple Instances of the Same Product to a Sales Agreement

Use unique display names to add any number of duplicate products to a sales agreement. Previously, you added a product to a sales agreement only once.

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: If there are multiple instances of a product, select one of the instances as the primary product to use for the actuals calculation. To select the product, on the Sales Agreement Product page, select **Actuals Calculation Product**.

Easily View the Unallocated Quantity for a Product

View the total unallocated quantity for a product in a sales agreement at a glance. Easily allocate this remaining quantity across schedules. For example, if the initial planned quantity value is 1200 batteries, and you allocate 300 units to one schedule, the total unallocated planned quantity is immediately adjusted to 900 units to reflect this change.

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: While creating a sales agreement, select **User Specifies Planned Quantity** to be able to distribute the values manually. Update the Planned Quantity field for a product and hover on the information icon next to the product name to view the adjusted total unallocated planned quantity.

Streamline Your Inventory Counting Processes

Compare physical and system inventory stocks, schedule inventory counts at scale, and easily capture count details by using Inventory Count. Inventory managers can efficiently schedule cycle and ad hoc inventory counts for products and parts by creating inventory count plans. Inventory count performers can easily capture product counts at inventory locations and record observations and instructions by using the Salesforce Field Service mobile app.

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 Inventory Count Manager and Inventory Count User permission sets.

Minimize Stockouts with Automated Inventory Replenishment

Use Inventory Replenishment to automate the replenishment of product items when they reach predefined stock levels. Inventory managers and service managers can design nuanced inventory replenishment policies at both a granular level, such as individual products at specific locations, and at a broader level, such as product categories across all locations. Automate the process to identify product items that require replenishments, find their applicable policies, and create product requests. Promptly address inventory needs and easily identify the applicable policy for each product item to avoid tedious policy searches.

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 Inventory Replenishment permission set.

Media Cloud

Use the Media Cloud application suite to manage subscribers and subscriptions, create and manage ad campaigns, and perform other key tasks, through community self-service interfaces or an agent console.

IN THIS SECTION:

Advertising Sales Management

Efficiently manage media sales, and collate and analyze data from multiple sources by integrating Advertising Sales Management with WideOrbit and Salesforce Data Cloud.

Advertising Sales Management

Efficiently manage media sales, and collate and analyze data from multiple sources by integrating Advertising Sales Management with WideOrbit and Salesforce Data Cloud.

IN THIS SECTION:

Boost Efficiency in Your Advertising Sales Workflow

Manage sales seamlessly and efficiently by integrating Advertising Sales Management with WideOrbit and combining the strengths of the two platforms. Manage proposals and orders directly from WideOrbit, while continuing to handle accounts in Advertising Sales Management.

Target Granular Audience Segments By Using Salesforce Data Cloud

Simplify your audience data management by integrating Advertising Sales Management with a remote Data Cloud instance. Import audience targeting segments from Salesforce Data Cloud, and use these segments to define targeting for your order line items. Upload the segment content to your external ad server, such as Google Ad Manager, directly from Salesforce Data Cloud.

Boost Efficiency in Your Advertising Sales Workflow

Manage sales seamlessly and efficiently by integrating Advertising Sales Management with WideOrbit and combining the strengths of the two platforms. Manage proposals and orders directly from WideOrbit, while continuing to handle accounts in Advertising Sales Management.

Note: This integration works with only WO Traffic TV.

Where: This feature is available in Lightning Experience in all editions.

How: Connect your WideOrbit account to your Advertising Sales Management org by setting up Media External Account WideOrbit Integrations API in MuleSoft Direct. Sales Reps can also use any integration layer with the Salesforce inbound and outbound Account APIs.

Target Granular Audience Segments By Using Salesforce Data Cloud

Simplify your audience data management by integrating Advertising Sales Management with a remote Data Cloud instance. Import audience targeting segments from Salesforce Data Cloud, and use these segments to define targeting for your order line items. Upload the segment content to your external ad server, such as Google Ad Manager, directly from Salesforce Data Cloud.

Where: This feature is available in Lightning Experience in all editions.

Who: This feature is available to all Media Cloud users who also have a Salesforce Data Cloud instance.

How: To use this integration, create and enable the DataSpace custom setting, and create a lightning page for the Salesforce Data Cloud segment import.

Net Zero Cloud

Improve the efficiency, auditability, and transparency of disclosure responses by using the new features and enhancements to Net Zero Cloud and Disclosure and Compliance Hub. Create disclosure reports directly in Google Docs by using the Salesforce Disclosure and Compliance Hub add-in. Manage and report on environmental, social, and governance (ESG)-related topics for materiality assessments in accordance with the Corporate Sustainability Reporting Directive (CSRD) framework. Create, manage, and score Impacts and Risks and Opportunities (IROs) according to the CSRD framework. Streamline your ESG reporting with the improved CSRD report template, now available directly in Net Zero Cloud. Meet the regulatory compliance requirements for CSRD by working with trusted eXtensible Business Reporting Language (XBRL) tagging partners listed on Net Zero Marketplace. Allocate the final scorecard emissions based on the ratio of the procurement item's spent amount and the total spent amount.

IN THIS SECTION:

Author Disclosure Reports in Google Docs

Use Google Docs to create disclosure reports by using the Salesforce Disclosure and Compliance Hub add-in. Access Salesforce data when you generate disclosures in Google Docs. Use the built-in information library search to efficiently fill the report.

Perform Materiality Assessments and Score Impacts and Risks and Opportunities for CSRD Compliance

Efficiently manage and report on environmental, social, and governance (ESG)-related topics for materiality assessments in line with the Corporate Sustainability Reporting Directive (CSRD) framework. Easily create, manage, and score Impacts and Risks and Opportunities (IROs) according to the CSRD directive. Show your IROs in an automatically generated heat map to identify the material ESG topics for your company. Track the IROs throughout your reporting journey in the Information Library.

Streamline CSRD Reporting with Simplified Setup and Enhanced Features

Use the improved Corporate Sustainability Reporting Directive (CSRD) report template for your environmental, social, and governance (ESG) reporting. Enjoy an easier and more efficient setup experience by using the built-in CSRD report builder. Save the reporting manager's time and costs by deploying with a single click the Omnistudio components needed for the CSRD report builder. The CSRD report builder Version 3 includes the European Financial Reporting Advisory Group (EFRAG) questionnaire published in April 2024.

Find XBRL Tagging Providers to Comply with CSRD Requirements

Meet the regulatory compliance requirements for Corporate Sustainability Reporting Directive (CSRD) by digitally assigning eXtensible Business Reporting Language (XBRL) standard tags to the disclosure reports. Find XBRL tagging providers on Net Zero Marketplace to help you comply with XBRL filing requirements, enabling end-to-end ESG reporting.

Allocate Scorecard Emissions Based on Spent Amount

Allocate the final scorecard emissions in Supplier Scorecard to the related allocated scorecard emissions in the Scope 3 Procurement Item based on the spent amount. Previously, allocations were based only on the ratio of calculated scope 3 emissions.

New and Changed Objects in Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

Author Disclosure Reports in Google Docs

Use Google Docs to create disclosure reports by using the Salesforce Disclosure and Compliance Hub add-in. Access Salesforce data when you generate disclosures in Google Docs. Use the built-in information library search to efficiently fill the report.

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 license.

Who: To edit Google Doc documents, you need a Google developer account.

How: In Setup, find and select **Disclosure and Compliance Hub Settings**. For Get Disclosure and Compliance Hub Plugin, select **Google Docs** from the list.

SEE ALSO:

Salesforce Help: Enable the Disclosure and Compliance Hub (can be outdated or unavailable during release preview)

Salesforce Help: Integrate Google Docs with Salesforce for Net Zero Cloud (can be outdated or unavailable during release preview)

Salesforce Help: Author Disclosures by Using Google Docs (can be outdated or unavailable during release preview)

Salesforce Help: Author Disclosures by Using OmniScript Forms and Google Docs (can be outdated or unavailable during release preview)

Perform Materiality Assessments and Score Impacts and Risks and Opportunities for CSRD Compliance

Efficiently manage and report on environmental, social, and governance (ESG)-related topics for materiality assessments in line with the Corporate Sustainability Reporting Directive (CSRD) framework. Easily create, manage, and score Impacts and Risks and Opportunities (IROs) according to the CSRD directive. Show your IROs in an automatically generated heat map to identify the material ESG topics for your company. Track the IROs throughout your reporting journey in the Information Library.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Growth license and the Materiality Assessment add-on license.

How: In Setup, find and select **Net Zero Settings**. Turn on Manage Materiality Assessments.

SEE ALSO:

Salesforce Help: Materiality Assessment Hub (can be outdated or unavailable during release preview)

Streamline CSRD Reporting with Simplified Setup and Enhanced Features

Use the improved Corporate Sustainability Reporting Directive (CSRD) report template for your environmental, social, and governance (ESG) reporting. Enjoy an easier and more efficient setup experience by using the built-in CSRD report builder. Save the reporting manager's time and costs by deploying with a single click the Omnistudio components needed for the CSRD report builder. The CSRD report builder Version 3 includes the European Financial Reporting Advisory Group (EFRAG) questionnaire published in April 2024.

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 license.

How: In Setup, find and select **Disclosure and Compliance Hub Settings**. Turn on Manage ESG Reports and Manage CSRD Reports.

SEE ALSO:

Salesforce Help: Enable the Disclosure and Compliance Hub (can be outdated or unavailable during release preview)

Salesforce Help: Manage CSRD Report Templates (can be outdated or unavailable during release preview)

Salesforce Help: Create CSRD Disclosures Report by Using the Net Zero Cloud Template (can be outdated or unavailable during release preview)

Find XBRL Tagging Providers to Comply with CSRD Requirements

Meet the regulatory compliance requirements for Corporate Sustainability Reporting Directive (CSRD) by digitally assigning eXtensible Business Reporting Language (XBRL) standard tags to the disclosure reports. Find XBRL tagging providers on Net Zero Marketplace to help you comply with XBRL filing requirements, enabling end-to-end ESG reporting.

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 license.

SEE ALSO:

Salesforce Help: Discover XBRL Tagging Providers to Tag Disclosure Reports (can be outdated or unavailable during release preview)

Allocate Scorecard Emissions Based on Spent Amount

Allocate the final scorecard emissions in Supplier Scorecard to the related allocated scorecard emissions in the Scope 3 Procurement Item based on the spent amount. Previously, allocations were based only on the ratio of calculated scope 3 emissions.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Growth license and the Net Zero Cloud External Engagement Management add-on license.

How: In Setup, find and select **Net Zero Settings**. Turn on Allocate Scorecard Emissions Based on Spent Amount.

SEE ALSO:

Salesforce Help: Enable Net Zero Cloud Features (can be outdated or unavailable during release preview)

Salesforce Help: Allocate Supplier Data to Procurement Items (can be outdated or unavailable during release preview)

New and Changed Objects in Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

Changed Objects

Specify the predefined disclosure definition version associated with the disclosure

Use the new `PredefinedDisclosureDefVersion` field on the Disclosure object.

Indicate whether or not a topic is material

Use the new `IsMaterial` field on the MaterialityTopic object.

Specify values to author disclosure reports in Google Docs

Use the new GoogleDocs or OmniscriptAndGoogleDocs values in the `AuthoringMode` field on the DisclosureDefinitionVersion object. These values are available only when Use Disclosure and Compliance Hub Plugin in Disclosure and Compliance Hub Settings is set to Google Docs.

Changed field type from ForeignKey to EnumOrId

This change results in the removal of the `DisclosureDefinitionId` field and addition of the `DisclosureDefinition` field. If you have any custom SoQL-based integration using the `DisclosureDefinitionId` field, modify the query to use the `DisclosureDefinition` field.

New Objects

Store information about the impact, risk, or opportunity

Use the new Impact Risk Opportunity object.

Store information about the assessment of ESG-related impacts, risks, and opportunities
Use the new Impact Risk Opportunity Assessment object.

Store information about the score of an impact, risk, or opportunity for an assessment
Use the new Impact Risk Opportunity Score object.

Create a junction between an impact risk opportunity assessment and a materiality topic
Use the new Impact Risk Opportunity Assessment Topic object.

Create a junction between an impact risk opportunity and a materiality topic
Use the new Impact Risk Opportunity Topic object.

Public Sector Solutions

Use Einstein to help caseworkers quickly get an overview of a benefit applicant's household. Build flexible job applications in which applicants can skip optional sections and complete required sections in their preferred sequence. Give supervisors a guided workflow to easily create tailored plans for employees on the Employee Experience portal. More easily migrate Dynamic Assessments across Salesforce orgs by using Metadata API.

IN THIS SECTION:

Help Caseworkers Quickly Learn About a Household with Einstein
When caseworkers review a benefit application, they can use Einstein to get an instant overview of the applicant's household. Learn about each member's name, age, and income, and their relationship to the applicant. Use the information to make faster, more informed decisions about the applicant's benefit eligibility.

Enhance Job Applications for Talent Recruitment Management
Organize questions in applications into well-defined sections. Identify required sections on applications, and the sections that applicants can skip. Give applicants the flexibility to complete the sections in their preferred sequence. Similarly, create intake forms with sections for complaints and referrals.

Easily Create Personalized Care Plans for Employees
Help employees' career development by using a guided flow to publish care plans for them on an Employee Experience cloud site. Start with a published care plan template, and add or remove goals and benefits to suit the employee's needs. Then, preview the plan and assign it to the employee.

Quickly Migrate Dynamic Assessments with Metadata API
Save the time and effort in migrating your Dynamic Assessments from a sandbox to production or across orgs by using Metadata APIs. Previously, you recreated the assessment questions, Omniscripts, and action plan templates in the target org.

Updated Metadata API Type in Public Sector Solutions
Access more metadata through this changed metadata type.

New and Changed Objects in Public Sector Solutions
Do more with these new and changed Public Sector Solutions 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.

- Action Plans

  Increase convenience of the users when working with action plans for their business processes. Enhance the user experience by automating updates for the action plans as the user completes the task action plan items.

- Business Rules Engine

  Monitor and manage the usage of Business Rules Engine components with the new Guardrail Connect API. Use transient attributes to temporarily store interim calculation results in an expression set. Activate and save expression sets in one step when copying them from templates. Create context-based expression sets easily, without marking steps as output. Retrieve datetime information in CSV decision tables by using the date/time data type. Track the CSV upload status for decision tables.

- Compliant Data Sharing

  Quickly deactivate Salesforce users who have Compliant Data Sharing records by using a new setting.

- Data Processing Engine

  Simplify field mapping in writeback nodes by using Einstein generative AI. Use the append and hierarchy nodes in Data Cloud to run batch transformations on large volumes of org data that you can later use for analytics and reporting. Ensure data integrity by using the composite writeback feature to group related records at run time, and write them back to the core. Download the failed records file and use it to debug the issues in composite writeback or CSV file ingestion when the Data Processing Engine definition run fails.

- Grantmaking

  Streamline the grant review process by supporting grant managers to batch-assign multiple applications to reviewers, saving time and boosting efficiency. Automate routine tasks with Stage Management to ensure accuracy and compliance through clearly defined stage criteria.

- Group Membership and Households

  Receive change events for more objects. Effortlessly add the right Members to your party relationship groups.

- Omnistudio

  Use Omnistudio with the Salesforce Lightning Design System 2 (SLDS 2) template for a refreshed user interface. OmniAnalytics is now enabled for guest users on Experience Cloud by default. Access customers' saved session information to create context-driven communications on your sites. In addition to improving usability, we made a few translation, accessibility, security, and deployment updates.

- Omnistudio Document Generation

  Ensure compatibility with the new document generation infrastructure and add flexibility to document generation workflows. Get increased hourly and daily limits for batch server-side document generation requests. Plan for the retirement of Document Generation 1.0 by switching to Document Generation 2.0. The enhancements in Document Generation 2.0 include a new custom fonts configuration, document previewer, and hybrid client-side processing. Use dynamic image tokens in document templates for server-side document generation.

- Outcome Management

  Manage your impact strategy more efficiently and improve consistency by entering multiple indicator results in a spreadsheet-like experience.

- Program and Case Management

  Create personalized care plans by setting client-specific goals in the Care Plan UI, making the plans more meaningful and motivating. Improve care plan quality and consistency and create compliant care plan templates from the existing ones.

- Record Rollup Definitions

  Aggregate tasks and events at a household or group level to help relationship managers stay organized and easily track the progress of events and tasks. Reduce clutter by deleting outdated and unused record rollup definitions. Edit the name and description of a definition for better clarity and usability.

Help Caseworkers Quickly Learn About a Household with Einstein

When caseworkers review a benefit application, they can use Einstein to get an instant overview of the applicant's household. Learn about each member's name, age, and income, and their relationship to the applicant. Use the information to make faster, more informed decisions about the applicant's benefit eligibility.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Public Sector Solutions is enabled, with the Einstein Platform add-on. To purchase the add-on, contact your Salesforce account executive.

SEE ALSO:

Salesforce Help: Built-In Einstein Generative AI Features (can be outdated or unavailable during release preview)

Salesforce Help: Get Household Overview (can be outdated or unavailable during release preview)

Enhance Job Applications for Talent Recruitment Management

Organize questions in applications into well-defined sections. Identify required sections on applications, and the sections that applicants can skip. Give applicants the flexibility to complete the sections in their preferred sequence. Similarly, create intake forms with sections for complaints and referrals.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Multi-Section Job Applications (can be outdated or unavailable during release preview)

Easily Create Personalized Care Plans for Employees

Help employees' career development by using a guided flow to publish care plans for them on an Employee Experience cloud site. Start with a published care plan template, and add or remove goals and benefits to suit the employee's needs. Then, preview the plan and assign it to the employee.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled, with the Employee Experience for Public Sector add-on.

Who: To use the guided flow, employee supervisors need the Employee Experience For Public Sector permission set license.

SEE ALSO:

Salesforce Help: Employee Experience for Public Sector Solutions (can be outdated or unavailable during release preview)

Quickly Migrate Dynamic Assessments with Metadata API

Save the time and effort in migrating your Dynamic Assessments from a sandbox to production or across orgs by using Metadata APIs. Previously, you recreated the assessment questions, Omniscripts, and action plan templates in the target org.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Dynamic Assessments Migration (can be outdated or unavailable during release preview)

Updated Metadata API Type in Public Sector Solutions

Access more metadata through this changed metadata type.

Retrieve the omni assessment tasks associated with an Omniscript

Use the new `OmniAssessmentTasks` field on the existing OmniScript metadata type.

New and Changed Objects in Public Sector Solutions

Do more with these new and changed Public Sector Solutions objects.

Define a section of an intake form, such as an application

Use the new IntakeFormSection object.

Relate an omni process to an omni assessment task

Use the new OmniProcessOmniAsmtTask object.

Relate a recruitment posting to an application form

Use the new `RecruitmentPosting` field on the existing ApplicationForm object.

REMOVED: The ActionPlanBaseTemplateAsgn object is removed

The ActionPlanBaseTemplateAsgn object is removed in API version 63.0 and later. Instead, use the ActionPlanTemplateAssignment object.

Specify the date when a job position was last filled

Use the new `LastFilledDate` field on the existing JobPosition object.

Specify the status of a job position

Use the new `Status` field on the existing JobPosition object.

Capture the date and time when a recruitment requisition was approved

Use the new `ApprovalDateTime` field on the existing RecruitmentRequisition object.

Capture the date and time when a vetting evaluation started

Use the new `VettingStartDateTime` field on the existing VettingEvaluation object.

Capture the date and time when a vetting evaluation ended

Use the new `VettingEndDateTime` field on the existing VettingEvaluation object.

Referral Marketing

Maximize the reach and impact of your referral promotions with WhatsApp messages. Gather insights about advocates and their referred friends with a prebuilt data kit.

IN THIS SECTION:

[Enhance Your Promotion's Reach with WhatsApp Messages](#)

Enable your brand to engage advocates and their friends by using WhatsApp as a mobile communication channel. To enhance a promotion's impact, configure personalized WhatsApp messages in the Referral Promotion guided setup. Advocates and their friends receive targeted messages directly through WhatsApp.

[Choose How to Verify Advocates' Data Cloud Segments](#)

Choose whether the Refer A Friend widget and the Referral Advocate Enrollments API use the Query API or data graphs to verify that advocates belong to the Data Cloud segments associated with referral promotions. Previously, Query API was used by default with an option to switch to data graphs.

[Sync Referral Marketing Data with Prebuilt Data Streams](#)
Easily send data from Referral Marketing objects to Data Cloud by using the brand-new Referral Marketing data kit. The data kit comes with data streams for all Referral Marketing objects.

[Get Predictions on Contacts' Likelihood to Refer](#)
Get accurate predictions on the likelihood of contacts referring their friends. Gain insights into your contacts, identify individuals with higher referral potential, and optimize promotional efforts. By focusing on individuals most likely to refer, organizations can manage marketing costs more effectively, reduce member dissatisfaction, and drive greater referral success.

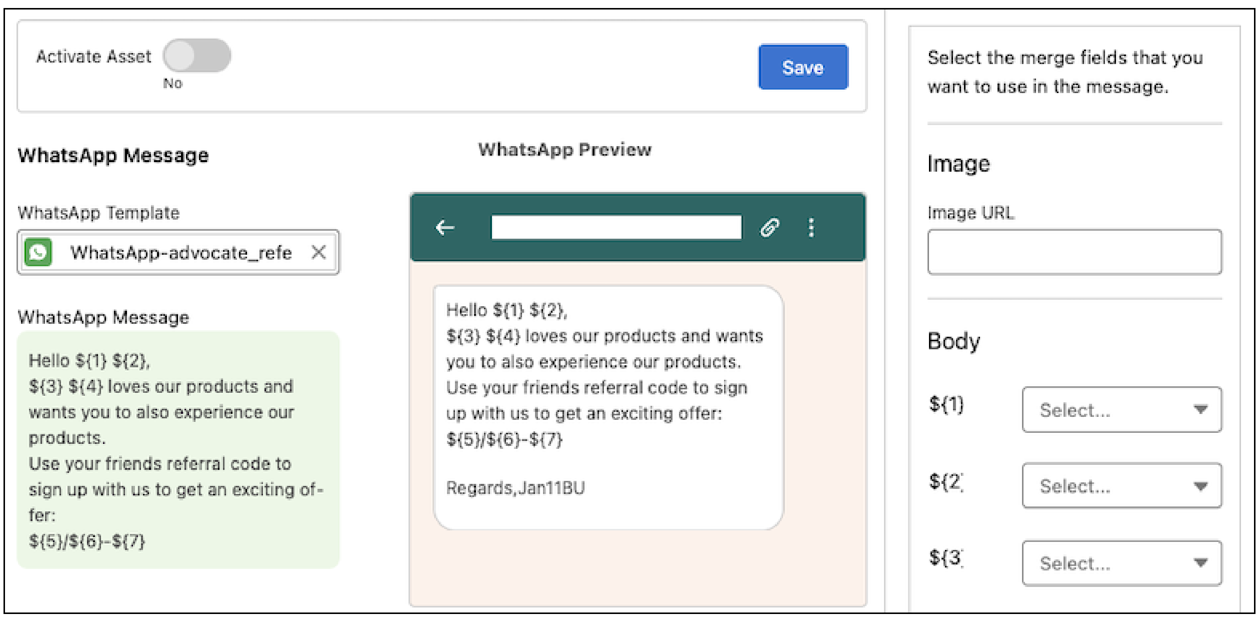
[New and Changed Objects in Referral Marketing](#)
Access and manage your Referral Marketing data through these objects.

Enhance Your Promotion's Reach with WhatsApp Messages

Enable your brand to engage advocates and their friends by using WhatsApp as a mobile communication channel. To enhance a promotion's impact, configure personalized WhatsApp messages in the Referral Promotion guided setup. Advocates and their friends receive targeted messages directly through WhatsApp.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is available.

How: On the Communication Assets step in the Referral Promotion guided setup, select WhatsApp as the communication channel. Select and personalize the messages for each promotion stage.



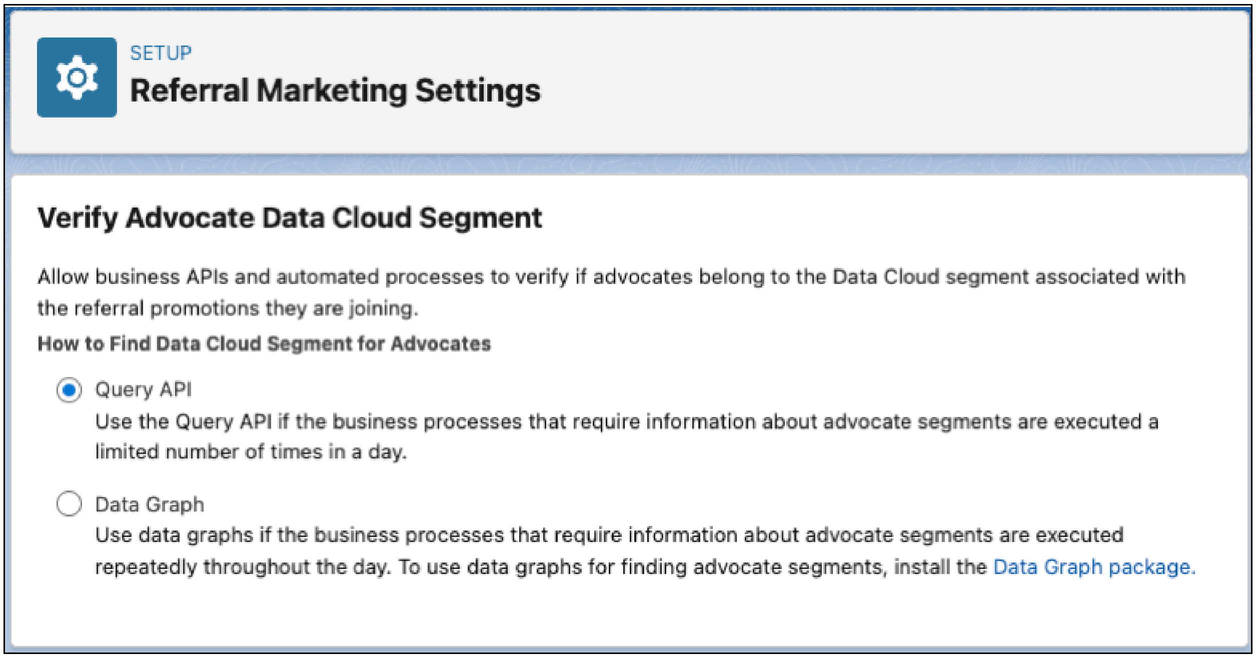
SEE ALSO:

Salesforce Help: WhatsApp Setup (can be outdated or unavailable during release preview)

Choose How to Verify Advocates' Data Cloud Segments

Choose whether the Refer A Friend widget and the Referral Advocate Enrollments API use the Query API or data graphs to verify that advocates belong to the Data Cloud segments associated with referral promotions. Previously, Query API was used by default with an option to switch to data graphs.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Referral Marketing is available.



SEE ALSO:

Salesforce Help: Enable Advocate Segment Verification (can be outdated or unavailable during release preview)

Sync Referral Marketing Data with Prebuilt Data Streams

Easily send data from Referral Marketing objects to Data Cloud by using the brand-new Referral Marketing data kit. The data kit comes with data streams for all Referral Marketing objects.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Referral Marketing and Data Cloud.

SEE ALSO:

Salesforce Help: Data Kit for Referral Marketing (can be outdated or unavailable during release preview)

Get Predictions on Contacts' Likelihood to Refer

Get accurate predictions on the likelihood of contacts referring their friends. Gain insights into your contacts, identify individuals with higher referral potential, and optimize promotional efforts. By focusing on individuals most likely to refer, organizations can manage marketing costs more effectively, reduce member dissatisfaction, and drive greater referral success.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Referral Marketing, CRM Analytics for Loyalty Management, and Scoring Framework are enabled.

Who: This feature is available to users with the Referral Marketing and Loyalty Analytics Apps permission set licenses.

How: To get predictions, go to the Scoring Framework page in Setup. Create a CRM Analytics template configuration by using the Contacts' Likelihood to Refer template configuration type.

New and Changed Objects in Referral Marketing

Access and manage your Referral Marketing data through these objects.

Select a type of communication channel for a promotion.
Use the new CommunicationChannelType object.

Select a template for the communication channels of a promotion.
Use the new CommunicationChannelTemplate object.

Select a communication channel for the internal organization unit.
Use the new InternalOrgUnitCommChannel object.

Associate a promotion stage with a communication channel template.
Use the new PromStageCommChannelTmpl object.

Salesforce for Education

Use the power of Agentforce to answer prospective students' questions and to enhance the work of relationship officers and advancement researchers. Manage student information with the enhanced data model that supports Student Information System (SIS) functionality, including course scheduling and a unified student profile. Strengthen your advancement efforts with new objects for prospect research and new fields on Fundraising objects for advancement-specific data processing. Understand student needs better with Einstein academic insights, enhancements to Pulse Checks, and an improved appointment-scheduling workflow. Streamline the application review process by using rubrics and scoring for admissions decisions and Stage Management for application reviews.

IN THIS SECTION:

Autonomously Answer and Support Prospective Students
Grow your admissions team's capacity in minutes. With Student Recruitment Agent for Agentforce, prospective students get immediate answers to their questions about application processes, deadlines, cost of attendance, financial aid, and more. The agent is preconfigured to respond with content from both published knowledge articles and applicable recruitment and admissions objects.

Gain Meaningful Insights with the Philanthropic Research Agent
Empower relationship officers with insights that enhance philanthropic research and engagement. The philanthropic research AI agent helps relationship officers and researchers by using party philanthropic milestone records to answer questions about prospects.

Consolidate Information in Student Records with the Student Management App
Give staff and faculty quick access to important student information. In a single, accessible view, include emergency contacts, relationships, student contact information, and enrollment data in student records. Add a relationship graph to convey students' relationships to households. Assign access to advisors, registrars, and faculty.

Get More from the Intelligent Degree Planner and the Learner Progress View
Use the Intelligent Degree Planner and the Learner Progress view to view courses that a student retakes, and help students plan their academic careers more effectively with new enrollment statuses. Advisors can now compare program plans for students. Customize the view for advisors by using the Compare Program Plans flow template. Add a button that staff can use to run a program plan comparison from records such as cases.

Streamline Advancement-Specific Data Processing
Manage and report on advancement designations by capturing important reporting details. Advancement operations teams can track a variety of funds, including endowed, capital, and operational, with flexible fields for additional reporting information. Ensure consistent data collection for institutional reporting, and support compliance with industry reporting standards. This feature also introduces a person's role with the institution, graduation status, giving levels, and the purpose of their gifts.

Drive Comprehensive Prospect Research Activities

Store and manage detailed prospect research data for alumni, donors, and households. Relationship officers and prospect researchers can track and analyze wealth indicators, philanthropic events, research assessments, and key milestones to build a complete picture of activity. This long-term view supports continuous research efforts, so that your institution can uncover deeper insights and strengthen relationships based on a lifetime of engagement and activity.

Unlock Deeper Insights with Generational Categories

Better understand your alumni through analysis of generational cohort and graduation status. Relationship officers and prospect researchers can now categorize alumni by groups like baby boomers, Gen X, millennials, and Gen Z. They can also group alumni into segments by graduation date.

Gain Holistic Student Insights and Visualize Learner Progress

Get the latest student data from external systems using Data Cloud for Education: Holistic Student Insights. With Einstein generative AI, get insights on a student, including their academic, current term, course offering participant, attendance, and course participation details. Use Visual Indicator to show a student's performance in the current term based on their course component scores. You can use custom categories such as At Risk, On Track, and Needs Attention.

Get a Unified View of Student Data with Learner Profile

Use the learner profile record page to get a unified view of student data from multiple related objects. Search, sort, and filter the records to create student list views, and then perform bulk actions on the lists. Schedule a batch job with the Update Learner Profiles with CRM Data definition to automatically create and update learner profile records.

Schedule Appointments Efficiently with a New Lightning Web Component

Use the new Lightning web component, Schedule Appointment, on your Experience Cloud site to streamline the appointment booking process. With the new workflow, students can check whether their advisor is available and see the available time slots before they make the appointment.

Capture Student Sentiment with Icon Responses in Pulse Checks

Create pulse check assessment questions with the icon data type so students can respond with emojis. Then, create a rating scale by assigning numeric values to the icon responses and view the student's sentiments over time on score graphs.

Score Applications with Rubrics

Make faster, more consistent, and more equitable admissions decisions with Application Scoring. Processors and reviewers can now use rubrics to score applications anytime after they're received. Administrators can define program-specific rubrics with weighted or unweighted criteria and ratings and assign rubrics to application types. After a processor or reviewer rates an application, a decision maker sees a score that captures the reviewer's recommendation and comments.

Streamline Admissions Reviews with Stage Management

Automate complex application processes with greater visibility and control. Define stage transition criteria and create a transition plan for each stage of the application review workflow. In addition to Case and Opportunity, stage management is now available for use with these Education Cloud objects: Application Review, Application Decision, and Individual Application. Give processors and reviewers a comprehensive view of the progress across stages with the Record Stage Overview Lightning web component.

New and Changed Objects in Education Cloud

Do more with the new and updated Education Cloud objects.

New and Changed Data Model Objects in Education Cloud

Access new education-specific data model objects (DMOs) within Data Cloud to bring learner data from external learning management, student information, engagement, advancement, and enterprise resource planning systems into Data Cloud. Then, you can harmonize the data to build segments, create calculated insights, and analyze key metrics.

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.

- Context Service

  Simplify the sharing and consumption of data for business applications by using Context Service. Context Service is a general module that connects applications and processes. It makes it easy to find and use data across different industries at every step of the digital process. Build a structure for efficient data access with context definitions. Map the nodes and attributes defined in your definition to the right input data sources. Import and export context definitions between orgs. Invoke and hydrate context instances through invocable actions by using Salesforce Flows.

- Fundraising

  Updates to Fundraising make it easy to manage and track campaign and donor information. You can automatically generate multiple outreach source codes at once, add interest tags to outreach source codes, get soft credit metrics at a glance, automatically update data rollups, and map custom fields for use in gift entry. You can also set up page layouts for summary objects, use the BP API to create or manage pledges, and customize how RFM Scoring is calculated.

- Stage Management

  With Stage Management, simplify the implementation of the application process with greater visibility and control. Define stage transition criteria and create a transition plan for each stage of the application review workflow. Your users can have a comprehensive view of the record stage progress by using the Record Stage Overview Lightning Web Component.

Autonomously Answer and Support Prospective Students

Grow your admissions team's capacity in minutes. With Student Recruitment Agent for Agentforce, prospective students get immediate answers to their questions about application processes, deadlines, cost of attendance, financial aid, and more. The agent is preconfigured to respond with content from both published knowledge articles and applicable recruitment and admissions objects.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license and the applicable Agentforce add-on license are enabled.

Who: Users with the Education Cloud Full Access permission set can configure Student Recruitment Agent. Any user, including guest users, can use the Student Recruitment Agent.

Gain Meaningful Insights with the Philanthropic Research Agent

Empower relationship officers with insights that enhance philanthropic research and engagement. The philanthropic research AI agent helps relationship officers and researchers by using party philanthropic milestone records to answer questions about prospects.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license and the applicable Agentforce add-on license are enabled. For additional information, contact your Salesforce account executive.

Who: Users with the Education Cloud Full Access permission set can configure and use the Philanthropic Research Agent.

Consolidate Information in Student Records with the Student Management App

Give staff and faculty quick access to important student information. In a single, accessible view, include emergency contacts, relationships, student contact information, and enrollment data in student records. Add a relationship graph to convey students' relationships to households. Assign access to advisors, registrars, and faculty.

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.

Get More from the Intelligent Degree Planner and the Learner Progress View

Use the Intelligent Degree Planner and the Learner Progress view to view courses that a student retakes, and help students plan their academic careers more effectively with new enrollment statuses. Advisors can now compare program plans for students. Customize the view for advisors by using the Compare Program Plans flow template. Add a button that staff can use to run a program plan comparison from records such as cases.

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 set up and manage degree plans in the CRM. Users with the Education Cloud Experience Cloud Access permission set can create degree plans on your Experience Cloud site.

SEE ALSO:

Salesforce Help: Intelligent Program Comparison Engine (can be outdated or unavailable during release preview)

Streamline Advancement-Specific Data Processing

Manage and report on advancement designations by capturing important reporting details. Advancement operations teams can track a variety of funds, including endowed, capital, and operational, with flexible fields for additional reporting information. Ensure consistent data collection for institutional reporting, and support compliance with industry reporting standards. This feature also introduces a person's role with the institution, graduation status, giving levels, and the purpose of their gifts.

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.

Drive Comprehensive Prospect Research Activities

Store and manage detailed prospect research data for alumni, donors, and households. Relationship officers and prospect researchers can track and analyze wealth indicators, philanthropic events, research assessments, and key milestones to build a complete picture of activity. This long-term view supports continuous research efforts, so that your institution can uncover deeper insights and strengthen relationships based on a lifetime of engagement and activity.

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.

Unlock Deeper Insights with Generational Categories

Better understand your alumni through analysis of generational cohort and graduation status. Relationship officers and prospect researchers can now categorize alumni by groups like baby boomers, Gen X, millennials, and Gen Z. They can also group alumni into segments by graduation date.

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.

Gain Holistic Student Insights and Visualize Learner Progress

Get the latest student data from external systems using Data Cloud for Education: Holistic Student Insights. With Einstein generative AI, get insights on a student, including their academic, current term, course offering participant, attendance, and course participation details. Use Visual Indicator to show a student's performance in the current term based on their course component scores. You can use custom categories such as At Risk, On Track, and Needs Attention.

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.

Who: Only users with the Education Cloud Full Access and Data Cloud permission sets can use Data Cloud for Education.

SEE ALSO:

Salesforce Help: Student Insights for Advisors (can be outdated or unavailable during release preview)

Get a Unified View of Student Data with Learner Profile

Use the learner profile record page to get a unified view of student data from multiple related objects. Search, sort, and filter the records to create student list views, and then perform bulk actions on the lists. Schedule a batch job with the Update Learner Profiles with CRM Data definition to automatically create and update learner profile records.

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 configure this feature.

SEE ALSO:

Salesforce Help: Learner Profile for Advisors (can be outdated or unavailable during release preview)

Schedule Appointments Efficiently with a New Lightning Web Component

Use the new Lightning web component, Schedule Appointment, on your Experience Cloud site to streamline the appointment booking process. With the new workflow, students can check whether their advisor is available and see the available time slots before they make the appointment.

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: Schedule Appointments with My Appointments Header (can be outdated or unavailable during release preview)

Capture Student Sentiment with Icon Responses in Pulse Checks

Create pulse check assessment questions with the icon data type so students can respond with emojis. Then, create a rating scale by assigning numeric values to the icon responses and view the student's sentiments over time on score graphs.

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 Learner Feedback (can be outdated or unavailable during release preview)

Score Applications with Rubrics

Make faster, more consistent, and more equitable admissions decisions with Application Scoring. Processors and reviewers can now use rubrics to score applications anytime after they're received. Administrators can define program-specific rubrics with weighted or unweighted criteria and ratings and assign rubrics to application types. After a processor or reviewer rates an application, a decision maker sees a score that captures the reviewer's recommendation and comments.

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.

Streamline Admissions Reviews with Stage Management

Automate complex application processes with greater visibility and control. Define stage transition criteria and create a transition plan for each stage of the application review workflow. In addition to Case and Opportunity, stage management is now available for use with these Education Cloud objects: Application Review, Application Decision, and Individual Application. Give processors and reviewers a comprehensive view of the progress across stages with the Record Stage Overview Lightning web component.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

Who: Users with the Stage Management Design User permission set can configure this feature.

SEE ALSO:

Salesforce Help: Verify, Review, and Decide on Applications (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 learner's profile
Use the new LearnerProfile object.

Associate a summary with a course offering participant
Use the new `Summary` field on the CourseOfferingParticipant object.

Associate an assessment question version choice with an assessment question response
Use the new `AssessmentQuestionVerChoice` field on the AssessmentQuestionResponse object.

Represent the resources required for the execution of an academic term grade point average calculation policy rule
Use the new AcademicTermGpaCalcEvent object.

Represent a junction between a regulatory code and a regulation clause version
Use the new RgltyCodeRegClauseVer object.

Represent a junction between a regulatory code violation and a regulation clause version

Use the new RgltyCodeViolRegClVer object.

Specify the usage type for a business operations process

Use the new `UsageType` field on the BusinessOperationsProcess object.

Specify the usage type for a compliance control

Use the new `UsageType` field on the ComplianceControl object.

Represent more details about a student's academic term

Use the new `AcademicStanding` field on the AcademicTermEnrollment object.

Picklist values for `AcademicStanding`:

- Good Standing
- HonorsDeans List
- Academic Warning
- Academic Probation
- Academic Dismissal
- Required Withdrawal
- Reinstatement Status

Specify more parameters for assessing an application to an institution

Use the new fields on the ActionPlanTemplateAssignment object: `AssignmentQueueName`, `AssignmentSize`, and `AssignmentType`. The picklist value for `AssignmentType` is Staff Review.

Represent the calculated score for a reviewer's assessment of an application to an institution

Use the new `Score` field on the ApplicationDecision, ApplicationReview, and Assessment objects.

Represent a learner's participation in a course more clearly

Use the new labels added to the `ParticipantResultStatus` field on the CourseOfferingPtcpResult object. The new labels are: Failed, Passed, Withdrew.

Indicate whether a course offering is active

Use the new `IsActive` field on the CourseOffering object.

Represent a rubric criterion for a course offering

Use the new CourseOfrgRubricCriterion object.

Represent the grade that a course offering participant received for an assignment, quiz, or other course offering activity

Use the new CourseOfrPtcpActvtyGrd object.

Represent more course participation statuses

Use the new picklist values on the `ParticipationStatus` field on the CourseOfferingParticipant object: Declined Waitlist, Dropped, Registering.

Represent timeframe, recurrence, and type, such as class or lab, in a course schedule

Use the new fields on the CourseOfferingSchedule object: `EndDate`, `RecurrencePattern`, `StartDate`, and `Type`.

Represent timeframe, recurrence, and type, such as class or lab, in a template for course schedule

Use the new fields on the CourseOfferingSchedule object: `EndDate`, `RecurrencePattern`, `StartDate`, and `Type`.

Record permission to make FERPA disclosures

Use the two new fields on the ContactProfile object: `HasFerpaParentalDisclosure`, `HasFerpaThrdPtyDisclosure`.

Represent the review and decision associated with an individual application task

Use the new fields on the IndividualApplicationTask object: `ApplicationDecision`, `ApplicationReview`.

Represent more details in a learner's program plan

Use the new fields on the LearnerProgram object: `CatalogYear`, `ClassCohort`, and `ExpectedGraduationDate`.

SEE ALSO:

Education Cloud Developer Guide: Education Cloud Standard Objects (can be outdated or unavailable during release preview)

New and Changed Data Model Objects in Education Cloud

Access new education-specific data model objects (DMOs) within Data Cloud to bring learner data from external learning management, student information, engagement, advancement, and enterprise resource planning systems into Data Cloud. Then, you can harmonize the data to build segments, create calculated insights, and analyze key metrics.

Represent a learner's activity in the Learning Management System, for example, logins

Use the new LearnerLearningSystemActivity object.

Represent a learner's activity on campus, for example, use of a library or gym

Use the new LearnerCampusSpacesActivity object.

Represent meal card transactions

Use the new MealCardActivityId object.

SEE ALSO:

Salesforce Help: Education Cloud Data Model Objects (can be outdated or unavailable during release preview)

Salesforce for Nonprofits

Customize Nonprofit Cloud with the improved Fundraising, Grantmaking, and Program and Case Management features. Leverage the enhancements to gift entry, outreach source code generation, rollups, scoring frameworks, and the Business Process API in Fundraising. Streamline grantmaking by batch assigning reviews and using the new stage management feature. Create multiple indicator results and custom care plan goals, as well as clone care plan templates in Program and Case Management.

IN THIS SECTION:

Nonprofit Cloud

Nonprofit Cloud improved Fundraising, Grantmaking, and Program and Case Management in this release. Enhancements to gift entry, outreach source code generation, rollups, scoring frameworks, and the Business Process API are available in Fundraising. Batch assigning reviews and a stage management feature to streamline grantmaking processes are new to Grantmaking. The ability to create multiple indicator results and custom care plan goals, as well as clone care plan templates is available in Program and Case Management with this release.

Salesforce for Nonprofits Managed Packages

The foundationConnect managed package is retiring.

Nonprofit Cloud

Nonprofit Cloud improved Fundraising, Grantmaking, and Program and Case Management in this release. Enhancements to gift entry, outreach source code generation, rollups, scoring frameworks, and the Business Process API are available in Fundraising. Batch assigning reviews and a stage management feature to streamline grantmaking processes are new to Grantmaking. The ability to create multiple indicator results and custom care plan goals, as well as clone care plan templates is available in Program and Case Management with this release.

- **Fundraising**

  Easily manage and track campaign and donor information with Nonprofit Cloud for Fundraising. Quickly generate multiple outreach source codes, add interest tags to outreach source codes, get soft credit metrics at-a-glance, automatically update data rollups, and map custom fields in gift entry. Additionally, set up page layouts for summary objects, use the Business Process (BP) API to create or manage pledges, and customize how Recency, Frequency, and Monetary Value (RFM) Scoring is calculated.

- **Outcome Management**

  Manage your impact strategy more efficiently and improve consistency by entering multiple indicator results in a spreadsheet-like experience.

- **Program and Case Management**

  Create personalized care plans by setting client-specific goals in the Care Plan UI, making the plans more meaningful and motivating. Improve care plan quality and consistency and create compliant care plan templates from the existing ones.

- **Grantmaking**

  Streamline the grant review process by supporting grant managers to batch-assign multiple applications to reviewers, saving time and boosting efficiency. Automate routine tasks with Stage Management to ensure accuracy and compliance through clearly defined stage criteria.

New and Enhanced Common Features for Nonprofit Cloud

Nonprofit Cloud includes some features that are available across the clouds and products in Industries. Use these features to extend and customize Nonprofit Cloud based on your business needs.

- **Action Launcher**

  Contact center agents can now find recommended actions based on semantic search.

- **Action Plans**

  Increase convenience of the users when working with action plans for their business processes. Enhance the user experience by automating updates for the action plans as the user completes the task action plan items.

- **Business Rules Engine**

  Monitor and manage the usage of Business Rules Engine components with the new Guardrail Connect API. Use transient attributes to temporarily store interim calculation results in an expression set. Activate and save expression sets in one step when copying them from templates. Create context-based expression sets easily, without marking steps as output. Retrieve datetime information in CSV decision tables by using the date/time data type. Track the CSV upload status for decision tables.

- **Compliant Data Sharing**

  Quickly deactivate Salesforce users who have Compliant Data Sharing records using a new setting.

- **Data Processing Engine**

  Simplify field mapping in writeback nodes by using Einstein generative AI. Use the append and hierarchy nodes in Data Cloud to run batch transformations on large volumes of org data that you can later use for analytics and reporting. Ensure data integrity by using the composite writeback feature to group related records at run time, and write them back to the core. Download the failed records file and use it to debug the issues in composite writeback or CSV file ingestion when the Data Processing Engine definition run fails.

- **Group Membership and Households**

  Receive change events for more objects. Effortlessly add the right Members to your party relationship groups.

- **Omnistudio Document Generation**

  Ensure compatibility with the new document generation infrastructure and add flexibility to document generation workflows. Get increased hourly and daily limits for batch server-side document generation requests. Plan for the retirement of Document Generation 1.0 by switching to Document Generation 2.0. The enhancements in Document Generation 2.0 include a new custom fonts configuration, document previewer, and hybrid client-side processing. Use dynamic image tokens in document templates for server-side document generation.

- **Record Rollup Definitions**

  Aggregate tasks and events at a household or group level to help relationship managers stay organized and easily track the progress of events and tasks. Reduce clutter by deleting outdated and unused record rollup definitions. Edit the name and description of a definition for better clarity and usability.

Salesforce for Nonprofits Managed Packages

The foundationConnect managed package is retiring.

IN THIS SECTION:

foundationConnect is Being Retired

Salesforce is retiring foundationConnect. After January 31, 2025, you can't renew subscriptions for this product, and foundationConnect is scheduled for retirement on January 31, 2026.

foundationConnect is Being Retired

Salesforce is retiring foundationConnect. After January 31, 2025, you can't renew subscriptions for this product, and foundationConnect is scheduled for retirement on January 31, 2026.

Where: This change applies to all foundationConnect products and editions.

Why: Grantmaking is available as a new product option. Learn more in Introduction for Grantmaking and contact your Account Executive with any questions.

Vlocity Contract Lifecycle Management

Ensure compatibility with the new document generation infrastructure and add greater flexibility to the workflows. Transition from retired Visualforce-based Omniscripts to Lightning Web Component-based Omniscripts. Prepare for the retirement of Document Generation 1.0 by upgrading to Document Generation 2.0, which introduces features like custom font configuration, a document previewer, and hybrid client-side processing.

IN THIS SECTION:

Visualforce-Based Document Generation Omniscripts Are Being Retired

The singleDocxVF, multiDocxVF, singleWebVF, and generic document generation Omniscripts are retired. Salesforce no longer supports these Omniscripts and their clones. To use Omniscripts for document generation, switch to Lightning Web Component-based (LWC) Omniscripts. Use the sample LWC Omniscripts, such as singleDocxLwc, multiDocxLwc, and singleWebLwc, in the Industries Communications, Media, Energy & Utilities, and Insurance managed packages.

[Document Generation 1.0 is Being Retired]

Document Generation 1.0 is scheduled for retirement on July 31, 2025. Document Generation 1.0 refers to the document generation within the Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages up to the Winter '25 release. To continue to use document generation capabilities, switch to Document Generation 2.0, which includes updates to the client-side document generation processing, the PDF previewer, and the custom font configuration.

[Enhance Document Generation with Document Generation 2.0]

Make document generation more robust without significantly altering your day-to-day experience or existing features within the Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages. You must provide in-app consent to transition to Document Generation 2.0, which includes changes to the client-side document generation process, the PDF previewer's look and feel, and minor changes to the custom font configuration. The client-side document generation adopts a hybrid approach, processing .docx files locally within the package and leveraging Hyperforce infrastructure for limited operations, ensuring consistency with server-side generation while adhering to its limits

Visualforce-Based Document Generation Omniscripts Are Being Retired

The singleDocxVF, multiDocxVF, singleWebVF, and generic document generation Omniscripts are retired. Salesforce no longer supports these Omniscripts and their clones. To use Omniscripts for document generation, switch to Lightning Web Component-based (LWC) Omniscripts. Use the sample LWC Omniscripts, such as singleDocxLwc, multiDocxLwc, and singleWebLwc, in the Industries Communications, Media, Energy & Utilities, and Insurance managed packages.

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

How: From the App Launcher, find and select **Vlocity Templates**. Then, install and activate the Lightning Experience Web Component-based Omniscripts available in the DocGenerationSampleLwc datapack.

SEE ALSO:

[Visualforce Omniscripts Retirement]

[Install and Activate Other Sample Omniscripts for CME Winter '23 and Later Releases]

[Generic Document Generation]

[docGenerationSample/singleDocxVFt]

[docGenerationSample/multiDocxVF]

[docGenerationSample/singleWebVF]

[docGenerationSample/singleDocxLwc]

[docGenerationSample/multiDocxLwc]

[docGenerationSample/singleWebLwc]

Document Generation 1.0 is Being Retired

Document Generation 1.0 is scheduled for retirement on July 31, 2025. Document Generation 1.0 refers to the document generation within the Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages up to the Winter '25 release. To continue to use document generation capabilities, switch to Document Generation 2.0, which includes updates to the client-side document generation processing, the PDF previewer, and the custom font configuration.

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

When: Document Generation 1.0 is set to retire by July 31, 2025. To continue access to document generation capabilities, upgrade to the Spring '25 managed package, provide in-app consent, and configure Document Generation 2.0.

How: To continue to access document generation capabilities, upgrade to the Spring '25 managed package, provide in-app consent, and perform post-upgrade steps to use Document Generation 2.0 services and features.

SEE ALSO:

Document Generation 1.0 Retirement

Changes to Document Generation Process and Previewer in Spring '25

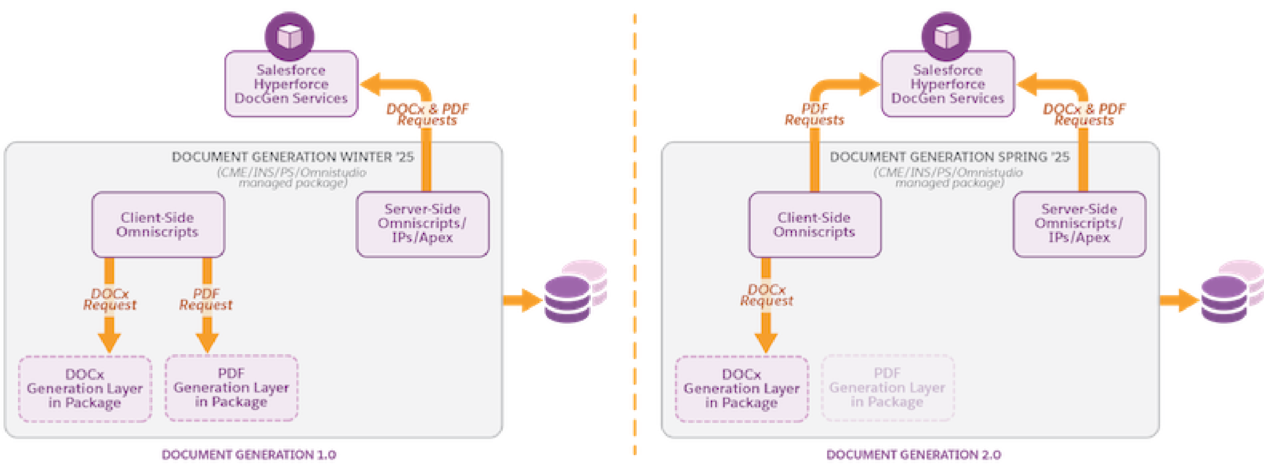
Document Generation Processing with Document Generation 2.0

Enhance Document Generation with Document Generation 2.0

Make document generation more robust without significantly altering your day-to-day experience or existing features within the Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages. You must provide in-app consent to transition to Document Generation 2.0, which includes changes to the client-side document generation process, the PDF previewer's look and feel, and minor changes to the custom font configuration. The client-side document generation adopts a hybrid approach, processing .docx files locally within the package and leveraging Hyperforce infrastructure for limited operations, ensuring consistency with server-side generation while adhering to its limits

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

How: From the App Launcher, find and select **Document Generation 2.0 Notification**. Then, click **Server-Side Notice**. Review the terms and conditions, complete the Document Generation 2.0 installation.



IN THIS SECTION:

Migrate and Sync Custom Fonts

Manage your custom fonts in Document Generation 2.0 by migrating them to a centralized repository and syncing them across orgs. If you add, delete, or modify font files, sync the fonts again to ensure the changes are applied.

SEE ALSO:

Document Generation 1.0 Retirement

Changes to Document Generation Process and Previewer in Spring '25

Get Started With Document Generation 2.0

Migrate and Sync Custom Fonts

Manage your custom fonts in Document Generation 2.0 by migrating them to a centralized repository and syncing them across orgs. If you add, delete, or modify font files, sync the fonts again to ensure the changes are applied.

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

Who: To migrate and sync fonts, users need the DocGen Designer permission set.

How: From Setup, in the Quick Find box, enter `Document Generation` and select **Custom Fonts Configuration**. To migrate your custom fonts, transfer them from Static Resources to the centralized Custom Fonts Library and click **Migrate**. To sync your custom fonts, click **Sync**.

Industries Common Features

Some Salesforce Industries products share features, and we've enhanced efficiency and scalability across industries. Business Rules Engine offers greater flexibility with transient attributes and context-based expression sets, while Collections helps minimize delinquencies and optimize debt collection. Cross-Object Field History tracks related record changes in a single view, and Data Processing Engine leverages Einstein Generative AI for field mapping suggestions. Group Membership and Households features simplify member management, while Industries CPQ improves catalog management and promotional strategies. MuleSoft integration apps now run in private spaces, and Omnistudio Document Generation 2.0 elevates document generation processes. Program and Case Management introduces care plan templates and client-specific goal-setting. Record Rollup Definitions allow aggregation and deletion of unused definitions, while Stage Management tracks stage transitions and progress toward key milestones. We've also made enhancements to action launcher, context services, decision table, record rollup definitions, and stage management features.

IN THIS SECTION:

AI Accelerator and Scoring Framework

Build and deploy propensity models effortlessly by using Scoring Framework. Define template configurations to create CRM Analytics apps with Einstein Discovery models, and recipes without writing any code.

Action Launcher

Contact center agents can now find recommended actions based on semantic search.

Action Plans

Increase convenience of the users when working with action plans for their business processes. Enhance the user experience by automating updates for the action plans as the user completes the task action plan items.

Business Compliance Suite

Make sure that your organization meets regulatory requirements, internal policies, and industry standards by using the compliance management solution, Business Compliance Suite. Create validation procedures with compliance controls to avoid non-compliance and to achieve ongoing regulatory compliance. Prevent compliance violations through compliance checks and compliance execution features. Draft clauses for regulations by using generative AI for quickly scanning a regulation document and providing a list of regulation clauses. Demonstrate compliance by using the audit trail of compliance control executions tied to regulations and policies.

Business Rules Engine

Monitor and manage the usage of Business Rules Engine components with the new Guardrail Connect API. Use transient attributes to temporarily store interim calculation results in an expression set. Activate and save expression sets in one step when copying them from templates. Create context-based expression sets easily, without marking steps as output. Retrieve datetime information in CSV decision tables by using the date/time data type. Track the CSV upload status for decision tables.

Collections

Financial institutions and businesses can streamline their collection processes, reduce delinquencies, and maintain positive customer relationships. Effectively manage collection plans and related details by ingesting data from third-party systems with CSV File Import and Composite Graph API. Simplify client interactions by using the prebuilt features in the Collections console app. Collections specialists can create promise-to-pay agreements, generate and send payment links, and request direct debit to the core banking system. Additionally, Salesforce Pay Now provides additional payment options, and MuleSoft integration expedites the collection process and improves overall cash flow.

Compliant Data Sharing

Quickly deactivate Salesforce users who have Compliant Data Sharing records using a new setting.

Context Service

Improve performance and minimize repetitive data retrieval from the database by using reference definitions. Automatically populate data in a context definition by using system information nodes. Store temporary data changes in the cache for a context definition, without saving them to the database by using the Transient option. Query, update, and delete context instances by using flow actions.

Cross-Object Field History (Beta)

Track and visualize field changes across related objects in a single view.

Data Processing Engine

Simplify field mapping in writeback nodes by using Einstein generative AI. Use the append and hierarchy nodes in Data Cloud to run batch transformations on large volumes of org data that you can later use for analytics and reporting. Ensure data integrity by using the composite writeback feature to group related records at run time, and write them back to the core. Download the failed records file and use it to debug the issues in composite writeback or CSV file ingestion when the Data Processing Engine definition run fails.

Einstein Autofill (Beta)

Streamline form completion by providing your teams access to the AI-powered Einstein Autofill feature.

Fundraising

Easily manage and track campaign and donor information with Nonprofit Cloud for Fundraising. Quickly generate multiple outreach source codes, add interest tags to outreach source codes, get soft credit metrics at-a-glance, automatically update data rollups, and map custom fields in gift entry. Additionally, set up page layouts for summary objects, use the Business Process (BP) API to create or manage pledges, and customize how Recency, Frequency, and Monetary Value (RFM) Scoring is calculated.

Grantmaking

Streamline the grant review process by supporting grant managers to batch-assign multiple applications to reviewers, saving time and boosting efficiency. Automate routine tasks with Stage Management to ensure accuracy and compliance through clearly defined stage criteria.

Group Membership and Households

Receive change events for more objects. Effortlessly add the right Members to your party relationship groups.

Industries Configure, Price, Quote (CPQ)

Spring 25 brings enhancements to streamline catalog management, promotions, and user experiences. Updates include automated duplicate offer resolution, seamless DC–CPQ integration, support for large promotion bundles, and timezone-aware catalog data. Additional features such as API versioning and anonymous user pricing offer greater flexibility and accuracy. These changes simplify processes, enhance efficiency, and improve overall performance.

Integration Solutions with MuleSoft

Save and reuse the configuration details when you enable an integration to connect your Salesforce org to an external system.

Omnistudio Document Generation

Ensure compatibility with the new document generation infrastructure and add flexibility to document generation workflows. Get increased hourly and daily limits for batch server-side document generation requests. Plan for the retirement of Document Generation 1.0 by switching to Document Generation 2.0. The enhancements in Document Generation 2.0 include a new custom fonts configuration, document previewer, and hybrid client-side processing. Use dynamic image tokens in document templates for server-side document generation.

Outcome Management

Manage your impact strategy more efficiently and improve consistency by entering multiple indicator results in a spreadsheet-like experience.

Program and Case Management

Create personalized care plans by setting client-specific goals in the Care Plan UI, making the plans more meaningful and motivating. Improve care plan quality and consistency and create compliant care plan templates from the existing ones.

Record Rollup Definitions

Aggregate tasks and events at a household or group level to help relationship managers stay organized and easily track the progress of events and tasks. Reduce clutter by deleting outdated and unused record rollup definitions. Edit the name and description of a definition for better clarity and usability.

Stage Management

Ensure alignment with overarching business goals by declaratively controlling parent object stage transitions based on child object criteria. Save time and effort by cloning stage definitions for similar business processes across different record types. Track progress towards a specific stage with the new Milestone step type. Optimize workflows with conditional step execution by using expression sets.

AI Accelerator and Scoring Framework

Build and deploy propensity models effortlessly by using Scoring Framework. Define template configurations to create CRM Analytics apps with Einstein Discovery models, and recipes without writing any code.

IN THIS SECTION:

Improve Prediction Accuracy by Optimizing Training and Scoring Data

Refine your training and scoring data by using the new separate filter options in the Scoring Framework. Optimize your training data to improve model accuracy and align your scoring process with business objectives. Streamline your workflow and boost overall performance by easily switching between separate filters or applying a single filter for both training and scoring data.

Improve Prediction Accuracy by Optimizing Training and Scoring Data

Refine your training and scoring data by using the new separate filter options in the Scoring Framework. Optimize your training data to improve model accuracy and align your scoring process with business objectives. Streamline your workflow and boost overall performance by easily switching between separate filters or applying a single filter for both training and scoring data.

Where: This change applies to the 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, go to the Scoring Framework Setup page, and select the relevant template configuration type.

Action Launcher

Contact center agents can now find recommended actions based on semantic search.

IN THIS SECTION:

Reduce the Cognitive Load of Contact Center Agents with Recommended Actions

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.

Reduce the Cognitive Load of Contact Center Agents with Recommended Actions

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 find recommended actions, turn on **Recommended Actions** on Action Launcher. Either type the search keyword and click **Search**, or click **Show Topics** and select a topic.

SEE ALSO:

Salesforce Help: Action Launcher

Action Plans

Increase convenience of the users when working with action plans for their business processes. Enhance the user experience by automating updates for the action plans as the user completes the task action plan items.

IN THIS SECTION:

Automate Status Update for Action Plans

Enable the status of the action plan to be in sync with the status of the task action plan items. Previously, the user had to manually update the status of the action plan. The action plan status can now automatically be updated according to the status of the task action plan items.

Automate Status Update for Action Plans

Enable the status of the action plan to be in sync with the status of the task action plan items. Previously, the user had to manually update the status of the action plan. The action plan status can now automatically be updated according to the status of the task action plan items.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

How: From **Setup**, in the Quick Find Box, select **Flows**. Clone and activate the existing **Update Action Plan Status** flow.

Business Compliance Suite

Make sure that your organization meets regulatory requirements, internal policies, and industry standards by using the compliance management solution, Business Compliance Suite. Create validation procedures with compliance controls to avoid non-compliance and to achieve ongoing regulatory compliance. Prevent compliance violations through compliance checks and compliance execution features. Draft clauses for regulations by using generative AI for quickly scanning a regulation document and providing a list of regulation clauses. Demonstrate compliance by using the audit trail of compliance control executions tied to regulations and policies.

IN THIS SECTION:

Capture Business Operations Processes for Compliance

Help your compliance officers effectively capture the details of business operations processes. Create detailed records and organize information in a single repository for any client engagement process within your Salesforce org or external systems. Reduce the risk of non-compliance and enable the smooth, compliant execution of business processes across your company.

Define Regulations and Track Amendments for Compliance

Give your compliance officers a platform that helps them to define, manage, and track regulations. In regulation management, regulations and their clauses automatically generate corresponding versions. Ensure accurate compliance by mapping regulation versions to clause versions, publishing updates, and notifying stakeholders promptly. Activate new versions on effective dates and retire old versions to maintain continuous regulatory adherence and operational efficiency.

Create Compliance Policies and Manage Updates

Maintain up-to-date compliance standards by optimizing policy management, reducing risks, and enhancing regulatory adherence. Compliance officers can define and update policies to align with laws and regulations, ensuring thorough coverage and accuracy. Notify business process owners of updates, link policies to business operations processes, and activate the policies and their clauses on the effective date for seamless compliance and efficiency.

Combine Validation Controls by Using Validation Procedures

Make sure that your business process adheres to policies and regulations based on the requirements defined by a compliance officer. When a business process runs a validation procedure, the validation controls in the procedure are executed.

Protect Your Company from Compliance Risks

Prevent compliance violations by using Compliance Controls. Track the changes in relevant policies and regulations, or a control gap by creating and maintaining previous compliance control versions. Automate compliance controls by using context definitions and business rule logic.

Track Compliance by Using Non-Validation Compliance Controls

Keep your users and customers compliant on their Salesforce and external processes by using non-validation compliance controls. Track and log compliance by using non-validation compliance controls through the Compliance Logging API. Log compliance for your external business processes and Salesforce processes such as Action Plans, Integrated Onboarding, and Stage Management.

View Relationships for Compliance Objects

Use the prebuilt Actionable Relationship Center (ARC) graph templates to visualize the Regulation Version, Regulation Clause Version, Business Operations Process, Compliance Control Version, Compliance Policy Version, and Compliance Policy Clause Version objects and their relationships.

Demonstrate Compliance Effectiveness

Provide your compliance officers and control managers with an easy-to-use compliance reporting capability. Show the effectiveness of compliance controls, identify compliance gaps, and demonstrate that business processes are compliant with laws and regulations. Use custom objects, Apex class, and joined reports to create a compliance audit log report and showcase that your compliance controls are preventing compliance violations.

Extract Clauses from Regulations by Using Generative AI (Beta)

With Compliance Document Extraction (Beta), save the time spent on reviewing and breaking down regulation and regulation clause documents. Boost your productivity, accuracy, and compliance by changing how your business extracts clauses from regulation documents and enables the efficient extraction of clause details in PDFs.

New Connect REST API Resources

Learn more about the new resources available with Business Compliance Suite.

New Invocable Action in Business Compliance Suite

Use the new invocable action in Business Compliance Suite.

New Objects in Business Compliance Suite

Do more with these new Business Compliance Suite objects.

Capture Business Operations Processes for Compliance

Help your compliance officers effectively capture the details of business operations processes. Create detailed records and organize information in a single repository for any client engagement process within your Salesforce org or external systems. Reduce the risk of non-compliance and enable the smooth, compliant execution of business processes across your company.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Business Compliance Suite.

When: Business Compliance Suite is available starting March 2025.

Why: Prevent compliance violations such as non-compliant actions, unauthorized sharing of sensitive data, missed deadlines, and missed required tasks or documents across the business processes. Use the unique API identifier to ensure smooth integration with other systems, improving overall data management and traceability.

How: From the App Launcher, go to the Business Operations Processes list view page, and create a business operations process record.

Define Regulations and Track Amendments for Compliance

Give your compliance officers a platform that helps them to define, manage, and track regulations. In regulation management, regulations and their clauses automatically generate corressponding versions. Ensure accurate compliance by mapping regulation versions to clause versions, publishing updates, and notifying stakeholders promptly. Activate new versions on effective dates and retire old versions to maintain continuous regulatory adherence and operational efficiency.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Business Compliance Suite.

When: Business Compliance Suite is available starting March 2025.

Why: From a single repository, manage all the compliance requirements set by regulatory authorities and legal bodies at the national, state, and regional levels. Versioning of regulations and regulation clauses helps companies track the changes over time, providing context for compliance requirements. Use the regulation management workflow to reduce the risk of inconsistent practices and promote accountability during compliance audits and investigations.

Create Compliance Policies and Manage Updates

Maintain up-to-date compliance standards by optimizing policy management, reducing risks, and enhancing regulatory adherence. Compliance officers can define and update policies to align with laws and regulations, ensuring thorough coverage and accuracy. Notify business process owners of updates, link policies to business operations processes, and activate the policies and their clauses on the effective date for seamless compliance and efficiency.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Business Compliance Suite.

When: Business Compliance Suite is available starting March 2025.

Why: An effective compliance policy workflow is crucial to prevent violations in systems, reducing risks such as using unsecured apps for sensitive data or failing to protect customer data because of insecure storage. Simplify the process of identifying impacted policies and making necessary and timely updates when regulations change, making sure that your company remains compliant and secure.

Combine Validation Controls by Using Validation Procedures

Make sure that your business process adheres to policies and regulations based on the requirements defined by a compliance officer. When a business process runs a validation procedure, the validation controls in the procedure are executed.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Business Compliance Suite.

When: Business Compliance Suite is available starting March 2025.

Why: Use Validation Procedure versions to track the changes to policies and regulations, or a control gap detected via the testing and audits of the controls. To implement changes to an active or retired version, create a procedure version or clone another version. Versions retain the traceability from a business process or invocation to the exact regulation, law, policy, procedure, and controls that were in effect at that time.

How: Configure a validation procedure by configuring controls, defining business context, mapping business context, and reviewing the configured procedure summary. The control manager reviews the configuration to confirm that the validation procedure meets the business requirements, and then activates it.

Protect Your Company from Compliance Risks

Prevent compliance violations by using Compliance Controls. Track the changes in relevant policies and regulations, or a control gap by creating and maintaining previous compliance control versions. Automate compliance controls by using context definitions and business rule logic.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Business Compliance Suite.

When: Business Compliance Suite is available starting March 2025.

Why: Use versions to implement controls uniformly across different departments by reusing active compliance controls across multiple validation procedures. For example, if you're preventing compliance violations when you check personal identification information (PII), the results must be consistent whether the communication for a loan product or investment advice was sent via email, chat, or voice communication.

How: Create a compliance control that describes the compliance requirement. Next, create a context definition that is a set of information required to run a validation control, and then create an expression set by using a compliance check and compliance control log elements that calculate if the business requirements are met. Then, add the compliance control to a validation procedure to define compliance for a business process.

Track Compliance by Using Non-Validation Compliance Controls

Keep your users and customers compliant on their Salesforce and external processes by using non-validation compliance controls. Track and log compliance by using non-validation compliance controls through the Compliance Logging API. Log compliance for your external business processes and Salesforce processes such as Action Plans, Integrated Onboarding, and Stage Management.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Business Compliance Suite.

When: Business Compliance Suite is available starting in March 2025.

Why: Create non-validation compliance controls for Salesforce business processes and save the time to verify if your users completed the tasks. For example, to verify a customer's identity, financial advisors must complete an anti-money laundering (AML) and know your customer (KYC) reviews. Use action plans to define business process tasks, such as collecting client identification documents, verifying address, and screening customers against sanction lists and politically exposed persons (PEP) databases. To track compliance on the action plan, connect the action plan to the Compliance Logging API.

How: Create a compliance control and select an implementor type that matches the process that you want to log compliance for. To connect the Salesforce or external process and log compliance, use the Compliance Logging API.

View Relationships for Compliance Objects

Use the prebuilt Actionable Relationship Center (ARC) graph templates to visualize the Regulation Version, Regulation Clause Version, Business Operations Process, Compliance Control Version, Compliance Policy Version, and Compliance Policy Clause Version objects and their relationships.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Business Compliance Suite.

When: Business Compliance Suite is available starting March 2025.

How: Create an ARC graph by using one of the Compliance templates. In Lightning App Builder, add the graph to an object record page that's the same as the root node on the graph.

Demonstrate Compliance Effectiveness

Provide your compliance officers and control managers with an easy-to-use compliance reporting capability. Show the effectiveness of compliance controls, identify compliance gaps, and demonstrate that business processes are compliant with laws and regulations. Use custom objects, Apex class, and joined reports to create a compliance audit log report and showcase that your compliance controls are preventing compliance violations.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Business Compliance Suite.

When: Business Compliance Suite is available starting March 2025.

Extract Clauses from Regulations by Using Generative AI (Beta)

With Compliance Document Extraction (Beta), save the time spent on reviewing and breaking down regulation and regulation clause documents. Boost your productivity, accuracy, and compliance by changing how your business extracts clauses from regulation documents and enables the efficient extraction of clause details in PDFs.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Business Compliance Suite.

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: Business Compliance Suite is available starting March 2025.

Why: With generative AI, streamline the process of drafting clauses for regulations by quickly scanning a regulation document and providing a list of regulation clauses. The compliance officer reviews the clauses extracted from the file. They can quickly add the extracted clauses as regulation clause records, eliminating the manual effort of creating the clauses.

New Connect REST API Resources

Learn more about the new resources available with Business Compliance Suite.

Evaluate compliance procedure with a business context

Make a POST request to the `/connect/compliance/procedure/${procedureName}/evaluate` resource.

New request body: Compliance Procedure Evaluation Request Input

New response body: Compliance Procedure Evaluation Response

Log compliance check events for control

Make a POST request to the `/connect/compliance/log/logevent` resource.

New request body: Compliance Logging Info Request Input

New response body: Compliance Logging Response

New Invocable Action in Business Compliance Suite

Use the new invocable action in Business Compliance Suite.

Evaluate a compliance validation procedure, and create a procedure evaluation API response.
Use the new `evalCmplValidationProcedure` action.

New Objects in Business Compliance Suite

Do more with these new Business Compliance Suite objects.

Represent the business rule that implements compliance requirements
Use the new ComplianceControl object.

Represent the compliance procedure version that the business process uses
Use the new ComplianceControlVersion object.

Represent a junction between a Compliance Procedure Version and a Compliance Control
Use the new ComplianceProcedureControl object.

Store a group of compliance controls that test the business process actions for compliance
Use the new CmpValidationProcedure object.

Represent a validation procedure version that the business process uses
Use the new CmplValidationProcdVer object.

Represent the input parameters passed in the business context when the Compliance API is invoked, and the output parameters expected by the validation procedure check
Use the new CmplValidationProcdParam object.

Represent a junction between a Validation Procedure Version and a Compliance Control
Use the new CmplValidationProcdControl object.

Represent the association between a Validation Procedure Control Param Map record and a Context Attribute for a specified validation procedure and control
Use the new CmplVldProcdCtrlParmMap object.

Represent the validation procedure version that the business process uses
Use the new CmplValidationProcdVer object.

Store the authority responsible for issuing licenses and permits, and defining the regulatory code
Use the new RegulatoryAuthority object.

Store the information on laws and regulations as specified by the regulatory agencies and authorities
Use the new Regulation object.

Store the version of the regulation that tracks amendments
Use the new RegulationVersion object.

Store the information related to a regulation or law outlining specific requirements or sections
Use the new RegulationClause object.

Store the version of the regulation clause that tracks amendments
Use the new RegulationClauseVersion object.

Add a junction between the Regulation Version and the Regulation Clause Version
Use the new RegulationVerRegClauseVer object.

Add a junction between the Regulation Clause Version and the Compliance Control Version
Use the new RegClCmplControlVer object.

Store the information on the internal policies of the organization.
Use the new CompliancePolicy object.

Store the version of the compliance policy that tracks amendments
Use the new CompliancePolicyVersion object.

Store the information related to a compliance policy outlining specific requirements or sections
Use the new CompliancePolicyClause object.

Store the version of the compliance policy clause that tracks amendments
Use the new CompliancePlcyClauseVersion object.

Add a junction between the Compliance Policy Version and the Compliance Policy Clause Version
Use the new CompliancePlcyCmplClVer object.

Add a junction between the Compliance Policy Clause Version and the Compliance Control Version
Use the new CmplPlcyClCmplCtlVer object.

Add a junction between the Regulation Clause Version and the Compliance Policy Clause Version
Use the new RegClCmplPlcyClVer object.

Store the details of the business process in the organization
Use the new BusinessOperationsProcess object.

Add a junction between the Business Operations Process and the Control Version
Use the new BusOperProcControlVer object.

Add a junction between the Business Operations Process and the Compliance Policy Clause Version
Use the new BusOperProcCmplPlcyClVer object.

Add a junction between the Business Operations Process and the Regulation Clause Version
Use the new BusOperProcRegClVer object.

Store the metrics related to compliance API invocations
Use the new ComplianceUsgMetrics object.

Store the metrics related to compliance API invocations across Salesforce orgs
Use the new CrossOrgComplianceUsgMetrics object.

Create a request to extract documents related to a regulation version
Use the new RegulationVerDocExtrctRqst object.

Business Rules Engine

Monitor and manage the usage of Business Rules Engine components with the new Guardrail Connect API. Use transient attributes to temporarily store interim calculation results in an expression set. Activate and save expression sets in one step when copying them from templates. Create context-based expression sets easily, without marking steps as output. Retrieve datetime information in CSV decision tables by using the date/time data type. Track the CSV upload status for decision tables.

IN THIS SECTION:

Monitor the Usage of Business Rules Engine Components
Inspect hourly limits on Business Rules Engine components by using the Guardrail Connect API and prevent errors caused by exceeding these limits. Optimize business rule management by building scheduled flows with Apex and Business Rules Engine Guardrail Connect API. Monitor usage and configure actions based on limits, such as sending email alerts when you reach a threshold.

Simplify Calculations By Using Transient Attributes

Break down complex calculations into multiple steps by using transient attributes from the linked context definition to temporarily store interim calculation results in expression set steps. Transient attributes don't require mapping, and their values aren't saved in the database.

Easily Activate Expression Set Templates in a Single Step

Quickly get expression sets ready for immediate testing and use. When you save a context-based template as an expression set or copy a context-based expression set, rank the expression set version and activate it.

Efficiently Configure Context-Based Expression Sets

Create business rules that use context-based expression sets without explicitly marking any step as an output step. This simplified configuration eliminates the need to manually select the Input in Output option and reduces the time and effort required to design complex business rules. Manage the output by using the context mapping itself.

Simplify Datetime Retrieval with the New Date/Time Data Type

Decision tables created using CSV as the data source now support the date/time data type, in addition to the existing data types. Use the date/time data type to tailor your decision tables to improve decision making and retrieve information such as created date, modified date, start date, or end date from date-time columns.

Monitor CSV Upload Progress for Decision Tables

Get visibility into CSV upload progress for decision tables with the CSV Upload Details field. The field is available on the Table tab of decision tables created using CSV as the source. You can start using the decision table when the upload is completed.

Monitor the Usage of Business Rules Engine Components

Inspect hourly limits on Business Rules Engine components by using the Guardrail Connect API and prevent errors caused by exceeding these limits. Optimize business rule management by building scheduled flows with Apex and Business Rules Engine Guardrail Connect API. Monitor usage and configure actions based on limits, such as sending email alerts when you reach a threshold.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Business Rules Engine and Context Service are enabled.

Simplify Calculations By Using Transient Attributes

Break down complex calculations into multiple steps by using transient attributes from the linked context definition to temporarily store interim calculation results in expression set steps. Transient attributes don't require mapping, and their values aren't saved in the database.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Business Rules Engine and Context Service are enabled.

Who: To create context definitions, users need the Context Service Admin permission set. To use context definitions in expression sets, users need the Rule Engine Designer permission set.

How: To mark an attribute as transient, select the **Transient** option in the context definition.

Easily Activate Expression Set Templates in a Single Step

Quickly get expression sets ready for immediate testing and use. When you save a context-based template as an expression set or copy a context-based expression set, rank the expression set version and activate it.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Business Rules Engine and Context Service are enabled.

Who: To create context definitions, users need the Context Service Admin permission set. To use context definitions in expression sets, users need the Rule Engine Designer permission set.

SEE ALSO:

Salesforce Help: Create and Configure Your Expression Set Version (can be outdated or unavailable during release preview)

Salesforce Help: Create and Configure Your Expression Set Version (can be outdated or unavailable during release preview)

Efficiently Configure Context-Based Expression Sets

Create business rules that use context-based expression sets without explicitly marking any step as an output step. This simplified configuration eliminates the need to manually select the Input in Output option and reduces the time and effort required to design complex business rules. Manage the output by using the context mapping itself.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Business Rules Engine and Context Service are enabled.

Who: To create context definitions, users need the Context Service Admin permission set. To use context definitions in expression sets, users need the Rule Engine Designer permission set.

Simplify Datetime Retrieval with the New Date/Time Data Type

Decision tables created using CSV as the data source now support the date/time data type, in addition to the existing data types. Use the date/time data type to tailor your decision tables to improve decision making and retrieve information such as created date, modified date, start date, or end date from date-time columns.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

SEE ALSO:

Salesforce Help: Supported Data Types and Operators in Decision Tables (can be outdated or unavailable during release preview)

Monitor CSV Upload Progress for Decision Tables

Get visibility into CSV upload progress for decision tables with the CSV Upload Details field. The field is available on the Table tab of decision tables created using CSV as the source. You can start using the decision table when the upload is completed.

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: Add CSV Data to Decision Tables (can be outdated or unavailable during release preview)

Collections

Financial institutions and businesses can streamline their collection processes, reduce delinquencies, and maintain positive customer relationships. Effectively manage collection plans and related details by ingesting data from third-party systems with CSV File Import and Composite Graph API. Simplify client interactions by using the prebuilt features in the Collections console app. Collections specialists can create promise-to-pay agreements, generate and send payment links, and request direct debit to the core banking system. Additionally, Salesforce Pay Now provides additional payment options, and MuleSoft integration expedites the collection process and improves overall cash flow.

IN THIS SECTION:

Manage Collection Activities Efficiently with Collections Console App

Help your collections specialists and supervisors streamline and optimize the debt collection processes, and achieve operational efficiency. Enhance transparency and improve the tracking and recovery of debts by using the console app's intuitive features for monitoring, managing, and communicating with debtors.

Save Time and Effort with a Preconfigured Action Launcher Deployment

Your collections specialists can quickly launch collection actions, such as create promise to pay, and generate and send payment link on a collection plan record page. Use Collection Plan Processes, a preconfigured Action Launcher deployment that includes context objects, and frequently used actions. Customize this preconfigured deployment to meet your business needs.

Create Promise to Pay Agreements Quickly

Your collections specialists can use the Create Promise to Pay prebuilt action on the collection plan Lightning record page. This action triggers the Create Promise to Pay prebuilt flow that helps collections specialists to get the payment commitment details from a delinquent borrower, to create a corresponding payment schedule, and to send an email to the borrower with the promised payment details. Customize this prebuilt flow according to your business requirements.

Offer Additional Payment Options with Salesforce Pay Now

Help your collections specialists facilitate payment activities related to an ongoing collection activity with Pay Now. From the Collections console app, your collections specialists can generate payment links on the fly and send them to customers, increasing the probability of timely payments, and reducing the time required for follow-up actions. Significantly boost recovery rates by making it easier for customers to complete payments through branded, mobile-responsive Pay Now web pages. Use the Generate and Send Payment Link prebuilt flow to quickly gather payment details and generate and send the payment link to the customer by email. Use the automatically triggered Send Reminder with Payment Link prebuilt flow to send the payment link to the customer one day before the payment due date. Customize these flows according to your business requirements.

Automatically Update Payments Received in Collection Plans and Payment Schedules

Automate the process to update the payments received details to save time, minimize human errors, and make sure that users always have access to the most accurate and up-to-date information. Use the Collections: Update Payment Details prebuilt flow that is triggered automatically when a payment intent event is created for a successful transaction. Customize the flow according to your business requirements.

Notify Customers of Payment Status Automatically

Enhance transparency, reduce customer inquiries, and improve the overall customer experience by automating the payment status notification process. Use the Collections: Send Payment Status Email prebuilt flow that's triggered automatically when a payment transaction event is created. Customize the flow according to your business requirements.

Automate Case Creation and Closure for Collection Plans

Use the prebuilt flows to help your collections specialists manage and track the cases for collection plans smoothly and efficiently. Customize the Create Case for Collection Plan prebuilt flow that creates a case for a collection plan and is triggered automatically when a collection plan record is created with a valid reason. Customize the Close Collection Plan and Associated Cases prebuilt flow that's triggered automatically and sets the status of a collection plan and all its associated cases to closed based on certain predefined conditions.

Determine Collection Plan Segments with Business Rules Engine

Determine and update the collection plan segments for collection plan records in bulk by using the prebuilt event orchestration procedure that uses Business Rules Engine components. Help collections managers create tailored collection strategies, mitigate credit risk, and prioritize collection efforts according to different segments. Collections managers can also customize the communication based on each segment, and enhance customer relationships. Clone and customize the Business Rules Engine components according to your business requirements.

Create a Prioritized List of Collection Plans with Actionable Segmentation

Prioritize high-value recovery efforts and improve recovery rates with prioritized lists of collection plans. Create actionable list definitions by using the Collection Plan and related objects. Your collections supervisors or collections managers can create prioritized lists of collection plans by using these list definitions. Collections managers can plan collection activities more effectively, streamline work distribution, and improve collaboration by assigning these lists or list members to collections specialists. Filter the lists by due amount, days past due, and collection plan segment, or even fields from other objects related to collections, including city or financial account type.

Maximize Collections with Request Direct Debit Action

Make your collections process more effective and efficiently address failed debits by using the Request Direct Debit action. When a mandated direct debit fails, the account enters a collections list because of an outstanding balance. Collections specialists can quickly request a new debit from the customer's account on an actionable list page, expediting the collection process, and improving overall cash flow. Use MuleSoft integration to help your collections specialist to submit a direct debit request to the core banking system.

Import Collections Data with CSV File Import

Simplify and accelerate the process of managing Collections data from external systems by using CSV File Import. Easily import large volumes of Collections data from CSV files into Collection Plan and related objects.

Streamline Record Creation for Collection Plan and Related Objects with Composite Graph API

Automate Collections data import processes, ensuring data consistency and integrity by using the Composite Graph API. Create all your collection plans, collection plan items, contacts, and other related object records in one go, through a single Composite Graph API request.

Create Effective Collection Campaigns with Collections Data Kit

Help collections managers effortlessly manage collection campaigns, segments, and content with Marketing Cloud Growth, without logging into a separate marketing app. After installing the Collections Data Kit, collections managers can readily use collections data to create Data Cloud segments by using criteria such as days past due, total overdue amount, or collection plan segment. Use automated workflows to run these targeted campaigns across multiple channels, such as email and SMS, to enhance the chances of successful collection outcomes and maintain positive relationships. Track the performance of your collection campaigns in real time and make data-driven adjustments to optimize results.

Get Collections Up and Running with Ease

Use the new Collections Guided Setup to assign required permissions, enable features, and use a preconfigured Action Launcher deployment. Set up integrated case management, Business Rules Engine components, Actionable Segmentation, Salesforce Pay Now, and MuleSoft Integration to get started with Collections activities easily and quickly.

New and Changed Objects

Do more with these new and updated Collections objects.

Manage Collection Activities Efficiently with Collections Console App

Help your collections specialists and supervisors streamline and optimize the debt collection processes, and achieve operational efficiency. Enhance transparency and improve the tracking and recovery of debts by using the console app's intuitive features for monitoring, managing, and communicating with debtors.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

Why: Collections specialists and collections supervisors or collections managers can streamline client interactions by using the prebuilt features in the Collections console app. Access collection plans, collection lists, cases, accounts, and contacts from the console's homepage. The home page also shows collection performance as of the current date, and the assigned lists of collection plans. Collections specialists and managers can see a borrower's profile card, loan details, promise to pay agreements, collection events on a timeline, and financial account details. They can also launch the important actions that are easily accessible on the collection plan record details pages.

How: From the App Launcher, find and select **Collections**.

Save Time and Effort with a Preconfigured Action Launcher Deployment

Your collections specialists can quickly launch collection actions, such as create promise to pay, and generate and send payment link on a collection plan record page. Use Collection Plan Processes, a preconfigured Action Launcher deployment that includes context objects, and frequently used actions. Customize this preconfigured deployment to meet your business needs.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

How: From Setup, in the Quick Find box, enter `Action Launcher`, and then select **Deployments**. Select **Collection Plan Processes**, and click **Use Deployment**.

Create Promise to Pay Agreements Quickly

Your collections specialists can use the Create Promise to Pay prebuilt action on the collection plan Lightning record page. This action triggers the Create Promise to Pay prebuilt flow that helps collections specialists to get the payment commitment details from a delinquent borrower, to create a corresponding payment schedule, and to send an email to the borrower with the promised payment details. Customize this prebuilt flow according to your business requirements.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

Why: By getting a commitment from the borrower to pay a specific amount by a certain date, banks and financial institutions can better manage their cash flow and financial planning. The promise to pay agreements streamline the collection process, so collections specialists can focus on more complex cases and reduce the time spent on follow-ups. Use a formal promise to pay agreement as legal documentation in cases of dispute. Offer flexible payment plans and maintain positive relationships with customers, leading to improved customer loyalty.

How: From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**. Open the Create Promise to Pay flow, and click **Save As New Version**.

Offer Additional Payment Options with Salesforce Pay Now

Help your collections specialists facilitate payment activities related to an ongoing collection activity with Pay Now. From the Collections console app, your collections specialists can generate payment links on the fly and send them to customers, increasing the probability of timely payments, and reducing the time required for follow-up actions. Significantly boost recovery rates by making it easier for customers to complete payments through branded, mobile-responsive Pay Now web pages. Use the Generate and Send Payment Link prebuilt flow to quickly gather payment details and generate and send the payment link to the customer by email. Use the automatically triggered Send Reminder with Payment Link prebuilt flow to send the payment link to the customer one day before the payment due date. Customize these flows according to your business requirements.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

Automatically Update Payments Received in Collection Plans and Payment Schedules

Automate the process to update the payments received details to save time, minimize human errors, and make sure that users always have access to the most accurate and up-to-date information. Use the Collections: Update Payment Details prebuilt flow that is triggered automatically when a payment intent event is created for a successful transaction. Customize the flow according to your business requirements.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

How: From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**. Open the Collections: Update Payment Details flow, and click **Save As New Version**.

Notify Customers of Payment Status Automatically

Enhance transparency, reduce customer inquiries, and improve the overall customer experience by automating the payment status notification process. Use the Collections: Send Payment Status Email prebuilt flow that’s triggered automatically when a payment transaction event is created. Customize the flow according to your business requirements.

Where: This change applies to Lightning Experience of multiple Industries clouds with Data Cloud and Marketing Cloud.

When: Collections is available starting April 2025.

How: From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**. Open the Collections: Send Payment Status Email flow, and click **Save As New Version**.

Automate Case Creation and Closure for Collection Plans

Use the prebuilt flows to help your collections specialists manage and track the cases for collection plans smoothly and efficiently. Customize the Create Case for Collection Plan prebuilt flow that creates a case for a collection plan and is triggered automatically when a collection plan record is created with a valid reason. Customize the Close Collection Plan and Associated Cases prebuilt flow that’s triggered automatically and sets the status of a collection plan and all its associated cases to closed based on certain predefined conditions.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

How: From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**. Open the flow that you want to customize, and click **Save As New Version**.

Determine Collection Plan Segments with Business Rules Engine

Determine and update the collection plan segments for collection plan records in bulk by using the prebuilt event orchestration procedure that uses Business Rules Engine components. Help collections managers create tailored collection strategies, mitigate credit risk, and prioritize collection efforts according to different segments. Collections managers can also customize the communication based on each segment, and enhance customer relationships. Clone and customize the Business Rules Engine components according to your business requirements.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

How: From the App Launcher, find and select **Business Rules Engine**.

Create a Prioritized List of Collection Plans with Actionable Segmentation

Prioritize high-value recovery efforts and improve recovery rates with prioritized lists of collection plans. Create actionable list definitions by using the Collection Plan and related objects. Your collections supervisors or collections managers can create prioritized lists of collection plans by using these list definitions. Collections managers can plan collection activities more effectively, streamline work distribution, and improve collaboration by assigning these lists or list members to collections specialists. Filter the lists by due amount, days past due, and collection plan segment, or even fields from other objects related to collections, including city or financial account type.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

How: From Setup, in the Quick Find box, enter `Actionable Segmentation`, and then select **Actionable Segmentation Settings**.

Maximize Collections with Request Direct Debit Action

Make your collections process more effective and efficiently address failed debits by using the Request Direct Debit action. When a mandated direct debit fails, the account enters a collections list because of an outstanding balance. Collections specialists can quickly request a new debit from the customer's account on an actionable list page, expediting the collection process, and improving overall cash flow. Use MuleSoft integration to help your collections specialist to submit a direct debit request to the core banking system.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

How: From the App Launcher, find and select **Actionable Lists**. Open a collection plan list. Select the collection plans, and click **Request Direct Debit**.

Import Collections Data with CSV File Import

Simplify and accelerate the process of managing Collections data from external systems by using CSV File Import. Easily import large volumes of Collections data from CSV files into Collection Plan and related objects.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

How: From the App Launcher, find and select **CSV File Import**.

Streamline Record Creation for Collection Plan and Related Objects with Composite Graph API

Automate Collections data import processes, ensuring data consistency and integrity by using the Composite Graph API. Create all your collection plans, collection plan items, contacts, and other related object records in one go, through a single Composite Graph API request.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

Create Effective Collection Campaigns with Collections Data Kit

Help collections managers effortlessly manage collection campaigns, segments, and content with Marketing Cloud Growth, without logging into a separate marketing app. After installing the Collections Data Kit, collections managers can readily use collections data to create Data Cloud segments by using criteria such as days past due, total overdue amount, or collection plan segment. Use automated workflows to run these targeted campaigns across multiple channels, such as email and SMS, to enhance the chances of successful collection outcomes and maintain positive relationships. Track the performance of your collection campaigns in real time and make data-driven adjustments to optimize results.

Where: This change applies to Lightning Experience of multiple Industries clouds with Data Cloud and Marketing Cloud.

When: Collections is available starting April 2025.

Get Collections Up and Running with Ease

Use the new Collections Guided Setup to assign required permissions, enable features, and use a preconfigured Action Launcher deployment. Set up integrated case management, Business Rules Engine components, Actionable Segmentation, Salesforce Pay Now, and MuleSoft Integration to get started with Collections activities easily and quickly.

Where: This change applies to Lightning Experience of multiple Industries clouds.

When: Collections is available starting April 2025.

How: From Setup, go to Guided Setup, and click **Collections**.

New and Changed Objects

Do more with these new and updated Collections objects.

Store details about the outstanding amounts linked to financial accounts, contacts, accounts, or cases associated with individuals or an organization
Use the new CollectionPlan object.

Store the delinquency details for multiple invoices in a single CollectionPlan record
Use the new CollectionPlanItem object.

Store the reason for initiating the collection process, including non-payment of bills, bankruptcy, outstanding invoices, and deceased account holders
Use the new CollectionPlanReason object.

Store the name of the source of funds to fulfill a commitment to make a payment
Use the new `PaymentSource` field on the existing PaymentSchedule object.

Store the usage type for a payment
Use the new `UsageType` field on the existing PaymentSchedule and PaymentScheduleItem objects.

Store the cumulative sum of payments received for all payment schedule items linked to a payment schedule
Use the new `TotalPaymentsReceived` field on the existing PaymentSchedule object.

Store the payment received from the borrower for the payment schedule item
Use the new `PaymentsReceived` field on the existing PaymentScheduleItem object.

Store the payment link that is sent to the borrower to repay the outstanding amount
Use the new `PaymentLinkId` field on the existing PaymentScheduleItem object.

Compliant Data Sharing

Quickly deactivate Salesforce users who have Compliant Data Sharing records using a new setting.

IN THIS SECTION:

Deactivate Users and Retain Compliant Data Sharing Participant Records

Save time deactivating Salesforce users who have Compliant Data Sharing records using the new Deactivate a user while retaining users' inactive participant records setting. Previously, you were required to remove access to the data granted through compliant data sharing before you deactivated a Salesforce user. This new setting retains the participant records for compliance and auditing.

Deactivate Users and Retain Compliant Data Sharing Participant Records

Save time deactivating Salesforce users who have Compliant Data Sharing records using the new Deactivate a user while retaining users' inactive participant records setting. Previously, you were required to remove access to the data granted through compliant data sharing before you deactivated a Salesforce user. This new setting retains the participant records for compliance and auditing.

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

How: In Setup, select **General Settings** in Compliant Data Sharing. Then select **Delete participant records before deactivating a user** or **Deactivate a user while retaining users' inactive participant records**.

Context Service

Improve performance and minimize repetitive data retrieval from the database by using reference definitions. Automatically populate data in a context definition by using system information nodes. Store temporary data changes in the cache for a context definition, without saving them to the database by using the Transient option. Query, update, and delete context instances by using flow actions.

IN THIS SECTION:

Optimize Performance by Using Reference Definitions

Use reference definitions to efficiently reuse and share common data among multiple context definitions. Reduce database load, enhance speed, and ensure consistency across context definitions that use the shared data.

Simplify Data Population for Nodes and Attributes

Use system information nodes to automatically generate and manage data for nodes and attributes within a context definition. Eliminate the need to manually define nodes, attributes, mappings, and data retrieval, simplifying the entire process. For example, directly generate data for the UserProfile attribute from user information without the need for manual mapping. They're suffixed with "_s" to easily identify them.

Conveniently Store Temporary Changes to Attributes

Store changes made to an attribute temporarily in the cache without saving them to the database. Simplify data management, reduce database load, and improve data processing speed, leading to enhanced performance.

Efficiently Manage Context Instances by Using Context Actions in Flows

Enhance user experience and save time by invoking multiple Context Service actions in Salesforce Flow. Use the Query Context action to query context instances by using tags associated with a context definition. Use the Delete Context action to delete context instances from the database. Use the Update Context Attributes action to update context attributes by using context tags.

Increase Database Efficiency with Polymorphic Fields

Simplify data modeling and reduce redundant foreign keys by enabling a single object field to reference multiple associated domains. Configure and handle diverse data types easily within a single attribute mapping. For example, define a single field to reference various domains to store different data entities, such as users, products, or orders. Enhance context-aware data management, faster data retrieval, reduced complexity, and a more efficient database structure. Previously, a field could reference only a fixed, single domain at a time to retrieve data.

Effortlessly Sync Extended Context Definitions

When an extended definition is out of sync with the standard definition, use the Sync Now option to instantly upgrade the standard components to their latest version. Easily track the progress of the sync by checking the progress status.

Easily Generate Tags for Attributes

Eliminate the need to manually select individual attributes for tag generation. Ensure that tags generated across all nodes and attributes within a context definition remain unique, even when attribute names are duplicated across different nodes. Use the Regenerate All option to generate new tags for the selected node and its attributes, including nodes and attributes with tags. Use the Retain and Generate option to generate tags only for the selected node and attributes without tags.

Easily Clone a Context Mapping

Save time and reduce manual effort by reusing existing mappings in context definition setup. Simplify the mapping by cloning context mappings for standard objects, context definition objects, data model objects, or any other input data source.

Conveniently Map Context Definitions to Data Model Objects

Enhance navigation, streamline data management, and easily access data model objects (DMOs). Quickly locate and map context definitions by using the dedicated tab for Data Model Objects.

New Object in Context Service

Store reference relationships between context definitions with the new ContextDefinitionReference object.

Optimize Performance by Using Reference Definitions

Use reference definitions to efficiently reuse and share common data among multiple context definitions. Reduce database load, enhance speed, and ensure consistency across context definitions that use the shared data.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: From Setup, in the Quick Find box, find and select **Context Definitions**. In the Custom Definitions tab, click **New**, or select a definition and click , then select **Edit**. In the Create Context Definition or Edit Context Definition page, select **Reference Definition**. If a new definition isn't marked as a reference, you can link it to two other definitions that act as reference definitions.

Simplify Data Population for Nodes and Attributes

Use system information nodes to automatically generate and manage data for nodes and attributes within a context definition. Eliminate the need to manually define nodes, attributes, mappings, and data retrieval, simplifying the entire process. For example, directly generate data for the UserProfile attribute from user information without the need for manual mapping. They're suffixed with "_s" to easily identify them.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: From Setup, in the Quick Find box, find and select **Context Definitions**. In the Custom Definitions tab, click **New**, or select a definition and click , then select **Edit**. In the Create Context Definition or Edit Context Definition page, specify the definition details and click **Next**. On the Add Nodes page, select **System Information Node**.

Conveniently Store Temporary Changes to Attributes

Store changes made to an attribute temporarily in the cache without saving them to the database. Simplify data management, reduce database load, and improve data processing speed, leading to enhanced performance.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: From Setup, in the Quick Find box, find and select **Context Definitions**. In the Custom Definitions tab, select the definition and click , then select **Edit**. In the Edit Context Definition page, click **Next** and navigate to the Edit Attributes page. Select the node, click **Add Attributes**, and then select **Transient**.

Efficiently Manage Context Instances by Using Context Actions in Flows

Enhance user experience and save time by invoking multiple Context Service actions in Salesforce Flow. Use the Query Context action to query context instances by using tags associated with a context definition. Use the Delete Context action to delete context instances from the database. Use the Update Context Attributes action to update context attributes by using context tags.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

Who: To use actions in flows, users need the ContextService Admin and ContextService Runtime permissions.

How: From Setup, in the Quick Find box, find and select **Flows**. Click **New Flow**, select **Start From Scratch**, and then click **Next**. Select **Screen Flow** and then click **Create**. Click + and then select **Action**. In the category section, select **Context Service**. Find and select the **Query Context**, **Delete Context**, or **Update Context Attributes** action that you want to use in flows.

Increase Database Efficiency with Polymorphic Fields

Simplify data modeling and reduce redundant foreign keys by enabling a single object field to reference multiple associated domains. Configure and handle diverse data types easily within a single attribute mapping. For example, define a single field to reference various domains to store different data entities, such as users, products, or orders. Enhance context-aware data management, faster data retrieval, reduced complexity, and a more efficient database structure. Previously, a field could reference only a fixed, single domain at a time to retrieve data.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: To map multiple domains to a context definition, start by opening the context definition. On the Context Definition Details page, go to the Map Data tab and select Add Mapping. On the Context Mapping page, go to the Connect Objects tile , search for the object that you want to map, click + next to the object name, and select the domain.

Effortlessly Sync Extended Context Definitions

When an extended definition is out of sync with the standard definition, use the Sync Now option to instantly upgrade the standard components to their latest version. Easily track the progress of the sync by checking the progress status.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: From Setup, in the Quick Find box, find and select **Context Definitions**. In the Custom Definitions tab, select a definition to upgrade. In the **Sync Status** column, click **Sync Now**.

Easily Generate Tags for Attributes

Eliminate the need to manually select individual attributes for tag generation. Ensure that tags generated across all nodes and attributes within a context definition remain unique, even when attribute names are duplicated across different nodes. Use the Regenerate All option to generate new tags for the selected node and its attributes, including nodes and attributes with tags. Use the Retain and Generate option to generate tags only for the selected node and attributes without tags.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: From Setup, in the Quick Find box, find and select **Context Definitions**. In the Custom Definitions tab, select a definition and click , then select **Edit**. In the Edit Context Definition page, click **Next** and navigate to the Edit Attribute Tags page, then click **Generate All Tags** or **Generate Node Tags**. In the Generate Tags window, select **Regenerate All** or **Retain and Generate**.

Easily Clone a Context Mapping

Save time and reduce manual effort by reusing existing mappings in context definition setup. Simplify the mapping by cloning context mappings for standard objects, context definition objects, data model objects, or any other input data source.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: From Setup, in the Quick Find box, find and select **Context Definitions**. In the Custom Definitions tab, select a definition and click, then select **Edit**.On the Edit Definitions page, select **Map Data**. Select a mapping, click , and then select **Clone**.

Conveniently Map Context Definitions to Data Model Objects

Enhance navigation, streamline data management, and easily access data model objects (DMOs). Quickly locate and map context definitions by using the dedicated tab for Data Model Objects.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: From Setup, in the Quick Find box, enter find and select **Context Definitions**. In the Custom Definitions tab, select a definition and click , then select **Edit**. On the Edit Definitions page, select **Map Data**. Click **Add Mapping**, specify the mapping details, and click **Next**. On the Mapping Intent Details tile, select at least one Mapping Intent operation and then click **Map**. On the **Connect Objects** tile, click **Select data source**. Select the **Data Model Objects** tab, search for the DMO that you want to map, click +, and then click **Done**.

New Object in Context Service

Store reference relationships between context definitions with the new ContextDefinitionReference object.

Store information about the reference relationships between context definitions
Use the new ContextDefinitionReference object.

Cross-Object Field History (Beta)

Track and visualize field changes across related objects in a single view.

IN THIS SECTION:

Track Changes Across Related Objects with Cross-Object Field History (Beta)
Identify key updates made by different users by easily monitoring changes to records across related objects in a single view. Eliminate the hassle of checking each record individually by using the Cross-Object Field History Lightning web component. Improve the auditability of record changes and derive inferences effortlessly by viewing these consolidated changes. Track updates across multiple objects with complex data models, such as those used for Know Your Customer and Business Relationship Plan.

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

Note: Cross-Object Field History is a 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 beta service is at the Customer's sole discretion.

How: In Setup, search for and select **Cross-Object Field History (Beta)**. Turn on Cross-Object Field History. Set up the objects to be tracked for field changes by using the Object Relationship Graphs builder.

Data Processing Engine

Simplify field mapping in writeback nodes by using Einstein generative AI. Use the append and hierarchy nodes in Data Cloud to run batch transformations on large volumes of org data that you can later use for analytics and reporting. Ensure data integrity by using the composite writeback feature to group related records at run time, and write them back to the core. Download the failed records file and use it to debug the issues in composite writeback or CSV file ingestion when the Data Processing Engine definition run fails.

IN THIS SECTION:

Automate Your Field Mapping with Einstein

Simplify the tedious task of manually mapping fields when you create a writeback node. Use Einstein generative AI to get field mapping suggestions. Review, accept, or reject the field mapping suggestions based on the Einstein score before you add them to the target object.

Perform Bulk Transformations with Data Cloud

Process large volumes of data and run complex transformations in Data Cloud runtime. Integrate data from various data sources into a single dataset by using the append node, and use this consolidated data for analysis and reporting. Visualize and process hierarchical relationships within your data by using the hierarchy nodes and get deeper insights into your org data.

Ensure Data Integrity for the Writeback of Transformed Data

Define the relationships between the records of different writeback nodes in your Data Processing Engine definition. Prevent data inconsistencies by using Data Processing Engine to group related records and write them back to the core as an atomic operation. Define prewrite hooks that can further transform the data.

Troubleshoot Composite Writeback or CSV File Ingestion

When a Data Processing Engine definition fails because of any error in composite writeback or CSV file ingestion, download the failed records in CSV format and use the CSV file for debugging purposes.

Changed Object in Data Processing Engine

Do more with the Data Processing Engine changed object.

Automate Your Field Mapping with Einstein

Simplify the tedious task of manually mapping fields when you create a writeback node. Use Einstein generative AI to get field mapping suggestions. Review, accept, or reject the field mapping suggestions based on the Einstein score before you add them to the target object.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Data Processing Engine and Einstein AI.

SEE ALSO:

Set Up Einstein Generative AI

Perform Bulk Transformations with Data Cloud

Process large volumes of data and run complex transformations in Data Cloud runtime. Integrate data from various data sources into a single dataset by using the append node, and use this consolidated data for analysis and reporting. Visualize and process hierarchical relationships within your data by using the hierarchy nodes and get deeper insights into your org data.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions of Data Cloud with Data Processing Engine.

Ensure Data Integrity for the Writeback of Transformed Data

Define the relationships between the records of different writeback nodes in your Data Processing Engine definition. Prevent data inconsistencies by using Data Processing Engine to group related records and write them back to the core as an atomic operation. Define prewrite hooks that can further transform the data.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Data Processing Engine.

Troubleshoot Composite Writeback or CSV File Ingestion

When a Data Processing Engine definition fails because of any error in composite writeback or CSV file ingestion, download the failed records in CSV format and use the CSV file for debugging purposes.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with Data Processing Engine.

How: In Monitor Workflow Services, on the Tasks tab, click ▾ next to the batch job part that you want to debug, and then click **Download Failed Records**.

Changed Object in Data Processing Engine

Do more with the Data Processing Engine changed object.

Store failed records from a definition's run in CSV, JSON, or TXT formats

Use the new `FailedRecFile` field on the existing BatchJobPart object.

SEE ALSO:

Industries Common Resources Developer Guide

Einstein Autofill (Beta)

Streamline form completion by providing your teams access to the AI-powered Einstein Autofill feature.

IN THIS SECTION:

Boost Efficiency and Customer Satisfaction with Einstein Autofill (Beta)

Your users can instantly transform call and chat conversations into form suggestions by using AI-driven recommendations. Reduce manual data entry, speed up response times, and improve customer experience by seamlessly integrating Einstein Autofill with Omniscripts. Ensure smoother processes by filling forms based on conversations.

Boost Efficiency and Customer Satisfaction with Einstein Autofill (Beta)

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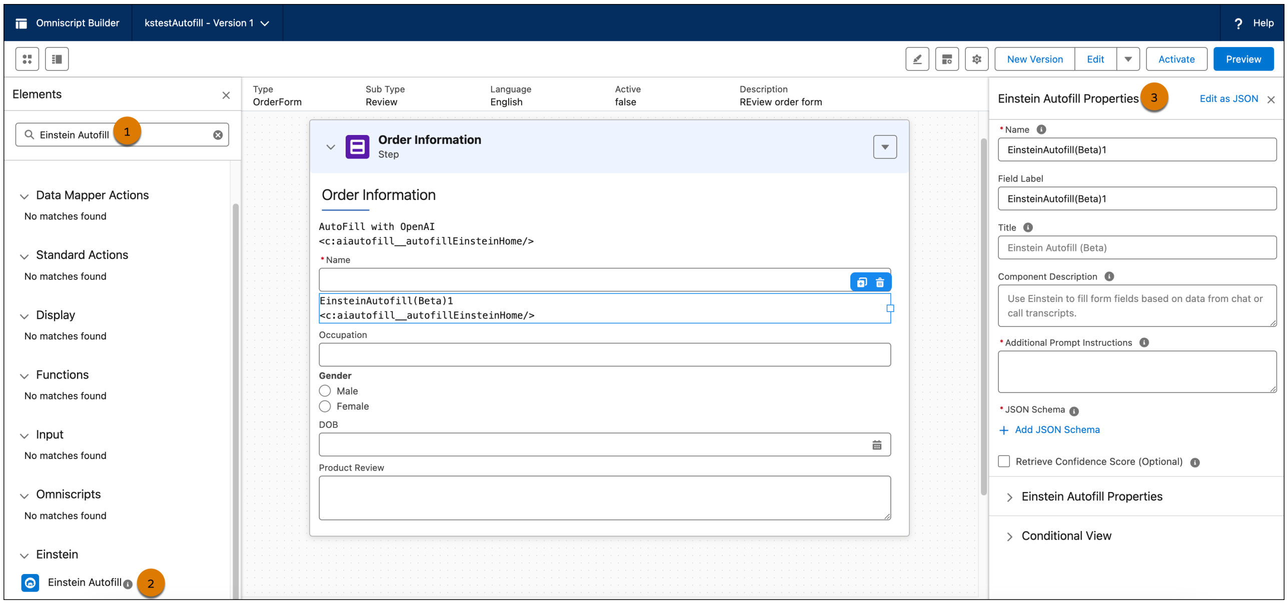
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of multiple Industries clouds.

Note: Einstein Autofill (Beta) 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 this feature, users need the Industry Service Excellence add-on license.

Why: Customer service reps in banking and other industries such as hospital receptionists, automotive dealers, retail support, insurance claims, often struggle with time-consuming and error-prone manual data entry, especially when they handle customer complaints. Inefficient data entry can lead to delays, repeated information requests, and frustration for both CSRs and customers.

How: In Omniscript Builder, enter `Einstein Autofill` in the search elements box and select **Einstein Autofill** (1). From the Einstein menu, drag the **Einstein Autofill** component onto the Omniscript step (2). Enter the details in the Einstein Autofill Properties pane (3).



SEE ALSO:

Salesforce Help:Einstein Autofill (Beta)

Fundraising

Easily manage and track campaign and donor information with Nonprofit Cloud for Fundraising. Quickly generate multiple outreach source codes, add interest tags to outreach source codes, get soft credit metrics at-a-glance, automatically update data rollups, and map custom fields in gift entry. Additionally, set up page layouts for summary objects, use the Business Process (BP) API to create or manage pledges, and customize how Recency, Frequency, and Monetary Value (RFM) Scoring is calculated.

IN THIS SECTION:

Scale Your Fundraising Efforts by Autogenerating Outreach Source Codes

Automate source code generation to efficiently manage large-scale fundraising campaigns. Ensure accuracy and consistency in your source codes, so you can focus on strategic tasks.

Understand Donor Impact by Using Soft Credit Rollups

Get a better understanding of a donor's impact on your organization by viewing their soft credit rollups. Help fundraisers track who influenced a gift by using soft credits to easily check donor contributions.

Automatically Receive Fundraising Rollup Calculation Updates

Automate the process of receiving updates to the rollup calculations without losing custom configurations and without manually re-cloning the latest Data Processing Engine (DPE) definition.

Delivered Idea: Customize Summary Displays

Fundraising admins can now set up page layouts for the summary objects, enhancing the visibility and organization of key information. We delivered this feature thanks to your ideas on IdeaExchange.

Enhance Donor Segmentation

Campaign managers can assign interest tags to outreach source codes for better donor segmentation.

Delivered Idea: Improve Donor Relations and Track the Impact of Gifts

Capture and store relevant information by mapping custom fields for use during gift entry. Add additional information to gifts, such as a donor's preferred communication method or the purpose of the gift. We delivered this feature thanks to your ideas on IdeaExchange.

Create and Manage Pledges in Bulk

Send multiple pledges or pledge updates to Nonprofit Cloud through the /commitments post of the Business Process API. Pledges are gifts with a predefined amount and an end date that the donor pays in the future, either in one payment or in multiple payments.

Customize Sources and Destinations for RFM Scoring

Choose the source objects and fields from which to build the Recency, Frequency, and Monetary Value (RFM) scores. Select the destination object and fields on which to show the singular scores and the composite RFM score.

Streamline Advancement-Specific Data Processing

Manage and report on advancement designations by capturing important reporting details. Advancement operations teams can track a variety of funds, including endowed, capital, and operational, with flexible fields for additional reporting information. Ensure consistent data collection for institutional reporting, and support compliance with industry reporting standards. This feature also introduces a person's role with the institution, graduation status, giving levels, and the purpose of their gifts.

Drive Comprehensive Prospect Research Activities

Store and manage detailed prospect research data for alumni, donors, and households. Relationship officers and prospect researchers can track and analyze wealth indicators, philanthropic events, research assessments, and key milestones to build a complete picture of activity. To support continuous research efforts and uncover deeper insights, this long-term view helps your institution strengthen relationships based on a lifetime of engagement and activity.

Gain Insight Through Generational Cohorts and Graduation Status

Unlock deeper alumni insights by analyzing generational cohorts and graduation status. Relationship officers and prospect researchers can now categorize alumni by groups such as baby boomers, Gen X, millennials, and Gen Z. They can also group alumni into segments by graduation date.

New and Changed Objects and Fields for Fundraising

Do more with the new and updated Fundraising objects.

Scale Your Fundraising Efforts by Autogenerating Outreach Source Codes

Automate source code generation to efficiently manage large-scale fundraising campaigns. Ensure accuracy and consistency in your source codes, so you can focus on strategic tasks.

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. To use Fundraising with Education Cloud, enable Fundraising in Education Cloud, and then create and assign a permission set to your users.

How: From Setup, in the Quick Find box, enter `Fundraising`, and then select **Outreach Source Codes.** Turn on Outreach Source Code Generation and format your codes.

SEE ALSO:

Salesforce Help: Set Up Outreach Source Codes (can be outdated or unavailable during release preview)

Salesforce Help: Create Outreach Source Codes for a Campaign (can be outdated or unavailable during release preview)

Understand Donor Impact by Using Soft Credit Rollups

Get a better understanding of a donor's impact on your organization by viewing their soft credit rollups. Help fundraisers track who influenced a gift by using soft credits to easily check donor contributions.

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Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set. To use Fundraising with Education Cloud, enable Fundraising in Education Cloud, and then create and assign a permission set to your users.

How: From Setup, in the Quick Find box, enter `Fundraising`, and then select **Gift Entry**. Use Field Mapping to map custom fields for gift entry.

SEE ALSO:

Salesforce Help: Map Custom Fields to Use During Gift Entry(can be outdated or unavailable during release preview)

Salesforce Help: Create a Gift Entry(can be outdated or unavailable during release preview)

Create and Manage Pledges in Bulk

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Choose the source objects and fields from which to build the Recency, Frequency, and Monetary Value (RFM) scores. Select the destination object and fields on which to show the singular scores and the composite RFM score.

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Manage and report on advancement designations by capturing important reporting details. Advancement operations teams can track a variety of funds, including endowed, capital, and operational, with flexible fields for additional reporting information. Ensure consistent data collection for institutional reporting, and support compliance with industry reporting standards. This feature also introduces a person's role with the institution, graduation status, giving levels, and the purpose of their gifts.

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.

Drive Comprehensive Prospect Research Activities

Store and manage detailed prospect research data for alumni, donors, and households. Relationship officers and prospect researchers can track and analyze wealth indicators, philanthropic events, research assessments, and key milestones to build a complete picture of activity. To support continuous research efforts and uncover deeper insights, this long-term view helps your institution strengthen relationships based on a lifetime of engagement and activity.

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Unlock deeper alumni insights by analyzing generational cohorts and graduation status. Relationship officers and prospect researchers can now categorize alumni by groups such as baby boomers, Gen X, millennials, and Gen Z. They can also group alumni into segments by graduation date.

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.

New and Changed Objects and Fields for Fundraising

Do more with the new and updated Fundraising objects.

New Education Cloud and Nonprofit Cloud Objects and Fields

Represent a formalized assessment of the wealth of a person, household, or organization. Examples of this assessment type are a third-party wealth assessment, a property valuation, a financial asset assessment, or an internal assessment

Use the new PartyPhilanthropicAssessment object.

Represent an unconfirmed or soft indication that highlights the wealth or growth potential of a person, household, or organization

Use the new PartyPhilanthropicIndicator object.

Represent philanthropic activities and financial status at a specific time

Use the new PartyPhilanthropicMilestone object.

Represent a confirmed or financially quantifiable occurrence in which the wealth of of a person, household, or organization changed

Use the new PartyPhilanthropicOccurrence object.

Track Soft Credits on the Donor Gift Summary

Use the new `CurrentYearSoftCreditCount`, `LastYearSoftCreditsAmount`, `CurrentYearSoftCreditsAmount`, `LastTwoYearSoftCreditCount`, `LastYearSoftCreditCount`, and `TotalSoftCreditsAccount` fields on the existing DonorGiftSummary object.

Represent more details about a person's role or relationship with an institution

Use the new `AdvancementGraduationDate`, `AdvancementType`, `GraduationCohort`, and `GraduationStatus` fields on the ContactProfile object in Education Cloud.

Enable gift entry clerks to designate and report on funding for current operations versus capital purposes

Use the new `CapitalPurpose` and `CurrentOperationsPurpose` fields on the GiftDesignation object in Education Cloud. Values align with the Council for Advancement and Support of Education's Voluntary Support of Education standards.

Represent more contextual information about the schedule for fulfilling a gift commitment

Use the new `AdvancementType`, `GraduationCohort`, and `GraduationAchievement` fields on the GiftCommitmentSchedule object in Education Cloud.

Represent more contextual information about a person to whom a soft credit is attributed

Use the new `AdvancementType`, `GenerationalCohort`, `GraduationAchievement`, and `GraduationCohortfields` on the GiftSoftCredit object in Education Cloud.

Represent more contextual information about a donor in a gift transaction

Use the new `AdvancementType`, `GraduationAchievement`, and `GraduationCohort` fields on the GiftTransaction object in Education Cloud.

Represent the amount a person, household, or organization has donated in the current year

Use the new `GivingLevel` field on the DonorGiftSummary object. Values align with the Council for Advancement and Support of Education's Voluntary Support of Education standards.

Represent a donor's age group

Use the new `GenerationalCohort` field on the ContactProfile object.

Picklist values for `GenerationalCohort` that align with industry standards:

- Silent Generation (1928–1945)
- Baby Boomers (1946–1964)
- Generation X (1965-1980)
- Millennials (1981–1996)
- Generation Z (1997–2012)
- Generation Alpha (2013–2025)

Represent the amount a person, household, or organization has donated in the current year

Use the new `GivingLevel` field on the DonorGiftSummary object.

Picklist values included for `GivingLevel` that align with U.S. industry standards:

- $25,000,000+
- $10,000,000–$24,999,999
- $5,000,000–$9,999,999
- $1,000,000–$4,999,999
- $250,000–$999,999
- $100,000–$249,999
- $50,000–$99,999
- $25,000–$49,999
- $10,000–$24,999
- $5,000–$9,999
- $2,500–$4,999
- $1,000–$2,499
- $500–$999
- $100–$499
- Under $100

Represent the contact for a gift commitment

Use the new `Contact` field on the GiftCommitment object.

Represent more contextual information about the schedule for fulfilling a gift commitment

Use the new `AdvancementType`, `GraduationAchievement`,and `GraduationCohort` fields on the GiftCommitmentSchedule object in Education Cloud.

Picklist values for `AdvancementType` that align with industry standards:

- Alumni
- Student
- Parent
- Faculty or Staff

- Private Institution Trustee or Board Member
- Public Institution Board Member
- Other Individual

Picklist values for `GraduationAchievement` that align with industry standards:

- Secondary Diploma
- Associate Degree
- Postgraduate Degree
- Multiple Degrees
- Non-Graduate
- Other

Picklist values for `GraduationCohort` that align with industry standards:

- Silent Generation (1928–1945)
- Baby Boomers (1946–1964)
- Generation X (1965-1980)
- Millennials (1981–1996)
- Generation Z (1997–2012)
- Generation Alpha (2013–2025)

Represent a donor's age group

Use the new `GenerationalCohort` field on the GiftCommitmentSchedule object.

Picklist values for `GenerationalCohort` that align with industry standards:

- Silent Generation (1928–1945)
- Baby Boomers (1946–1964)
- Generation X (1965-1980)
- Millennials (1981–1996)
- Generation Z (1997–2012)
- Generation Alpha (2013–2025)

Represent a donor's age group

Use the new `GenerationalCohort` field on the GiftTransaction object.

Picklist values for `GenerationalCohort` that align with industry standards:

- Silent Generation (1928–1945)
- Baby Boomers (1946–1964)
- Generation X (1965-1980)
- Millennials (1981–1996)
- Generation Z (1997–2012)
- Generation Alpha (2013–2025)

Represent a donor's age group

Use the new `GenerationalCohort` field on the GiftSoftCredit object in Education Cloud and Nonprofit Cloud.

Picklist values for `GenerationalCohort` that align with industry standards:

- Silent Generation (1928–1945)

- Baby Boomers (1946–1964)
- Generation X (1965-1980)
- Millennials (1981–1996)
- Generation Z (1997–2012)
- Generation Alpha (2013–2025)

Represent the tax deduction applicable to a gift

Use the new `TaxDeductionAmount` field on the GiftTransaction object.

Represent a formalized assessment of the wealth of a person, household, or organization, such as a third-party wealth assessment, a property valuation, a financial asset assessment, or an internal assessment

Use the new PartyPhilanthropicAssessment object.

Represent an unconfirmed or soft indication that highlights the wealth or growth potential of a person, household, or organization

Use the new PartyPhilanthropicIndicator object.

Represent the activities and financial status of a philanthropic project for a point in time

Use the new PartyPhilanthropicMilestone object.

Represent a confirmed or financially quantifiable occurrence in which the wealth of of a person, household, or organization has changed

Use the new PartyPhilanthropicOccurrence object.

New Education Cloud Objects and Fields

Represent more details about a person's role or relationship with an institution

Use the new `AdvancementGraduationDate`, `AdvancementType`, `GraduationAchievement`, and `GraduationCohort` fields on the ContactProfile object in Education Cloud.

Picklist values for `AdvancementType` that align with industry standards:

- Alumni
- Student
- Parent
- Faculty or Staff
- Private Institution Trustee or Board Member
- Public Institution Board Member
- Other Individual

Picklist values for `GraduationAchievement` that align with industry standards:

- Secondary Diploma
- Associate Degree
- Postgraduate Degree
- Multiple Degrees
- Non-Graduate
- Other

Picklist values for `GraduationCohort` that align with industry standards:

- 0–5 Years Since Graduation
- 6–10 Years Since Graduation

- 11–20 Years Since Graduation
- 21–30 Years Since Graduation
- 31–40 Years Since Graduation
- 41–50 Years Since Graduation
- 50+ Years Since Graduation

Let gift entry clerks designate and report on funding for current operations versus capital purposes

Use the new `CapitalPurpose` and `CurrentOperationsPurpose` fields on the GiftDesignation object in Education Cloud

Picklist values for `CapitalPurpose` that align with industry standards:

- Property
- Buildings and Equipment
- Endowment: Income Unrestricted
- Endowment: Income Restricted
- Loan Funds
- Other Capital Purpose

Picklist values for `CurrentOperationsPurpose` that align with industry standards:

- Unrestricted
- Academic
- Faculty / Staff Compensation
- Research
- Student Financial Aid
- Student Affairs / Life
- Athletics
- Other Restricted

Represent more contextual information about a person to whom a soft credit is attributed

Use the new `AdvancementType`, `GraduationAchievement`, and `GraduationCohort` fields on the GiftSoftCredit object in Education Cloud.

Picklist values for `AdvancementType` that align with industry standards:

- Alumni
- Student
- Parent
- Faculty or Staff
- Private Institution Trustee or Board Member
- Public Institution Board Member
- Other Individual

Picklist values for `GraduationAchievement` that align with industry standards:

- Secondary Diploma
- Associate Degree
- Postgraduate Degree
- Multiple Degrees

- Non-Graduate
- Other

Picklist values for `GraduationCohort` that align with industry standards:

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Represent more contextual information about a donor in a gift transaction

Use the new `AdvancementType`, `GraduationAchievement`, and `GraduationCohort` fields on the GiftTransaction object in Education Cloud.

Picklist values for `AdvancementType` that align with industry standards:

- Alumni
- Student
- Parent
- Faculty or Staff
- Private Institution Trustee or Board Member
- Public Institution Board Member
- Other Individual

Picklist values for `GraduationAchievement` that align with industry standards:

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- Postgraduate Degree
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Picklist values for `GraduationCohort` that align with industry standards:

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Grantmaking

Streamline the grant review process by supporting grant managers to batch-assign multiple applications to reviewers, saving time and boosting efficiency. Automate routine tasks with Stage Management to ensure accuracy and compliance through clearly defined stage criteria.

IN THIS SECTION:

[Delivered Idea: Save Time by Bulk-Assigning Grant Application Reviews](#)

Streamline the grant review process by creating flows so grant managers can assign multiple applications to reviewers and share the related records. Save time, reduce frustration, improve consistency and compliance, and enhance the overall user experience with these flows alongside Stage Management. We delivered this feature thanks to your ideas on IdeaExchange.

Streamline Grantmaking Processes with Stage Management

Automate routine tasks, ensure accuracy, and enhance compliance through defined entry and exit criteria of stages. Additionally, grant managers can save time and effort, and focus on meaningful tasks by assigning reviews in batches.

Enter Multiple Grant Funding Results in Experience Cloud

Grant recipients can easily report results they achieved thanks to your funding. Provide a spreadsheet-like experience to enter multiple results in one go on your Experience Cloud site.

Delivered Idea: Share Funding Disbursements

You can now customize sharing settings for funding disbursements and set the default internal or external access to Private, Public Read Only, or Public Read-Write. These additional sharing settings give you more flexibility to control who can see and edit your data. We delivered this feature thanks to your ideas on IdeaExchange.

Changed Objects for 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.

Save Time by Bulk-Assigning Grant Application Reviews

Streamline the grant review process by creating flows so grant managers can assign multiple applications to reviewers and share the related records. Save time, reduce frustration, improve consistency and compliance, and enhance the overall user experience with these flows alongside Stage Management. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

SEE ALSO:

IdeaExchange: Bulk Review Assignment (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Grant Application Reviews, Batch Assign Reviews, and Share Application Records (can be outdated or unavailable during release preview)

Streamline Grantmaking Processes with Stage Management

Automate routine tasks, ensure accuracy, and enhance compliance through defined entry and exit criteria of stages. Additionally, grant managers can save time and effort, and focus on meaningful tasks by assigning reviews in batches.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

When: You can enable and configure Stage Management starting on February 17, 2025.

SEE ALSO:

Salesforce Help: Set Up Grant Application Reviews, Batch Assign Reviews, and Share Application Records (can be outdated or unavailable during release preview)

Salesforce Help: Improve Accuracy and Compliance with Stage Management for Grantmaking (can be outdated or unavailable during release preview)

Enter Multiple Grant Funding Results in Experience Cloud

Grant recipients can easily report results they achieved thanks to your funding. Provide a spreadsheet-like experience to enter multiple results in one go on your Experience Cloud site.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

How: On your Experience Cloud site, on the Funding Award page, add the Create Indicator Results component.

SEE ALSO:

Salesforce Help: Define and Measure the Impact of Grants with Outcome Management (can be outdated or unavailable during release preview)

Share Funding Disbursements

You can now customize sharing settings for funding disbursements and set the default internal or external access to Private, Public Read Only, or Public Read-Write. These additional sharing settings give you more flexibility to control who can see and edit your data. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

SEE ALSO:

IdeaExchange: Funding Disbursement - Funding Award as Lookup relationship (can be outdated or unavailable during release preview)

Changed Objects for 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.

Specify the status of the application review

Use the new `Draft` picklist value on the ApplicationReview object. Use the updated `Canceled` picklist value on the ApplicationReview object.

Specify the usage type of the application render method

Use the new `Form Framework` picklist value picklist value for `UsageType` on the ApplicationRenderMethod object, where `Grantmaking` is the default value.

Specify the type of application stage definition

Use the new `Form Framework` picklist value for `Type` on the ApplicationStageDefinitionMethod object.

Identify the owner or funding recipient

Use the `OwnerId` field on the FundingDisbursement object. Sharing and SharingRules associated objects are available on FundingDisbursment.

Track planned and actual budget utilization

Use the `EstimatedUtilizationAmount` and `UtilizedAmount` fields on the Budget object.

SEE ALSO:

Developer Guide: Grantmaking Developer Guide (can be outdated or unavailable during release preview)

Group Membership and Households

Receive change events for more objects. Effortlessly add the right Members to your party relationship groups.

IN THIS SECTION:

Receive Change Event Notifications for More Objects

Use Change Data Capture to receive notifications of record changes for the Party Relationship Group, Account Account Relation, Contact Contact Relation, Party Role Relation, and Record Aggregation Result objects. Record changes include creating a record, updating a record, and deleting a record.

Easily Find Contacts for Party Relationship Groups

Easily add the correct members to your party relationship groups with the help of email IDs. When you create a party relationship group, if the member search lists two contacts with the same name, identify the correct contact by using the associated email ID and phone number that appears next to a contact. Previously, only the phone number appeared next to a contact.

Receive Change Event Notifications for More Objects

Use Change Data Capture to receive notifications of record changes for the Party Relationship Group, Account Account Relation, Contact Contact Relation, Party Role Relation, and Record Aggregation Result objects. Record changes include creating a record, updating a record, and deleting a record.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: On the Change Data Capture page in Setup, select the objects that you want to get notifications for, and save the changes.

SEE ALSO:

Object Documentation: Account Account Relation

Object Documentation: Contact Contact Relation

Object Documentation: Party Relationship Group

Object Documentation: Party Role Relation

Easily Find Contacts for Party Relationship Groups

Easily add the correct members to your party relationship groups with the help of email IDs. When you create a party relationship group, if the member search lists two contacts with the same name, identify the correct contact by using the associated email ID and phone number that appears next to a contact. Previously, only the phone number appeared next to a contact.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: From the App Launcher, find and select **Party Relationship Groups**. Click **New Group**. Enter a group name, and search for and select contacts to add as members to the group.

Industries Configure, Price, Quote (CPQ)

Spring 25 brings enhancements to streamline catalog management, promotions, and user experiences. Updates include automated duplicate offer resolution, seamless DC–CPQ integration, support for large promotion bundles, and timezone-aware catalog data. Additional features such as API versioning and anonymous user pricing offer greater flexibility and accuracy. These changes simplify processes, enhance efficiency, and improve overall performance.

IN THIS SECTION:

Detect and Resolve Duplicate Offers During Hierarchical Catalog Compilation

Manage complex catalog structures and compile all catalogs in a hierarchy simultaneously without manual intervention. The Digital Commerce framework enhancements automatically detect and resolve duplicate offers across hierarchical catalogs. This automation reduces errors, saves time, and simplifies catalog management.

Configuring and Pricing Bundles for Anonymous User

From Spring '25, a new single Digital Commerce (DC) API—Preview Offers API allows anonymous B2C users to configure and price product bundles without adding them to a cart. This streamlines the browsing and comparison process, enhancing the overall customer experience. The API also supports advanced pricing models, including usage-based and attribute-based pricing.

Support for Offer Specification

From Spring'25, Offer Specification is supported for Standard DC APIs. Offer Specification allows service providers flexibility for existing subscribers to manage in-life changes with purchased configurations.

Ensure Seamless Promotion Management Across Digital Commerce and Standard CPQ

The Communications, Media, and Energy & Utilities (CME) Managed Package now supports interoperability between Standard Digital Commerce (DC) and Standard Configure, Price, Quote (CPQ). You can now resolve the promotion cache conflicts and enable unified promotion compilation, ensuring consistent and reliable promotion management across both the systems.

Process Large Promotion Bundles Seamlessly in Standard Digital Commerce

Scale your promotional strategies with enhanced support for large, complex bundles in Standard Digital Commerce (DC). By removing size constraints, you can compile and process bundles with over 200 line items effortlessly. Save time and reduce manual efforts with optimized processing for intricate promotional structures.

Automate Cache Cleanup with Lifecycle Management

Reduce maintenance efforts in Developer and Sandbox orgs with the new Cache Lifecycle Management Job. This automated job clears stale snapshot data and removes duplicates, freeing up storage space and improving system performance.

Simplify MACD (Move, Add, Change, Delete) Journeys with Guided Transform Multiplay

Boost flexibility and efficiency in Move, Add, Change, and Delete (MACD) workflows with a new guided journey for the Transform Multiplay feature, available as part of the CPQ UI Lightning Web Component (LWC). This enhancement empowers sales representatives to split, merge, and replace offers in existing assets, enabling service providers to deliver tailored solutions and optimized bundles.

Integrate Salesforce Pricing with Standard Digital Commerce APIs

Extend Salesforce Pricing integration to the Standard Digital Commerce (DC) APIs. This integration supports unified pricing and simplifies setup with a common configuration for Standard Cart CPQ and Digital Commerce APIs.

Attribute Validation in PutCartsItems API

From Spring'25, the PutCartsItems API now validates the userValues when updating attributes to ensure they match the correct data type. If there is a mismatch, such as attempting to update a numeric attribute with a string value, an exception is raised.

Sync Product and Promotion Launch Dates Across Time Zones

Align effective date and end date of products and promotions with the right time zone based on the user's locale and eliminate errors caused by GMT-based time zone calculations. Ensure real-time accuracy, improving customer experience and operational precision in global order executions. For instance, when an admin schedules a product launch on Black Friday at noon US time, customers around the world can experience the launch at the corresponding local time.

SEE ALSO:

Known Issues: Standard Cart API - putCartsItems fails with Internal Server Error

Known Issues: Standard Digital Commerce API - Asset To Basket fails with Argument cannot be null error

Known Issues: Standard Cart API - putCartsItems fails with Internal Server Error

Known Issues: Hybrid Cart - Even with Collapsible Hierarchy, all optional products are visible with actions

Known Issues: OS Runtime - Success Message not displayed

Known Issues: applyAdjustment fails with Apex CPU time limit exceeded

Detect and Resolve Duplicate Offers During Hierarchical Catalog Compilation

Manage complex catalog structures and compile all catalogs in a hierarchy simultaneously without manual intervention. The Digital Commerce framework enhancements automatically detect and resolve duplicate offers across hierarchical catalogs. This automation reduces errors, saves time, and simplifies catalog management.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Who: For users with admin or developer permissions to configure Digital Commerce catalog settings.

How: Admins and developers can access the updated Digital Commerce job framework to compile catalogs in a hierarchy. The system automatically identifies and resolves duplicate offers during the process. No additional configuration is needed.

Configuring and Pricing Bundles for Anonymous User

From Spring '25, a new single Digital Commerce (DC) API—Preview Offers API allows anonymous B2C users to configure and price product bundles without adding them to a cart. This streamlines the browsing and comparison process, enhancing the overall customer experience. The API also supports advanced pricing models, including usage-based and attribute-based pricing.

This API retrieves fully priced product bundles based on user inputs such as estimated usage, location, and product attributes. It supports pricing calculations through Unit-Based Pricing (UBP), Attribute-Based Pricing (ABP), and the Business Rules Engine (BRE). The API provides a detailed price breakdown, including a waterfall view, for each configured bundle, facilitating easy comparison of offers. This functionality meets a critical need for B2C customers and reduces the dependency on custom code for anonymous pricing scenarios.

Note: Since the Preview Offers API is a new API endpoint, customers using DC APIs must run the Load API Metadata job. Perform these steps to ensure all API metadata customizations remain intact.

- Backup your customizations to ensure you have a copy of your work.
- Execute the Load API Metadata job to synchronize the resource file and the values in the VlocityAPIMetadata__c table.
- Restore your customizations from the backup to reapply your previous settings.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed and Digital Commerce APIs is enabled.

Who: This feature is accessible to anonymous B2C users.

Support for Offer Specification

From Spring'25, Offer Specification is supported for Standard DC APIs. Offer Specification allows service providers flexibility for existing subscribers to manage in-life changes with purchased configurations.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed and Digital Commerce APIs is enabled.

Who: This feature is available to users with the necessary permissions to configure and manage offers in Standard DC APIs.

Ensure Seamless Promotion Management Across Digital Commerce and Standard CPQ

The Communications, Media, and Energy & Utilities (CME) Managed Package now supports interoperability between Standard Digital Commerce (DC) and Standard Configure, Price, Quote (CPQ). You can now resolve the promotion cache conflicts and enable unified promotion compilation, ensuring consistent and reliable promotion management across both the systems.

Where: This change applies to all editions where the CME managed package is installed.

Who: To enable and manage DC and standard CPQ Promotion Integration, users must have permissions to manage promotions in both Standard Digital Commerce and Standard CPQ.

How: Admins can enable and manage DC and standard CPQ Promotion Integration through existing promotion compilation workflows. The CME managed package automatically resolves cache conflicts, ensuring seamless promotion management across both DC and CPQ without additional configuration. End users benefit from consistent promotion behavior across systems.

Process Large Promotion Bundles Seamlessly in Standard Digital Commerce

Scale your promotional strategies with enhanced support for large, complex bundles in Standard Digital Commerce (DC). By removing size constraints, you can compile and process bundles with over 200 line items effortlessly. Save time and reduce manual efforts with optimized processing for intricate promotional structures.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Who: This feature is available to users with permissions to configure and manage promotions in Standard DC.

Why: Previously, large promotional bundles exceeded system limits, requiring manual restructuring and frequent cache clearance to process. With the latest enhancements, you can eliminate those barriers to manage and scale large promotions efficiently without applying workarounds.

How: Admins and developers can compile large promotional bundles directly in Standard DC without additional configuration.

Automate Cache Cleanup with Lifecycle Management

Reduce maintenance efforts in Developer and Sandbox orgs with the new Cache Lifecycle Management Job. This automated job clears stale snapshot data and removes duplicates, freeing up storage space and improving system performance.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Who: This feature is available to admins and developers managing org storage and cache configurations.

How: Admins can schedule or run the Cache Lifecycle Management Job through the Vlocity CMT Administration EPC Jobs interface. The job automatically identifies and clears outdated snapshot records and duplicate data, ensuring optimized storage use without requiring additional configuration or manual intervention.

Simplify MACD (Move, Add, Change, Delete) Journeys with Guided Transform Multiplay

Boost flexibility and efficiency in Move, Add, Change, and Delete (MACD) workflows with a new guided journey for the Transform Multiplay feature, available as part of the CPQ UI Lightning Web Component (LWC). This enhancement empowers sales representatives to split, merge, and replace offers in existing assets, enabling service providers to deliver tailored solutions and optimized bundles.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Who: This feature is accessible to users with permissions to manage assets and configure offers in the CME managed package.

SEE ALSO:

Help Documentation: Transformation of Multiplay Offers

Integrate Salesforce Pricing with Standard Digital Commerce APIs

Extend Salesforce Pricing integration to the Standard Digital Commerce (DC) APIs. This integration supports unified pricing and simplifies setup with a common configuration for Standard Cart CPQ and Digital Commerce APIs.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Why: Previously, Salesforce Pricing integration was limited to the Standard Cart API. This enhancement introduces support for the Standard DC APIs, ensuring consistent and accurate pricing across both APIs while reducing the need for separate configurations.

How: Set up Salesforce Pricing integration. See at Standard Salesforce Pricing for Communications, Media, and Energy (CME). The setup process is shared between the Standard Cart and Standard DC APIs, making configuration straightforward and efficient.

SEE ALSO:

Help Documentation: Standard Salesforce Pricing for Communications, Media, and Energy (CME)

Attribute Validation in PutCartsItems API

From Spring'25, the PutCartsItems API now validates the userValues when updating attributes to ensure they match the correct data type. If there is a mismatch, such as attempting to update a numeric attribute with a string value, an exception is raised.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Sync Product and Promotion Launch Dates Across Time Zones

Align effective date and end date of products and promotions with the right time zone based on the user's locale and eliminate errors caused by GMT-based time zone calculations. Ensure real-time accuracy, improving customer experience and operational precision in global order executions. For instance, when an admin schedules a product launch on Black Friday at noon US time, customers around the world can experience the launch at the corresponding local time.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed and Digital Commerce APIs is enabled. This feature is currently not available to Standard Digital Commerce users.

How: Both Admins and Product Designers can add time zone information to the product and promotion effectivity dates, so that accurate availability data is consistent with regional customer expectations.

Sales Reps can access the latest offers and confirm product availability in real time based on localized timing. They can view catalog items accurately aligned with purchase timing across customer regions. When scheduling jobs, admins can verify the time across different time zones, ensuring correct execution and alignment with intended timelines.

SEE ALSO:

Help Documentation: Create Products in the Product Designer

Integration Solutions with MuleSoft

Save and reuse the configuration details when you enable an integration to connect your Salesforce org to an external system.

IN THIS SECTION:

Save and Reuse Connection Settings When You Enable MuleSoft Integrations

Work faster by reusing the saved connection settings instead of reentering them every time you enable an integration. Reuse the saved settings for other apps or the dependent apps of the same integration app with minimal effort. Edit, delete, or disconnect the failed connections to improve your workflow efficiency.

Integration Solutions with MuleSoft Video

Watch the video to learn the capabilities of Integration Solutions with MuleSoft.

Save and Reuse Connection Settings When You Enable MuleSoft Integrations

Work faster by reusing the saved connection settings instead of reentering them every time you enable an integration. Reuse the saved settings for other apps or the dependent apps of the same integration app with minimal effort. Edit, delete, or disconnect the failed connections to improve your workflow efficiency.

Where: This change applies to Lightning Experience where MuleSoft Direct is enabled.

Who: To save the connection configurations, users must have the Salesforce Administrator user permission.

How: In Setup, find and select **MuleSoft Direct**. Enable an integration by providing the configuration details. Save the configuration with a connection name.

SEE ALSO:

Salesforce Help: Enable Integrations

Integration Solutions with MuleSoft Video

Watch the video to learn the capabilities of Integration Solutions with MuleSoft.

- Get Started with MuleSoft Direct Integrations shows how admins can connect an org with MuleSoft instance.

Omnistudio Document Generation

Ensure compatibility with the new document generation infrastructure and add flexibility to document generation workflows. Get increased hourly and daily limits for batch server-side document generation requests. Plan for the retirement of Document Generation 1.0 by switching to Document Generation 2.0. The enhancements in Document Generation 2.0 include a new custom fonts configuration, document previewer, and hybrid client-side processing. Use dynamic image tokens in document templates for server-side document generation.

IN THIS SECTION:

[Process More Batch Server-Side Document Generation Requests with Increased Limits]

Process up to 2,500 batch server-side document generation requests per hour and up to 60,000 requests per day. The previous hourly and daily limits for these requests were 1,000 and 24,000, respectively. After you provide the in-app consent to use Document Generation 2.0, the client-side PDF generation requests will transition to Hyperforce infrastructure, where processing will be subject to the server-side document generation limits.

[Document Generation 1.0 is Being Retired]

Document Generation 1.0 is scheduled for retirement on July 31, 2025. Document Generation 1.0 refers to the document generation within the Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages up to the Winter '25 release. To continue to use document generation capabilities, switch to Document Generation 2.0, which includes updates to the client-side document generation processing, the PDF previewer, and the custom font configuration.

[Enhance Document Generation with Document Generation 2.0]

Make document generation more robust without significantly altering your day-to-day experience or existing features within the Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages. You must provide in-app consent to transition to Document Generation 2.0, which includes changes to the client-side document generation process, the PDF previewer's look and feel, and minor changes to the custom font configuration. The client-side document generation adopts a hybrid approach, processing .docx files locally within the package and leveraging Hyperforce infrastructure for limited operations, ensuring consistency with server-side generation while adhering to its limits.

[Enrich Server-Side Document Generation with Dynamic Images]

Insert product images, barcodes, or pie charts in your generated .docx and .pdf documents by using image tokens in a Microsoft Word or Microsoft PowerPoint document template. Use a single image, multiple images, and loop images. Place image tokens anywhere within a document template, including paragraphs, tables, and text boxes. Define the height and width of the images in Omnistudio Data Mapper Transform. Use image tokens within the Token Data and Token Data Content Document fields of the Document Generation Process. Add images to the rich text field for server-side document generation. Use a custom class to load a blob for dynamic image rendering from sources, such as non-contentDocumentId, URL, sObjectID, or other strings and identifiers.

Process More Batch Server-Side Document Generation Requests with Increased Limits

Process up to 2,500 batch server-side document generation requests per hour and up to 60,000 requests per day. The previous hourly and daily limits for these requests were 1,000 and 24,000, respectively. After you provide the in-app consent to use Document Generation 2.0, the client-side PDF generation requests will transition to Hyperforce infrastructure, where processing will be subject to the server-side document generation limits.

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

SEE ALSO:

[Metering and Throttling]

[Document Generation with Omniscript]

Document Generation 1.0 is Being Retired

Document Generation 1.0 is scheduled for retirement on July 31, 2025. Document Generation 1.0 refers to the document generation within the Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages up to the Winter '25 release. To continue to use document generation capabilities, switch to Document Generation 2.0, which includes updates to the client-side document generation processing, the PDF previewer, and the custom font configuration.

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

When: Document Generation 1.0 is set to retire by July 31, 2025. To continue access to document generation capabilities, upgrade to the Spring '25 managed package, provide in-app consent, and configure Document Generation 2.0.

How: To continue to access document generation capabilities, upgrade to the Spring '25 managed package, provide in-app consent, and perform post-upgrade steps to use Document Generation 2.0 services and features.

SEE ALSO:

Document Generation 1.0 Retirement

Changes to Document Generation Process and Previewer in Spring '25

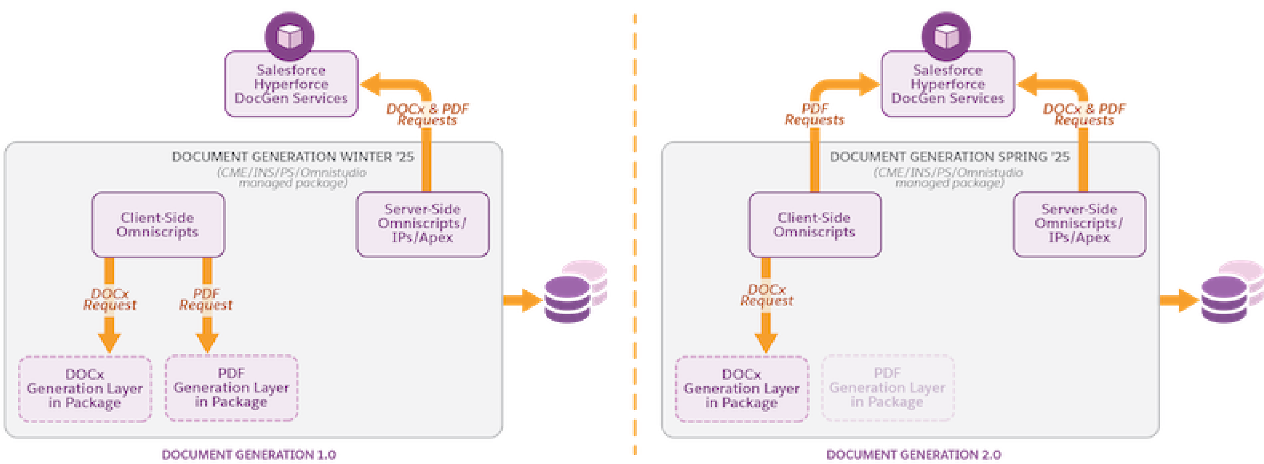
Document Generation Processing with Document Generation 2.0

Enhance Document Generation with Document Generation 2.0

Make document generation more robust without significantly altering your day-to-day experience or existing features within the Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages. You must provide in-app consent to transition to Document Generation 2.0, which includes changes to the client-side document generation process, the PDF previewer's look and feel, and minor changes to the custom font configuration. The client-side document generation adopts a hybrid approach, processing .docx files locally within the package and leveraging Hyperforce infrastructure for limited operations, ensuring consistency with server-side generation while adhering to its limits.

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

How: From the App Launcher, find and select **Document Generation 2.0 Notification**. Then, click **Server-Side Notice**. Review the terms and conditions, complete the Document Generation 2.0 installation.



IN THIS SECTION:

Migrate and Sync Custom Fonts

Manage your custom fonts in Document Generation 2.0 by migrating them to a centralized repository and syncing them across orgs. If you add, delete, or modify font files, sync the fonts again to ensure the changes are applied.

SEE ALSO:

Document Generation 1.0 Retirement

Changes to Document Generation Process and Previewer in Spring '25

Get Started With Document Generation 2.0

Migrate and Sync Custom Fonts

Manage your custom fonts in Document Generation 2.0 by migrating them to a centralized repository and syncing them across orgs. If you add, delete, or modify font files, sync the fonts again to ensure the changes are applied.

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

Who: To migrate and sync fonts, users need the DocGen Designer permission set.

How: From Setup, in the Quick Find box, enter `Document Generation` and select **Custom Fonts Configuration**. To migrate your custom fonts, transfer them from Static Resources to the centralized Custom Fonts Library and click **Migrate**. To sync your custom fonts, click **Sync**.

Enrich Server-Side Document Generation with Dynamic Images

Insert product images, barcodes, or pie charts in your generated .docx and .pdf documents by using image tokens in a Microsoft Word or Microsoft PowerPoint document template. Use a single image, multiple images, and loop images. Place image tokens anywhere within a document template, including paragraphs, tables, and text boxes. Define the height and width of the images in Omnistudio Data Mapper Transform. Use image tokens within the Token Data and Token Data Content Document fields of the Document Generation Process. Add images to the rich text field for server-side document generation. Use a custom class to load a blob for dynamic image rendering from sources, such as non-contentDocumentId, URL, sObjectID, or other strings and identifiers.

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

How: To insert dynamic images into a generated document, first store the images in the Files, or Documents tab of your Salesforce org. Create custom text fields in the object that you want to fetch your image from. Map the uploaded images to the custom fields by using the image API names. Add image tokens in the document template, provide data mapping in the Extract and Transform Data Mappers, and then generate the document with dynamic images.

Outcome Management

Manage your impact strategy more efficiently and improve consistency by entering multiple indicator results in a spreadsheet-like experience.

IN THIS SECTION:

Create Multiple Indicator Results

Capture multiple indicator results on one easy-to-use page. Enter results in a spreadsheet format on Lightning record pages or your Experience Cloud site. Easily manage your impact strategy and collect clean, usable data to track your progress. Customize the information you capture to fit your organization's workflow.

Create Multiple Indicator Results

Capture multiple indicator results on one easy-to-use page. Enter results in a spreadsheet format on Lightning record pages or your Experience Cloud site. Easily manage your impact strategy and collect clean, usable data to track your progress. Customize the information you capture to fit your organization's workflow.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Outcome Management is enabled.

How: Add the Create Indicator Results component to Program, Outcome, or other Lightning record pages. Add, remove, or configure fields in the grid.

SEE ALSO:

Help Documentation: Track Progress with Indicator Results (can be outdated or unavailable during release preview)

Program and Case Management

Create personalized care plans by setting client-specific goals in the Care Plan UI, making the plans more meaningful and motivating. Improve care plan quality and consistency and create compliant care plan templates from the existing ones.

IN THIS SECTION:

Delivered Idea: Create Custom Care Plan Goals

Make every client feel special. Create personalized care plans with custom goals that fit each client's unique needs. Make care plans more meaningful and engaging for your clients. We delivered this feature thanks to your ideas on IdeaExchange.

Delivered Idea: Clone Care Plan Templates

Improve care plan quality and consistency and create compliant care plan templates from the existing ones. Create a flow based on the Copy Care Plan Template flow template and add a button to launch the flow on the page layouts. We delivered this feature thanks to your ideas on IdeaExchange.

Improve Accuracy and Compliance with Stage Management

Use Stage Management to automate repetitive tasks, reduce human errors, and ensure regulatory compliance for program enrollments. Create well-defined stages with specific entry and exit criteria to drive efficiency for your program staff.

Set a Default Status for Program Enrollments

Now, you can use your own default status for program enrollments when you click Add Participant on a program. Previously, all program enrollments defaulted to Applied, even if your default was different.

Updated Objects for Program and Case Management

Do more with the updated Program and Case Management objects. To use the new fields, add them to page layouts and make sure your users have edit access for them.

Create Custom Care Plan Goals

Make every client feel special. Create personalized care plans with custom goals that fit each client's unique needs. Make care plans more meaningful and engaging for your clients. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Care Plans are enabled.

SEE ALSO:

Help Documentation: Care Plans Prerequisites (can be outdated or unavailable during release preview)

Help Documentation: Create Goal Definitions (can be outdated or unavailable during release preview)

Help Documentation: Create a Care Plan for a Case (can be outdated or unavailable during release preview)

IdeaExchange: Ability to create Goal Definition ad hoc in Care Plan wizard (can be outdated or unavailable during release preview)

Clone Care Plan Templates

Improve care plan quality and consistency and create compliant care plan templates from the existing ones. Create a flow based on the Copy Care Plan Template flow template and add a button to launch the flow on the page layouts. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Care Plans are enabled.

SEE ALSO:

Help Documentation: Use a Flow to Clone Care Plan Templates (can be outdated or unavailable during release preview)

IdeaExchange: Allow Care Plan Templates to be modified once published (can be outdated or unavailable during release preview)

Improve Accuracy and Compliance with Stage Management

Use Stage Management to automate repetitive tasks, reduce human errors, and ensure regulatory compliance for program enrollments. Create well-defined stages with specific entry and exit criteria to drive efficiency for your program staff.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Program Management is enabled.

When: You can enable and configure Stage Management starting on February 17, 2025.

SEE ALSO:

Help Documentation: Improve Accuracy and Compliance with Stage Management for Program Management (can be outdated or unavailable during release preview)

Set a Default Status for Program Enrollments

Now, you can use your own default status for program enrollments when you click Add Participant on a program. Previously, all program enrollments defaulted to Applied, even if your default was different.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Program Management is enabled.

SEE ALSO:

Help Documentation: Enroll Individual Participants in Programs (can be outdated or unavailable during release preview)

Updated Objects for Program and Case Management

Do more with the updated Program and Case Management objects. To use the new fields, add them to page layouts and make sure your users have edit access for them.

Create a personalized name for your goal

Use the new `CustomGoalName` field on the existing GoalAssignment object.

Indicate whether a custom goal name is required for a goal assignment related to the goal definition

Use the new `IsCustomGoalNameRequired` field on the existing GoalDefinition object.

Record Rollup Definitions

Aggregate tasks and events at a household or group level to help relationship managers stay organized and easily track the progress of events and tasks. Reduce clutter by deleting outdated and unused record rollup definitions. Edit the name and description of a definition for better clarity and usability.

IN THIS SECTION:

Aggregate Tasks and Events with Record Rollup Definitions

Create record rollup definitions for Task and Event objects. Provide deeper insights and context to your relationship managers to make informed decisions by aggregating tasks and events at a household or group level. Easily track progress and stay organized with a comprehensive view of all tasks and events related to a household or group.

Delete Record Rollup Definitions

Reduce the data clutter and simplify maintenance by deleting record rollup definitions that you no longer use. You can delete only the definitions that are in the draft status.

Provide More Meaningful Names and Descriptions to Your Record Rollup Definitions

Effortlessly edit the names and descriptions of your record rollup definitions to ensure that your definitions clearly communicate their purpose. You can edit only the definitions that are in the draft or inactive status.

Aggregate Tasks and Events with Record Rollup Definitions

Create record rollup definitions for Task and Event objects. Provide deeper insights and context to your relationship managers to make informed decisions by aggregating tasks and events at a household or group level. Easily track progress and stay organized with a comprehensive view of all tasks and events related to a household or group.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: From Setup, in the Quick Find box, enter *`Rollup Definitions`*, and then select **Record Rollup Definitions**. To create a record rollup definition, click **New Rollup Definition**, and select **Event** or **Task** as the rollup source object or rollup target object according to your business requirements.

Delete Record Rollup Definitions

Reduce the data clutter and simplify maintenance by deleting record rollup definitions that you no longer use. You can delete only the definitions that are in the draft status.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: From Setup, in the Quick Find box, enter `Rollup Definitions`, and then select **Record Rollup Definitions**. Open the definition that you want to delete, and click **Delete**.

SEE ALSO:

Salesforce Help: Delete a Record Rollup Definition

Provide More Meaningful Names and Descriptions to Your Record Rollup Definitions

Effortlessly edit the names and descriptions of your record rollup definitions to ensure that your definitions clearly communicate their purpose. You can edit only the definitions that are in the draft or inactive status.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: From Setup, in the Quick Find box, enter `Rollup Definitions`, and then select **Record Rollup Definitions**. Open an inactive or draft record rollup definition that you want to edit, and click .

SEE ALSO:

Salesforce Help: Edit a Record Rollup Definition

Stage Management

Ensure alignment with overarching business goals by declaratively controlling parent object stage transitions based on child object criteria. Save time and effort by cloning stage definitions for similar business processes across different record types. Track progress towards a specific stage with the new Milestone step type. Optimize workflows with conditional step execution by using expression sets.

IN THIS SECTION:

Manage Parent and Child Stage Transitions Declaratively

Enhance business process management by using a declarative approach to control parent object stage transitions based on child object stage transitions. Configure the criteria and conditions to automatically update the parent object's stage whenever the child object meets specific criteria. Your users can efficiently oversee and track interconnected business processes, making sure that dependent processes align with the overarching business goals.

Clone and Customize Stage Definitions

Save time and effort by cloning stage definitions and mapping their stages to the new definitions. Easily create definitions for similar business processes applicable to different record types.

Define Key Checkpoints with Milestones

With the Milestone step type in the Stage Management builder, users can track their progress towards a specific stage in a business process. Set specific goals based on completed steps or key actions, such as document validation for a party profile record. Easily track and visualize progress in the Record Stage Overview lightning web component.

Automate Step Definition Execution

Optimize your workflows and improve process efficiency with conditional step execution in Stage Management. Use predefined logic to automate complex decision-making processes by using expression sets. The expression set evaluates the specified conditions and, based on the results, determines whether the step must be executed or skipped.

SEE ALSO:

Salesforce Help: Stage Management

Manage Parent and Child Stage Transitions Declaratively

Enhance business process management by using a declarative approach to control parent object stage transitions based on child object stage transitions. Configure the criteria and conditions to automatically update the parent object's stage whenever the child object meets specific criteria. Your users can efficiently oversee and track interconnected business processes, making sure that dependent processes align with the overarching business goals.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Stage Management.

How: After you set up the stage transition for the reference object, in the Stage Management builder, click **Stage Transition Rules**. Then, select **Add Child Object Criteria and Conditions**.

Clone and Customize Stage Definitions

Save time and effort by cloning stage definitions and mapping their stages to the new definitions. Easily create definitions for similar business processes applicable to different record types.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Stage Management.

How: Clone a stage definition from the Stage Management Setup page or from the Stage Management builder.

Define Key Checkpoints with Milestones

With the Milestone step type in the Stage Management builder, users can track their progress towards a specific stage in a business process. Set specific goals based on completed steps or key actions, such as document validation for a party profile record. Easily track and visualize progress in the Record Stage Overview lightning web component.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Stage Management.

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Optimize your workflows and improve process efficiency with conditional step execution in Stage Management. Use predefined logic to automate complex decision-making processes by using expression sets. The expression set evaluates the specified conditions and, based on the results, determines whether the step must be executed or skipped.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Stage Management.

Marketing

Salesforce offers three marketing products: Account Engagement (formerly known as Pardot), Engagement (formerly known as Marketing Cloud), and Marketing Cloud Growth and Advanced editions.

IN THIS SECTION:

Marketing Cloud

Marketing Cloud offers a number of enhancements in Spring '25, including channel support for WhatsApp, more control over campaign flows, and scoring for accounts. Plus, new and improved Agentforce capabilities for content generation.

Marketing Cloud Account Engagement

Marketing Cloud Account Engagement introduces a number of exciting updates in Spring '25, including the ability to generate marketing copy in multiple languages with Einstein Assistant, API support for copying marketing assets to Salesforce CMS, and troubleshooting email send failures more precisely with upgraded list email reports. Plus, save time and optimize your marketing efforts by ingesting Account Engagement data into Data Cloud with a new data bundle.

Marketing Cloud Engagement

The Spring '25 Marketing Cloud Engagement release occurs February 21, 2025 through March 14, 2025. Some features are made available to you within a week of the release. Get an exclusive, in-depth look at the new features by tuning into the Spring '25 Marketing Cloud Engagement Release New Feature Overview webinar. Stay tuned for updates on this page!

Personalization

Enhance customer experiences using Personalization (previously named Einstein Personalization) and other Marketing Cloud products. Configure personalization experiences directly on any website using Personalization and the Data Cloud Web SDK. Create custom recommender objectives, test experiences using web-based experimentation, and build custom attribution models to visualize customer engagement journeys.

Marketing Cloud

Marketing Cloud offers a number of enhancements in Spring '25, including channel support for WhatsApp, more control over campaign flows, and scoring for accounts. Plus, new and improved Agentforce capabilities for content generation.

IN THIS SECTION:

Reach More People with WhatsApp

Add WhatsApp to your multichannel marketing strategy to better connect with your customers around the world. After you set up WhatsApp in your org, marketers can use the new Blank WhatsApp campaign option to create WhatsApp messages that include rich media content, such as audio and video.

Save Time with New AI Capabilities for Campaigns and Content

Generate campaign content with ease with the Agentforce (Default) agent for emails and landing pages. Plus, get going faster by using the campaign brief prompt in Prompt Builder to generate a brief name, key message, audience description, and detailed campaign goals.

Create Campaigns with Agentforce Campaign Designer (Beta)

Edit and refine your campaign strategy, multi-channel flows, and content from a single interface. This feature helps marketers quickly generate targeted campaigns that better resonate with your audience.

Personalize Emails Consistently with Reusable Personalization Settings and Expressions

Save time and avoid starting from scratch every time you want to personalize content. To craft consistent personalized emails, marketers can reuse personalization settings when they create variations of email components. They can also save and reuse criteria for defining merge fields for consistent use across marketing content.

Reach the Right Customers with Enhanced Audience Tools

Now it's easier than ever to manage and target audience members at every stage of the customer lifecycle. Enjoy a more accurate pipeline with the new Prospect object, apply scoring rules to accounts, and quickly create and preview segments right from a campaign.

Connect Experiences on External Sites

Now you can collect information from your customers on external sites with an embedded form. Plus, relate activity from your site to a campaign for reporting.

Extend Your Marketing with Enhanced Messaging Tools

Now you can expand your SMS marketing to more locations around the globe. Plus, manage blockout windows, and easily review the source of consent status changes in Data Cloud.

Get More Flexibility and Visibility with Campaigns and Flows

Now you have more visibility and control over your flows from the campaign record. You can also plan and track campaigns with the new marketing calendar. Plus, use custom fields with campaign briefs, and get insight into the status of your campaign flows with the Flow Version Occurrence related list and the Campaign Stage field.

Create and Manage Content More Efficiently

Now marketers can save time with content cloning capabilities, shared workspaces, and default branding for new content. Plus, get more insight on the status of your landing page, form, and brand content.

Get Started Faster with Setup Enhancements

Whether you're new to Marketing Cloud or exploring new features, our improved setup experience saves you time so your team can get to work. Now it's easier to track your setup progress, authenticate a domain for branding or sending email, automatically generate an identity resolution ruleset, and more.

User Interface Updates in Marketing Cloud

Take advantage of improvements throughout the Marketing Cloud app that make it easier for you to accomplish tasks and get important details at a glance.

Reach More People with WhatsApp

Add WhatsApp to your multichannel marketing strategy to better connect with your customers around the world. After you set up WhatsApp in your org, marketers can use the new Blank WhatsApp campaign option to create WhatsApp messages that include rich media content, such as audio and video.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

How: Marketing Cloud now includes these features and functions.

- A WhatsApp campaign option that includes a preconfigured flow with a Send WhatsApp Message element
- Flow Builder elements to support 2-way conversation
- A WhatsApp message builder experience for content creation that includes support for audio, video, and document files
- Communication subscription support and a default preference page for WhatsApp
- Marketing Performance dashboards that include comprehensive insights on delivery rates, reads, replies, and other key metrics.

To get started, connect your WhatsApp Business Account to Salesforce and create communication subscriptions to store consent for WhatsApp messages. Then, set up Marketing Performance to get detailed metrics about your new channel. After setup is complete, marketers can import consent data and begin crafting WhatsApp campaign content.

SEE ALSO:

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

Save Time with New AI Capabilities for Campaigns and Content

Generate campaign content with ease with the Agentforce (Default) agent for emails and landing pages. Plus, get going faster by using the campaign brief prompt in Prompt Builder to generate a brief name, key message, audience description, and detailed campaign goals.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

SEE ALSO:

Salesforce Help: Agentforce Campaigns and Einstein in Marketing Cloud (can be outdated or unavailable during release preview)

Create Campaigns with Agentforce Campaign Designer (Beta)

Edit and refine your campaign strategy, multi-channel flows, and content from a single interface. This feature helps marketers quickly generate targeted campaigns that better resonate with your audience.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Advanced edition or Marketing Cloud Account Engagement Plus, Advanced, and Premium editions.

Note: Agentforce Campaign Designer 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.

Personalize Emails Consistently with Reusable Personalization Settings and Expressions

Save time and avoid starting from scratch every time you want to personalize content. To craft consistent personalized emails, marketers can reuse personalization settings when they create variations of email components. They can also save and reuse criteria for defining merge fields for consistent use across marketing content.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Reuse Personalization Settings Throughout Email Components

Improve conversations and deliver more effective email campaigns by consistently personalizing components throughout an email. To create variations of a component with preconfigured personalization settings, clone a personalization point. Marketers can clone one from the same email or from a different email to personalize consistently across content. Within the same email, marketers can also link components to one personalization point and control them with the same personalization settings, which ensures consistency and saves time while editing.

SEE ALSO | *Salesforce Help*: Linked Personalization Points in Dynamic Content (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: How Dynamic Content and Personalization Work Together (can be outdated or unavailable during release preview)

Reduce Message Design Time with Reusable Expressions that Define Personalized Merge Fields

Marketers can quickly and consistently build marketing content by reusable filter and sort criteria to select a data attribute, such as Product Name, to use in a merge field. They save this criteria in a new content type called an expression in Salesforce CMS. Content creators can also get more timely and accurate results for merge fields from across multiple related data objects. For example, with a merge field related to both accounts and opportunities, a marketer can define criteria for an email that returns the most recent opportunity for a specific account.

SEE ALSO | *Salesforce Help*: Personalize Marketing Content (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: Create and Manage an Expression (can be outdated or unavailable during release preview)

Reach the Right Customers with Enhanced Audience Tools

Now it's easier than ever to manage and target audience members at every stage of the customer lifecycle. Enjoy a more accurate pipeline with the new Prospect object, apply scoring rules to accounts, and quickly create and preview segments right from a campaign.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Create a Segment with Quick Filters

Marketers can now create a segment from the campaign record with common attribute filters, such as New Leads. With quick filters, marketers can work in the context of the campaign without going into the segment canvas. Add as many filters as needed, and then save it to continue building the campaign.

SEE ALSO | *Salesforce Help*: Add and Preview Segments from a Campaign (can be outdated or unavailable during release preview)

Preview Segment Membership Before Sending

To help marketers make sure they're sending to the right people, they can now preview segment membership before activating a campaign flow. A marketer can preview up to 1,000 members for any published segment on a campaign, and search for specific people. To update the preview with the latest data, republish a segment from the campaign record before previewing again.

SEE ALSO | *Salesforce Help*: Add and Preview Segments from a Campaign (can be outdated or unavailable during release preview)

Expand Your Customer Base with Prospects and Leads

Grow your audience by creating prospects manually or through form submission. Drive engagement with personalized campaigns that are tailored to their interests. Nurture your prospects until they meet the qualification threshold. After they're qualified, convert them to leads manually or through automated flows.

SEE ALSO | *Salesforce Help*: Manage Prospects and Leads (can be outdated or unavailable during release preview)

Prioritize Ready-to-Purchase Accounts with Account Scoring

Prioritize and manage your accounts more efficiently with rule-based account scoring. Now you can segment accounts based on engagement, fit, and intention to purchase, so that you can focus your sales efforts on the accounts that matter most to your business.

SEE ALSO | *Salesforce Help*: Configure Account Scoring in Marketing Cloud (can be outdated or unavailable during release preview)

Connect Experiences on External Sites

Now you can collect information from your customers on external sites with an embedded form. Plus, relate activity from your site to a campaign for reporting.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Embed Forms on External Sites

Deliver a form from exactly where you need it by embedding it on your own hosted web page. After some configuration in both your external site and in Salesforce, grab a form's code block from its detail page, and then embed it into the HTML of an external site. The external site must support iframes, be secure, and use HTTPS.

SEE ALSO | *Salesforce Help*: Forms on External Sites (can be outdated or unavailable during release preview)

Relate External Web Engagement to a Campaign

Get important web traffic data for your sites by relating a campaign to an external web tracking connector. After you configure the campaign and connector, add the tracking snippet to your external site's source code. Then, you can evaluate your web engagement using Marketing Performance reports and dashboards.

SEE ALSO | *Salesforce Help*: Track Activity on External Sites (can be outdated or unavailable during release preview)

External Tracking Data Kit Was Updated

To support the web tracking connector and campaign association, we updated the external tracking data kit. If you already have external web tracking configured, you must install the new data kit from the Web Tracking page in Salesforce Setup, and then deploy both of the included data streams. To retain your previous customizations, save a copy of your current Sitemap code, configure the new settings, and then reapply the custom code. You don't need to make any changes to the tracking snippet on your site.

SEE ALSO | *Salesforce Help*: Track Activity on External Sites (can be outdated or unavailable during release preview)

Extend Your Marketing with Enhanced Messaging Tools

Now you can expand your SMS marketing to more locations around the globe. Plus, manage blockout windows, and easily review the source of consent status changes in Data Cloud.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Expand SMS Marketing to More Countries

Marketing Cloud now supports sending SMS messages in more than 50 countries. Request the applicable codes and determine how to send SMS messages to different countries around the world. Many countries have different sending and compliance guidelines, so review rules before you begin.

SEE ALSO | *Salesforce Help*: Set Up SMS Messages in Marketing Cloud (can be outdated or unavailable during release preview)

Use Brand Vetting to Enhance Your SMS Sending Reputation

Validate your identity during the SMS channel setup process. Brand vetting improves your reputation more quickly and increases the number of SMS messages you can send from newly approved long and short codes.

SEE ALSO | *Salesforce Help*: Vet Your SMS Brand in Unified Messaging (can be outdated or unavailable during release preview)

Use Blockout Windows to Send SMS and WhatsApp Messages at the Right Time

Customers can learn a lot from your messages but notifications for noncritical messages can be overwhelming. This feeling is especially true for messages that send alerts when they're delivered, such as SMS and WhatsApp. To increase the chances that messages are well received, set a blockout window for SMS and WhatsApp that schedules messages more effectively.

SEE ALSO | *Salesforce Help*: Configure Blockout Windows in Unified Messaging (can be outdated or unavailable during release preview)

Review Consent Source Details in Data Cloud

To help you comply with marketing laws and regulations that apply to your business, review the source of a consent status change from the Consent Audit Trail in Data Explorer. You also get details about each consent source, such as the import file name when the source was a consent import.

SEE ALSO | *Salesforce Help*: Review Marketing Consent Data (can be outdated or unavailable during release preview)

Get More Flexibility and Visibility with Campaigns and Flows

Now you have more visibility and control over your flows from the campaign record. You can also plan and track campaigns with the new marketing calendar. Plus, use custom fields with campaign briefs, and get insight into the status of your campaign flows with the Flow Version Occurrence related list and the Campaign Stage field.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Manage More of Your Flow from the Campaign

Now you're squarely in the driver's seat with more visibility and control over each flow from the campaign record. View up to 5 message or time-based wait elements on the campaign's flow summary in the same order that they appear in Flow Builder. Plus, edit time-based wait elements from the campaign without going into Flow Builder.

SEE ALSO | *Salesforce Help*: Navigating Campaigns in Marketing Cloud (can be outdated or unavailable during release preview)

Gain Insight on Campaign ROI with Opportunity Influence

Use engagement data to automatically attribute revenue from each Closed/Won opportunity back to specific campaigns. Opportunity Influence comes with first-touch and last-touch attribution models, so marketers can see which campaigns are most effective at different stages of the customer journey. After you enable the feature in Salesforce Setup, Opportunity Influence appears on the sidebar of campaign records under Performance.

SEE ALSO | *Salesforce Help*: Enable Opportunity Influence (can be outdated or unavailable during release preview)

Track your Campaigns and Flows with Marketing Calendar

Collaboration between marketing and sales teams has never been easier with the new Marketing Calendar, integrated with the Sales Calendar. Check out the new Marketing Calendar tab for a unified view of all your planned and activated campaigns and segment flows. Manage items directly from the calendar, add new events, and create custom object calendars.

SEE ALSO | *Salesforce Help*: Manage Your Campaigns and Flows with Marketing Calendar (can be outdated or unavailable during release preview)

Get Insight into the Status of All Flows in a Campaign

Help your marketing team keep tabs on the progress of each campaign with the Campaign Stage field. The campaign stage is based on the status of all the flows related to a campaign. Add the field to the campaign page layout and set the field-level security for each profile that needs access to the field.

SEE ALSO | *Salesforce Help*: Tools for Monitoring and Reporting on Campaigns (can be outdated or unavailable during release preview)

Monitor the Progress of Flow Version Occurrences

Inform your users about the running status of flow interviews in the Flow Version Occurrences section of a Flow's related list. If a flow fails, your users can find the cause with detailed error information that they can use to fix the problem quickly.

SEE ALSO | *Salesforce Help*: Monitoring your Flow Status(can be outdated or unavailable during release preview)

Enhance Campaign Briefs with Custom Fields

Improve the effectiveness of your campaign briefs by including custom fields. This feature enables you to add extra context for additional use cases, making your briefs more comprehensive and useful for your team.

Create and Manage Content More Efficiently

Now marketers can save time with content cloning capabilities, shared workspaces, and default branding for new content. Plus, get more insight on the status of your landing page, form, and brand content.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Content Processing Status Was Added

When a landing page, form, or branding content type is in the process of publishing or unpublishing, the content status is Processing. Users can't make changes while content is processing.

SEE ALSO | *Salesforce Help*: Marketing Cloud Content Items and Status (can be outdated or unavailable during release preview)

Work More Efficiently with Workspace Content

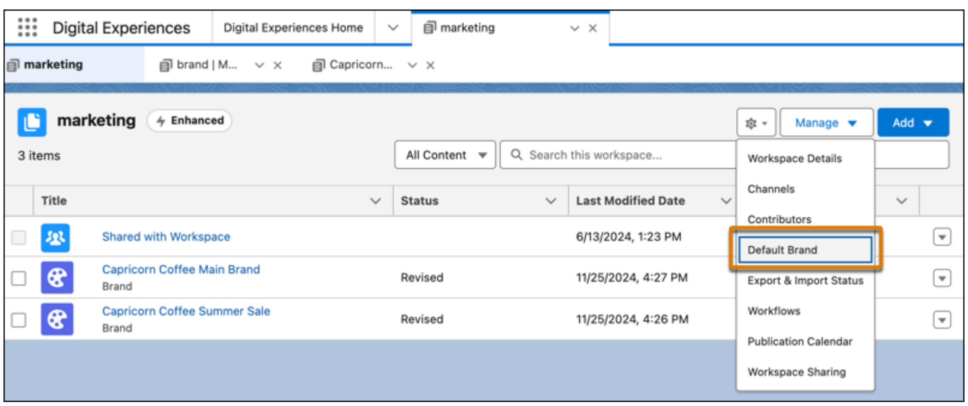
To save time and storage space, users can reuse branded content in multiple workspaces. Users can now make copies of a shared content record and save it to a folder in a shared workspace. Previously, users couldn't save the cloned content to a specific folder.

SEE ALSO | *Salesforce Help*: Create Content in Marketing Cloud (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: Organize and Share Content in a Workspace (can be outdated or unavailable during release preview)

Set a Default Brand for Your Marketing Workspace

Ensure that the look and feel of your content is always on brand. When a Content Admin or Content Manager sets a default brand for a marketing workspace, all emails, landing pages, and forms created in the workspace use those brand values.



To apply a brand that's created for a special event or campaign, a content author can change the brand for an individual piece of content.

SEE ALSO | *Salesforce Help*: Brand Your Content in Marketing Cloud (can be outdated or unavailable during release preview)

Add a Brand to Your Forms

Assign a brand to the forms that you create and keep the look of your forms consistent with your other content. If your workspace has an assigned default brand, the form reflects those brand values. If you embed the form in a landing page with a different brand, the form reflects the landing page's brand values. If you include the form on an external website, the form retains the brand that you assigned to it.

SEE ALSO | *Salesforce Help*: Brand Your Content in Marketing Cloud (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: Forms on External Sites (can be outdated or unavailable during release preview)

Get Started Faster with Setup Enhancements

Whether you're new to Marketing Cloud or exploring new features, our improved setup experience saves you time so your team can get to work. Now it's easier to track your setup progress, authenticate a domain for branding or sending email, automatically generate an identity resolution ruleset, and more.

Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Track Your Progress in Marketing Cloud Setup

Find and complete the most important tasks in Salesforce Setup. Our new setup assistant home page provides a shortcut to required and recommended settings, and includes checkboxes so you can track your progress along the way.

SEE ALSO | *Salesforce Help*: Get Started with Marketing Cloud Setup (can be outdated or unavailable during release preview)

Install or Update the Sales Data Kit Quickly

The required Sales data kit is now available in the Marketing Cloud setup assistant, so that you can install or update it with one click. The Sales data kit includes data streams for Salesforce standard objects like Account, Contact, and Lead. Previously, you had to install or update the Sales data kit on a separate page in Salesforce Setup.

SEE ALSO | *Salesforce Help*: Install and Deploy Data Streams for Marketing Cloud (can be outdated or unavailable during release preview)

Authenticate Domains More Easily

Setting up an authenticated domain for branding or email sending is easier than ever with a new guided experience. After you add a domain in Unified Messaging setup, update your DNS records with your domain registrar. Then, return to Unified Messaging setup to verify that everything is set up correctly and complete your domain authentication. Plus, you can easily add a From email address for sending during the setup process or after you authenticate your domain.

SEE ALSO | *Salesforce Help*: Authenticate a Domain for Unified Messaging

Create an Identity Resolution Ruleset with One Click

To help you consolidate your data from multiple sources, we now provide the option to automatically generate an identity resolution ruleset. The autogenerated ruleset uses Normalized Email as match criteria to create Unified Individual profiles. Previously, you had to create a ruleset and manually configure its match rules.

SEE ALSO | *Salesforce Help*: Create an Identity Resolution Ruleset for Marketing Cloud (can be outdated or unavailable during release preview)

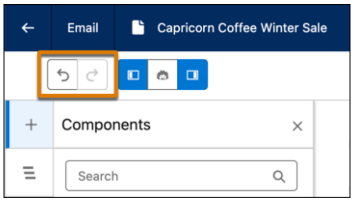
User Interface Updates in Marketing Cloud

Take advantage of improvements throughout the Marketing Cloud app that make it easier for you to accomplish tasks and get important details at a glance.

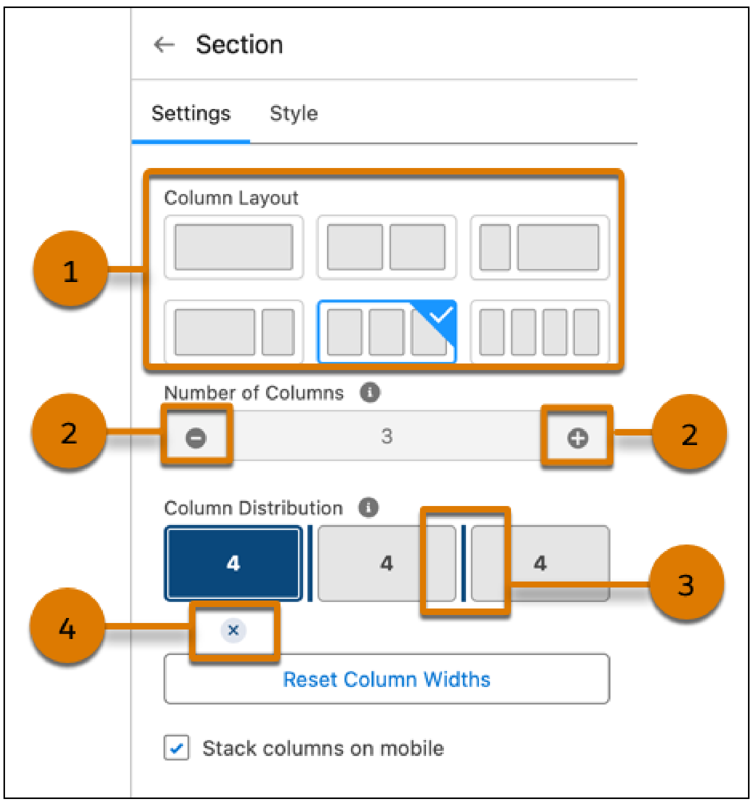
Where: These changes apply to Salesforce Enterprise, Performance, and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Why: Here are the changes that we made for Spring '25.

- Undo and restore functionality is now available for emails. While you draft or revise email content, use keyboard commands or the onscreen buttons to undo changes or restore the original content.



- Quickly add or move sections in an email or landing page. Select a section and click the + button at the top or bottom of the section to add a new section. Reposition a section on the canvas more intuitively with improved drag-drop functionality, which highlights where the moved section will appear.
- Adjust section layouts more easily in emails and landing pages. In the Section property panel, use column layout presets (1), add or delete a column (2), drag the handle to resize columns (3), or delete a column (4).



SEE ALSO:

Salesforce Help: Create Content in Marketing Cloud (can be outdated or unavailable during release preview)

Marketing Cloud Account Engagement

Marketing Cloud Account Engagement introduces a number of exciting updates in Spring '25, including the ability to generate marketing copy in multiple languages with Einstein Assistant, API support for copying marketing assets to Salesforce CMS, and troubleshooting email send failures more precisely with upgraded list email reports. Plus, save time and optimize your marketing efforts by ingesting Account Engagement data into Data Cloud with a new data bundle.

IN THIS SECTION:

Get Helpful Resources for Enabling Marketing Cloud

A new Optimizer page called Enable Marketing Cloud is available to guide you and your business units as you access new marketing functionality in Salesforce Marketing Cloud. Review curated resources, prerequisites, and tasks to help you take advantage of the power of Salesforce Data Cloud and new Marketing Cloud campaign innovations like Agentforce and SMS. To view these resources, navigate to the Optimizer, and click Enable Marketing Cloud in the Optimizer welcome banner.

Automate Account Engagement Data Stream Creation in Data Cloud

Automatically create data streams in Data Cloud with the Account Engagement CRM Data data bundle. Previously, you had to create the landing page, list email, and marketing form data streams manually and individually map the fields of each object. The new data bundle includes all three streams and their field mappings.

Expedite Content Creation by Copying Assets to CMS via API

Copy email, file, form, and landing page objects from your Account Engagement business unit to a Salesforce CMS workspace by using Version 5 of the Account Engagement API.

Streamline Content Creation by Copying Additional Asset Types to CMS

For more consistent and efficient content creation, you can now copy existing landing pages to a Salesforce CMS workspace for use in new marketing campaigns. You can also copy inline CSS when copying a form to a CMS workspace.

Get More Visibility into Email Send Issues

List email reporting includes more reasons for prospect email send failures, such as invalid or banned email addresses. And when an email fails to send, the configuration issue now appears in the Account Engagement Optimizer. The issue description links to the Failed Email Sends table, which lists the emails that failed with the prospect's name, company, failure reason, and other related details.

Generate Account Engagement Content in More Languages

Use generative AI to streamline your content creation process in French, German, Japanese, Portuguese (Brazil), and Spanish. Quickly create forms, landing pages, email subject lines, and email body copy with Content Creation for Account Engagement, powered by Einstein.

Prepare for End of Support for Enhanced Email Experience

Support for Enhanced Email Experience in Account Engagement ends beginning Winter '25. To create emails with the same functionality, use the Classic Email Builder.

Get Helpful Resources for Enabling Marketing Cloud

A new Optimizer page called Enable Marketing Cloud is available to guide you and your business units as you access new marketing functionality in Salesforce Marketing Cloud. Review curated resources, prerequisites, and tasks to help you take advantage of the power of Salesforce Data Cloud and new Marketing Cloud campaign innovations like Agentforce and SMS. To view these resources, navigate to the Optimizer, and click Enable Marketing Cloud in the Optimizer welcome banner.

Where: This change applies to Account Engagement Growth, Plus, Advanced, and Premium editions with Data Cloud enabled in regions where Marketing Cloud Growth and Advanced editions are supported.

Automate Account Engagement Data Stream Creation in Data Cloud

Automatically create data streams in Data Cloud with the Account Engagement CRM Data data bundle. Previously, you had to create the landing page, list email, and marketing form data streams manually and individually map the fields of each object. The new data bundle includes all three streams and their field mappings.

Where: This change applies to all Account Engagement editions.

SEE ALSO:

Salesforce Help: Ingesting Account Engagement Data into Data Cloud (can be outdated or unavailable during release preview)

Expedite Content Creation by Copying Assets to CMS via API

Copy email, file, form, and landing page objects from your Account Engagement business unit to a Salesforce CMS workspace by using Version 5 of the Account Engagement API.

- To copy an object, use the `/copyToCms` endpoint.
- To verify that an object successfully copied, use the `/salesforceCmsId` read-only field.

SEE ALSO:

Salesforce Developer: Marketing Cloud Account Engagement API Version 5 (can be outdated or unavailable during release preview)

Streamline Content Creation by Copying Additional Asset Types to CMS

For more consistent and efficient content creation, you can now copy existing landing pages to a Salesforce CMS workspace for use in new marketing campaigns. You can also copy inline CSS when copying a form to a CMS workspace.

Where: This change applies to Account Engagement Growth, Plus, Advanced, and Premium editions.

SEE ALSO:

Salesforce Help: Copy Landing Pages from Your Account Engagement Business Unit to a CMS Workspace (can be outdated or unavailable during release preview)

Get More Visibility into Email Send Issues

List email reporting includes more reasons for prospect email send failures, such as invalid or banned email addresses. And when an email fails to send, the configuration issue now appears in the Account Engagement Optimizer. The issue description links to the Failed Email Sends table, which lists the emails that failed with the prospect's name, company, failure reason, and other related details.

Where: This change applies to Account Engagement Growth, Plus, Advanced, and Premium editions.

SEE ALSO:

Salesforce Help: View the List Email Report (can be outdated or unavailable during release preview)

Salesforce Help: Access Account Engagement Optimizer (can be outdated or unavailable during release preview)

Generate Account Engagement Content in More Languages

Use generative AI to streamline your content creation process in French, German, Japanese, Portuguese (Brazil), and Spanish. Quickly create forms, landing pages, email subject lines, and email body copy with Content Creation for Account Engagement, powered by Einstein.

Where: This change applies to Account Engagement Advanced and Premium editions and to Lightning Experience in Enterprise, Unlimited, and Performance editions.

SEE ALSO:

Salesforce Help: Einstein Assistant in Account Engagement (can be outdated or unavailable during release preview)

Prepare for End of Support for Enhanced Email Experience

Support for Enhanced Email Experience in Account Engagement ends beginning Winter '25. To create emails with the same functionality, use the Classic Email Builder.

Where: This change applies to all Account Engagement Editions with Salesforce Professional, Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Classic Email for Account Engagement (can be outdated or unavailable during release preview)

Knowledge Article: We're Ending Support for the Enhanced Email Experience in Account Engagement (can be outdated or unavailable during release preview)

Marketing Cloud Engagement

The Spring '25 Marketing Cloud Engagement release occurs February 21, 2025 through March 14, 2025. Some features are made available to you within a week of the release. Get an exclusive, in-depth look at the new features by tuning into the Spring '25 Marketing Cloud Engagement Release New Feature Overview webinar. Stay tuned for updates on this page!

Personalization

Enhance customer experiences using Personalization (previously named Einstein Personalization) and other Marketing Cloud products. Configure personalization experiences directly on any website using Personalization and the Data Cloud Web SDK. Create custom recommender objectives, test experiences using web-based experimentation, and build custom attribution models to visualize customer engagement journeys.

IN THIS SECTION:

Einstein Personalization Is Now Called Personalization

The name is changed, but the functionality remains the same. Please bear with us as we update our documentation and UI to reflect this change.

Explore the Enhanced Web Personalization Manager

Save and publish your personalization experiences with ease, ensuring that your changes go live in a controlled and dynamic manner. Select which decisions you want to preview to get a broader view of how your content appears to different audiences. Edit your personalization experiences with an intuitive user interface.

Define Custom Objectives for Recommendations

Take advantage of machine learning and AI to create custom objective-based recommenders based on your desired business outcomes. Select specific engagement signals for model training, and reuse objectives across different recommenders.

Use Scheduling Rules for Decisions

When defining a Personalization Decision targeting rule, you can define scheduling rules to use a date range or time of day when determining who is eligible for personalization decisions.

Test the Effectiveness of Personalized Experiences

Discover which personalized experiences resonate best with your customers. Design A/B/n experiments using measures of success that you define to compare the effectiveness of personalized experiences. You can apply the tests to AI-based recommendations.

Use Only Authenticated Endpoints When Accessing Data Cloud

When using Data Cloud authenticated server-to-server real time data capture, you can require that personalization points use authenticated endpoints for evaluations. When creating a personalization point, select the Authentication Required checkbox to require using only authenticated endpoints for sending real-time events to and requesting authenticated recommendations from Data Cloud.

View Recommender Training Status and Refresh History

Use the Recommender record Refresh History tab to view a list of the last 30 recommender refresh dates, times, and resulting refresh status.

Track and Evaluate Visitor Engagement Through Attribution

Evaluate the effectiveness of personalization decisions or strategies by creating custom attribution configurations using first touch or last touch models. Use engagement signals and metrics that can track the customer journey from initial contact to conversion.

Visualize the Customer Journey with the Attribution Dashboard

Create and run custom or preconfigured attribution models, and then view the attribution results from the Analytics tab of the attribution model record.

Personalize Business Processes and Screens with Flow

Use the new Get Personalization Decisions invocable action in Flow to request personalized content from the Decisioning API. Integrate and deliver personalized content directly into your workflows and custom screens. Use the Get Personalization Decisions action in screen flows to design and embed personalized content to Salesforce pages. You can also use it in triggered flows to automatically get personalized recommendations based on specific events or tasks.

Einstein Personalization Is Now Called Personalization

The name is changed, but the functionality remains the same. Please bear with us as we update our documentation and UI to reflect this change.

Where: This change applies to all editions supporting Personalization.

Explore the Enhanced Web Personalization Manager

Save and publish your personalization experiences with ease, ensuring that your changes go live in a controlled and dynamic manner. Select which decisions you want to preview to get a broader view of how your content appears to different audiences. Edit your personalization experiences with an intuitive user interface.

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

SEE ALSO:

Salesforce Help: Einstein Web Personalization Manager (can be outdated or unavailable during release preview)

Define Custom Objectives for Recommendations

Take advantage of machine learning and AI to create custom objective-based recommenders based on your desired business outcomes. Select specific engagement signals for model training, and reuse objectives across different recommenders.

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

SEE ALSO:

Salesforce Help: Configure a Custom Objective (can be outdated or unavailable during release preview)

Use Scheduling Rules for Decisions

When defining a Personalization Decision targeting rule, you can define scheduling rules to use a date range or time of day when determining who is eligible for personalization decisions.

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

SEE ALSO:

Salesforce Help: Create a Targeting Rule (can be outdated or unavailable during release preview)

Test the Effectiveness of Personalized Experiences

Discover which personalized experiences resonate best with your customers. Design A/B/n experiments using measures of success that you define to compare the effectiveness of personalized experiences. You can apply the tests to AI-based recommendations.

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

SEE ALSO:

Salesforce Help: Web Experimentation (can be outdated or unavailable during release preview)

Use Only Authenticated Endpoints When Accessing Data Cloud

When using Data Cloud authenticated server-to-server real time data capture, you can require that personalization points use authenticated endpoints for evaluations. When creating a personalization point, select the Authentication Required checkbox to require using only authenticated endpoints for sending real-time events to and requesting authenticated recommendations from Data Cloud.

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

SEE ALSO:

Salesforce Help: Configure a Personalization Point (can be outdated or unavailable during release preview)

View Recommender Training Status and Refresh History

Use the Recommender record Refresh History tab to view a list of the last 30 recommender refresh dates, times, and resulting refresh status.

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

Track and Evaluate Visitor Engagement Through Attribution

Evaluate the effectiveness of personalization decisions or strategies by creating custom attribution configurations using first touch or last touch models. Use engagement signals and metrics that can track the customer journey from initial contact to conversion.

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

SEE ALSO:

Salesforce Help: Configure Custom Attribution Models (can be outdated or unavailable during release preview)

Visualize the Customer Journey with the Attribution Dashboard

Create and run custom or preconfigured attribution models, and then view the attribution results from the Analytics tab of the attribution model record.

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

SEE ALSO:

Salesforce Help: Visualize Attribution Intelligence Data (can be outdated or unavailable during release preview)

Personalize Business Processes and Screens with Flow

Use the new Get Personalization Decisions invocable action in Flow to request personalized content from the Decisioning API. Integrate and deliver personalized content directly into your workflows and custom screens. Use the Get Personalization Decisions action in screen flows to design and embed personalized content to Salesforce pages. You can also use it in triggered flows to automatically get personalized recommendations based on specific events or tasks.

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

SEE ALSO:

Salesforce Developer Documentation: Get Personalization Decisions API (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

User Opt-In Biometric Login is now generally available in Mobile Publisher. Customize your Experience Cloud app's security alerts with new fields and use newly supported download methods. There are also upgrades to the Salesforce mobile app and Briefcase Builder.

IN THIS SECTION:

Salesforce Mobile App

Send attachments from the Salesforce mobile app. Malware Detection security policy is being retired.

Mobile Publisher

Enable fast and secure Experience Cloud app logins with User Opt-In Biometric Login, which is now generally available. Customize the style of your Experience Cloud app's security alerts with new fields in Setup for Mobile Publisher. Upgrade your Experience Cloud app's download offerings with newly supported download methods.

General Mobile Updates

Assign a briefcase to your mobile workforce by their profile. We've made enhancements to Seller-Focused Mobile Experience. Also, diagnose and improve mobile and offline development with the latest versions of the ESLint rules plugin and Salesforce Extensions for Visual Studio Code.

Salesforce Mobile App

Send attachments from the Salesforce mobile app. Malware Detection security policy is being retired.

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, determines the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of February 18, 2025.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Files			
Send Attachments in Messaging on the Salesforce Mobile App	✓	✓	
Access and Security			
Malware Detection Security Policy for Android is Being Retired	✓		✓

IN THIS SECTION:

Malware Detection Security Policy for Android is Being Retired

We're retiring the Malware Detection security policy for Android on January 31, 2025. We rely on Android SafetyNet API from Google to offer this policy. Google is retiring this API and any call to it fails after January 31, 2025. To maintain security, consider enabling alternative policies such as Block Jailbroken Device and Minimum Security Patch Version.

Send Attachments in Messaging on the Salesforce Mobile App

Service reps can now send attachments while messaging from the Salesforce mobile app. This change improves parity between the mobile app's messaging experience and the desktop site's messaging experience. Previously, service reps messaging from the Salesforce app could only send messages; transfer messages to other reps, bots, or queues; send messaging components; and send voice notes.

Malware Detection Security Policy for Android is Being Retired

We're retiring the Malware Detection security policy for Android on January 31, 2025. We rely on Android SafetyNet API from Google to offer this policy. Google is retiring this API and any call to it fails after January 31, 2025. To maintain security, consider enabling alternative policies such as Block Jailbroken Device and Minimum Security Patch Version.

Where: This change applies to Salesforce Mobile App Plus and Mobile Publisher for Android in all editions.

How: If you have the Malware Detection policy for Android enabled with Enhanced Mobile Security, either with Salesforce Mobile App Plus or Mobile Publisher, we recommend that you disable it. Disabling the policy prevents disruption to users who are using older versions of the Salesforce Mobile App or Mobile Publisher apps. If no action is taken, this policy is automatically turned off with the Spring '25 release and can't be configured for your org.

SEE ALSO:

Salesforce Help: Enable and Configure Mobile App Security Policies

Salesforce Help: Enhanced Mobile App Security Policies for Mobile Publisher

Send Attachments in Messaging on the Salesforce Mobile App

Service reps can now send attachments while messaging from the Salesforce mobile app. This change improves parity between the mobile app's messaging experience and the desktop site's messaging experience. Previously, service reps messaging from the Salesforce app could only send messages; transfer messages to other reps, bots, or queues; send messaging components; and send voice notes.

Where: This feature applies to Enhanced messaging channels and Messaging for In-App and Web. View required editions.

How: In the agent console of the Salesforce mobile app, click the agent actions launcher. Then select the camera icon. From the Upload Files icon, choose whether to open the photo library, take a photo, or choose a file. Then send your file to the end user.

SEE ALSO:

Salesforce Help: Considerations and Limitations for Messaging in the Salesforce Mobile App (can be outdated or unavailable during release preview)

Salesforce Help: Message Customers in the Salesforce Mobile App (can be outdated or unavailable during release preview)

Mobile Publisher

Enable fast and secure Experience Cloud app logins with User Opt-In Biometric Login, which is now generally available. Customize the style of your Experience Cloud app's security alerts with new fields in Setup for Mobile Publisher. Upgrade your Experience Cloud app's download offerings with newly supported download methods.

IN THIS SECTION:

Download Files Your Way in Mobile Publisher for Experience Cloud

To give you more flexibility and control over the download links that you specify for your users, Mobile Publisher now supports additional download methods. You can specify a third-party URL, like a Google or Box URL, as a download link for authenticated or guest users. You can also support chat transcript downloads from Messaging for In-App and Web via a Binary Large Object (Blob) (authenticated iOS users only). Previously, Mobile Publisher supported only authenticated downloads from specified SObjects.

Remove Unwanted /s Elements in Older Experience Cloud LWR Site URLs

Some older LWR Experience Cloud sites include `/s` at the end of the site's base URL. You can now update the site URL in the site's Experience Cloud Administration workspace to remove this unwanted element. After you update the URL of an LWR site, no related changes are required for a Mobile Publisher app that was created from that site.

Set Up Opt-In Biometric Login for Fast and Secure Experience Cloud App Logins (Generally Available)

Now generally available, User Opt-In Biometric Login for your Experience Cloud app lets users opt in to using biometric credentials (face or fingerprint recognition) to log in. After a user first logs in to the app with their username and password, they can opt in to using their biometric credentials for future logins.

Customize Mobile Publisher Android App Permission Requests to Post Notifications

In Setup for Mobile Publisher, you can now customize the text shown to users when your Android app requests permission to post notifications to the notification tray on their device. Make sure that your permission description meets Google Play's requirements for prominent disclosure.

Customize the Style of Your Experience Cloud App's Security Alerts

With Enhanced Mobile App Security for your Experience Cloud app, you can configure how your app responds to security threats. Now you can customize the style of your app's security alerts to match the user experience of your app. Select the alert button color and text color, and upload your own custom fonts.

Download Files Your Way in Mobile Publisher for Experience Cloud

To give you more flexibility and control over the download links that you specify for your users, Mobile Publisher now supports additional download methods. You can specify a third-party URL, like a Google or Box URL, as a download link for authenticated or guest users. You can also support chat transcript downloads from Messaging for In-App and Web via a Binary Large Object (Blob) (authenticated iOS users only). Previously, Mobile Publisher supported only authenticated downloads from specified SObjects.

Where: This change applies to Mobile Publisher for Experience Cloud app versions 13.010 and later. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

SEE ALSO:

Salesforce Help: Supported Objects for Download (can be outdated or unavailable during release preview)

Remove Unwanted /s Elements in Older Experience Cloud LWR Site URLs

Some older LWR Experience Cloud sites include `/s` at the end of the site's base URL. You can now update the site URL in the site's Experience Cloud Administration workspace to remove this unwanted element. After you update the URL of an LWR site, no related changes are required for a Mobile Publisher app that was created from that site.

Where: This change applies to LWR sites that are accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Update the URL of Your LWR Site

Set Up Opt-In Biometric Login for Fast and Secure Experience Cloud App Logins (Generally Available)

Now generally available, User Opt-In Biometric Login for your Experience Cloud app lets users opt in to using biometric credentials (face or fingerprint recognition) to log in. After a user first logs in to the app with their username and password, they can opt in to using their biometric credentials for future logins.

Where: This change applies to Mobile Publisher for Experience Cloud app versions 14.000 and later.

How: From Setup, in the Quick Find box, enter **Connected App**, and then select **Manage Connected Apps**. Find your Mobile Publisher for Experience Cloud app's connected app, and then add custom attributes that configure opt-in biometric login.

SEE ALSO:

Salesforce Help: User Opt-In Biometric Login (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Enable User Opt-In Biometric Login (Beta) (can be outdated or unavailable during release preview)

Customize Mobile Publisher Android App Permission Requests to Post Notifications

In Setup for Mobile Publisher, you can now customize the text shown to users when your Android app requests permission to post notifications to the notification tray on their device. Make sure that your permission description meets Google Play's requirements for prominent disclosure.

Where: This change applies to Mobile Publisher for Experience Cloud Android apps. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

How: In your app's Setup for Mobile Publisher project, enable the Post Notifcation app permission. Then, edit the permission description to explain to users why your app is requesting permission to post notifications.

SEE ALSO:

Salesforce Help: App Permissions for Device Capabilities (can be outdated or unavailable during release preview)

Customize the Style of Your Experience Cloud App's Security Alerts

With Enhanced Mobile App Security for your Experience Cloud app, you can configure how your app responds to security threats. Now you can customize the style of your app's security alerts to match the user experience of your app. Select the alert button color and text color, and upload your own custom fonts.

Where: This change applies to Mobile Publisher for Experience Cloud app versions 14.000 and later. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited Editions.

How: Enable Enhanced Mobile App Security in your app's Setup for Mobile Publisher project. Then configure the colors and fonts under Security Alert Settings.

SEE ALSO:

Salesforce Help: Set Up Enhanced Mobile App Security for Mobile Publisher (can be outdated or unavailable during release preview)

General Mobile Updates

Assign a briefcase to your mobile workforce by their profile. We've made enhancements to Seller-Focused Mobile Experience. Also, diagnose and improve mobile and offline development with the latest versions of the ESLint rules plugin and Salesforce Extensions for Visual Studio Code.

IN THIS SECTION:

Assign Briefcases to Users by Profile

You can now assign a briefcase to your mobile workforce by their profile. For example, to enable a mobile sales department to access records in low-connectivity settings, you can assign a briefcase to a profile that represents the sales department. Previously, briefcases were assigned only to users or user groups.

Do More with Seller-Focused Mobile Experience

Prepare for meetings with Seller-Focused Mobile Experience. Customize the app using Mobile Builder for Seller-Focused Experience.

Validate Mobile Lightning Web Components with ESLint Rules

Use the new ESLint rules plugin to help you develop code that works with mobile and offline Lightning web components.

Reduce Mobile Performance Issues with the Salesforce Extensions Pack

The latest version of the Salesforce Extensions for Visual Studio Code comes with new diagnostic improvements to help flag and resolve mobile and offline performance-related issues.

Accept On-Site Payments with Tap-to-Pay

Use the PaymentsService API to create a Lightning web component 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.

Assign Briefcases to Users by Profile

You can now assign a briefcase to your mobile workforce by their profile. For example, to enable a mobile sales department to access records in low-connectivity settings, you can assign a briefcase to a profile that represents the sales department. Previously, briefcases were assigned only to users or user groups.

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**. Update an existing briefcase or create a new briefcase.

SEE ALSO:

Salesforce Help: Create a Briefcase (can be outdated or unavailable during release preview)

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

Do More with Seller-Focused Mobile Experience

Prepare for meetings with Seller-Focused Mobile Experience. Customize the app using Mobile Builder for Seller-Focused Experience.

Where: Seller-Focused Sales Mobile Experience for Android and iOS on phones and tablets in all editions, except Database.com.

SEE ALSO:

Prepare for Meetings Without Opening Your Laptop

Customize Seller-Focused Mobile Experience (Beta)

Validate Mobile Lightning Web Components with ESLint Rules

Use the new ESLint rules plugin to help you develop code that works with mobile and offline Lightning web components.

> **Note:** Salesforce recommends using Visual Studio Code with the Salesforce Extensions for Visual Studio Code to develop offline Lightning web components.

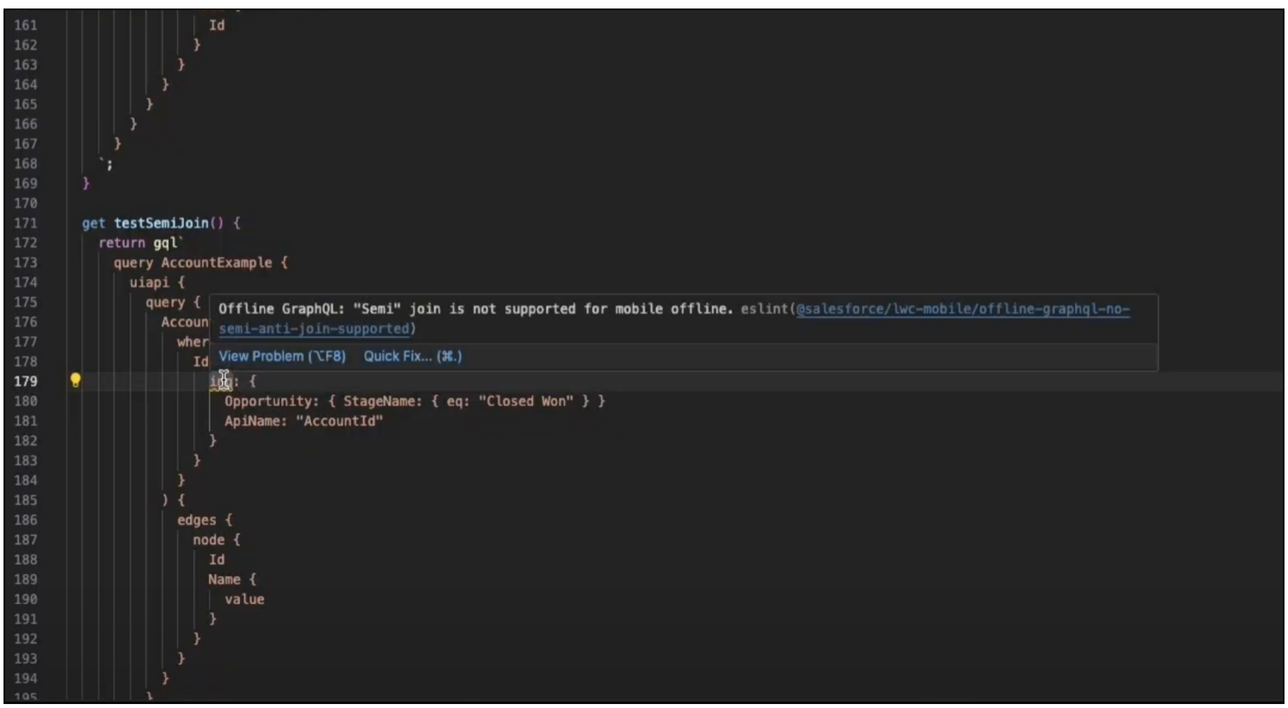
Where: This change applies to the Salesforce Mobile App Plus for iOS and Android on devices in all editions, except Database.com.

How:

The ESLint rules flag violations for:

- Apex usage
- Offline GraphQL feature limitations
- Offline GraphQL hard limits

Here's an example of a lint rule violation popup for the use of semi-join filter with GraphQL offline.



An example resolution for semi-join filter use with GraphQL offline.

no-semi-anti-join-supported

This rule flags the use of semi-join and anti-join filters with GraphQL. Currently, semi-join and anti-join filters with GraphQL are not supported for offline use cases.

See Feature Limitations of Offline GraphQL for more details.

❌ Incorrect

```
query AccountExample {
    uiapi {
        query {
            Account (where: {
                Id: { inq: {
                    Opportunity: {
                        StageName: { eq: "Closed Won" } },
                        ApiName:"AccountId"
                        }
                    }
                }) {
                    edges {
                        node {
                            Id
                            Name { value }
                        }
                    }
                }
            }
        }
    }
}
```

✅ Correct

```
query AccountExample {
    uiapi {
        query {
            Account {
                edges {
                    node {
                        Id
                        Name {
                            value
                        }
                    }
                }
            }
        }
    }
}
```

SEE ALSO:

Mobile and Offline Developer Guide: Install ESLint Rules for Mobile Lightning Web Components

GitHub: ESLint Rules for Mobile Lightning Web Components

Mobile and Offline Developer Guide: Use Apex While Mobile and Offline

Mobile and Offline Developer Guide: Use GraphQL While Mobile and Offline

Reduce Mobile Performance Issues with the Salesforce Extensions Pack

The latest version of the Salesforce Extensions for Visual Studio Code comes with new diagnostic improvements to help flag and resolve mobile and offline performance-related issues.

Note: Salesforce recommends using Visual Studio Code with the Salesforce Extensions for Visual Studio Code to develop offline Lightning web components.

Where: This change applies to the Salesforce Mobile App Plus for iOS and Android on devices in all editions, except Database.com.

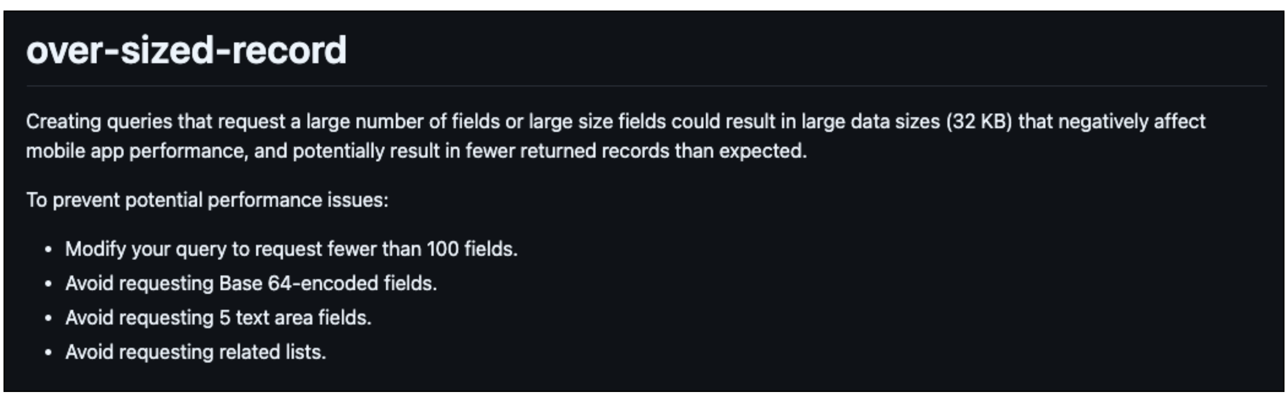
How:

The new diagnostic improvements flag potential performance issues related to:

- Large number of fields exceeding 32KB
- Base Lightning web components that aren't optimized for mobile offline use
- Use of wire adapters `getRelatedListRecords` and `getRelatedListCount` while offline

Here's an example of the diagnostic tool flagging field sizes exceeding 32KB.

An example resolution for field sizes exceeding 32KB.



Go to the Visual Studio Marketplace to install the Salesforce Extension Pack.

SEE ALSO:

GitHub: Salesforce Mobile Extensions for Visual Studio Code

GraphQL API: Parent-to-Child Relationships

Accept On-Site Payments with Tap-to-Pay

Use the PaymentsService API to create a Lightning web component 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.

Note: PaymentsService does not and cannot function when running in a web browser, whether on a desktop or mobile device.

How: To develop an LWC with the Payments Service plug-in features, use the Payments Plugin API as your method for accessing a device's native Tap to Pay functionality.

- Import PaymentsService to make the PaymentsService API functions available to your code.
- Test to make sure PaymentsService is available before you call payment functions.
- Use the payment functions to start collecting payments.

For more details, see Accept On-Site Payments with Tap-to-Pay in the *Mobile and Offline Developer Guide*.

SEE ALSO:

Lightning Web Components Developer Guide: Payments Service API

Omnistudio

Omnistudio now offers a standard designer and list view for all components. With this designer, explore new features including Omnistudio Design Assistant, OmniOut, and Lightning Rich Text Editor. Use Omnistudio with the Salesforce Lightning Design System 2 (SLDS 2) template for a refreshed user interface. OmniAnalytics is now enabled for guest users on Experience Cloud by default. Access customers' saved session information to create context-driven communications on your sites. In addition to improving usability, we made a few translation, accessibility, security, and deployment updates.

IN THIS SECTION:

Explore Omnistudio's Refreshed Visual Style with SLDS 2

Enhance the user experience (UI) of your Omnistudio applications at runtime with the new Omnistudio Salesforce Lightning Design System 2 (SLDS 2) theme. Turn on the Omnistudio SLDS 2 theme in your org, which uses the features of SLDS 2 and the new UI. Get a clear and consistent visual experience in Omnistudio through a simplified color palette, improved font styles, better spacing, and higher contrast.

Integrate Guest User Data on Experience Cloud with OmniAnalytics

Get clear insights about how guest users interact with your Omniscripts and Flexcards, and also see the visualization on the OmniAnalytics dashboard.

Use Omniscript Saved Sessions in Emails and Email Templates

Access customers' saved session information to create context-driven communications tailored to customer interactions on your sites. Populate email templates and email messages with relevant Omniscript saved session information. This helps reengage customers with personalized and timely email-based communication.

Save Costs and Time with Built-In Translations for Omniscripts and Flexcards

Use autotranslated system labels to localize your single-language Omniscripts and Flexcards based on the user's locale. Note that these autotranslated labels won't affect your multi-language Omniscripts, which use the translations that are defined using custom labels.

Seamlessly Enable Omnistudio Metadata in Scratch Orgs by Updating the Org Shape File

To enable the Omnistudio Metadata setting after you create a scratch org with an org shape file, include the `OmniStudioSettings` property in the org shape file.

Upgrade to a Secure Node.js Version for OmniOut

Secure your org by installing the latest supported version of Node.js. OmniOut now supports Node.js versions from 18.20.4 to 22.11.0.

Securely Deploy Omnistudio Components by Using the Latest Versions of Build Tool and Node.js

Upgrade your Build Tool to a version later than 1.17.11, and the Node.js to a version later than 18 to deploy Omnistudio components. This upgrade also includes an upgrade to the Puppeteer version from 5.3.1 to 21.11.0.

Accessibility Enhancements in Omnistudio

Learn about important changes that make Omnistudio more accessible.

Other Improvements in Omnistudio

Learn about enhancements to the Apex Class Permission Checker and the UserLocaleDateTime Omni Interaction Configuration in Spring '25.

Deprecation and End of Support for AngularJS-Based Omniscripts

Omnistudio no longer supports Omniscripts built on AngularJS. To continue using these Omniscripts, migrate all AngularJS-based Omniscripts to the Omniscript Lightning Web Component framework.

Omnistudio Minor Releases

Find out about bug fixes, minor updates, and known issues about Omnistudio made after the Spring '25 and before Summer '25.

Explore Omnistudio's Refreshed Visual Style with SLDS 2

Enhance the user experience (UI) of your Omnistudio applications at runtime with the new Omnistudio Salesforce Lightning Design System 2 (SLDS 2) theme. Turn on the Omnistudio SLDS 2 theme in your org, which uses the features of SLDS 2 and the new UI. Get a clear and consistent visual experience in Omnistudio through a simplified color palette, improved font styles, better spacing, and higher contrast.

Where: This change applies to 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.

How: Verify if the SLDS 2 theme is activated in your Salesforce org: From Setup, in the Quick Find box, find and select **Themes and Branding**, and then verify the SLDS 2 theme setting. If the SLDS 2 theme is already activated in the Salesforce org, turn on the corresponding setting in your Omnistudio org. From Setup, in the Quick Find box, find and select **Omnistudio Settings**, and then turn on **Omnistudio SLDS 2**.

You can choose to turn on Omnistudio SLDS 2 in your Omnistudio org even if the SLDS 2 theme is not activated in the Salesforce org.

SEE ALSO:

Salesforce Help for Omnistudio Installation and Upgrade: Enable the Omnistudio SLDS 2 Theme (can be outdated or unavailable during release preview)

Integrate Guest User Data on Experience Cloud with OmniAnalytics

Get clear insights about how guest users interact with your Omniscripts and Flexcards, and also see the visualization on the OmniAnalytics dashboard.

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.

How: OmniAnalytics is now turned on for guest users on Experience Cloud by default. When OmniAnalytics is turned on in your org, guest user interactions are automatically tracked for Omniscripts and Flexcards.

SEE ALSO:

Salesforce Help for Omnistudio: Enable OmniAnalytics and Store Tracking Data

Use Omniscript Saved Sessions in Emails and Email Templates

Access customers' saved session information to create context-driven communications tailored to customer interactions on your sites. Populate email templates and email messages with relevant Omniscript saved session information. This helps reengage customers with personalized and timely email-based communication.

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.

How: To use Omniscript Saved Session in an email template:

In App Launcher, find and select Email Template. Create an email template, and select **Omniscript Saved Session** from the Related Entity Type list.

To use Omniscript Saved Session in an email:

Create a new email message record and map the `OmniScriptSavedSession` object to the `RelatedTo` field.

SEE ALSO:

Object Reference for the Salesforce Platform: EmailMessage

Object Reference for the Salesforce Platform: EmailTemplate

Save Costs and Time with Built-In Translations for Omniscripts and Flexcards

Use autotranslated system labels to localize your single-language Omniscripts and Flexcards based on the user's locale. Note that these autotranslated labels won't affect your multi-language Omniscripts, which use the translations that are defined using custom labels.

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.

SEE ALSO:

Salesforce Help for Omnistudio: Considerations for Single-Language Omniscripts (can be outdated or unavailable during release preview)

Salesforce Help for Omnistudio: Configure Flexcard Settings

Seamlessly Enable Omnistudio Metadata in Scratch Orgs by Updating the Org Shape File

To enable the Omnistudio Metadata setting after you create a scratch org with an org shape file, include the `OmniStudioSettings` property in the org shape file.

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.

How: Add this key-value pair in the `OmniStudioSettings` property in the org shape file:

```
"OmniStudioSettings": {
"enableOmniStudioMetadata": true
}
```

Upgrade to a Secure Node.js Version for OmniOut

Secure your org by installing the latest supported version of Node.js. OmniOut now supports Node.js versions from 18.20.4 to 22.11.0.

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 managed package runtime.

How: Existing OmniOut users can upgrade the npm packages by using the `npm install` command. If you're new to OmniOut, see OmniOut in Salesforce Help.

Securely Deploy Omnistudio Components by Using the Latest Versions of Build Tool and Node.js

Upgrade your Build Tool to a version later than 1.17.11, and the Node.js to a version later than 18 to deploy Omnistudio components. This upgrade also includes an upgrade to the Puppeteer version from 5.3.1 to 21.11.0.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

When: The Puppeteer version upgrade on the Build Tool version later than 1.17.11 is scheduled for January 03, 2025.

Who: This feature is available to Omnistudio customers who use the managed package runtime and standard runtime.

Accessibility Enhancements in Omnistudio

Learn about important changes that make Omnistudio more accessible.

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.

Why: The Read-Only property is now replaced with Disabled for Radio and Radio Group elements. If this property is enabled, these elements are no longer a part of the focus order for users navigating with keyboards.

Other Improvements in Omnistudio

Learn about enhancements to the Apex Class Permission Checker and the UserLocaleDateTime Omni Interaction Configuration in Spring '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: The Apex Class Permission Checker feature is available to Omnistudio customers who use the managed package runtime and the standard runtime. The changes for the UserLocaleDateTime Omni Interaction Configuration feature are available for customers who use the standard runtime.

Why: Omnistudio offers these new enhancements.

- Users assigned a permission set or permission set group can now call the allowlisted Apex classes remotely. Previously, the Apex Class Permissions Checker enforced the checks only on the Apex classes that were assigned to a user's profile. Now, the checker also checks for Apex classes that are assigned to a user's permission set or permission set group.
- The UserLocaleDateTime Omni Interaction Configuration now considers the user locale for Datetime and Time field types when set to `true`. Previously, only the Date field type was supported. In addition, when this configuration is enabled, the FORMATDATETIME function also adheres to the user locale. This means, when the function has an input with a Date, Datetime, or Time in a format that matches your user locale, the output is returned in the same format.

How: Review the Apex classes that you've added to permission sets or permission set groups, and remove any Apex classes that you don't want users to access from the allowlist.

SEE ALSO:

Salesforce Help for Omnistudio: Add an Apex Class Permissions Checker

Salesforce Help for Omnistudio for Managed Packages: Add an Apex Class Permissions Checker

Salesforce Help for Omnistudio: Configure Date and Time Settings in Data Mappers

Deprecation and End of Support for AngularJS-Based Omniscripts

Omnistudio no longer supports Omniscripts built on AngularJS. To continue using these Omniscripts, migrate all AngularJS-based Omniscripts to the Omniscript Lightning Web Component framework.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

When: Salesforce ended support for AngularJS-based Omniscript on December 31, 2022.

Who: This change impacts Omnistudio customers who use the managed package runtime and standard runtime.

SEE ALSO:

Salesforce Help for Omnistudio for Managed Packages: Lightning Web Component Omniscripts

Salesforce Help for Omnistudio for Managed Packages: Convert an Angular Omniscript to an LWC Omniscript

Omnistudio Minor Releases

Find out about bug fixes, minor updates, and known issues about Omnistudio made after the Spring '25 and before Summer '25.

Omnistudio Minor Releases

Revenue Cloud

Quickly create products by using Deep Clone. Speed up product discovery through faceted search and partial indexing. Improve Salesforce Pricing by using tools for accurate discounts, troubleshooting, pricing recipes, and optimal strategies. Save and reuse configurations. Use streamlined rules and dynamic configurations to design bundles faster. Support large, complex deals through robust quoting, ordering, contracting, and approvals. Manage usage-based products through usage modeling, rate management, and consumption tracking. Integrate Microsoft 365 with Salesforce Contracts to streamline reviews, configure file formats, enhance workflows, and extract data from images by using multimodal processing. With Dynamic Revenue Orchestrator, streamline order processing, automate tasks, track fulfillment changes, and manage ramp deal orders. Customize and optimize billing by using flexible invoice schedules, PDF generation, error reduction, multi-currency support, and automated journal entries.

IN THIS SECTION:

Product Catalog Management

Clone existing products and their related information to increase productivity. For products that support decimal quantities, specify exact product quantities. Accelerate your product discovery with faceted search and partial indexing. Faceted search simplifies browsing, and partial indexing supports quick updates to product data without a full index rebuild.

Salesforce Pricing

Leverage Einstein generative AI for automated context tagging. Use enhanced Salesforce Pricing capabilities for accurate discount application, streamlined pricing recipe management and troubleshooting, and optimised pricing strategies. Improve efficiency and pricing accuracy through expanded data type support in the Assignment element within a pricing procedure.

Product Configurator

Save and reuse your configurations, design bundles faster with streamlined rules and dynamic configurations, and use decimal quantities. Create constraint models with CML and customize product cards and UI elements for better visibility and control.

Transaction Management

Support large, complex deals efficiently. The Revenue Cloud enhancements make quoting, ordering, contracting, and approvals robust and intuitive. To honor and track your customers' negotiated prices, use pricing contracts to make tiered volume adjustments and use pricing agreement contracts to specify pricing at the line item level. Provide more transparency with custom fields for usage-based pricing, and enable usage selling on Experience Cloud. Streamline approval processes with email approvals and submitter notifications. Create larger, more complex quotes and orders faster, thanks to performance improvements.

Usage Management (Generally Available)

Manage consumption of usage-based products with Usage Management. It includes usage modeling to simplify the setup of product definitions, rate management to establish and adjust rates, and consumption management to track consumption data. It also provides invoice-ready consumption summaries and wallet management to manage entitlements and facilitate drawdowns based on consumption data.

Salesforce Contracts

Quickly and easily integrate Microsoft 365 with Salesforce Contracts through a guided setup. Use private and non-private modes during external reviews, and restart private reviews with new reviewers by using the improved privacy controls. Contract authors can configure the file attachment formats for check-in documents. Maintain consistent branding by applying custom fonts to generated documents.

Dynamic Revenue Orchestrator

Process incoming orders depending on their priority and quantity. Assetize and hand over fulfilled products to customers without delay, independent of other in-progress items. Link, review, and act upon dependent steps that are part of other fulfillment plans. Automate manual task assignments with custom rules, routing tasks to specific users, queues, or those users with the least workload. Track all changes in your fulfillment steps from a comprehensive history view. Plan and run fulfillment order line items on a specified future date and time. Decompose and fulfill ramp deal orders directly with Dynamic Revenue Orchestrator. Decompose products with quantities that are in decimal format.

Billing

Enhance billing flexibility and simplify accounting with our advanced invoicing solutions. Use the enhanced invoice scheduler for instant one-time invoicing, automatic deactivation, multi-currency support, and effortless editing of draft or inactive schedules. Suspend billing for specific accounts or schedule groups as needed. Preview upcoming invoices and adjust billing parameters to fit your business requirements. Generate invoices for amendments, cancellations, or early renewals of evergreen subscriptions.

Product Catalog Management

Clone existing products and their related information to increase productivity. For products that support decimal quantities, specify exact product quantities. Accelerate your product discovery with faceted search and partial indexing. Faceted search simplifies browsing, and partial indexing supports quick updates to product data without a full index rebuild.

IN THIS SECTION:

Accelerate Product Creation with Deep Clone

Clone product definitions, including all related entities such as attributes, child components, and selling models. Simplify product creation, boost productivity, ensure consistency across your catalog, eliminate manual record recreation, reduce errors, and save time by streamlining the product creation process through Deep Clone.

Define Decimal Values for Product Quantity

Specify accurate product quantities for products that support decimal values. Define the number of decimal places the product supports, with specific rounding methodologies. This feature is key for customers where specifying exact product quantities is crucial for their business.

Update Product Index Quickly with Partial Index Rebuilds

You no longer have to rebuild the entire index whenever you add, remove, or update product information. With the new Partial Index feature, you can efficiently capture product updates and apply incremental indexing swiftly for product search. For instance, you can quickly publish product changes and search for products on the product discovery page.

Enhance Product Discovery with Faceted Search

Elevate your search capabilities with Faceted Search. Facets provide a powerful filtering mechanism for your search results. Quickly locate the products you need by narrowing down the search results based on the chosen facets. For example, when searching for a phone, you can refine your search results using facets such as color, screen size, storage capacity, memory, and more.

Changed Objects in Product Catalog Management

Access more data with the new fields in Product Catalog Management objects.

Connect REST APIs

Connect REST APIs for Product Catalog Management help customers, partners, and ISVs access data related to products, categories, and catalogs.

Accelerate Product Creation with Deep Clone

Clone product definitions, including all related entities such as attributes, child components, and selling models. Simplify product creation, boost productivity, ensure consistency across your catalog, eliminate manual record recreation, reduce errors, and save time by streamlining the product creation process through Deep Clone.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Catalog Management is enabled.

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Enhance Product Discovery with Faceted Search

Elevate your search capabilities with Faceted Search. Facets provide a powerful filtering mechanism for your search results. Quickly locate the products you need by narrowing down the search results based on the chosen facets. For example, when searching for a phone, you can refine your search results using facets such as color, screen size, storage capacity, memory, and more.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Catalog Management is enabled.

How: Configure filters for your org that translate to facets during runtime based on the search result.

Changed Objects in Product Catalog Management

Access more data with the new fields in Product Catalog Management objects.

Define the units and systems of units used to express and account for quantities

Use the new `UnitOfMeasure` field on the existing Product2 and AttributePicklist objects.

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 and Updated 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 and Updated Connect REST API Resources

Learn more about the resources available with Product Catalog Management.

Retrieve the created snapshots and snapshot indexes

Make a GET request to the `/connect/pcm/index/snapshots` resource.

New request parameter: numberOfIndexLogs

Fetch settings related to indexing and search

Make a GET request to the `/connect/pcm/index/setting` resource.

New response body: Index Setting

Update settings related to indexing and search

Make a PATCH request to the `/connect/pcm/index/setting/`***`settingId`*** resource.

New request body: Index Setting Input

New response body: Index Setting Update

Get count and details of errors that occurred during the indexing process

Make a GET request to the `/connect/pcm/index/error` resource.

New response body: Snapshot Index Error

Copy related records of an object along with the main product record

Make a POST request to the `/connect/pcm/deep-clone` resource.

New request body: Deep Clone Input

New response body: Deep Clone Response

SEE ALSO:

Revenue Cloud Developer Guide: Product Catalog Management Business APIs

Revenue Cloud Developer Guide: Product Discovery Business APIs

Changed Connect REST API Request Bodies

These request bodies have changes.

Product Catalog Management

Index Configuration Input

This request body has these new properties.

- `isFacetable`—Indicates whether the field is facetable.

- `facetDisplayRank`—Sort order for displaying the facets at run time.

Criteria Input

This request body has this new property.

- `attributeType`—Search attribute type of the facet for a faceted search.

Product Discovery

Filter Criteria Input

This request body has this new property.

- `attributeType`—Search attribute type of the facet for a faceted search.

SEE ALSO:

Revenue Cloud Developer Guide: Product Catalog Management Business APIs

Revenue Cloud Developer Guide: Product Discovery Business APIs

Changed Connect REST API Response Bodies

These response bodies have changes.

Product Catalog Management

Snapshot Index

This response body has these new properties.

- `indexInfos`—Index information records associated with the snapshot index.
- `indexLogs`—Index logs associated with the snapshot index.
- `venueId`—Venue ID of the snapshot index.

Fields Info

This response body has these new properties.

- `isSearchableConfigurable`—Indicates whether the field is facetable.
- `isFacetableConfigurable`—Indicates whether the field is searchable.

Index Configuration Field

This response body has these new properties.

- `isFacetable`—Indicates whether the field is facetable.
- `facetDisplayRank`—Sort order for displaying the facets at run time.

Products

This response body has this new property.

- `facets`—Details of the faceted search.

Product Discovery

CPQ Base List

This response body has this new property.

- `facets`—Details of the faceted search.

SEE ALSO:

Revenue Cloud Developer Guide: Product Catalog Management Business APIs

Revenue Cloud Developer Guide: Product Discovery Business APIs

Salesforce Pricing

Leverage Einstein generative AI for automated context tagging. Use enhanced Salesforce Pricing capabilities for accurate discount application, streamlined pricing recipe management and troubleshooting, and optimised pricing strategies. Improve efficiency and pricing accuracy through expanded data type support in the Assignment element within a pricing procedure.

IN THIS SECTION:

Add Context Tags Automatically to Your Pricing Elements

Leverage Einstein generative AI to map the appropriate context tags as inputs within your pricing elements. Automating this process minimizes the manual effort and improves the accuracy for pricing designers.

Apply Discounts Accurately by Using the Discount Distribution Service Element

Ensure pricing transparency by applying discounts fairly across all line items using the Discount Distribution Service element. Control discounts by excluding products or categories that you don't want the discounts to apply to. Customize the element for your specific business needs and safeguard profitability by setting floor price limits.

Determine the Right Price for a Product by Combining Multiple Outputs

Assist organizations in offering their customers the best price for a product when a given pricing rule produces multiple outcomes. Users can configure procedure output resolution records to determine the optimal price or discounts by using the List Price and Price Tracking elements.

Troubleshoot Pricing Errors with the Pricing Operations Console

Troubleshoot and fix issues that arise after your users run pricing APIs or simulations. View and open price logs to resolve errors with all the necessary log information available directly in the Pricing Operations Console app.

Streamline Line Item Tagging

Accurately and efficiently calculate the prices for each line item by using the Map Line Items element. Easily map the tags for each line item detail by mapping them once and using parent tag mappings, instead of repeating the mappings in each pricing element.

Delete Pricing Recipes

To locate the right pricing recipe and prevent unnecessary data storage, delete pricing recipes created on a Salesforce Pricing org. Previously, pricing recipes could only be modified or created.

Enhance Flexibility with New Data Types in Assignment Element

Use the date and time, text (string), boolean, number, and currency data types to expand data compatibility with other elements within Salesforce Pricing. Previously, only the number and currency data types were supported.

Simplify Line Item Mapping

Eliminate the need to reenter line item variables in each discovery element. Map the line item variable in a discovery procedure by using the Discovery Settings element.

New and Changed Objects in Salesforce Pricing

Do more with these new and changed Salesforce Pricing objects.

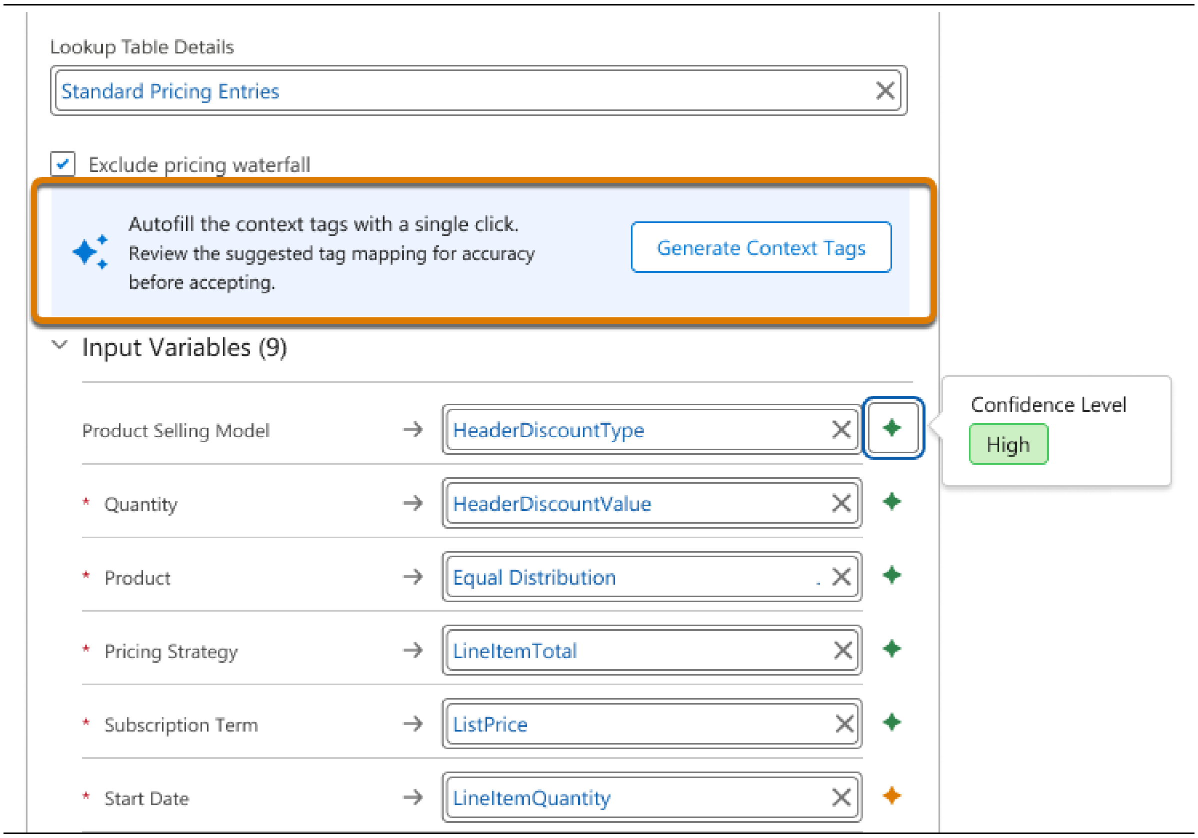
Add Context Tags Automatically to Your Pricing Elements

Leverage Einstein generative AI to map the appropriate context tags as inputs within your pricing elements. Automating this process minimizes the manual effort and improves the accuracy for pricing designers.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled, with the Einstein for Platform add-on license.

How: To fully access Einstein generative AI to map your context tags in a pricing element, from Setup, in the Quick Find box, enter `Einstein`, and then select **Einstein Setup**. Turn on Einstein.

On your pricing element, select **Auto Populate Context Tags**.



SEE ALSO:

Salesforce Help: Einstein Generative AI for Salesforce Pricing (can be outdated or unavailable during release preview)

Apply Discounts Accurately by Using the Discount Distribution Service Element

Ensure pricing transparency by applying discounts fairly across all line items using the Discount Distribution Service element. Control discounts by excluding products or categories that you don't want the discounts to apply to. Customize the element for your specific business needs and safeguard profitability by setting floor price limits.

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: Discount Distribution Service (can be outdated or unavailable during release preview)

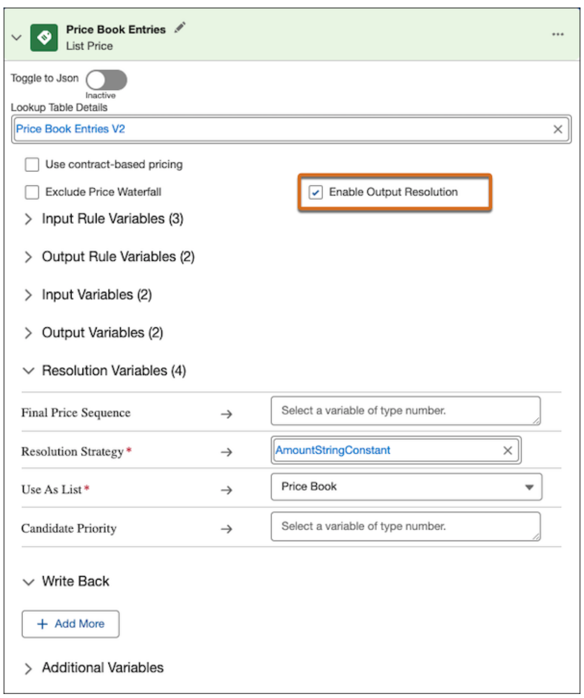
Determine the Right Price for a Product by Combining Multiple Outputs

Assist organizations in offering their customers the best price for a product when a given pricing rule produces multiple outcomes. Users can configure procedure output resolution records to determine the optimal price or discounts by using the List Price and Price Tracking elements.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: Define the pricing resolution strategy for a pricing element by creating a procedure output resolution record.

To derive the best price or discounts from multiple outputs, select **Enable Output Resolution** only in the List Price element or the Price Tracking element. Provide the resolution variables and optionally, add write-back conditions to determine the best price.



SEE ALSO:

Salesforce Help: Procedure Output Resolution (can be outdated or unavailable during release preview)

Troubleshoot Pricing Errors with the Pricing Operations Console

Troubleshoot and fix issues that arise after your users run pricing APIs or simulations. View and open price logs to resolve errors with all the necessary log information available directly in the Pricing Operations Console app.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: From Setup, in the Quick Find box, enter `Salesforce Pricing`, and then select **Salesforce Pricing Setup**. Turn on Price Logs Capture.

SEE ALSO:

Salesforce Help: Pricing Operations Console (can be outdated or unavailable during release preview)

Streamline Line Item Tagging

Accurately and efficiently calculate the prices for each line item by using the Map Line Items element. Easily map the tags for each line item detail by mapping them once and using parent tag mappings, instead of repeating the mappings in each pricing element.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: From the App Launcher, find and select **Discovery Procedure**. Click ⊕, and select the **Map Line Item** element from the list.

From the App Launcher, find and select **Pricing Procedure**. Click ⊕, and select the **Map Line Item** element from the list.

SEE ALSO:

Salesforce Help: Map Line Item (can be outdated or unavailable during release preview)

Delete Pricing Recipes

To locate the right pricing recipe and prevent unnecessary data storage, delete pricing recipes created on a Salesforce Pricing org. Previously, pricing recipes could only be modified or created.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

Who: To delete pricing recipes, users need the Salesforce Pricing Design Time permission.

Enhance Flexibility with New Data Types in Assignment Element

Use the date and time, text (string), boolean, number, and currency data types to expand data compatibility with other elements within Salesforce Pricing. Previously, only the number and currency data types were supported.

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: Assignment (can be outdated or unavailable during release preview)

Simplify Line Item Mapping

Eliminate the need to reenter line item variables in each discovery element. Map the line item variable in a discovery procedure by using the Discovery Settings element.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: Add the **Discovery Settings** element as the first element in your Discovery Procedure.

SEE ALSO:

Salesforce Help: Discovery Settings Element (can be outdated or unavailable during release preview)

New and Changed Objects in Salesforce Pricing

Do more with these new and changed Salesforce Pricing objects.

Define a pricing resolution strategy for a pricing element
Use the new ProcedureOutputResolution object.

Store Pricing API execution logs
Use the new PricingApiExecution object.

Track the records generated when discovery and pricing procedures are run
Use the new PricingProcessExecution object.

Associate different business processes in a procedure plan definition record
Use the new `ProcessType` field on the ProcedurePlanDefinition object.

Product Configurator

Save and reuse your configurations, design bundles faster with streamlined rules and dynamic configurations, and use decimal quantities. Create constraint models with CML and customize product cards and UI elements for better visibility and control.

IN THIS SECTION:

Create Quotes and Orders Faster by Saving and Reusing Configurations

Sales reps can save their frequently used configurations, and then reuse them with just a few clicks. Use the saved configurations to quickly create quotes and orders even when they're working with complex bundles and products.

Create Precise Configurations with Decimal Quantity Support

For products that are measured with decimal precision, your sales reps and rule designers can enter decimal values for the quantity when they configure the products and define the rules. Sales reps and rule designers can also see the associated unit of measure record and an infobubble that shows the number of decimal values that the value is rounded off to. For attributes that require a decimal input, your sales reps and rule designers can see the associated unit of measure record. However, attribute values aren't rounded off.

Design Product Configurations Faster With Product Classes and Flexible Rules

Rules for creating product bundles are now simpler and more flexible. You can define a class of values to display in dropdowns at run time, as opposed to statically defining the dropdowns. Also, when defining a rule with a condition, you can choose anything that's related via Context Service mappings. These changes make your rules more compact, faster to create, and easier to maintain.

View More Products at Once with Compact Mode in Product Configurator

With compact mode, see more products onscreen and work with large bundles more easily. Use the toggle to turn Compact Mode on and off.

Find Products in a Large Bundle Easily

Use the search field in Product Configurator to easily find a product in the current bundle. To show the search field, make sure that the product configuration flow contains the Product Configurator Breadcrumb Navigation component (included by default in the Default Product Configurator Flow).

Show More Details About Your Products with Customized Product Cards

Select the fields that you want to show on a product card and capture the information that isn't covered in the default card layout. To select fields in the Product Configurator Option Groups component, choose up to 5 options in each of the two picklists. The selected fields appear in two rows in the product card, with options from the first picklist in the top row.

Set Up Complex Product Validation Rules Easily by Using Advanced Configurator (Closed Beta)

Rule designers can set up validation rules for complex product configurations by using Advanced Configurator (closed beta) in Product Configurator. Based on your business requirements, you can use Advanced Configurator or the existing Standard Configurator. After you enable Advanced Configurator, rule designers can use Constraint Builder (closed beta) to create advanced configuration rules.

Configure Complex Products Accurately with Constraint Models (Closed Beta)

Manage the complex configuration and validation for your products by using constraint models. Create constraint models in the Constraint Builder, a part of the Advanced Configurator, to use constraints in addition to if-then rules to customize complex products quickly and accurately.

New Configurator Flow Component Fields

Ensure more control over layout and other functions by using the new fields added to the Product Configurator Flow screen components.

Create Quotes and Orders Faster by Saving and Reusing Configurations

Sales reps can save their frequently used configurations, and then reuse them with just a few clicks. Use the saved configurations to quickly create quotes and orders even when they're working with complex bundles and products.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

How: Open Product Configurator. To save a configuration for reuse, click ☆ . To load a saved configuration, click ▼ and then select **Load Configuration**.

Create Precise Configurations with Decimal Quantity Support

For products that are measured with decimal precision, your sales reps and rule designers can enter decimal values for the quantity when they configure the products and define the rules. Sales reps and rule designers can also see the associated unit of measure record and an infobubble that shows the number of decimal values that the value is rounded off to. For attributes that require a decimal input, your sales reps and rule designers can see the associated unit of measure record. However, attribute values aren't rounded off.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

Who: To enter decimal quantities, users must have the DecimalQuantityRuntime permission set.

SEE ALSO:

Define Decimal Values for Product Quantity

Design Product Configurations Faster With Product Classes and Flexible Rules

Rules for creating product bundles are now simpler and more flexible. You can define a class of values to display in dropdowns at run time, as opposed to statically defining the dropdowns. Also, when defining a rule with a condition, you can choose anything that's related via Context Service mappings. These changes make your rules more compact, faster to create, and easier to maintain.

Where: This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions where Revenue Cloud is enabled

Who: You must have the Product Configuration Rules Designer permission.

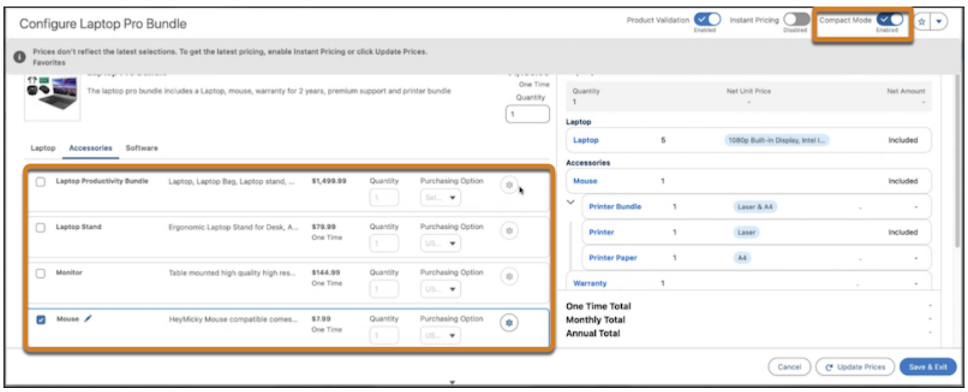
SEE ALSO:

Salesforce Help: Create a Configuration (can be outdated or unavailable during release preview)

View More Products at Once with Compact Mode in Product Configurator

With compact mode, see more products onscreen and work with large bundles more easily. Use the toggle to turn Compact Mode on and off.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

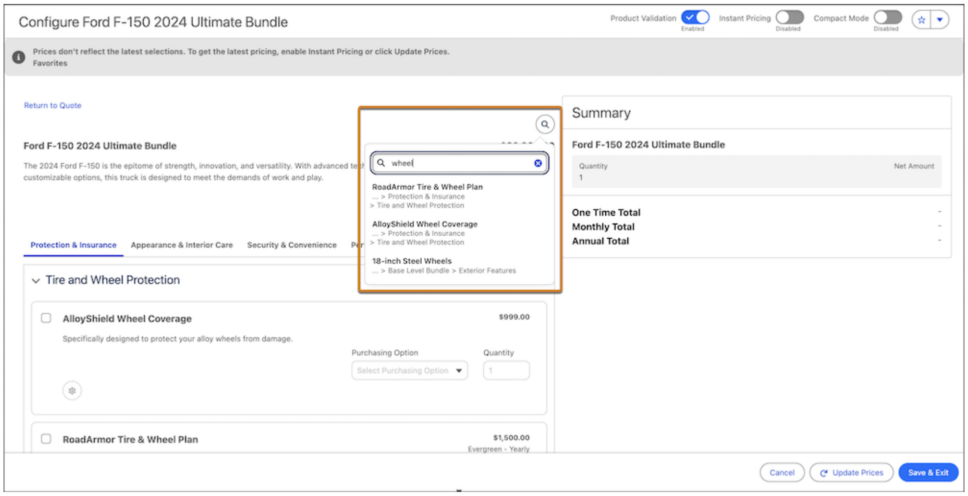


Find Products in a Large Bundle Easily

Use the search field in Product Configurator to easily find a product in the current bundle. To show the search field, make sure that the product configuration flow contains the Product Configurator Breadcrumb Navigation component (included by default in the Default Product Configurator Flow).

Note: If you're looking for a product that isn't in the current bundle, search for it on the Browse Products page in the catalog.

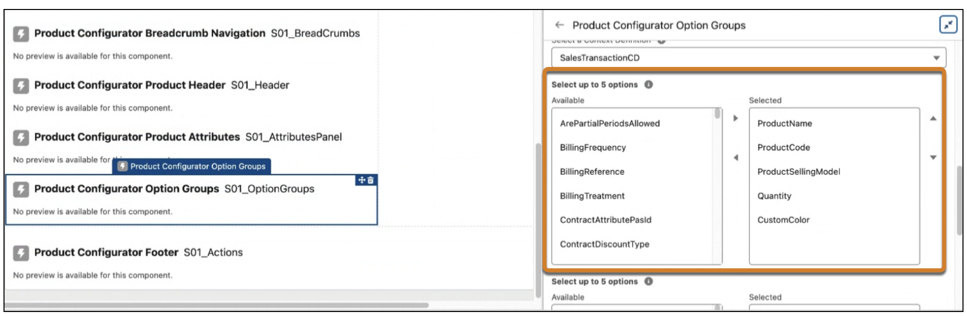
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

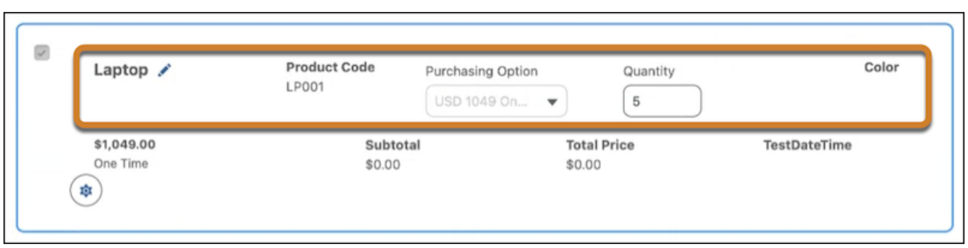


Show More Details About Your Products with Customized Product Cards

Select the fields that you want to show on a product card and capture the information that isn't covered in the default card layout. To select fields in the Product Configurator Option Groups component, choose up to 5 options in each of the two picklists. The selected fields appear in two rows in the product card, with options from the first picklist in the top row.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.





Set Up Complex Product Validation Rules Easily by Using Advanced Configurator (Closed Beta)

Rule designers can set up validation rules for complex product configurations by using Advanced Configurator (closed beta) in Product Configurator. Based on your business requirements, you can use Advanced Configurator or the existing Standard Configurator. After you enable Advanced Configurator, rule designers can use Constraint Builder (closed beta) to create advanced configuration rules.

Note: Advanced Configurator (closed beta) is a beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this beta service is at the Customer's sole discretion.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

Who: To enable Advanced Configurator (closed beta) and create Advanced Configurator rules, you and rule designers must have the Advanced Configurator Designer permission set. To use Advanced Configurator rules, users must have the Advanced Configurator User permission set.

How: Contact your Salesforce account executive to opt in and get Advanced Configurator (closed beta) enabled. To use Advanced Configurator, on the Revenue Settings page, turn on Advanced Configurator.

Configure Complex Products Accurately with Constraint Models (Closed Beta)

Manage the complex configuration and validation for your products by using constraint models. Create constraint models in the Constraint Builder, a part of the Advanced Configurator, to use constraints in addition to if-then rules to customize complex products quickly and accurately.

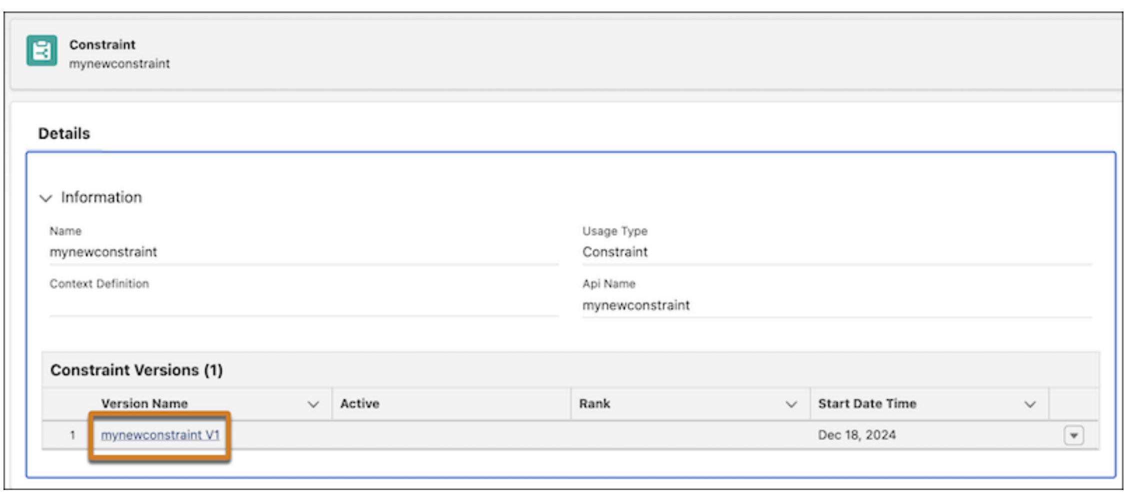
Note: Constraint Builder (closed beta) is a beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this beta service is at the Customer's sole discretion.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

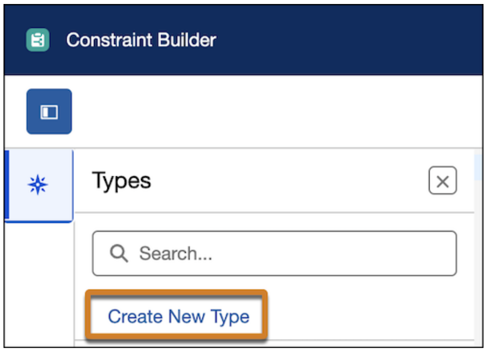
Who: To use the Constraint Builder, users must have the Advanced Configurator Designtime permission set license.

How: To open the Constraint Builder, in the App Launcher enter `constraints`, and select **Constraints**. On the Constraints page, click **New Constraint**. In the New Constraint modal, enter a name. For Usage Type select **Constraint**, and click **Save**. In the Constraints details page, click the constraint name to open the Constraint Builder.

Note: To view the Constraint Builder, on the Revenue Settings page, turn on Advanced Configurator (closed beta).



To create a constraint model, in the Constraint Builder, click **Create New Type** and specify the details.



SEE ALSO:

Set Up Complex Product Validation Rules Easily by Using Advanced Configurator (Closed Beta)

New Configurator Flow Component Fields

Ensure more control over layout and other functions by using the new fields added to the Product Configurator Flow screen components.

Where: This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions with Revenue Cloud.

Context Definition

A JSON string that contains the context definition, which includes the developer name and ID. The field appears on the Option Groups component.

Context Metadata

A JSON string containing metadata for a sales transaction item. The metadata is generated from the Context Service. The field appears on the Data Manager and Option Groups components.

Current Line Item ID

The ID of the current transaction line from which Configurator is launched. The field on the Data Manager component.

Layout Mode

A string value that specifies the layout mode of the Configurator UI, either Compact or Standard. The field appears on the Data Manager, Header, Option Groups, Summary, and Product Header components.

Navigation Tabs

A collection of Apex transaction line records displayed as tabs in the Configurator. The field appears on the Data Manager and Header components.

Option Groups Display Style

The display style to use for option groups, either tabs (the default) or accordions. The field appears on the Option Groups component.

Ramp Deals Enabled

A Boolean that indicates whether Ramp Deals are enabled. This feature was formerly known as Price Ramp. The field appears on the Data Manager and components.

Sales Transaction Items

A collection of Apex sales transaction item records that contain sales transaction item details. One use for this field is to quickly access sales transaction item details that have already been added to a transaction. The field appears on the Data Manager, Option Groups, and Summary components.

Searchable Products

A collection of Apex search item info records that represent products available to search in the Configurator. Use this field to constrain search to specific products. The field appears on the Data Manager and Breadcrumb Navigation components.

Select Up to 5 Fields

A JSON string that contains a list of the fields to show on the first or second line of the product option card. The field appears on the Option Groups component.

Wait for API

The API name of a boolean resource that indicates whether the API call is in progress. When selected, fields on the component are locked until the call completes. The field appears on the Footer, Product Attributes, Data Manager, Breadcrumb Navigations, Header, Option Groups, and Product Header components.

Transaction Management

Support large, complex deals efficiently. The Revenue Cloud enhancements make quoting, ordering, contracting, and approvals robust and intuitive. To honor and track your customers' negotiated prices, use pricing contracts to make tiered volume adjustments and use pricing agreement contracts to specify pricing at the line item level. Provide more transparency with custom fields for usage-based pricing, and enable usage selling on Experience Cloud. Streamline approval processes with email approvals and submitter notifications. Create larger, more complex quotes and orders faster, thanks to performance improvements.

IN THIS SECTION:

Amend Evergreen Subscriptions on Any Date

You can amend evergreen subscriptions on any date without being restricted to the anniversary date. This update provides flexibility and timely adjustments to meet your changing business needs when managing subscriptions. Avoid delays that could put your revenue opportunities at risk.

Create Precise Quotes and Orders with Decimal Quantity Support

For products that are measured with decimal precision, sales reps, partners, and customers can enter decimal values for quantity from Transaction Line Editor and line item pages. Also, they can see the unit of measure field on the side panel and line item pages, by default.

Negotiate Tiered Volume Adjustments and Prices by Using Contract Pricing

Your sales reps and contract managers can add volume tiers to contract pricing to specify the price or discount your customers receive based on sales quantity volume. Create individual tiers directly associated with a contract item price record from the contract record page. Manage a product's negotiated pricing in your contract pricing agreements more easily and accurately.

Unlock More Flexibility with Line Item Level Pricing Contracts

With the new Pricing Contract field on the quote line item level and order line item level, override the header level contract price agreement with a line level contract price agreement. You can also price individual transaction lines by using different contracts. To get the right price for your customers, choose a specific pricing contract that you want to use for the transaction or for individual lines.

Specify Pricing Agreement Type Contracts for Quotes and Orders

To price a transaction or line item, create a specific pricing agreement contract. This contract is different from the existing sales contract that contains the assets. Easily distinguish between pricing agreement contracts and sales contracts when you create quotes or orders. Choose different contracts for pricing purposes for your customers so that the correct contracts are used for the right transactions. You can also have multiple pricing contracts for any account.

Track Pricing Agreement Contracts Easily

Use the new Is Pricing Contract field for reporting when you track which contracts are used for pricing purposes. Easily differentiate between sales contracts and pricing contracts in your reporting. The Is Pricing Contract field is set when you add a contract item price or a price adjustment schedule to a contract. The field denotes the contract record as a pricing contract because the contract captures customer-negotiated pricing.

Organize Quote and Order Line Items into Groups with Ease

Work on large, complex deals efficiently in Revenue Cloud with the more intuitive quoting and ordering experience. With the Transaction Line Editor, sales reps can organize line items on quotes and on orders into groups, expand and collapse these groups with a click, and edit line items across groups. Also, notification badges on groups indicate unsaved changes and errors, prompting sales reps to take action.

Enhance Transparency with Custom Fields on Usage-Based Products

Use custom fields to give sales reps and customers a more detailed and comprehensive view of the usage rates for consumption-based products. Give your sales reps the tools to configure and quote your company's unique products and services by showing custom fields on the product's usage rate card.

Enable Usage Selling on Experience Cloud Sites

Expand your company's market reach by enabling partners and guest users to sell usage-based products on Experience Cloud for Partner Communities and Customer Community Plus.

Receive Email Notifications for Approval Submissions

You can now receive email confirming approval submissions and when those submissions are updated.

Manage Advanced Approvals Through Email

With Advanced Approvals, approvers and delegates receive email when there are submissions that need their attention. They can also approve and reject submissions by responding to email.

Create Quotes and Orders Fast with More Responsive Pages

Pages are more responsive when creating quotes and orders. Thanks to API improvements, clicks and selections are up to twice as fast.

Create Complex Quotes and Orders

During quoting and ordering, you can now create, configure, and price a single large quote or order for complex products governed by intricate rules. The revamped API supports processing up to 1,000 lines synchronously, ensuring smoother and more efficient processing.

New and Changed Objects in Transaction Management

Transaction Management has one new object: ContractItemPriceAdjTier. Three existing objects are now available for Experience Cloud to support Community Plus users with advanced approvals: ApprovalSubmission, ApprovalSubmissionDetail, and ApprovalWorkItem.

Amend Evergreen Subscriptions on Any Date

You can amend evergreen subscriptions on any date without being restricted to the anniversary date. This update provides flexibility and timely adjustments to meet your changing business needs when managing subscriptions. Avoid delays that could put your revenue opportunities at risk.

Where: This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions of Revenue Cloud where Transaction Management is enabled.

Create Precise Quotes and Orders with Decimal Quantity Support

For products that are measured with decimal precision, sales reps, partners, and customers can enter decimal values for quantity from Transaction Line Editor and line item pages. Also, they can see the unit of measure field on the side panel and line item pages, by default.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: To enter decimal quantities, users must have the DecimalQuantityRuntime permission set.

How: Add the Quantity Unit of Measure field to Transaction Line Editor and the related lists for line items to show the unit of measure.

SEE ALSO:

Define Decimal Values for Product Quantity

Negotiate Tiered Volume Adjustments and Prices by Using Contract Pricing

Your sales reps and contract managers can add volume tiers to contract pricing to specify the price or discount your customers receive based on sales quantity volume. Create individual tiers directly associated with a contract item price record from the contract record page. Manage a product's negotiated pricing in your contract pricing agreements more easily and accurately.

Where: This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions of Revenue Cloud where Transaction Management is enabled.

Why: Sales reps and contract managers need an easier way to negotiate and capture volume adjustments or prices as a part of their customer-specific contract pricing agreements. New pricing data is secure based on the contract.

How: Add the Contract Item Price Adjustment Tier related list to the Contract Item Price page layout. Configure the pricing procedure to apply the new volume tiers data model at runtime.

Unlock More Flexibility with Line Item Level Pricing Contracts

With the new Pricing Contract field on the quote line item level and order line item level, override the header level contract price agreement with a line level contract price agreement. You can also price individual transaction lines by using different contracts. To get the right price for your customers, choose a specific pricing contract that you want to use for the transaction or for individual lines.

Where: This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions of Revenue Cloud where Transaction Management is enabled.

How: Salesforce admins must add the Pricing Contract field to an existing custom permission set, and add the Pricing Contract field to the quote and order page layouts. You must also update your pricing procedure based on the latest template to apply the contract from the Pricing Contract field.

Specify Pricing Agreement Type Contracts for Quotes and Orders

To price a transaction or line item, create a specific pricing agreement contract. This contract is different from the existing sales contract that contains the assets. Easily distinguish between pricing agreement contracts and sales contracts when you create quotes or orders. Choose different contracts for pricing purposes for your customers so that the correct contracts are used for the right transactions. You can also have multiple pricing contracts for any account.

Where: This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions of Revenue Cloud where Transaction Management is enabled.

How: Salesforce admins must add the new Pricing Contract field to the Quote and Order page layouts. You must update your pricing procedure based on the latest template to apply the contract from the Pricing Contract field.

Track Pricing Agreement Contracts Easily

Use the new Is Pricing Contract field for reporting when you track which contracts are used for pricing purposes. Easily differentiate between sales contracts and pricing contracts in your reporting. The Is Pricing Contract field is set when you add a contract item price or a price adjustment schedule to a contract. The field denotes the contract record as a pricing contract because the contract captures customer-negotiated pricing.

Where: This change applies to Lightning Experience in Enterprise, Developer, and Unlimited editions of Revenue Cloud where Transaction Management is enabled.

How: Salesforce admins must add the Is Pricing Contract field to the contract page layout.

Organize Quote and Order Line Items into Groups with Ease

Work on large, complex deals efficiently in Revenue Cloud with the more intuitive quoting and ordering experience. With the Transaction Line Editor, sales reps can organize line items on quotes and on orders into groups, expand and collapse these groups with a click, and edit line items across groups. Also, notification badges on groups indicate unsaved changes and errors, prompting sales reps to take action.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps who can create and edit quotes and orders in Revenue Cloud can group line items.

How: In Revenue Settings, enable the **Enable Groups in quotes and orders** setting. On a quote or order, organize your transaction by grouping line items.

Enhance Transparency with Custom Fields on Usage-Based Products

Use custom fields to give sales reps and customers a more detailed and comprehensive view of the usage rates for consumption-based products. Give your sales reps the tools to configure and quote your company's unique products and services by showing custom fields on the product's usage rate card.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Administrators with Customize Application can create custom fields, map custom fields to objects, and use Lightning App Builder to customize components.

How: Create a custom field and map the field to the Quote, Order, and Asset objects. In Lightning App Builder, open the Usage Rates component and add the custom field. The custom field is visible on the Price By Usage page for quotes and orders that contain usage-based products.

Enable Usage Selling on Experience Cloud Sites

Expand your company's market reach by enabling partners and guest users to sell usage-based products on Experience Cloud for Partner Communities and Customer Community Plus.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Receive Email Notifications for Approval Submissions

You can now receive email confirming approval submissions and when those submissions are updated.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Revenue Cloud Approvals is enabled.

Manage Advanced Approvals Through Email

With Advanced Approvals, approvers and delegates receive email when there are submissions that need their attention. They can also approve and reject submissions by responding to email.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Revenue Cloud Advanced Approvals is enabled.

Create Quotes and Orders Fast with More Responsive Pages

Pages are more responsive when creating quotes and orders. Thanks to API improvements, clicks and selections are up to twice as fast.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Revenue Cloud Advanced Approvals is enabled.

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During quoting and ordering, you can now create, configure, and price a single large quote or order for complex products governed by intricate rules. The revamped API supports processing up to 1,000 lines synchronously, ensuring smoother and more efficient processing.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Revenue Cloud Advanced Approvals is enabled.

New and Changed Objects in Transaction Management

Transaction Management has one new object: ContractItemPriceAdjTier. Three existing objects are now available for Experience Cloud to support Community Plus users with advanced approvals: ApprovalSubmission, ApprovalSubmissionDetail, and ApprovalWorkItem.

Set up price adjustment tiers for products in contracts
Use the new ContractItemPriceAdjTier object.

Track approval submissions
The ApprovalSubmission object is now available in Experience Cloud.

Work with the details of approval submissions
The ApprovalSubmissionDetail object is now available in Experience Cloud.

Track the work items associated with approval submissions
The ApprovalWorkItem object is now available in Experience Cloud.

Usage Management (Generally Available)

Manage consumption of usage-based products with Usage Management. It includes usage modeling to simplify the setup of product definitions, rate management to establish and adjust rates, and consumption management to track consumption data. It also provides invoice-ready consumption summaries and wallet management to manage entitlements and facilitate drawdowns based on consumption data.

IN THIS SECTION:

Usage Modeling

Manage usage-based products easily with Usage Modeling. Define sellable products, usage resources, and product usage grants to lay a foundation for accurate and efficient usage management. Define aggregation policies and policies to manage grants allocated to the sellable products.

Rate Management

Calculate rates for the consumption of usage-based products based on the negotiations. Improve control over rate card entries from creation to activation and deactivation, ensuring immutability and reliability throughout the consumption management process.

Consumption Management

Track and manage consumption data, rate consumption accurately, and generate invoice-ready summaries for billing.

Wallet Management

Wallet management provides an intuitive interface to list, view, and manage the consumption of usage resources.

New Objects in Usage Management

Do more with these new Usage Management objects.

Usage Modeling

Manage usage-based products easily with Usage Modeling. Define sellable products, usage resources, and product usage grants to lay a foundation for accurate and efficient usage management. Define aggregation policies and policies to manage grants allocated to the sellable products.

IN THIS SECTION:

Define Sellable Products and Usage Resources

Define different business models by using sellable products, such as pay-as-you-go or prepurchase and overage. Use usage resources to define a service, such as cloud storage that's sold or granted with the sellable product.

Define Units of Measure to Quantify Usage Resources

Quantify how much of a usage resource a customer consumes by defining a new unit of measure class and a related unit of measure. Units of measure can be time-based, transaction-based, volume-based, or count-based.

Track and Rate Usage Consumption with Product Usage Grants

Use product usage grants to track and rate resource consumption. When configuring product usage grants, set properties such as overage charges, validity, renewability, and rollover policies. To streamline your credit redemption processes, populate the Drawdown Order field when defining the product usage grant.

Define Refresh Policies for Usage Resources

Specify how often usage resource grants are refreshed. For a specified term of the sellable product, the grants are periodically refreshed. Renewal frequency for the grant refresh can be set to monthly, quarterly, or annually.

Manage Unused Usage Grants Effectively

Control what happens to unused usage grants after they expire by defining rollover policies for usage resources. You can choose to expire the grants immediately after a specified date, roll over for a specified period, or roll over indefinitely.

Define Usage Aggregation Methods and Periods

Specify how usage is aggregated over time for a given resource by creating usage aggregation policies. By defining an accumulation method and an accumulation period, you can use the policy to rate the usage amounts in a given billing period.

Manage Grants for Sellable Products

Define grant-binding policies to manage the allocation and the appropriate timing of distributing grants to customers. With greater control and flexibility over their grant allocations, your executives can address their needs for tailored scheduling and management.

Define Sellable Products and Usage Resources

Define different business models by using sellable products, such as pay-as-you-go or prepurchase and overage. Use usage resources to define a service, such as cloud storage that's sold or granted with the sellable product.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: From the App Launcher, find and select **Products**. On the Products list view, click **New**.

From the App Launcher, find and select **Usage Resource**. On the Usage Resources list view page, click **New**.

Define Units of Measure to Quantify Usage Resources

Quantify how much of a usage resource a customer consumes by defining a new unit of measure class and a related unit of measure. Units of measure can be time-based, transaction-based, volume-based, or count-based.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: From the App Launcher, find and select **Unit of Measure Class**. On the Unit of Measure Classes list view page, click **New**.

From the App Launcher, find and select **Units of Measure**. On the Units of Measure list view page, click **New**.

Track and Rate Usage Consumption with Product Usage Grants

Use product usage grants to track and rate resource consumption. When configuring product usage grants, set properties such as overage charges, validity, renewability, and rollover policies. To streamline your credit redemption processes, populate the Drawdown Order field when defining the product usage grant.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: From the App Launcher, find and select **Product Usage Grants**. On the Product Usage Grants list view page, click **New**.

Define Refresh Policies for Usage Resources

Specify how often usage resource grants are refreshed. For a specified term of the sellable product, the grants are periodically refreshed. Renewal frequency for the grant refresh can be set to monthly, quarterly, or annually.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: From the App Launcher, find and select **Usage Grant Refresh Policies**. On the Usage Grant Refresh Policies list view page, click **New**.

Manage Unused Usage Grants Effectively

Control what happens to unused usage grants after they expire by defining rollover policies for usage resources. You can choose to expire the grants immediately after a specified date, roll over for a specified period, or roll over indefinitely.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: From the App Launcher, find and select **Usage Grant Rollover Policies**. On the Usage Grant Rollover Policies list view page, click **New**.

Define Usage Aggregation Methods and Periods

Specify how usage is aggregated over time for a given resource by creating usage aggregation policies. By defining an accumulation method and an accumulation period, you can use the policy to rate the usage amounts in a given billing period.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: From the App Launcher, find and select **Usage Aggregation Policies**. On the Usage Aggregation Policies list view page, click **New**.

Manage Grants for Sellable Products

Define grant-binding policies to manage the allocation and the appropriate timing of distributing grants to customers. With greater control and flexibility over their grant allocations, your executives can address their needs for tailored scheduling and management.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: From the App Launcher, find and select **Usage Product Grant Binding Policies**. On the Usage Product Grant Binding Policies list view page, click **New**.

Rate Management

Calculate rates for the consumption of usage-based products based on the negotiations. Improve control over rate card entries from creation to activation and deactivation, ensuring immutability and reliability throughout the consumption management process.

IN THIS SECTION:

Optimize Usage Costs with Predefined Negotiable Rating Elements

Use the predefined negotiable rating procedure or create a rating procedure by using the negotiable rating elements to calculate negotiated rates. Use Rating Procedure Builder to calculate negotiated rates and make sure that you apply the most accurate and favorable rates for your usage resources, reflecting any special agreements made during the negotiation. Provide precise billing and maintain customer satisfaction by honoring the negotiated terms. Default to base rates when specific negotiations don't exist.

Manage the Lifecycle of Rate Card Entries Effectively

Simplify the transition of rate card entries from the draft to the active or the inactive state. Leverage the flexibility of status-based management to edit rate card entries in the draft status.

New and Changed Objects in Rate Management

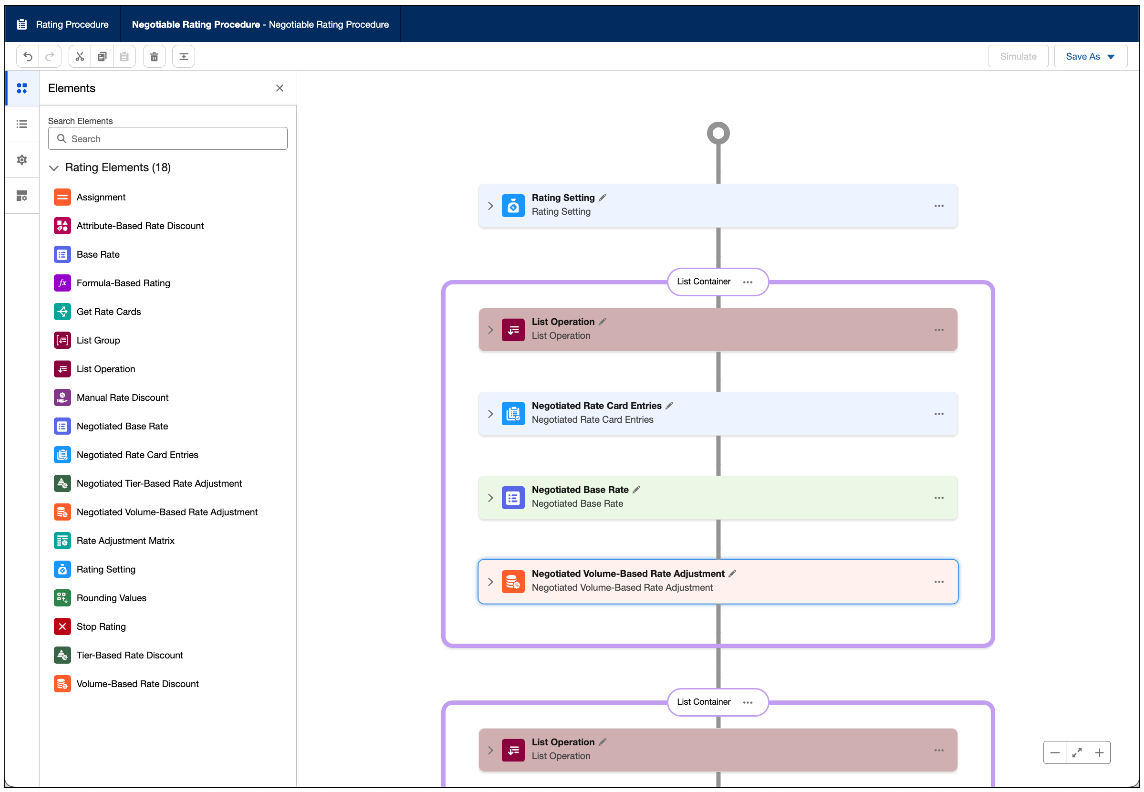
Do more with these changed Rate Management objects.

Optimize Usage Costs with Predefined Negotiable Rating Elements

Use the predefined negotiable rating procedure or create a rating procedure by using the negotiable rating elements to calculate negotiated rates. Use Rating Procedure Builder to calculate negotiated rates and make sure that you apply the most accurate and favorable rates for your usage resources, reflecting any special agreements made during the negotiation. Provide precise billing and maintain customer satisfaction by honoring the negotiated terms. Default to base rates when specific negotiations don't exist.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Rate Management is enabled.

How: From the list of expression sets, select **Negotiable Rating Procedure**.

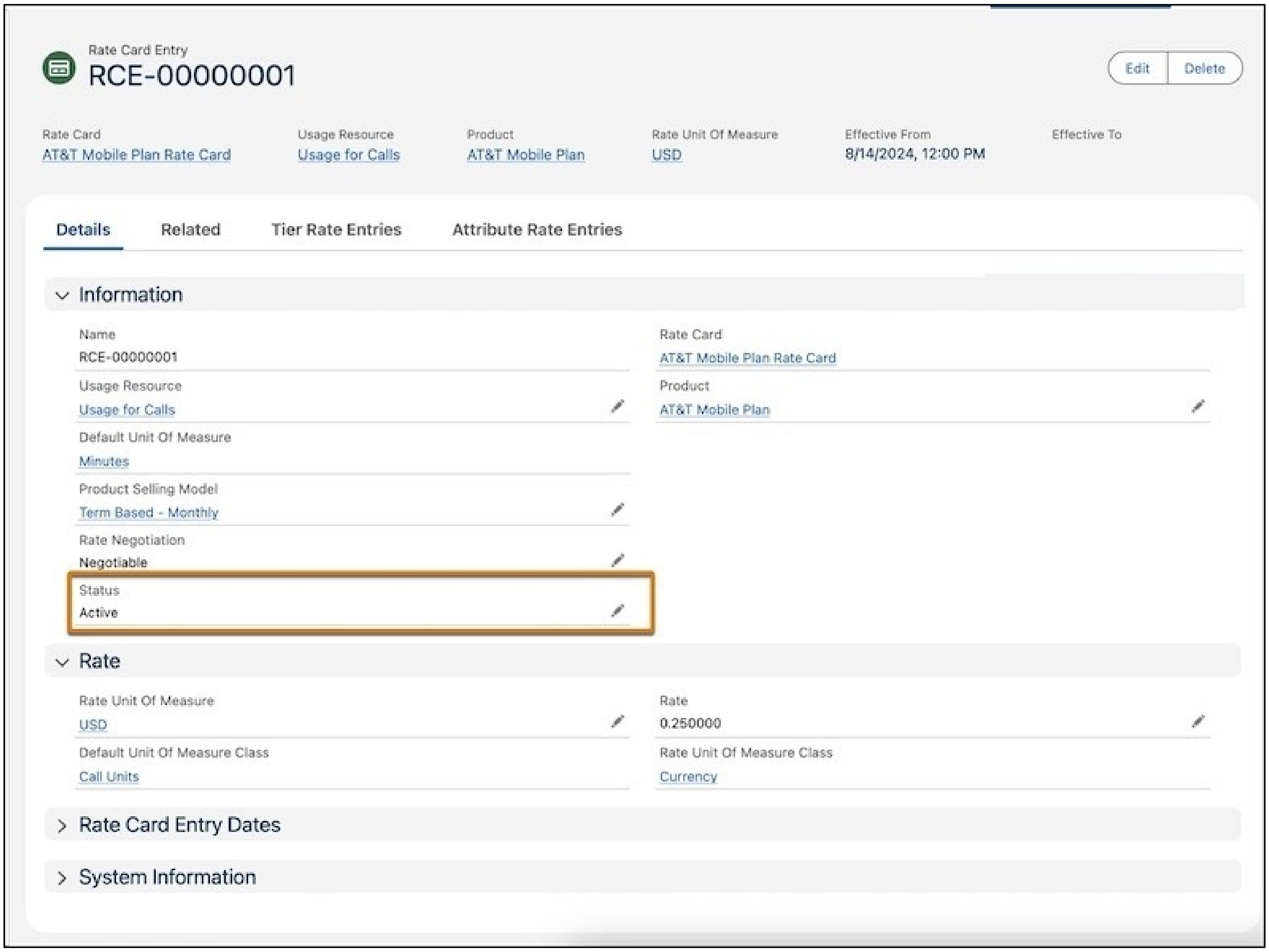


Manage the Lifecycle of Rate Card Entries Effectively

Simplify the transition of rate card entries from the draft to the active or the inactive state. Leverage the flexibility of status-based management to edit rate card entries in the draft status.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Rate Management is enabled.

How: When you create a rate card entry for a rate card record, define the status as draft, active, or inactive.



New and Changed Objects in Rate Management

Do more with these changed Rate Management objects.

Define the status of rate card entries for immutability

Use the new `Status` field on the RateCardEntry object.

Define the status of the rate card entry related to tier-based rate adjustments

Use the new `RateCardEntryStatus` field on the RateAdjustmentByTier object.

Define the status of the rate card entry related to attribute-based rate adjustments

Use the new `RateCardEntryStatus` field on the RateAdjustmentByAttribute object.

Define the type of rate card associated with the rate card entry

Use the new `RateCardType` field on the RateCardEntry object.

Define the type of rate negotiation applicable to the rate card entry

Use the new `RateNegotiation` field on the RateCardEntry object.

Consumption Management

Track and manage consumption data, rate consumption accurately, and generate invoice-ready summaries for billing.

IN THIS SECTION:

[Enhance Reporting with On-Demand Summary Generation]

Empower account executives to quickly create comprehensive usage summaries that they can use to generate reports and forecast consumption of a resource. With quick access to consumption records and summaries, executives can swiftly resolve customer disputes.

[Calculate Rates for Usage Summaries on Demand]

Quickly resolve customer disputes and generate reports outside the schedule by calculating rates for usage summaries when needed. The process makes sure that all unrated usage records are considered. You can select specific usage records.

[Streamline Billing with Enhanced Liable Summary Generation]

Simplify your billing cycle and reduce errors in consumption logging with liable summaries that are autogenerated every month. The predefined Data Processing Engine (DPE) job effectively logs and rates consumption, converts the consumed units into payable amounts, and prepares them for invoicing. By optimizing your billing processes, the DPE jobs guarantees precision and expedites consumption management, which ensures a clear, dispute-free invoicing process.

Enhance Reporting with On-Demand Summary Generation

Empower account executives to quickly create comprehensive usage summaries that they can use to generate reports and forecast consumption of a resource. With quick access to consumption records and summaries, executives can swiftly resolve customer disputes.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: From the App Launcher, find and select **Transaction Journals**. On the Transaction Journals list view page, select the journals, and then click **Summarize**.

Calculate Rates for Usage Summaries on Demand

Quickly resolve customer disputes and generate reports outside the schedule by calculating rates for usage summaries when needed. The process makes sure that all unrated usage records are considered. You can select specific usage records.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: To calculate the rate for specific usage summaries, from the App Launcher, find and select **Usage Summaries**. On the Usage Summaries list view page, select the usage summaries, and then click **Calculate Rate**.

Streamline Billing with Enhanced Liable Summary Generation

Simplify your billing cycle and reduce errors in consumption logging with liable summaries that are autogenerated every month. The predefined Data Processing Engine (DPE) job effectively logs and rates consumption, converts the consumed units into payable amounts, and prepares them for invoicing. By optimizing your billing processes, the DPE jobs guarantees precision and expedites consumption management, which ensures a clear, dispute-free invoicing process.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

Wallet Management

Wallet management provides an intuitive interface to list, view, and manage the consumption of usage resources.

IN THIS SECTION:

[Manage Wallets for Usage Resources](#)

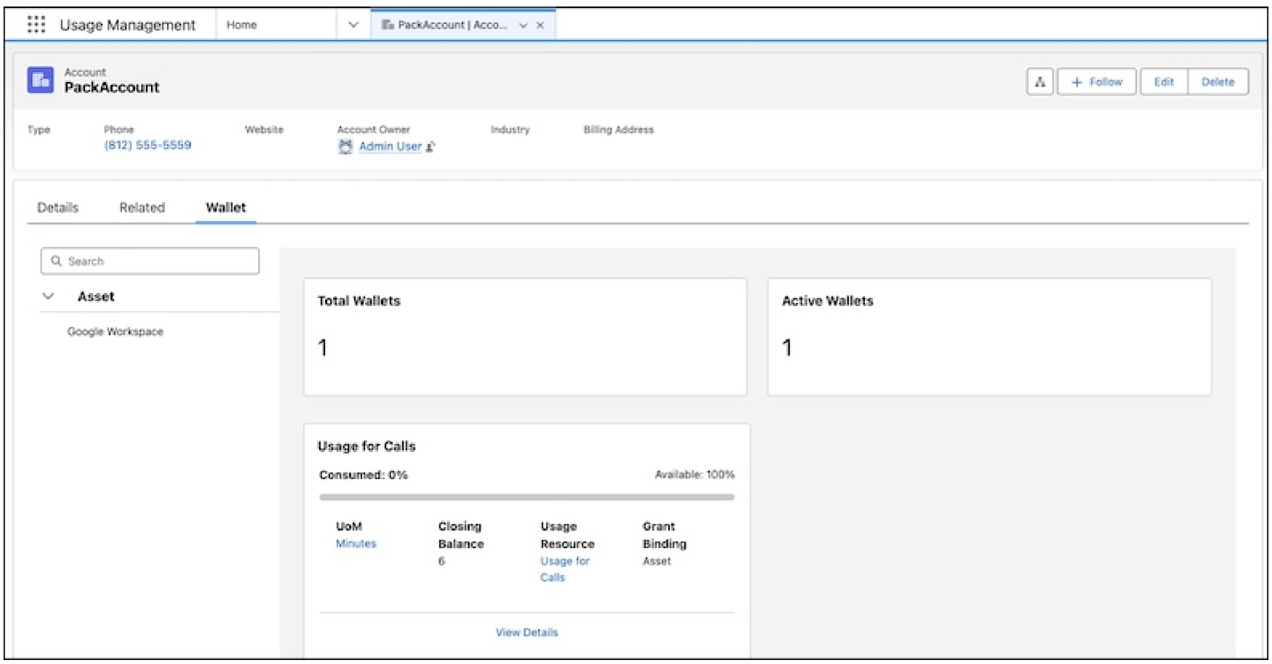
Seamlessly manage wallets for various usage resources' transactions with Wallet Management. Account executives can manage credits and consumption, and handle entitlements and transactions, and customers can effectively track and control their service usage.

Manage Wallets for Usage Resources

Seamlessly manage wallets for various usage resources' transactions with Wallet Management. Account executives can manage credits and consumption, and handle entitlements and transactions, and customers can effectively track and control their service usage.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management is enabled.

How: To view the list of wallets and their consumption details, go to the Wallet tab on an account page.



New Objects in Usage Management

Do more with these new Usage Management objects.

Store usage entitlements granted with the sellable product
: Use the new TransactionUsageEntitlement object.

Store entitlement account details related to the asset that holds the wallet with the granted units
: Use the new UsageEntitlementAccount object.

Store usage entitlement details, such as usage consumption and rollovers, for each tenure
: Use the new UsageEntitlementEntry object.

Store a usage entitlement granted with the sellable product
: Use the new UsageEntitlementBucket object.

Aggregate transaction journal entries of a usage entitlement for a specified period
Use the new UsageSummary object.

Aggregate usage summaries to calculate the rate at which the overages are charged
Use the new UsageRatableSummary object.

Calculate overages for the usage entitlement and the amount charged for these overages
Use the new UsageBillingPeriodItem object.

Define a group to classify units of measure
Use the new UnitOfMeasureClass object.

Define an entitlement granted by a provider, such as data storage, computing power, or any other product or service
Use the new UsageResource object.

Define the policy to manage rollovers of a usage grant
Use the new UsageGrantRolloverPolicy object.

Define the policy to manage usage grant refreshes at a specified frequency
Use the new UsageGrantRenewalPolicy object.

Define the details of a grant associated with a resource, product, or service
Use the new ProductUsageGrant object.

Define the aggregation policy for resource consumption before rating the usage resource
Use the new UsageResourceBillingPolicy object.

Associate the grants of a usage resource with a sellable product
Use the new UsageProductGrantBinding object.

Store consumption details of a usage resource
Use the new TransactionJournal object.

Salesforce Contracts

Quickly and easily integrate Microsoft 365 with Salesforce Contracts through a guided setup. Use private and non-private modes during external reviews, and restart private reviews with new reviewers by using the improved privacy controls. Contract authors can configure the file attachment formats for check-in documents. Maintain consistent branding by applying custom fonts to generated documents.

IN THIS SECTION:

Use a Guided Setup to Easily Integrate Microsoft 365 with Salesforce Contracts

Find all the necessary steps in one place to get a clear and organized path to complete the integration. Easily configure key components and ensure an error-free setup with step validation, embedded help content, and walkthrough videos. Simplify the integration, reduce setup time, address all prerequisites, and minimize troubleshooting. Eliminate the need for rediscovery with prebuilt configurations. Resolve issues efficiently with the help of clear error messages.

Enhance Privacy with a Discreet External Review Process

Safeguard document integrity and establish full control over your review process with additional privacy controls for external reviews. Prevent internal comments and user-specific changes from being exposed to third parties. Ensure document integrity by controlling the access for various stakeholders during different stages of the review. Contract authors can select between private and non-private modes when they share contract documents for review. In private review, the ownership of the temporary document copy is transferred to third-party reviewers and the contract author doesn't have access to this document. Comments and changes from external reviewers are anonymized. Contract authors can even restart a private review with a revised set of reviewers.

Specify Attachment Format During Document Check-In

Contract authors can specify the file format for the document to be attached to a contract document version when they check in the document. Use the Check In Document File Type setting in Contract Type Config to control whether only .docx or both .pdf and .docx versions of the document are attached during check-in.

Manage Custom Fonts for Consistent Document Branding

Easily align your documents with your organization's branding by using proprietary custom fonts. Upload, organize, and synchronize your font library across Hyperforce servers to ensure consistent branding in generated documents. Maintain a professional and cohesive brand identity throughout your document generation process.

Use a Guided Setup to Easily Integrate Microsoft 365 with Salesforce Contracts

Find all the necessary steps in one place to get a clear and organized path to complete the integration. Easily configure key components and ensure an error-free setup with step validation, embedded help content, and walkthrough videos. Simplify the integration, reduce setup time, address all prerequisites, and minimize troubleshooting. Eliminate the need for rediscovery with prebuilt configurations. Resolve issues efficiently with the help of clear error messages.

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

Who: To perform guided setup, the user must be a system administrator or contract administrator.

How: From Setup, in the Quick Find box, enter *`Microsoft 365 and Azure Integration`*, and then select it.

Enhance Privacy with a Discreet External Review Process

Safeguard document integrity and establish full control over your review process with additional privacy controls for external reviews. Prevent internal comments and user-specific changes from being exposed to third parties. Ensure document integrity by controlling the access for various stakeholders during different stages of the review. Contract authors can select between private and non-private modes when they share contract documents for review. In private review, the ownership of the temporary document copy is transferred to third-party reviewers and the contract author doesn't have access to this document. Comments and changes from external reviewers are anonymized. Contract authors can even restart a private review with a revised set of reviewers.

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

Who: To initiate external reviews, contract authors need the Microsoft 365 Word User permission set.

Specify Attachment Format During Document Check-In

Contract authors can specify the file format for the document to be attached to a contract document version when they check in the document. Use the Check In Document File Type setting in Contract Type Config to control whether only .docx or both .pdf and .docx versions of the document are attached during check-in.

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

Who: To define the contract type config settings, users need the CLM Admin User permission set.

Manage Custom Fonts for Consistent Document Branding

Easily align your documents with your organization's branding by using proprietary custom fonts. Upload, organize, and synchronize your font library across Hyperforce servers to ensure consistent branding in generated documents. Maintain a professional and cohesive brand identity throughout your document generation process.

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

Who: To manage fonts, the user must be a Salesforce Admin.

Dynamic Revenue Orchestrator

Process incoming orders depending on their priority and quantity. Assetize and hand over fulfilled products to customers without delay, independent of other in-progress items. Link, review, and act upon dependent steps that are part of other fulfillment plans. Automate manual task assignments with custom rules, routing tasks to specific users, queues, or those users with the least workload. Track all changes in your fulfillment steps from a comprehensive history view. Plan and run fulfillment order line items on a specified future date and time. Decompose and fulfill ramp deal orders directly with Dynamic Revenue Orchestrator. Decompose products with quantities that are in decimal format.

IN THIS SECTION:

[Prioritize Orders for Processing]

Process order submissions based on defined priority levels—High, Default, or Bulk. Dynamic Revenue Orchestrator processes high-priority transactions with established hourly limits. Manage the default and bulk transactions so as to make the most of system resources.

[Optimize Fulfillment Efficiency with Staged Assetization]

You can now assetize fulfilled products individually, without waiting for the entire fulfillment plan to finish. This change facilitates faster revenue recognition, especially when dealing with partially fulfilled orders.

[Manage Dependencies Across Related Fulfillment Plans]

Make sure that your fulfillment plans are connected and aligned by enabling fulfillment designers to establish cross-plan dependencies between steps that should be part of different fulfillment plans. Fulfillment managers can view and easily access dependencies directly from the plan view. Reduce manual effort and time by using this real-time visibility to act on the steps that require attention.

[Define Rules to Assign Manual Tasks]

When configuring tasks, fulfillment designers can now use the new task-assignment rules to automatically assign tasks to a specific user or a queue. They can customize the rules and set conditions and priorities. For example, assign tasks to a resource with the least current workload or use a specific context for the assignment.

[Track Your Fulfillment Step Changes]

Gain a clear understanding of the progress and status of each step, improving your ability to manage and optimize the fulfillment process. The step details page now shows the activity history.

[Configure Future Dated Steps]

Fulfillment designers can now configure steps to execute at a future date and time. They can also set intervals between the start date of the order line items and the execution time of previous steps.

[Decompose Orders with Decimal Quantities]

Generate fulfillment order line items with decimal precision. Decompose commercial products into technical products even when the quantity values are in the decimal format.

[Fulfill Ramp Deal Orders]

Decompose orders containing ramp deals into fulfillment lines and orchestrate the orders directly with Dynamic Revenue Orchestrator. To ensure easy data management, fulfillment assets now stay synchronized with the asset state periods of their related assets.

[New and Changed Objects in Dynamic Revenue Orchestrator]

Do more with these new and changed Dynamic Revenue Orchestrator objects.

Prioritize Orders for Processing

Process order submissions based on defined priority levels—High, Default, or Bulk. Dynamic Revenue Orchestrator processes high-priority transactions with established hourly limits. Manage the default and bulk transactions so as to make the most of system resources.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with Revenue Cloud.

Optimize Fulfillment Efficiency with Staged Assetization

You can now assetize fulfilled products individually, without waiting for the entire fulfillment plan to finish. This change facilitates faster revenue recognition, especially when dealing with partially fulfilled orders.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with Revenue Cloud.

How: From the App Launcher, find and select **Fulfillment Workspaces** and add a fulfillment step. Select **Staged Assetize** as the step type to assetize the entire bundle.

Manage Dependencies Across Related Fulfillment Plans

Make sure that your fulfillment plans are connected and aligned by enabling fulfillment designers to establish cross-plan dependencies between steps that should be part of different fulfillment plans. Fulfillment managers can view and easily access dependencies directly from the plan view. Reduce manual effort and time by using this real-time visibility to act on the steps that require attention.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with Revenue Cloud.

How: In the Fulfillment Workspace, connect step definitions between plans by using the Cross Plan scope. At runtime, click the **View External Dependencies** icon on a step in the fulfillment plan.

Define Rules to Assign Manual Tasks

When configuring tasks, fulfillment designers can now use the new task-assignment rules to automatically assign tasks to a specific user or a queue. They can customize the rules and set conditions and priorities. For example, assign tasks to a resource with the least current workload or use a specific context for the assignment.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with Revenue Cloud.

How: Create a fulfillment task assignment rule and associate it with a manual fulfillment step. The rule automatically assigns the step to a user based on the assignment source, destination, priority, and any defined condition.

SEE ALSO:

Salesforce Help: Manual Task Fulfillment Step(can be outdated or unavailable during release preview)

Track Your Fulfillment Step Changes

Gain a clear understanding of the progress and status of each step, improving your ability to manage and optimize the fulfillment process. The step details page now shows the activity history.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with Revenue Cloud.

Configure Future Dated Steps

Fulfillment designers can now configure steps to execute at a future date and time. They can also set intervals between the start date of the order line items and the execution time of previous steps.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with Revenue Cloud.

How: From the App Launcher, find and select **Fulfillment Workspaces** and add a fulfillment step. When you add the Fulfillment Step Definition, from the Execute On field, select either **Order Line Start Date** or **Previous Steps Execution Date** and then enter a delay unit value.

SEE ALSO:

Salesforce Help: Set Dependencies Between Fulfillment Steps(can be outdated or unavailable during release preview)

Decompose Orders with Decimal Quantities

Generate fulfillment order line items with decimal precision. Decompose commercial products into technical products even when the quantity values are in the decimal format.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with Revenue Cloud.

Fulfill Ramp Deal Orders

Decompose orders containing ramp deals into fulfillment lines and orchestrate the orders directly with Dynamic Revenue Orchestrator. To ensure easy data management, fulfillment assets now stay synchronized with the asset state periods of their related assets.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with Revenue Cloud.

New and Changed Objects in Dynamic Revenue Orchestrator

Do more with these new and changed Dynamic Revenue Orchestrator objects.

Perform a set of actions to assign a manual task to an assignee
Use the new FulfillmentTaskAssignmentRule object.

Specify the priority of the fulfillment plan execution
Use the new `Priority` field on the FulfillmentPlan object.

Specify when to execute the fulfillment step
Use the new `ExecuteBasedOn` field on the FulfillmentStepDefinition and FulfillmentStep objects.

Specify the unit for the delay of the fulfillment step
Use the new `DelayUnit` field on the FulfillmentStepDefinition and FulfillmentStep objects.

Specify the user or queue that's assigned to the manual task
Use the new `AssignedTo` field on the FulfillmentStep object.

Specify the unit of measure for the asset quantity
Use the new `UnitOfMeasure` field on the FulfillmentAsset and FulfillmentOrderLineItem objects.

Specify the delay value to execute the fulfillment step
Use the new `DelayValue` field on the FulfillmentStepDefinition and FulfillmentStep objects.

Specify whether the rule applies to all fulfillment requests or only to specific ones
Use the new `RuleEnforcement` field on the ProductDecompEnrichmentRule object.

Identifies the group of sales transactions that require synchronization before processing
Use the new `GroupIdentifier` field on the SalesTransactionFulfillReq object.

Identifies the ramp segment associated with the asset state period
Use the new `SegmentIdentifier` field on the AssetFulfillmentDecomp object.

Billing

Enhance billing flexibility and simplify accounting with our advanced invoicing solutions. Use the enhanced invoice scheduler for instant one-time invoicing, automatic deactivation, multi-currency support, and effortless editing of draft or inactive schedules. Suspend billing for specific accounts or schedule groups as needed. Preview upcoming invoices and adjust billing parameters to fit your business requirements. Generate invoices for amendments, cancellations, or early renewals of evergreen subscriptions.

IN THIS SECTION:

[Manage Bulk Invoicing Efficiently with the New Invoice Scheduler Features]

Reduce manual effort and respond efficiently to changing business needs with instant one-time invoicing, automatic deactivation, multicurrency selection, and the easy edit feature for draft or inactive schedulers.

[Suspend and Resume Billing for Accounts and Billing Schedule Groups]

Tackle billing errors, disputes, and any payment disruptions by pausing or suspending billing for customer accounts or for a set of billing schedule groups. Resume billing after the suspension period, without restarting the entire billing cycle.

[Preview Upcoming Invoices to Get Billing Estimates]

Reduce billing disputes and increase billing transparency with your customers with invoice previews. Use the Invoice Preview API to generate previews for the next two invoices of any billing transaction, without having to store the invoicing data in Salesforce. Share the invoice previews with your customers so that they assess the estimated charges of orders, finalize order details, and get purchase order approvals.

[Update Billing Parameters Any Time During the Customer Lifecycle]

Get increased flexibility for parameters that impact billing transactions by changing them at any time for any asset based on your needs. Edit the billing day of the month, the override next billing date, and the tax treatment of billing schedule groups.

[Generate Invoices on Demand for Accounts and Orders]

Generate invoices for any account or activated orders when your customers demand them, after milestone completions, or as soon as a product or service is delivered. Save time by generating these invoices with a few clicks, without having to configure an invoice run.

[Create Invoices from Internal or External Data]

Use the Invoice Ingestion API to import invoices from an external system or to create invoices by providing the required details, and skip the intermediate step of creating billing schedules. Provide details from any standard or custom Salesforce object record, or an external system. Invoice records, Invoice Line records, and Invoice Line Tax records are created based on the provided details.

[Streamline Invoice Due Dates with End-of-Month Payment Terms]

Configure end-of-month payment terms to define a uniform invoice due date for products and services sold on a monthly basis. Set invoice due dates to be at the end of the month in which the invoice is posted or for a specific period after the end of the month.

[Accurately Bill Amended or Canceled Evergreen Subscriptions]

Flexibly handle various business scenarios for evergreen subscriptions by billing them accurately when they're amended or canceled on any date. When your customers cancel evergreen subscriptions, bill the appropriate amount based on the end date of the subscription. When your customers amend evergreen subscription, bill the correct amount based on the type and date of the amendment.

[Align Billing Subscriptions with Early Renewal]

Simplify the billing process for customers who renew their subscriptions before the current one expires. Enhance operational efficiency and customer satisfaction by automatically generating invoices that reflect the early renewal dates and adjusted pricing, ensuring accurate billing for all overlapping and new renewal periods.

Make Billing for Rampable Products More Efficient

Streamline the billing process for rampable products by generating invoices that align with the evolving pricing structure of ramped contracts. Businesses can efficiently manage billing for contracts with extended terms, support larger orders and longer agreement periods, while ensuring predictable cash flow.

Simplify Financial Accounting by Capturing Transaction Amounts in Corporate Currency

Easily manage multiple currencies for billing transactions by viewing the transaction amounts not only in the transactional currency but also in your corporate currency. All the transaction amounts in corporate currency are used for accounting, thus simplifying your accounting process.

New and Changed Objects for Billing

Store and access more data with these new and changed Billing objects.

New Platform Events for Billing

Receive real-time notifications from Salesforce by subscribing to the channels of these new Billing platform events.

Changed Metadata Types

Learn more about the changed metadata types in Billing.

Connect REST APIs

Use Billing Connect REST APIs to manage billing for accounts and billing schedule groups, or to preview invoices for upcoming billing transactions.

Manage Bulk Invoicing Efficiently with the New Invoice Scheduler Features

Reduce manual effort and respond efficiently to changing business needs with instant one-time invoicing, automatic deactivation, multicurrency selection, and the easy edit feature for draft or inactive schedulers.

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 the Billing Admin or Billing Operations User permission set.

Why: The invoice run scheduler includes these new features.

- **Ad Hoc Invoicing:** With the Run Now feature, initiate a one-time invoice run instantly and address urgent invoicing needs.
- **Automatic Scheduler Deactivation:** Use Stop Scheduler Recurrence to set an end date for invoice schedulers.
- **Multicurrency Selection:** Select multiple currencies simultaneously to handle invoicing spanning across various regions and locations.
- **Invoice Editing:** Use the Edit option to modify draft or inactive invoice schedulers.

How: From the App Launcher, find and select **Billing Batch Scheduler**. To modify existing drafts or inactive invoice schedulers, edit the invoice schedulers and add the new features. You can also create invoice schedulers that include the new features.

SEE ALSO:

Salesforce Help: Generate Invoices Automatically Based on Billing Schedules (can be outdated or unavailable during release preview)

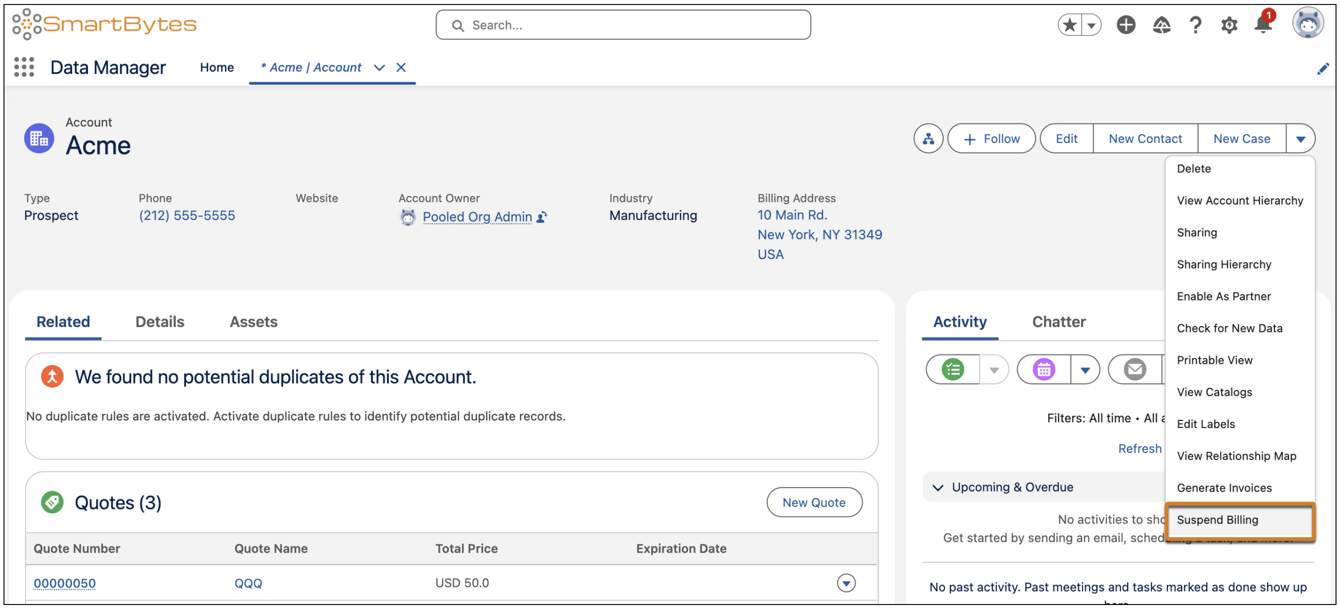
Suspend and Resume Billing for Accounts and Billing Schedule Groups

Tackle billing errors, disputes, and any payment disruptions by pausing or suspending billing for customer accounts or for a set of billing schedule groups. Resume billing after the suspension period, without restarting the entire billing cycle.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To suspend and resume billing, you need the Billing Admin permission set, or the Billing Operations User permission set, or the Billing Customer Service User permission set.

How: From the quick actions menu of the Account record or the Billing Schedule Group record that you want to suspend and resume billing for, click **Suspend Billing** or **Resume Billing**, or use the Suspend and Resume Billing APIs.



SEE ALSO:

Salesforce Help: Suspend and Resume Billing (can be outdated or unavailable during release preview)

Preview Upcoming Invoices to Get Billing Estimates

Reduce billing disputes and increase billing transparency with your customers with invoice previews. Use the Invoice Preview API to generate previews for the next two invoices of any billing transaction, without having to store the invoicing data in Salesforce. Share the invoice previews with your customers so that they assess the estimated charges of orders, finalize order details, and get purchase order approvals.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To use the Invoice Preview API, you need the Billing Operations User permission set.

SEE ALSO:

Salesforce Help: Generate Invoice Previews (can be outdated or unavailable during release preview)

Update Billing Parameters Any Time During the Customer Lifecycle

Get increased flexibility for parameters that impact billing transactions by changing them at any time for any asset based on your needs. Edit the billing day of the month, the override next billing date, and the tax treatment of billing schedule groups.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To update the billing parameters, you need the Billing Admin permission set or the Billing Operations User permission set.

SEE ALSO:

Salesforce Help: Update Billing Schedule Groups (can be outdated or unavailable during release preview)

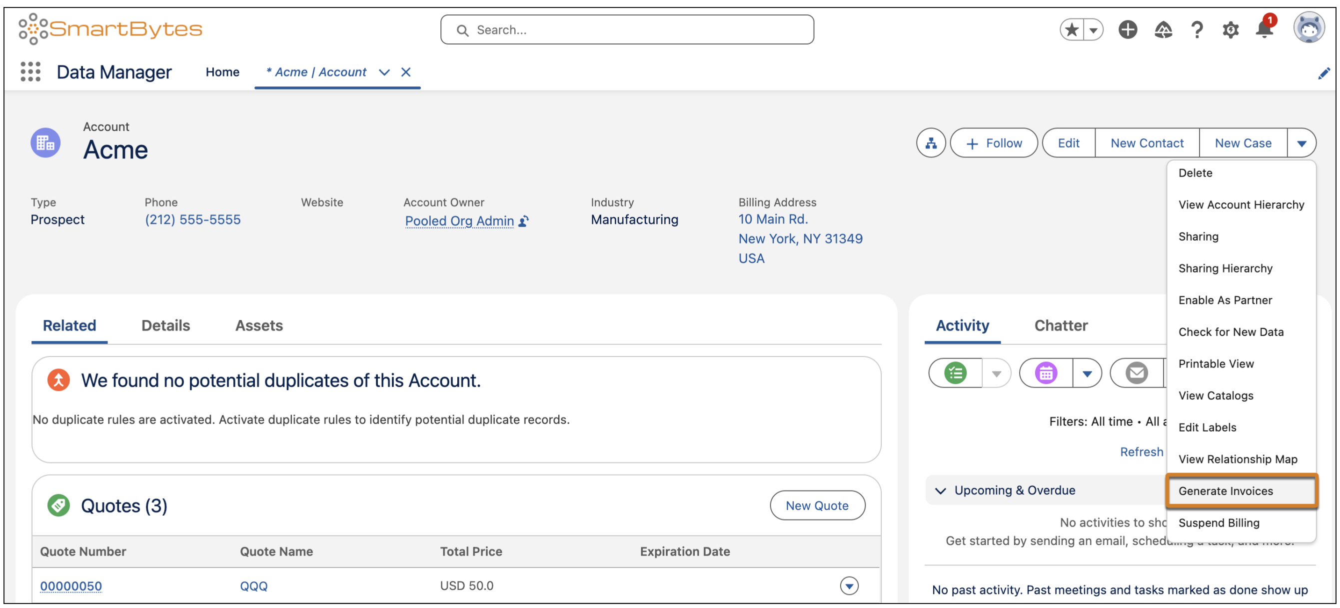
Generate Invoices on Demand for Accounts and Orders

Generate invoices for any account or activated orders when your customers demand them, after milestone completions, or as soon as a product or service is delivered. Save time by generating these invoices with a few clicks, without having to configure an invoice run.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To generate invoices for accounts or orders, you need the Billing Operations User permission set or the Billing Customer Service User permission set.

How: From the quick actions menu on an Account or Order record, click **Generate Invoices**. You receive a notification when the invoices are generated.



SEE ALSO:

Salesforce Help: Generate Invoices for Accounts or Orders (can be outdated or unavailable during release preview)

Create Invoices from Internal or External Data

Use the Invoice Ingestion API to import invoices from an external system or to create invoices by providing the required details, and skip the intermediate step of creating billing schedules. Provide details from any standard or custom Salesforce object record, or an external system. Invoice records, Invoice Line records, and Invoice Line Tax records are created based on the provided details.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To use the Invoice Ingestion API, you need the Billing Operations User permission set.

SEE ALSO:

Salesforce Help: Create Standalone Invoices or Import External Invoices (can be outdated or unavailable during release preview)

Streamline Invoice Due Dates with End-of-Month Payment Terms

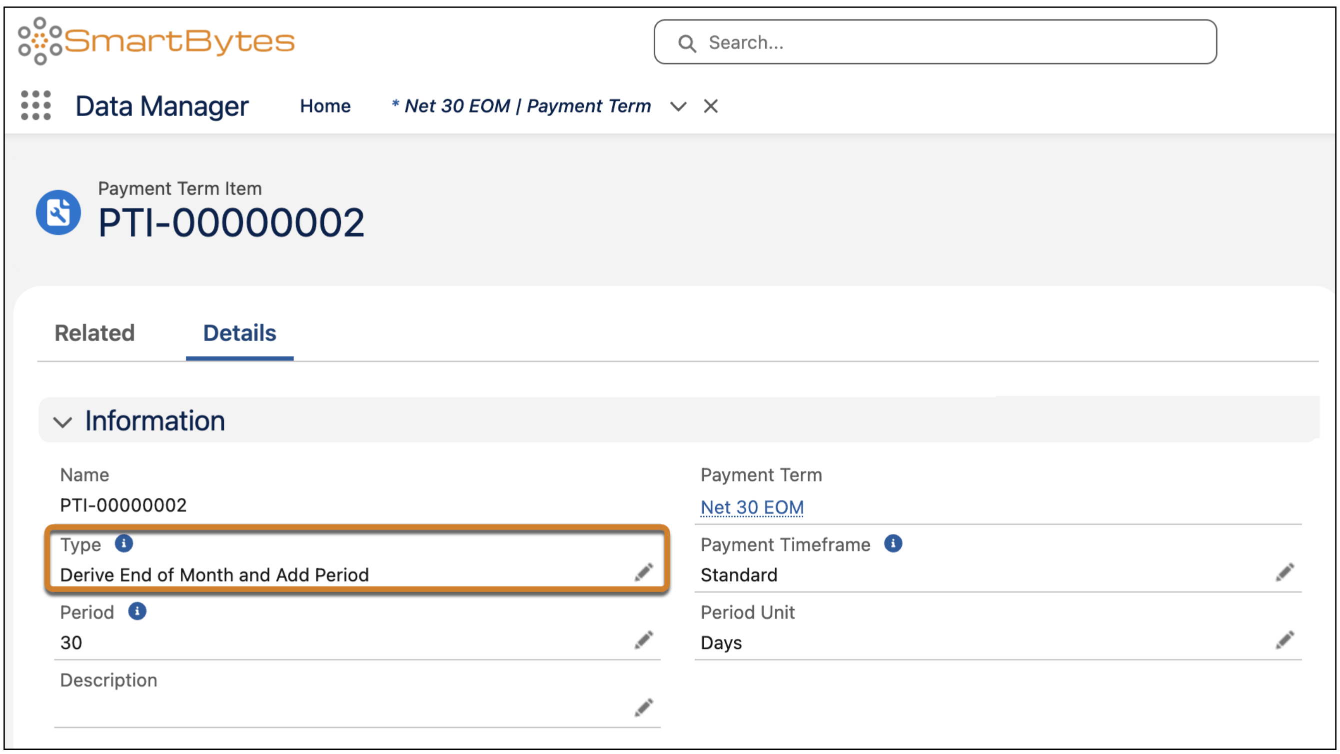
Configure end-of-month payment terms to define a uniform invoice due date for products and services sold on a monthly basis. Set invoice due dates to be at the end of the month in which the invoice is posted or for a specific period after the end of the month.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To create payment terms and payment term items, you need the Billing Operations User permission set.

How: Create a payment term and then create a related payment term item with Derive End of Month and Add Period as the type.

When invoices are generated for billing schedules, payment terms specified for the orders related to the billing schedules are used to calculate the invoice due date.



SEE ALSO:

Salesforce Help: Create Payment Term Items (can be outdated or unavailable during release preview)

Accurately Bill Amended or Canceled Evergreen Subscriptions

Flexibly handle various business scenarios for evergreen subscriptions by billing them accurately when they're amended or canceled on any date. When your customers cancel evergreen subscriptions, bill the appropriate amount based on the end date of the subscription. When your customers amend evergreen subscription, bill the correct amount based on the type and date of the amendment.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To generate invoices, you need the Billing Admin permission set or the Billing Operations User permission set.

SEE ALSO:

Salesforce Help: View Billing Schedule Groups (can be outdated or unavailable during release preview)

Align Billing Subscriptions with Early Renewal

Simplify the billing process for customers who renew their subscriptions before the current one expires. Enhance operational efficiency and customer satisfaction by automatically generating invoices that reflect the early renewal dates and adjusted pricing, ensuring accurate billing for all overlapping and new renewal periods.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To create invoices, you need the Billing Admin or the Billing Operations User permission set.

How: To invoice for products with early renewals, from the App Launcher, find and select **Billing Batch Schedulers**. You can then generate invoices by using the New Invoice Scheduler option.

Make Billing for Rampable Products More Efficient

Streamline the billing process for rampable products by generating invoices that align with the evolving pricing structure of ramped contracts. Businesses can efficiently manage billing for contracts with extended terms, support larger orders and longer agreement periods, while ensuring predictable cash flow.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To create invoices, you need the Billing Admin or the Billing Operations User permission set.

How: To generate invoices for ramp deal products, from the App Launcher, find and select **Billing Batch Schedulers**. You can then generate invoices for billing schedules by using the New Invoice Scheduler option.

Simplify Financial Accounting by Capturing Transaction Amounts in Corporate Currency

Easily manage multiple currencies for billing transactions by viewing the transaction amounts not only in the transactional currency but also in your corporate currency. All the transaction amounts in corporate currency are used for accounting, thus simplifying your accounting process.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To turn on Store Transaction Amounts in Corporate Currency, you need the Billing Admin permission set.

How: From the Billing Settings page in Setup, turn on Store Transaction Amounts in Corporate Currency.

SEE ALSO:

Salesforce Help: Capture Transaction Amounts in Corporate Currency (can be outdated or unavailable during release preview)

New and Changed Objects for Billing

Store and access more data with these new and changed Billing objects.

New Objects

Get information about the billing accounts related to accounts
Use the new AccountBillingAccount object.

Get information about the suspension dates and resumption dates of billing accounts
Use the new BillingAccount object.

Changed Objects

Indicate whether the invoice scheduler must start the run immediately or not
Use the new `ShouldStartRunImmediately` field on the existing BillingBatchScheduler object.

Specify the units used to measure the overage
Use the new `UnitOfMeasure` field on the existing BillingPeriodItem object.

Specify the unit of measure for a billing schedule
Use the new `UnitOfMeasureId` field on the existing BillingSchedule object.

Specify the date when billing for the asset related to the billing schedule group is resumed
Use the new `BillingResumptionDate` field on the existing BillingScheduleGroup object.

Specify the date when billing for the asset related to the billing schedule group is suspended
Use the new `BillingSuspensionDate` field on the existing BillingScheduleGroup object.

Override the next billing dates of all the billing schedules related to a billing schedule group
Use the new `NextBillingDateOverride` field on the existing BillingScheduleGroup object.

Stores a credit memo's sum of the total amount with tax in corporate currency
Use the new `CorpCrcyCnvTotAmtWithTax` field on the existing CreditMemo object.

Stores the date on which a credit memo's total amount with tax is converted into corporate currency
Use the new `CorporateCurrencyCvsnDate` field on the existing CreditMemo object.

Specify the exchange rate that's used to convert a credit memo's total amount with tax into corporate currency
Use the new `CorporateCurrencyCvsnRate` field on the existing CreditMemo object.

Stores the currency ISO code of the corporate currency
Use the new `CorporateCurrencyIsoCode` field on the existing CreditMemo and CreditMemoLine objects.

Stores a credit memo line's charge amount in corporate currency
Use the new `CorpCurrencyCnvChargeAmt` field on the existing CreditMemoLine object.

Stores a credit memo line's total amount with tax in corporate currency
Use the new `CorpCurrencyCnvTotalTaxAmt` field on the existing CreditMemoLine object.

Stores the date on which a credit memo line's amounts are converted into corporate currency
Use the new `CorporateCurrencyCvsnDate` field on the existing CreditMemoLine object.

Specify the exchange rate that's used to convert a credit memo line's amounts into corporate currency
Use the new `CorporateCurrencyCvsnRate` field on the existing CreditMemoLine object.

Stores the currency ISO code of the corporate currency
Use the new `CorporateCurrencyIsoCode` field on the existing CreditMemoLine object.

Stores a credit memo line tax's total tax amount in corporate currency
Use the new `CorpCurrCnvTaxAmount` field on the existing CreditMemoLineTax object.

Stores the date on which a credit memo line tax's total tax amount is converted into corporate currency
Use the new `CorporateCurrencyCvsnDate` field on the existing CreditMemoLineTax object.

Specify the exchange rate that's used to convert credit memo line tax's total tax amount into corporate currency
Use the new `CorporateCurrencyCvsnRate` field on the existing CreditMemoLineTax object.

Stores the currency ISO code of the corporate currency
Use the new `CorporateCurrencyIsoCode` field on the existing CreditMemoLineTax object.

Stores the date on which an invoice's total amount with tax was converted into corporate currency
Use the new `CorporateCurrencyCvsnDate` field on the existing Invoice object.

Specify the exchange rate that's used to convert an invoice's total amount with tax into corporate currency
Use the new `CorporateCurrencyCvsnRate` field on the existing Invoice object.

Stores the currency ISO code of the corporate currency
Use the new `CorporateCurrencyIsoCode` field on the existing Invoice object.

Indicates whether an invoice is generated from a billing transaction directly or from a billing schedule group
Use the new `IsBillingScheduleGroupSkipped` field on the existing Invoice object.

Indicates the unique identifier of an externally ingested invoice that's used to ensure that duplicate invoices aren't inserted
Use the new `UniqueIdentifier` field on the existing Invoice object.

Indicates the status subtype of the invoice batch run that corresponds to the status of the invoice batch run
Use the new `StatusSubtype` field on the existing InvoiceBatchRun object.

Specify whether the invoice date is derived from the run date or target date
Use the new `IsInvoiceDateFromRunDate` field on the existing InvoiceBatchRunCriteria object.

Stores an invoice line's charge amount in corporate currency
Use the new `CorpCurrencyCnvChargeAmt` field on the existing InvoiceLine object.

Stores an invoice line's total tax amount in corporate currency
Use the new `CorpCurrencyCnvTotalTaxAmt` field on the existing InvoiceLine object.

Stores the date on which an invoice line's amounts are converted into corporate currency
Use the new `CorporateCurrencyCvsnDate` field on the existing InvoiceLine object.

Specify the exchange rate that's used to convert an invoice line's amounts into corporate currency
Use the new `CorporateCurrencyCvsnRate` field on the existing InvoiceLine object.

Stores the currency ISO code of the corporate currency
Use the new `CorporateCurrencyIsoCode` field on the existing InvoiceLine object.

Specify the unit of measure of the product associated with the invoice line
Use the new `UnitOfMeasure` field on the existing InvoiceLine object.

Stores the total tax amount of an invoice line tax in corporate currency
Use the new `CorpCrcyCnvTaxAmount` field on the existing InvoiceLineTax object.

Stores the date on which an invoice line tax's amounts are converted into corporate currency
Use the new `CorporateCurrencyCvsnDate` field on the existing InvoiceLineTax object.

Specify the exchange rate that's used to convert an invoice line tax's amounts into corporate currency
Use the new `CorporateCurrencyCvsnRate` field on the existing InvoiceLineTax object.

Stores the currency ISO code of the corporate currency
Use the new `CorporateCurrencyIsoCode` field on the existing InvoiceLineTax object.

Specifies the identifier of the primary record associated with the error log

Use the new `PrimaryTextRecord` field on the existing RevenueTransactionErrorLog object.

REMOVED: The `Product2Id` field on the InvoiceLineTax object is removed from API version 63.0 and later

Instead, use the `Product2Id` field on the InvoiceLine object.

REMOVED: The `Quantity` field on the InvoiceLineTax object is removed from API version 63.0 and later

Instead, use the `Quantity` field on the InvoiceLine object.

REMOVED: The `UnitPrice` field on the InvoiceLineTax object is removed from API version 63.0 and later

Instead, use the `UnitPrice` field on the InvoiceLine object.

REMOVED: The `Product2Id` field on the CreditMemoLineTax object is removed from API version 63.0 and later

Instead, use the `Product2Id` field on the CreditMemoLine object.

SEE ALSO:

Revenue Cloud Developer Guide: Billing Standard Objects (can be outdated or unavailable during release preview)

New Platform Events for Billing

Receive real-time notifications from Salesforce by subscribing to the channels of these new Billing platform events.

Notify subscribers when the process of creating billing schedule from order items is complete

Subscribe to the new BillingScheduleCreatedEvent platform event to receive notifications related to the process completion for the `/commerce/invoicing/billing-schedules/actions/create` request.

Notify subscribers about the errors that occurred when creating billing scheduling from order items

Subscribe to the new BillSchdCreatedEventDetail platform event to receive notifications related to errors.

SEE ALSO:

Revenue Cloud Developer Guide: Billing Platform Events (can be outdated or unavailable during release preview)

Changed Metadata Types

Learn more about the changed metadata types in Billing.

Metadata Type

Enable conversion of amounts of the Invoice, Invoice Line, Credit Memo, and Credit Memo Line records to your corporate currency

Use the new `enableTrxnAmountsStorageInCorpCurrency` field on the existing BillingSettings metadata type.

SEE ALSO:

Revenue Cloud Developer Guide: BillingSettings (can be outdated or unavailable during release preview)

Connect REST APIs

Use Billing Connect REST APIs to manage billing for accounts and billing schedule groups, or to preview invoices for upcoming billing transactions.

IN THIS SECTION:

New Connect REST API Resources
Learn more about the new resources available with Billing.

Changed Connect REST API Request Bodies
This request body has changes.

New Connect REST API Resources

Learn more about the new resources available with Billing.

Suspend billing for billing schedule groups or an account for a predefined period

Make a POST request to the `/commerce/invoicing/actions/suspend-billing` resource.

New request body: Suspend Billing Input

New response body: Suspend Resume Billing

Resume billing for billing schedule groups or an account

Make a POST request to the `/commerce/invoicing/actions/resume-billing` resource.

New request body: Resume Billing Input

New response body: Suspend Resume Billing

Generate preview invoices for a billing transaction

Make a POST request to the `/commerce/invoicing/invoices/collection/actions/preview` resource.

New request body: Invoice Preview Input

New response body: Invoice Preview

Calculate estimated tax for invoices

Make a POST request to the `/commerce/invoicing/invoices/collection/actions/calculate-estimated-tax` resource.

New request body: Invoice Estimated Tax Calculation Input

SEE ALSO:

Revenue Cloud Developer Guide: Billing Business APIs (can be outdated or unavailable during release preview)

Changed Connect REST API Request Bodies

This request body has changes.

Invoice Input

This request body has these new properties.

- `accountId`—ID of the account record to create the invoices for
- `billingTransactionId`—ID of the billing transaction record, which is the order ID, to create the invoices for

Sales

Boost your sales teams' results with new features across Sales Cloud. Help your account teams collaborate, strategize, and succeed with more efficiency and accountability with enhancements to Account Plans. Manually upload video recordings to Einstein Conversation Insights to get key insights and action items for meetings from external sources. Forecast your consumption-based business. Customize the mobile app with Mobile Builder for Seller-Focused Experience. And plan quotas that reflect ramp-up time and seasonal sales patterns in Quota Planning.

IN THIS SECTION:

Agentforce for Sales

Scale your sales team by using sales agents.

Sales Cloud Go

See feature-specific permission sets or permission set groups in context during setup in Sales Cloud Go. Monitor permission set license assignments and active users.

Sales Fundamentals

Help your account teams collaborate, strategize, and succeed with more efficiency and accountability with Account Plan enhancements.

Einstein Conversation Insights

Einstein Conversation Insights (ECI) users can upload previously recorded meetings to ECI to identify coachable moments for meetings from external sources. A few generative AI features (Call Summaries, Call Explorer, and Generative Conversation Insights) are now supported in 37 languages. And Explore Conversation is supported in Flow as a standard action.

Sales Engagement

Let Prospecting Center find your most qualified customer, using trusted data and AI. Prospecting Center analyzes your CRM and external data and identifies your most promising opportunities with the highest probability of closing, so you know which deals to prioritize. With the power of Data Cloud, you can analyze your accounts, contacts, and leads to identify your most accurate, data-driven prospects.

Salesforce Forecasting

Collaborative Forecasts is now called Pipeline Forecasting. Forecast managers can now apply their judgment to a direct subordinate's opportunity that's split across multiple owners. Your sales team can accurately forecast consumption-based businesses.

Pipeline Inspection

Get a more consistent user experience in Pipeline Inspection list views. Close Date Predictions, a feature of Einstein Deal Insights in Pipeline Inspection, is being retired as of Spring '25.

Sales Programs, Partner Tracks, and In-App Guidance

Enhance your sales approach with data-driven insights and take complete control of your Enablement settings. Quickly deploy in-app guidance into your Salesforce orgs.

Sales Performance Management

Plan quotas that account for ramp-up of new reps and seasonal sales patterns in Quota Planning. Publish quota plans to territory-based forecast types within Pipeline Forecasting. Navigate with ease among various sales planning disciplines. Simplify activity and qualified mileage tracking in timesheets for reps who rely on Salesforce Maps. And set expectations with your reps for working in the now standard, enhanced user experience within Salesforce Maps.

Email, Calendar, and Integrations

Prepare for service account OAuth 2.0 retirement by upgrading to org-level OAuth 2.0 authentication. If you use Salesforce Inbox, allowlist `*.svc.sfdcfc.net`. And Salesforce for Outlook retires in December 2027.

[Partner Relationship Management]
Maximize channel sales, collaborate on shared business, and maintain trusted relationships with more efficient tools in your partner experience.

[Sales Cloud Everywhere]
We streamlined navigation by moving top object shortcuts to a dedicated page and adding the recent records component. Sales reps can easily track achievement with the goals component from Seller Home.

[Sales Cloud on Mobile]
Prepare for meetings in Seller-Focused Mobile Experience. Customize the app with Mobile Bulder for Seller-Focused Experience (Beta).

[Other Changes in the Sales Cloud]
Anticipate other changes that can affect your sales teams.

Agentforce for Sales

Scale your sales team by using sales agents.

IN THIS SECTION:

[Agentforce Sales Coach]
Help sales reps grow in their role and close more deals with Agentforce Sales Coach.

[Scale Your Sales Funnel with Agentforce SDR]
Agentforce SDR (Sales Development Rep) helps sales teams expand their top-of-funnel efforts with an AI agent, qualifying more leads and giving sales reps more time to nurture relationships. The SDR agent sends initial emails, nudges, and responses to interested replies by answering questions, connecting leads to sales reps, and offering to book a meeting.

[Monitor Agentforce Sales Coach and SDR Usage with Digital Wallet]
You can now monitor your Sales Coach Agent and Agentforce SDR (Sales Development Rep) usage in Digital Wallet, an account management tool for consumption-based features. On the Digital Wallet homepage, the Conversations consumption card summarizes the combined usage of Sales Coach Agent and Agentforce SDR along with ASA Messaging (formerly Agentforce Service Agent - Inbound). Additionally, Digital Wallet's Consumption Insights page offers a breakdown of your combined Agentforce usage by time period to help you detect trends over time.

Agentforce Sales Coach

Help sales reps grow in their role and close more deals with Agentforce Sales Coach.

IN THIS SECTION:

[Coach Sales Reps at Scale with Agentforce Sales Coach]
Provide personalized coaching at scale to enhance sales rep's ability to handle challenging conversations, improve performance, and increase ROI. Sales Coach agent, an Agentforce agent, analyzes sales pitches and role play sessions. It then delivers tailored feedback by using AI and CRM data to help sales reps advance deals more effectively.

[Enhance Agentforce Sales Coach Responses with a Data Library]
Give Agentforce Sales Coach access to a collection of files, knowledge articles, and other information via a Data Library. Data Libraries allow Agentforce Sales Coach to generate more personalized and reliable responses based on trusted data when conducting role play sessions and generating feedback for sales reps.

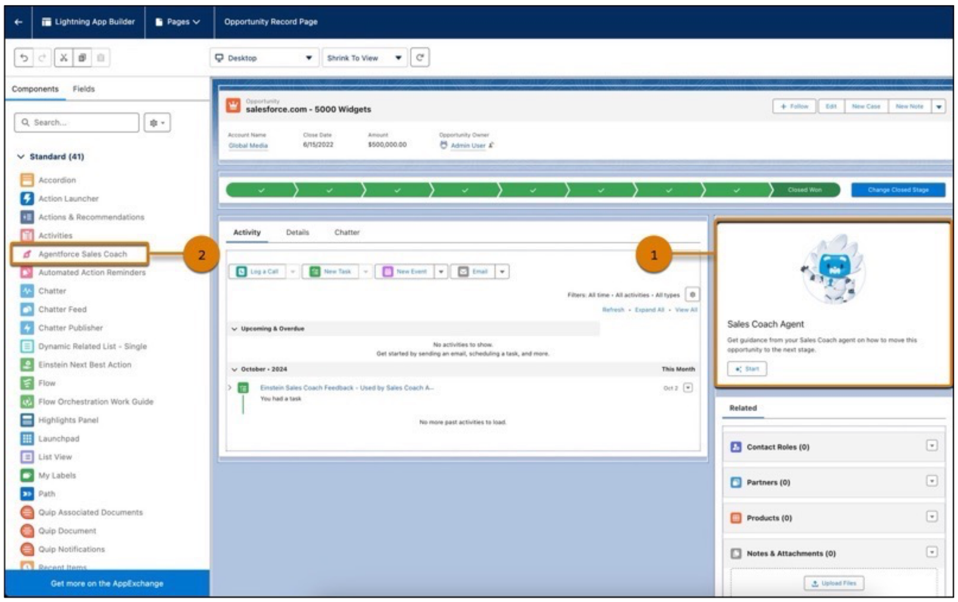
Coach Sales Reps at Scale with Agentforce Sales Coach

Provide personalized coaching at scale to enhance sales rep's ability to handle challenging conversations, improve performance, and increase ROI. Sales Coach agent, an Agentforce agent, analyzes sales pitches and role play sessions. It then delivers tailored feedback by using AI and CRM data to help sales reps advance deals more effectively.

Where: This change applies to Lightning Expereince in Enterprise, Performance, and Unlimited editions with the Agentforce Sales Coach add-on.

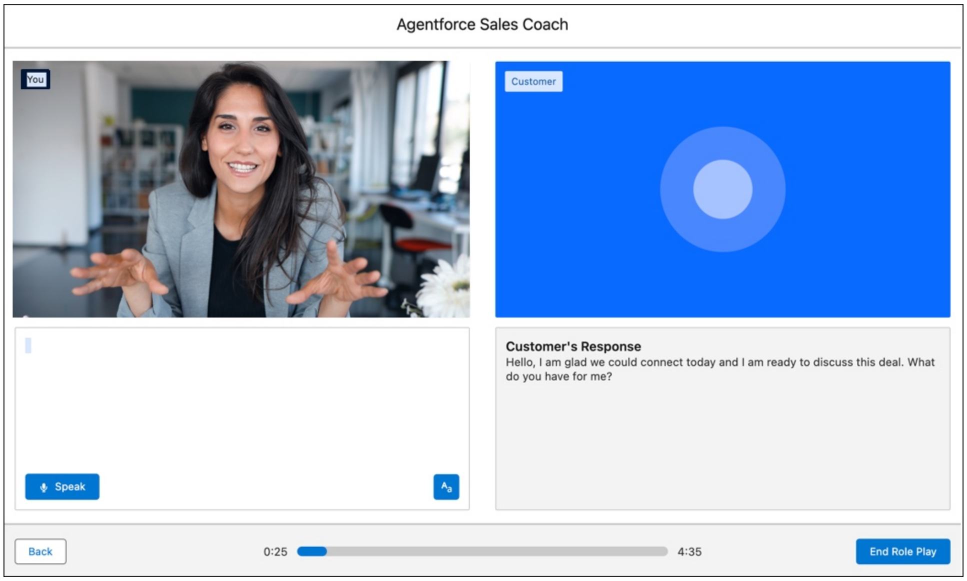
When: This change is available starting in late October.

How: Sales Coach agent is available on Opportunity pages via the new Agentforce Sales Coach Lightning page component.



For opportunities in the Qualification or Needs Analysis stages, sales reps practice a sales pitch. After the sales pitch is completed, Sales Coach agent analyzes the transcript and provides feedback.

For opportunities in the Proposal/Pricing Quote or Negotiation/Review stages, sales reps engage in a role-play session with Sales Coach agent as the customer. After the role-play, Sales Coach agent provides personalized feedback and outlines next steps for improvement.



To generate accurate, actionable, and personalized coaching, Sales Coach agent includes these new Agent topics.

- Sales Coach Agent: Opportunity Coaching
- Sales Coach Agent: Negotiation/Review Role-Play
- Sales Coach Agent: Proposal/Pricing Quote Role-Play

Sales Coach agent includes a new prompt template type called Sales Pitch Feedback.

SEE ALSO:

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

Enhance Agentforce Sales Coach Responses with a Data Library

Give Agentforce Sales Coach access to a collection of files, knowledge articles, and other information via a Data Library. Data Libraries allow Agentforce Sales Coach to generate more personalized and reliable responses based on trusted data when conducting role play sessions and generating feedback for sales reps.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Agentforce Sales Coach add on.

When: This change is available starting on December 17, 2024.

How: From Agent Builder setup, in the Select Data Step.

SEE ALSO:

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

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

Scale Your Sales Funnel with Agentforce SDR

Agentforce SDR (Sales Development Rep) helps sales teams expand their top-of-funnel efforts with an AI agent, qualifying more leads and giving sales reps more time to nurture relationships. The SDR agent sends initial emails, nudges, and responses to interested replies by answering questions, connecting leads to sales reps, and offering to book a meeting.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Agentforce SDR add-on. Setup for agents is available on the desktop site.

When: This change is available beginning October, 2024.

Why: The SDR agent can work around the clock, initiating contact with leads on a schedule you set. The agent generates a customized initial email based on the lead record details. If a lead doesn't reply, the agent sends a follow-up. When a lead replies, the agent detects whether the lead is interested, sends a response containing a meeting link from the lead owner's calendar, and copies the sales rep.

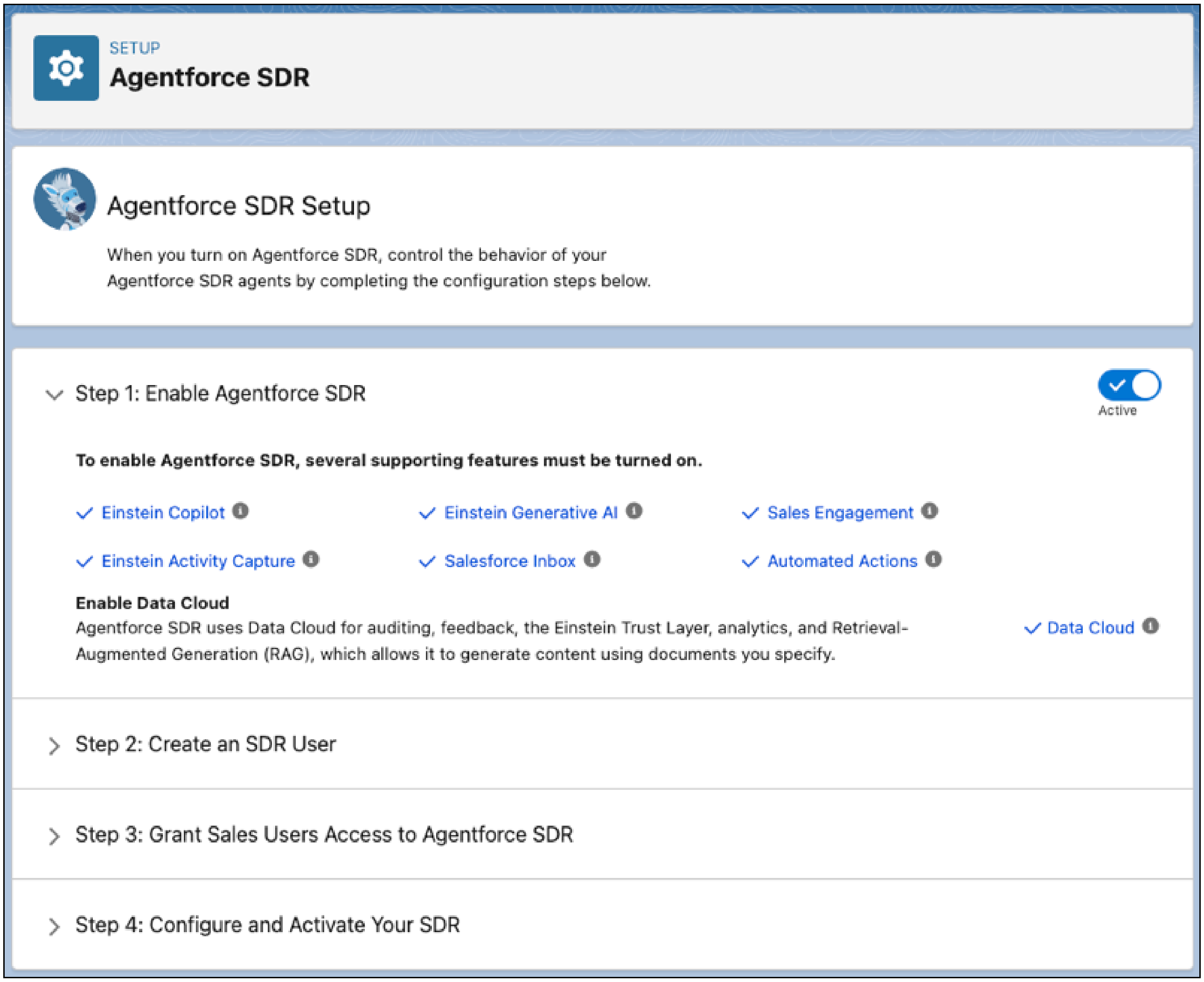
When leads respond with a question, the agent can provide specific answers generated from product and service literature you upload in Agent Builder. Reps can also see past and upcoming emails in the Activity Timeline of the lead.

Agentforce SDR requires these additional Sales Cloud features to perform its work.

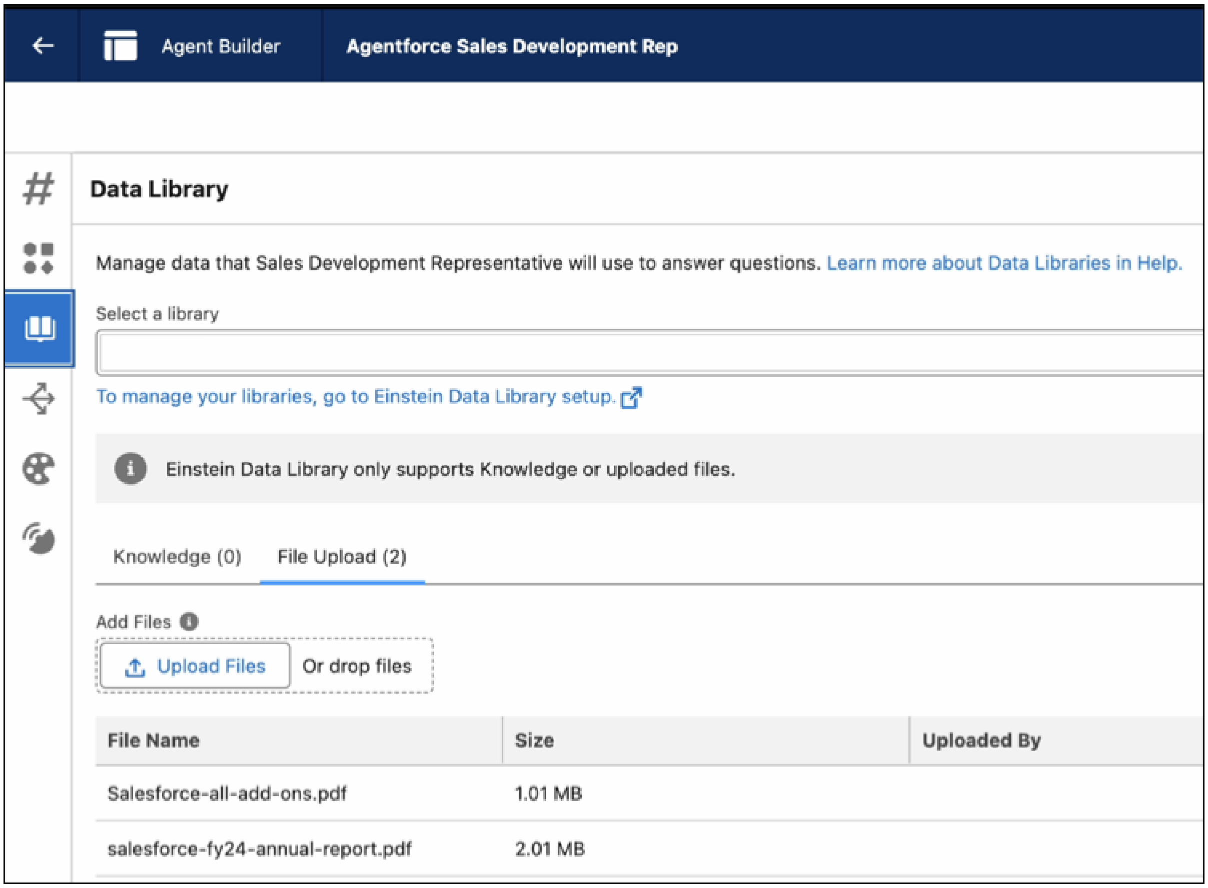
- Sales Engagement: engages leads with planned prospect outreach cadences
- Einstein Activity Capture: keeps data between Salesforce and the agent's email client and calendar applications up to date
- Einstein Copilot: The AI agents platform chooses which actions to take and drafts emails
- Einstein Generative AI: drafts emails and creates summaries
- Salesforce Inbox: provides Outlook and Gmail integration and performs email tasks
- Automated Actions: adds, removes, and manages prospects in outreach cadences
- Data Cloud: provides auditing, feedback, the Einstein Trust Layer, and analytics

Agentforce SDR has access to Digital Wallet, a free Salesforce account management tool that offers near real-time consumption data for enabled products across your active contracts. Access Digital Wallet to track your usage. To learn more, see About Digital Wallet in Salesforce Help

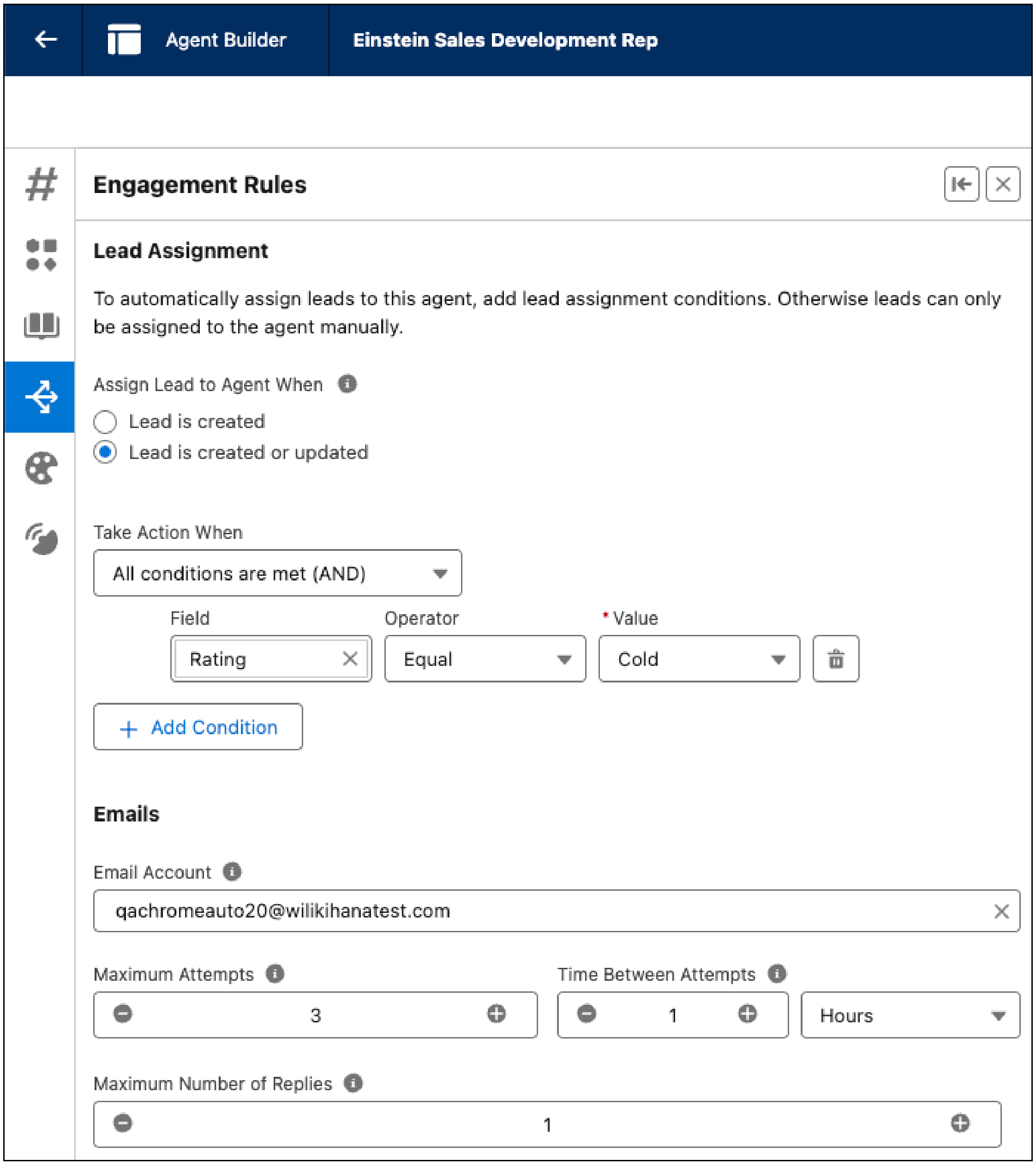
How: When you turn on Agentforce SDR, the guided setup takes you through enabling the required related features, creating a user record for the agent, and configuring agent settings in Agent Builder.



To let your agent generate specific and accurate replies to prospect questions about your company's products or services, you can upload text, HTML, or PDF files such as product descriptions, price sheets, white papers, etc.



You can assign leads to the agent with rules set in the Agent Builder, automated actions, or manually.



Monitor Agentforce Sales Coach and SDR Usage with Digital Wallet

You can now monitor your Sales Coach Agent and Agentforce SDR (Sales Development Rep) usage in Digital Wallet, an account management tool for consumption-based features. On the Digital Wallet homepage, the Conversations consumption card summarizes the combined usage of Sales Coach Agent and Agentforce SDR along with ASA Messaging (formerly Agentforce Service Agent - Inbound). Additionally, Digital Wallet's Consumption Insights page offers a breakdown of your combined Agentforce usage by time period to help you detect trends over time.

Where: Digital Wallet is available in Lightning Experience in Enterprise and Unlimited editions. Agentforce SDR is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. Setup for agents is available on the desktop site. Sales Coach is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

Who: Digital Wallet is available to users with the View Consumption user permission or Your Account access. Agentforce SDR is available with the Agentforce for Sales add-on. Sales Coach is available to users with the Agentforce for Sales add-on.

How: To get started with Digital Wallet, see Access Digital Wallet. To get started with Agentforce SDR, see Set Up Agentforce SDR. To get started with Agentforce Sales Coach, see Setting Up Agentforce Sales Coach.

SEE ALSO:

Salesforce Help: Sales Cloud Agents

Salesforce Help: About Digital Wallet

Sales Cloud Go

See feature-specific permission sets or permission set groups in context during setup in Sales Cloud Go. Monitor permission set license assignments and active users.

IN THIS SECTION:

View and Assign Permission Sets and Monitor Usage in Sales Cloud Go

With Sales Cloud Go, we show you the exact permission sets and permission set groups for your Sales Cloud feature. Assign access to your users in Sales Cloud Go while setting up a feature. Previously, you searched through long lists to find the permission sets and permission set groups that you needed. You can easily monitor permission set licenses for each feature, tracking both assigned and actively used licenses. You also get options for customizing Lightning pages and email panes.

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Where: This change applies to Lightning Experience in Pro Suite, Professional, Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition editions.

Who: To view Sales Cloud Go, users must have the View Setup and Configuration user permission. To turn on features, users must have the Customize Application user permission.

How: From the gear menu ( ), select **Sales Setup**, or access Sales Cloud Go from Sales Setup in the Setup Menu. Find the feature that you want to turn on. On the feature's page, click **Manage Permissions** to see the permission sets and permission set groups for the feature and assign them to your users.

SEE ALSO:

Salesforce Help: Discover and Set Up Sales Cloud Features With Sales Cloud Go (can be outdated or unavailable during release preview)

Sales Fundamentals

Help your account teams collaborate, strategize, and succeed with more efficiency and accountability with Account Plan enhancements.

IN THIS SECTION:

Accounts

Help your account teams collaborate, strategize, and succeed with more efficiency and accountability. Create more specific, measurable goals for your long-term account strategy, and find new upsell and cross-sell opportunities more easily. Quickly find all the tasks and events that your team has planned for achieving your account growth objectives.

Activities

Take advantage of the increased limit of custom fields for activities.

Accounts

Help your account teams collaborate, strategize, and succeed with more efficiency and accountability. Create more specific, measurable goals for your long-term account strategy, and find new upsell and cross-sell opportunities more easily. Quickly find all the tasks and events that your team has planned for achieving your account growth objectives.

IN THIS SECTION:

Track Progress Toward Sales Account Plan Objectives More Easily

Gain immediate insight into the progress your teams make toward achieving your sales account plan's measurable objectives. Define the objects, fields, and specific conditions that satisfy your goals for long-term account growth, and select the specific records that you want to track activity on. For example, set a goal for your team to achieve a certain dollar amount from closing a specific set of opportunities. Progress is calculated and updated automatically. Standardize account plan tracking across your enterprise by reusing calculation definitions across all your accounts, specifying different target values for different objectives.

Delivered Idea: Coordinate Your Sales Team's Activities with More Transparency

Provide accountability and alignment on your sales account team members' activities. Create sales action plans that specify the tasks and events that you want users to achieve. Associate sales action plans with accounts, cases, campaigns, contacts, contracts, leads, and opportunities. If you use sales account plans, collaborate on the work needed to achieve your measurable goals for long-term account growth by adding sales action plans to each account plan objective's Strategic Tracker. We delivered this feature thanks to your ideas on IdeaExchange.

Discover Untapped Selling Opportunities

Sales teams can use the Account Plan Whitespace Map component to identify potential upsell or cross-sell opportunities more easily. Strategically plan for your next deal by reviewing top-selling products from closed-won opportunities, filtering by amount, count, or quantity, and comparing with related accounts in the account hierarchy.

Track Progress Toward Sales Account Plan Objectives More Easily

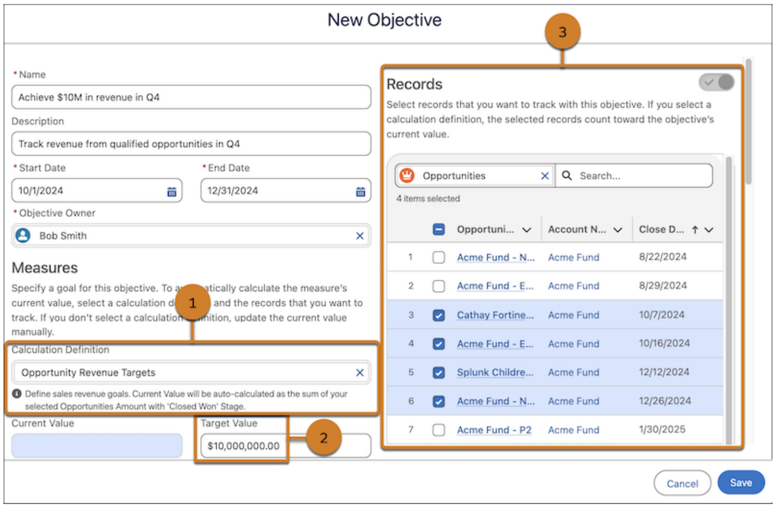
Gain immediate insight into the progress your teams make toward achieving your sales account plan's measurable objectives. Define the objects, fields, and specific conditions that satisfy your goals for long-term account growth, and select the specific records that you want to track activity on. For example, set a goal for your team to achieve a certain dollar amount from closing a specific set of opportunities. Progress is calculated and updated automatically. Standardize account plan tracking across your enterprise by reusing calculation definitions across all your accounts, specifying different target values for different objectives.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions and in Einstein 1 Sales Edition with Sales Cloud.

Why: Previously, your sales team could only manually edit an objective's current value. With this enhancement, your sales team has more flexibility to specify and track different types of qualitative and quantitative objectives and include related records.

How: From the Sales Account Plans page in Setup, create and activate the calculation definitions that you want to make available to your sales teams. Two prebuilt calculation definitions are available by default.

As a Sales user, when you add an objective to a sales account plan, select a calculation definition (1), specify a target value (2), and select related campaigns, cases, contacts, or opportunities (3).



As sales team members complete activity that satisfies the calculation definition's criteria, the objective's current value is updated. The current value is updated daily based on activity on the selected records. If users select a different calculation definition or select different records, the current value is updated immediately.

Calculation definitions are optional. You can still create objective measures that require manual progress updates.

SEE ALSO:

Salesforce Help: Turn on Sales Account Plans (can be outdated or unavailable during release preview)

Salesforce Help: Sales Account Plan Objectives, Measures, and Calculation Definitions (can be outdated or unavailable during release preview)

Coordinate Your Sales Team's Activities with More Transparency

Provide accountability and alignment on your sales account team members' activities. Create sales action plans that specify the tasks and events that you want users to achieve. Associate sales action plans with accounts, cases, campaigns, contacts, contracts, leads, and opportunities. If you use sales account plans, collaborate on the work needed to achieve your measurable goals for long-term account growth by adding sales action plans to each account plan objective's Strategic Tracker. We delivered this feature thanks to your ideas on IdeaExchange.

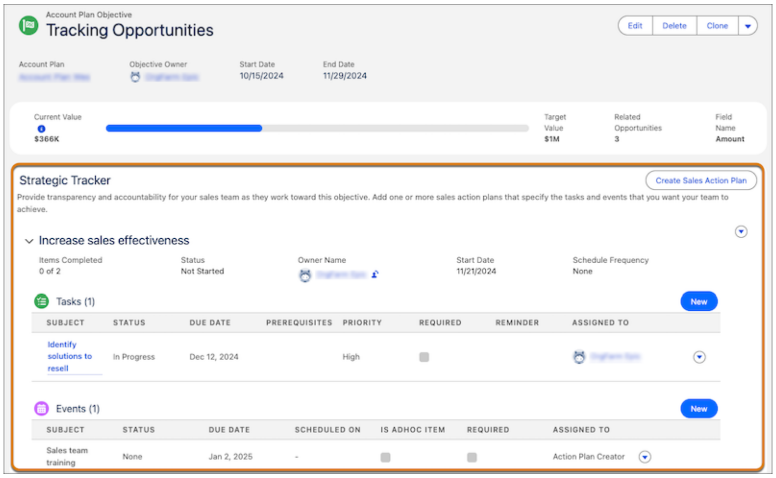
Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions and in Einstein 1 Sales Edition with Sales Cloud.

When: Sales action plans are available on a rolling basis starting in Spring '25 and are available to all customers by late March to mid-April 2025. To access sales action plans in a sandbox, they must be available in production first. Then, run the Match Production Licenses tool or request a refresh.

How: Sales action plans extend Industries action plans and use the same standard objects but include the unique Event item type. To get started, go to Sales Action Plans in Setup to assign permissions and create sales action plan templates.

To access sales action plans from most supported objects, add the Action Plans related list to the object's page layout.

To access sales action plans from a sales account plan, click **Action Plans** from the objective's Strategic Tracker. Or, when viewing a sales account plan objective, find sales action plans under the Strategic Tracker heading.



SEE ALSO:

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

Salesforce Help: Strategic Tracker (can be outdated or unavailable during release preview)

Discover Untapped Selling Opportunities

Sales teams can use the Account Plan Whitespace Map component to identify potential upsell or cross-sell opportunities more easily. Strategically plan for your next deal by reviewing top-selling products from closed-won opportunities, filtering by amount, count, or quantity, and comparing with related accounts in the account hierarchy.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition editions with Sales Cloud.

Who: This feature is available to users with access to account plans.

How: The Account Plan Whitespace Map component automatically displays on the default account plan page layout.

Activities

Take advantage of the increased limit of custom fields for activities.

IN THIS SECTION:

Take Advantage of the Increased Custom Field Limit for Activities

The custom field limit of activities for Salesforce orgs with fewer than 400 million activities has increased from 100 to 300, allowing for enhanced data tracking, more powerful reports, and improved feature integrations without complex workarounds.

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

SEE ALSO:

Capture More Data with the Increased Limit of Custom Fields for Activities

Einstein Conversation Insights

Einstein Conversation Insights (ECI) users can upload previously recorded meetings to ECI to identify coachable moments for meetings from external sources. A few generative AI features (Call Summaries, Call Explorer, and Generative Conversation Insights) are now supported in 37 languages. And Explore Conversation is supported in Flow as a standard action.

Einstein Conversation Insights doesn't record your calls. You connect it with your recording system such as Sales Dialer, Service Cloud Voice, or other supported partners. It's a customer's responsibility to manage consent and comply with local privacy requirements in the way that calls are recorded.

IN THIS SECTION:

[Identify Coachable Moments from Recorded Video Calls with Einstein Conversation Insights](#)

Process important meetings that were recorded on a third-party platform by using Einstein Conversation Insights. Upload video call recordings under 2 GB in the MP4 format and get insights, see transcripts, and identify coachable moments surfaced from that meeting.

[Use Generative AI in All Languages Supported by Einstein Conversation Insights](#)

Want to see call summaries for Catalan conversations? Have queries about Korean calls? Most of the generative AI features available in Einstein Conversation Insights are supported in 37 languages. The features include Call Summaries, Call Explorer, and Generative Conversation Insights.

[Use Call Explorer in Flows](#)

Want to automate record updates related to customer calls so your sales teams can focus on selling? Harness the power of flows to automatically capture insights and update Salesforce records. Explore Conversation is available as a standard action in Flow Builder.

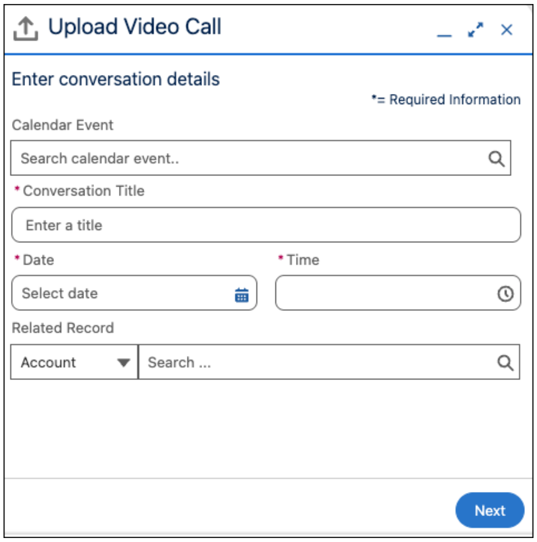
Identify Coachable Moments from Recorded Video Calls with Einstein Conversation Insights

Process important meetings that were recorded on a third-party platform by using Einstein Conversation Insights. Upload video call recordings under 2 GB in the MP4 format and get insights, see transcripts, and identify coachable moments surfaced from that meeting.

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.

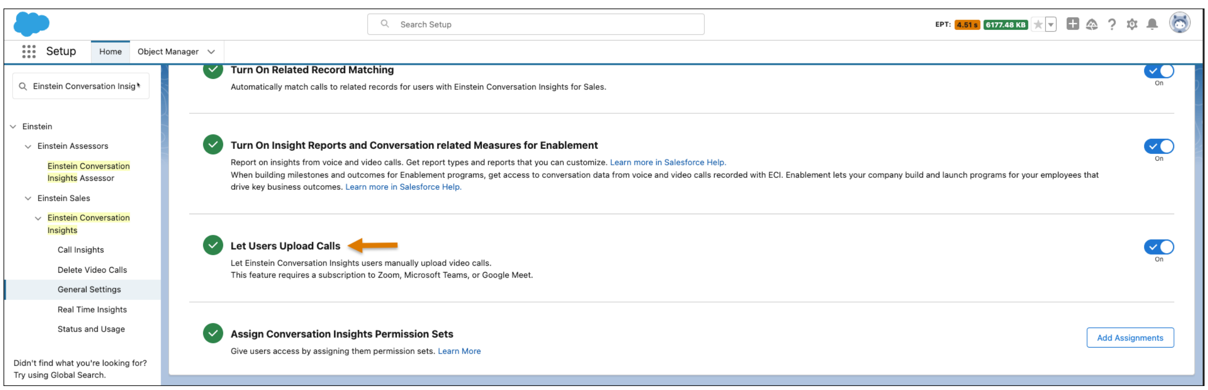
Who: This feature is available only for orgs on Hyperforce. Einstein Conversation Insights (ECI) users must be authenticated with least one of these vendors—Zoom, Microsoft Teams, or Google Meet—to use this feature.

Why: From the Conversation Insights tab, ECI users can upload the video call file by clicking **+Upload Video Call**. The file must be in the MP4 format and under 2 GB. Each user can upload a maximum of three video call recordings in a day.



The Upload Video Call window enables users to fetch details from a calendar event or enter the meeting details. Add internal users, customer contacts, or leads that were part of the meeting, select the meeting platform, and upload the meeting file.

How: To turn on the feature, from Setup, enter `Einstein Conversation Insights` in the Quick Find box, and then select **General Settings**. Then turn on **Let Users Upload Calls**.



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Where: This feature requires Einstein Conversation Insights and Einstein for Sales and is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, contact your Salesforce account executive.

Why: Einstein Conversation Insights (ECI) now supports Call Summaries, Call Explorer, and Generative Conversation Insights in all 37 ECI-supported languages. The supported languages include:

- Arabic
- Bulgarian
- Catalan

- Chinese (Simplified and Traditional)
- Croatian
- Czech
- Danish
- Dutch
- English (Australia), English (England), English (India), English (Ireland), English (New Zealand), English (Scotland), English (US)
- Finnish
- French (Canada), French (France)
- German
- Greek
- Hebrew
- Hindi
- Hungarian
- Icelandic
- Indonesian
- Italian
- Japanese
- Korean
- Latvian
- Lithuanian
- Norwegian
- Polish
- Portuguese (Brazil), Portuguese (Portugal)
- Punjabi
- Romanian
- Russian
- Serbian
- Slovak
- Spanish (Spain), Spanish (US)
- Swedish
- Thai
- Turkish
- Ukrainian
- Vietnamese

Sales Signals is available only in English.

Important: The languages supported include languages not covered by the Einstein Trust Layer. Sensitive data isn't automatically detected and masked for some regions and languages. Review the risks before using any features, and check your output for safety and accuracy.

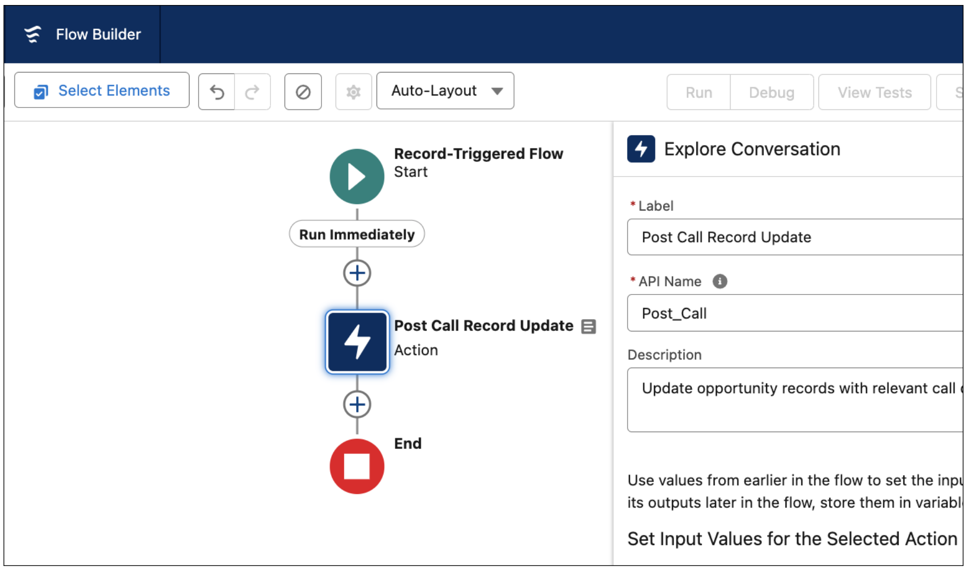
Use Call Explorer in Flows

Want to automate record updates related to customer calls so your sales teams can focus on selling? Harness the power of flows to automatically capture insights and update Salesforce records. Explore Conversation is available as a standard action in Flow Builder.

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 Salesforce admins with access to Einstein Conversation Insights and Einstein for Sales features.

How: You can add Explore Conversation as a standard action in Flow Builder.



All flows are supported, including screen flows, scheduled flows, and record-triggered flows. For more information about using flows, see Automate Tasks with Flows.

SEE ALSO:

Salesforce Help: Call Explorer Powered by Generative AI (can be outdated or unavailable during release preview)

Sales Engagement

Let Prospecting Center find your most qualified customer, using trusted data and AI. Prospecting Center analyzes your CRM and external data and identifies your most promising opportunities with the highest probability of closing, so you know which deals to prioritize. With the power of Data Cloud, you can analyze your accounts, contacts, and leads to identify your most accurate, data-driven prospects.

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:

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.

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.

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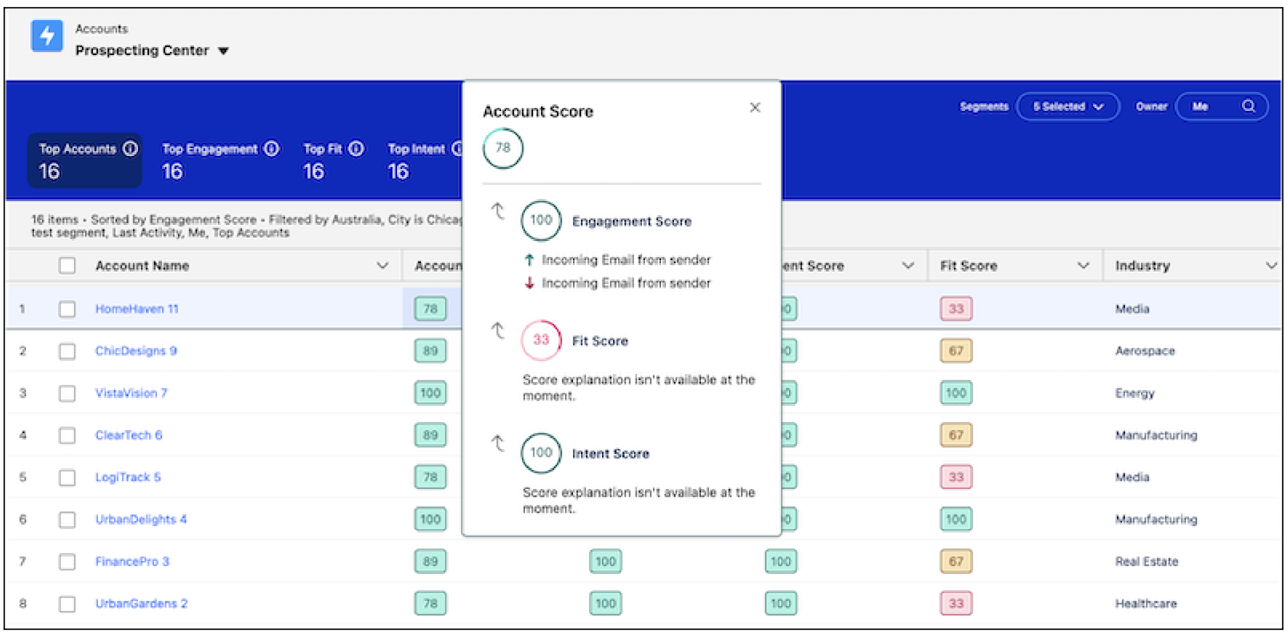
Where: This change applies to Lightning Experience and Salesforce Classic in Performance and Unlimited editions.

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. All the data can be brought in from third party data connectors like Zoominfo and Demandbase.



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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.

Salesforce Forecasting

Collaborative Forecasts is now called Pipeline Forecasting. Forecast managers can now apply their judgment to a direct subordinate's opportunity that's split across multiple owners. Your sales team can accurately forecast consumption-based businesses.

IN THIS SECTION:

Collaborative Forecasts Is Now Pipeline Forecasting

Manage your opportunity-based forecast models the same way you have, but now under the name Pipeline Forecasting, which is part of the Salesforce Forecasting product umbrella. The new name better positions forecasts that use the standard opportunity and closely related objects such as opportunity product, opportunity split, and line item schedules. It also accommodates forecast models that use Data Cloud data, including Consumption Forecasting. With this change, you continue to view all your forecasts on the forecasts page.

Improve Pipeline Forecast Visibility with Manager Judgments on Opportunity Splits

Forecast managers can now apply their judgment to a direct subordinate's opportunity that's split across multiple owners. Each manager's judgment on their portion of the opportunity rolls up through their forecast hierarchy, allowing sales and specialist leaders insight into their own forecasts for their areas of the business. Previously, front-line managers could apply judgments only to opportunities that had a single owner. This change applies to opportunity split-based forecast types in user role and territory forecast hierarchies, and it doesn't include opportunity product splits.

Forecast Your Consumption-Based Business

With Consumption Forecasting, enable your sales team to accurately forecast consumption-based businesses monthly and quarterly. After you create forecast types, your sales team can forecast and view details such as actual and predicted revenue. This feature is an addition to Pipeline Forecasting, so now you can create consumption-based forecasts alongside opportunity-based forecasts.

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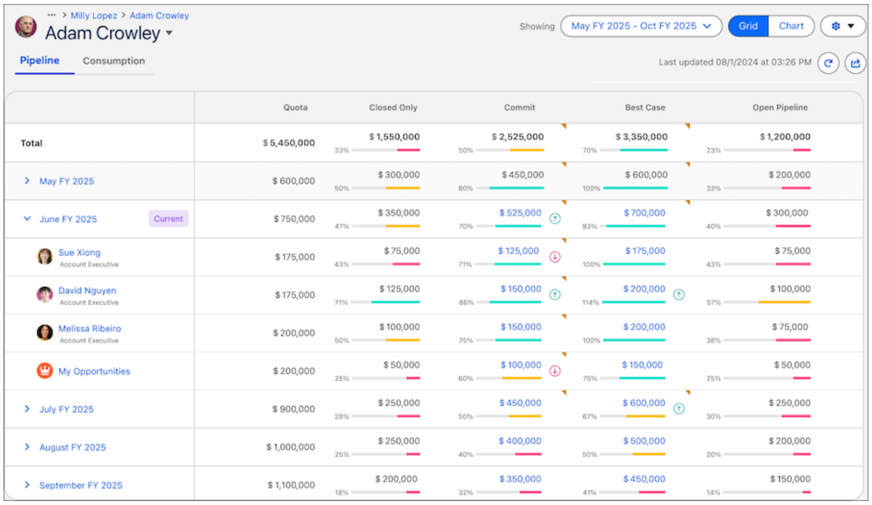
Where: This change applies to Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

How: Active forecast types continue to be available to you on a single forecasts page.



SEE ALSO:

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

Improve Pipeline Forecast Visibility with Manager Judgments on Opportunity Splits

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Where: This change applies to Lightning Experience in Professional and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

Why: With this change, forecast managers can use judgments to help define their path to their committed forecast number, even if their team doesn't own 100% of an opportunity. Sales leaders can make sure that all managers who are part of a split opportunity are in alignment about whether an opportunity is included as part of the committed forecast.

How: Manager judgments are available on opportunity splits when Team Selling and Opportunity Splits are enabled in Setup and the Manager Judgments option is selected on the Forecasts Settings page. Make sure that you add the Manager Judgment column to the opportunity list for your forecast types that are based on the Opportunity Split object.

SEE ALSO:

Salesforce Help: Enable Opportunity Splits (can be outdated or unavailable during release preview)

Salesforce Help: Allow Manager Judgments in Pipeline Forecasts (can be outdated or unavailable during release preview)

Forecast Your Consumption-Based Business

With Consumption Forecasting, enable your sales team to accurately forecast consumption-based businesses monthly and quarterly. After you create forecast types, your sales team can forecast and view details such as actual and predicted revenue. This feature is an addition to Pipeline Forecasting, so now you can create consumption-based forecasts alongside opportunity-based forecasts.

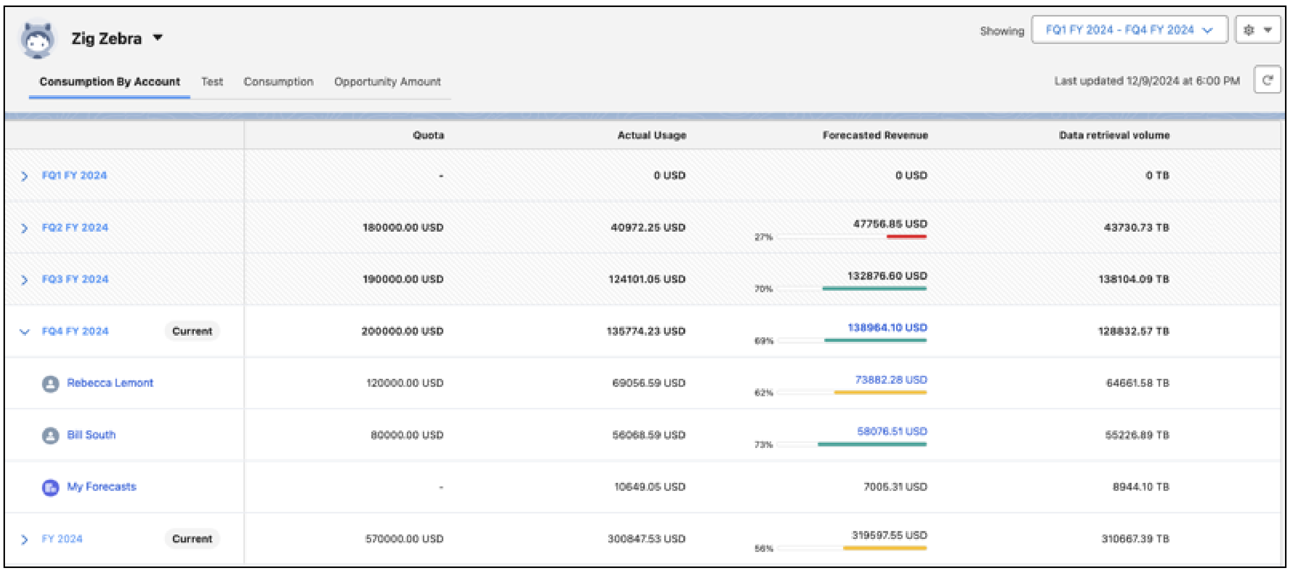
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions and in Einstein 1 Sales Edition with Sales Cloud.

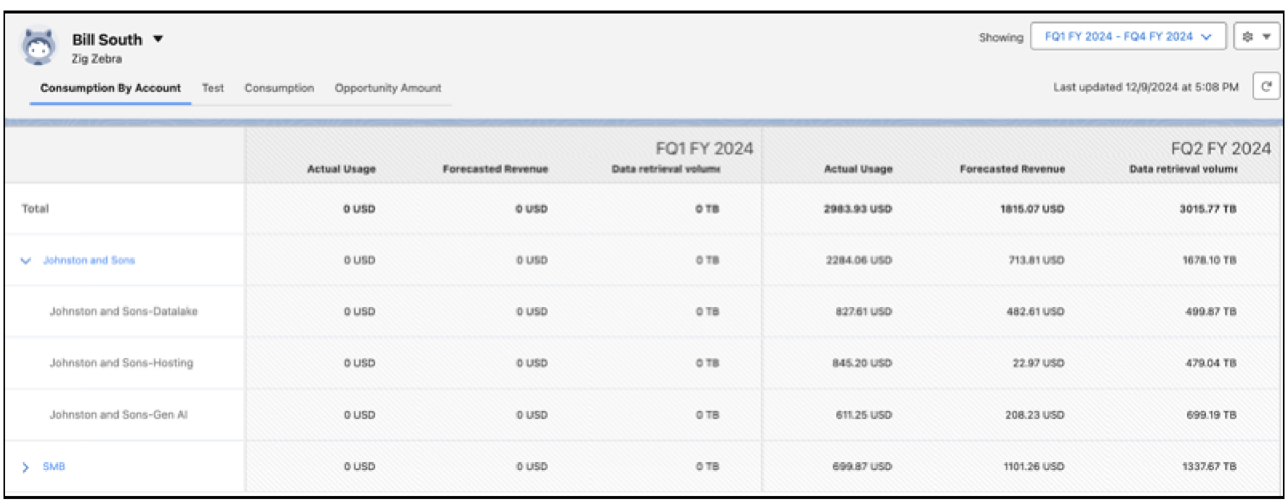
Why: Consumption Forecasting helps you and your sales team:

- Bring data from your CRM system and from external sources to generate comprehensive forecasts.
- Forecast consumption-based data to provide leadership teams with actionable insights.
- View the historical trends of your metrics aggregated by different dimensions and user hierarchies.
- Adjust forecast values individually or in bulk by smart adjustments.
- Roll up adjustments in the hierarchy in real time.
- Show progress toward quota attainment.

How: Enable Salesforce Forecasting and set up Data Cloud prior to turning on Consumption Forecasting. On the Forecast Settings page, turn on Consumption Forecasting and create consumption-based forecast types.

After you set up Consumption Forecasting, sales reps and managers can view their consumption-based business measures and adjust their own forecasts that are rolled up in the hierarchy.





Pipeline Inspection

Get a more consistent user experience in Pipeline Inspection list views. Close Date Predictions, a feature of Einstein Deal Insights in Pipeline Inspection, is being retired as of Spring '25.

IN THIS SECTION:

Get an Improved User Experience in Pipeline Inspection List View

Fields you mark as Read-Only on the Opportunity page layout now behave that way in the Pipeline Inspection list view. This change gives you a more consistent user experience. Previously in the Pipeline Inspection list view, you could make inline edits to fields even when they were marked as Read-Only. Field-level security settings still take precedence over the field's configuration on the Opportunity page layout.

Close Date Predictions Has Been Retired

As of this release, Close Date Predictions, a feature of Einstein Deal Insights in Pipeline Inspection, has been retired. 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.

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Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

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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, Partner Tracks, and In-App Guidance

Enhance your sales approach with data-driven insights and take complete control of your Enablement settings. Quickly deploy in-app guidance into your Salesforce orgs.

IN THIS SECTION:

Sales Programs and Partner Tracks with Enablement

Elevate your sales strategy with seamless access to Enablement analytics that guide you in making data-driven decisions for your teams. Gain complete control over your Enablement settings with the new Enablement switch.

In-App Guidance

Deploy In-App Guidance into production quickly, with the flexibility to version managed packages that contain prompts, walkthroughs, and their dependencies.

Sales Programs and Partner Tracks with Enablement

Elevate your sales strategy with seamless access to Enablement analytics that guide you in making data-driven decisions for your teams. Gain complete control over your Enablement settings with the new Enablement switch.

IN THIS SECTION:

Empower Your Sales Leaders with Enablement Analytics

Enhance your sales team's performance by providing your sales leaders with essential analytical insights to develop impactful strategies and drive success. With the Manage Enablement Analytics permission, sales leaders can view Enablement analytics without being an admin. Leaders can use the Enablement-specific data to analyze their team's performance and take informed decisions. Previously, Enablement reports and dashboards were accessible to Enablement admins only.

Take Full Control of Your Enablement Settings with One Switch

Tailor your Enablement settings to meet the specific configuration requirements of your Salesforce org. With the Enablement switch on the settings page, Salesforce admins can now enable or disable Enablement with one click. By default, the switch is turned on for you if your company has an Enablement add-on license.

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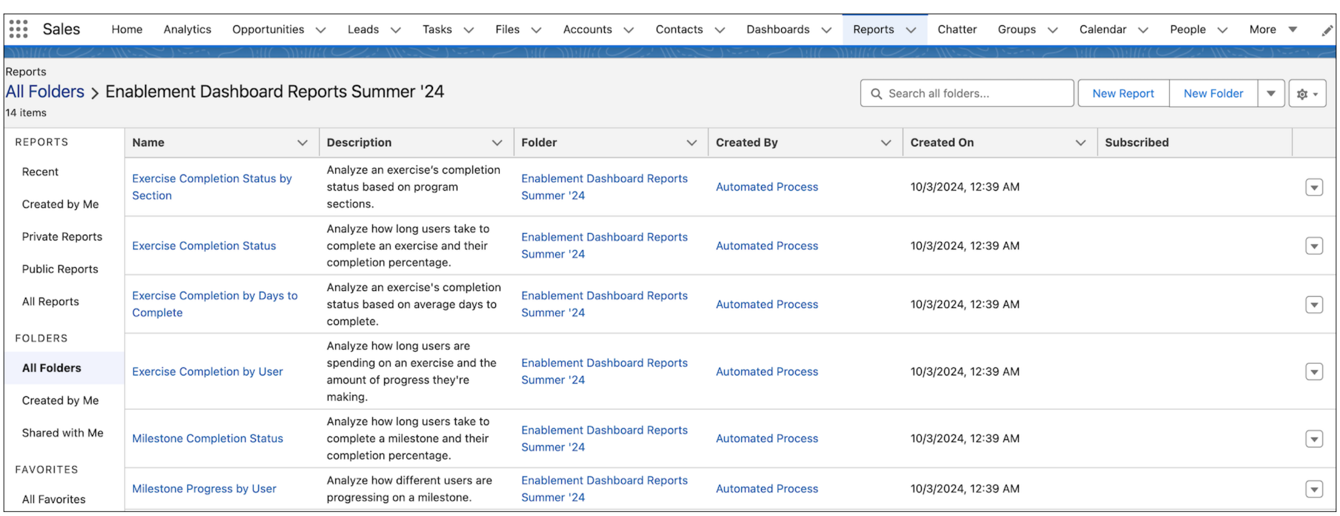
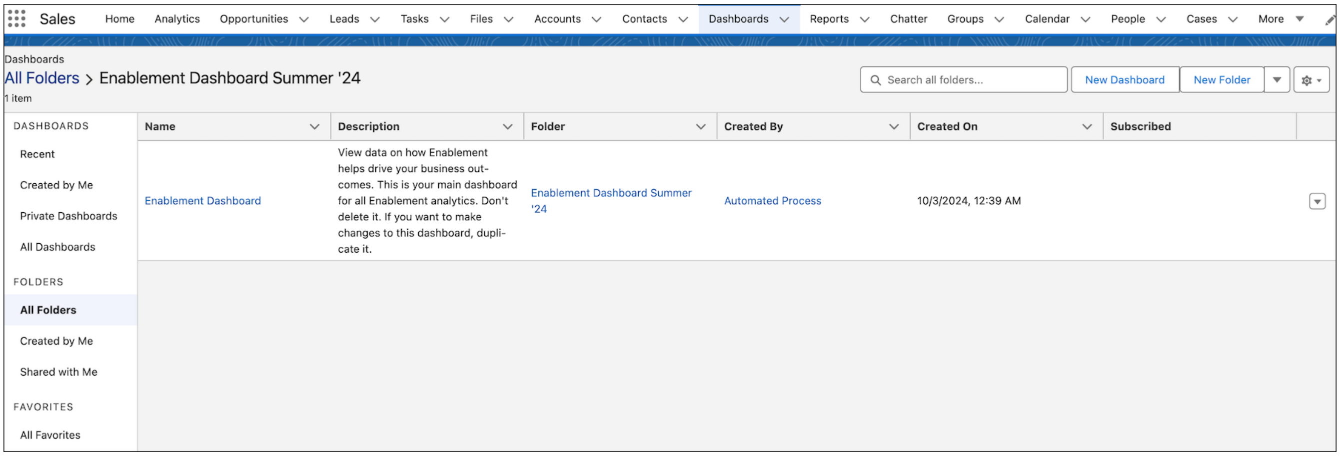
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required.

Who: Enablement users who have the Manage Enablement Analytics permission can view prebuilt Enablement reports and dashboards.

How: Sales leaders go to the Reports page in Lightning Experience and access the reports folder for a specific release. Leaders then select the report that they want to view.



Sales leaders go to the Dashboards page in Lightning Experience and access the dashboard folder for a specific release. Leaders then select the dashboard that they want to view and apply filters to see the analytics for a particular program.



SEE ALSO:

Salesforce Help: Tracking Enablement Programs (can be outdated or unavailable during release preview)

Take Full Control of Your Enablement Settings with One Switch

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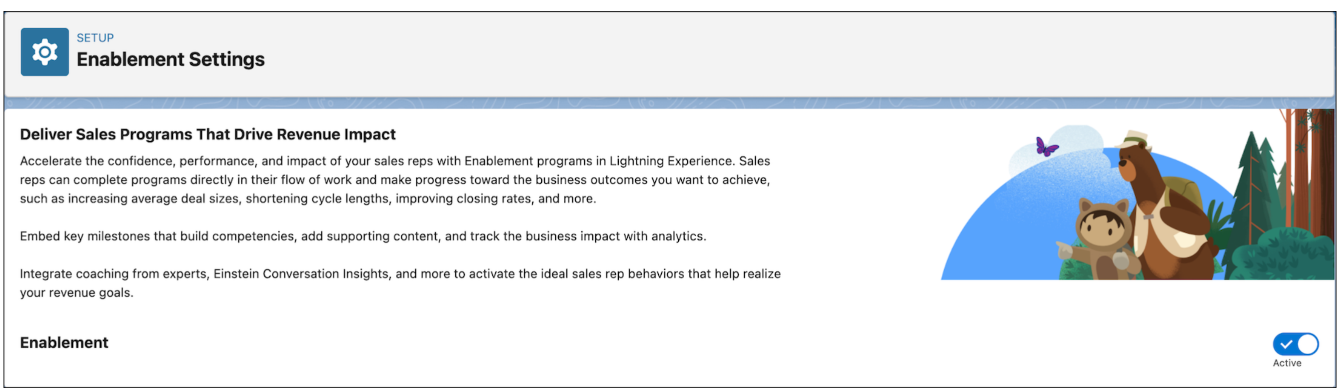
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer editions with Sales Cloud, Service Cloud, or Salesforce Platform. An Enablement add-on license is required.

How: From Setup, on the Enablement Settings page, turn on Enablement.



SEE ALSO:

Salesforce Help: Setting Up Enablement (can be outdated or unavailable during release preview)

In-App Guidance

Deploy In-App Guidance into production quickly, with the flexibility to version managed packages that contain prompts, walkthroughs, and their dependencies.

IN THIS SECTION:

Deliver In-App Guidance Quickly with Managed Packages

Speed up the deployment of in-app guidance and its dependencies in your Salesforce org by using second-generation managed packages. Create packages with prompts and walkthroughs to provide real-time, contextual help and enhance user engagement across all environments and versions of your application. Previously, prompts were available for first-generation managed packages only.

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Where: This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer editions. An Enablement add-on license is required.

How: Metadata components are available for prompts and walkthroughs in second-generation managed packages. Package developer bundles in-app Guidance components along with their dependencies, such as custom objects, profiles, and standard apps. Package versions are distributed on the AppExchange.

SEE ALSO:

Salesforce Help: Guidelines for In-App Guidance in Managed Packages (can be outdated or unavailable during release preview)

Second-Generation Managed Packaging Developer Guide: Components Available in Second-Generation Managed Packages (can be outdated or unavailable during release preview)

Sales Performance Management

Plan quotas that account for ramp-up of new reps and seasonal sales patterns in Quota Planning. Publish quota plans to territory-based forecast types within Pipeline Forecasting. Navigate with ease among various sales planning disciplines. Simplify activity and qualified mileage tracking in timesheets for reps who rely on Salesforce Maps. And set expectations with your reps for working in the now standard, enhanced user experience within Salesforce Maps.

IN THIS SECTION:

Sales Planning

Plan sales targets that account for ramp-up of new reps and tenure of experienced ones, and seasonal sales patterns in Quota Planning. Experience intuitive navigation among the various disciplines for planning sales strategies.

Salesforce Maps

Increase your reps' time with customers when you simplify timesheet entries for activities and qualified travel distances. Set parameters for distances that qualify for reimbursements, and establish a timesheet approval process. Familiarize yourself with the new permission set for communications with Hyperforce, and prepare all reps for the now standard, enhanced user experience.

Sales Planning

Plan sales targets that account for ramp-up of new reps and tenure of experienced ones, and seasonal sales patterns in Quota Planning. Experience intuitive navigation among the various disciplines for planning sales strategies.

IN THIS SECTION:

[Plan Accurate Quotas That Account for Ramp and Seasonality]

Reflect anticipated ramp-up time for new reps and consider the tenure of experienced ones when you plan quotas. And account for seasonal sales patterns and other realities that affect your business in Quota Planning. Then publish ramp- and season-adjusted quotas to active territory-based forecasts in Pipeline Forecasting.

[Publish Quota Plans to Pipeline Forecasting]

Provide a clear path for your sales reps to meet quotas when you publish plans from Quota Planning to territory-based forecasting types in Pipeline Forecasting.

[Design Sales Strategies with a More Intuitive Experience]

Plan territories with the full context of segments in Sales Planning. Navigate easily among segmentation, territory planning, and quota planning disciplines without losing your place.

[Other Improvements Within Sales Performance Management]

Identify improvements to Sales Planning and Territory Planning resulting from customer requests.

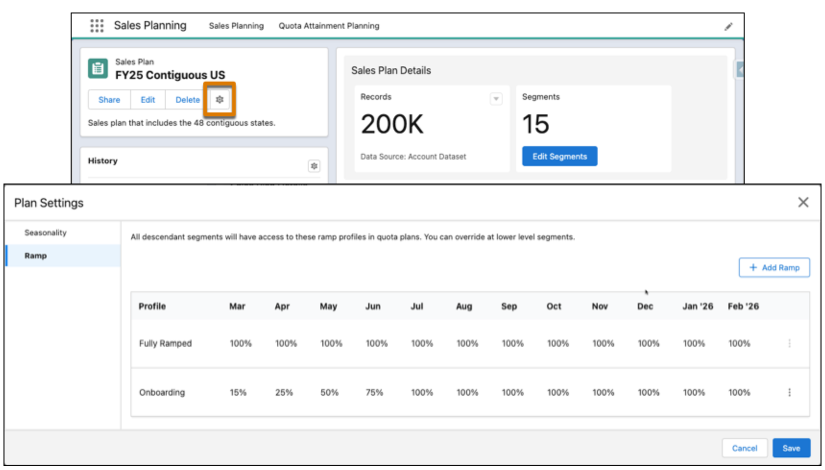
Plan Accurate Quotas That Account for Ramp and Seasonality

Reflect anticipated ramp-up time for new reps and consider the tenure of experienced ones when you plan quotas. And account for seasonal sales patterns and other realities that affect your business in Quota Planning. Then publish ramp- and season-adjusted quotas to active territory-based forecasts in Pipeline Forecasting.

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

When: This feature is not part of the initial Spring '25 release and can be included afterward.

How: In Sales Planning, open a sales plan and click **Settings**. Specify seasonal adjustments and add ramp profiles.



Anyone with access to the entire sales plan can further adjust ramp-up and seasonality values in segments.

Publish Quota Plans to Pipeline Forecasting

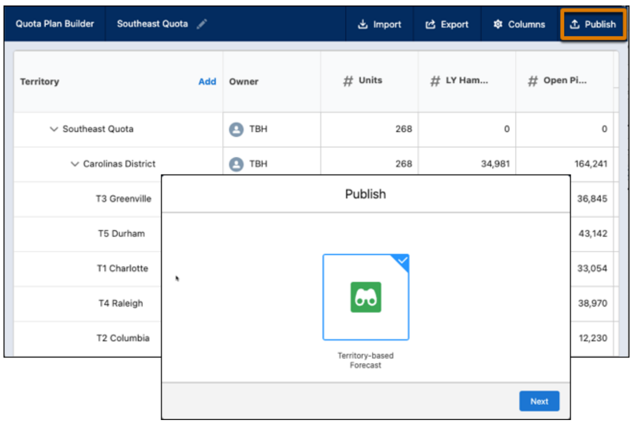
Provide a clear path for your sales reps to meet quotas when you publish plans from Quota Planning to territory-based forecasting types in Pipeline Forecasting.

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

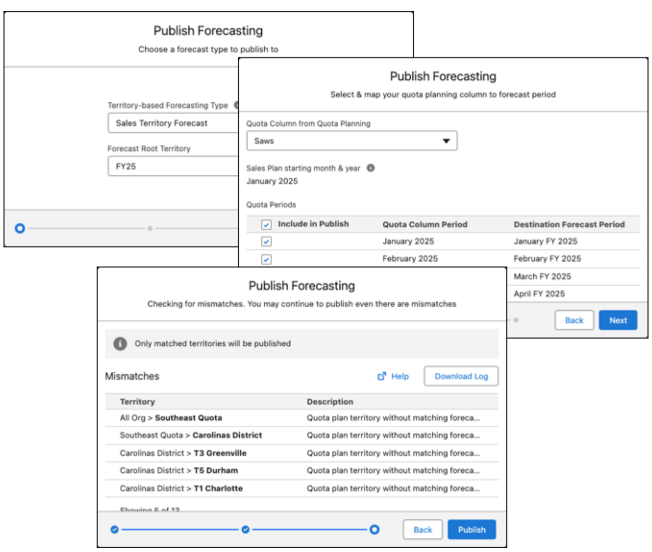
When: This feature is not part of the initial Spring '25 release and can be included afterward.

How: Publishing quotas to territory-based forecasts requires an active territory model with designated forecast managers in Sales Territories. In addition, publishing requires a forecast type that includes a territory-based hierarchy with the option to show quotas.

In Sales Planning, open a sales plan, select a segment, and then open a quota plan within it. Click **Publish**, and then select **Territory-based Forecast**.



Select a territory-based forecast type and a root territory. Then select a quota column from your plan. Identify any mismatched territories, and then publish the ones that match.



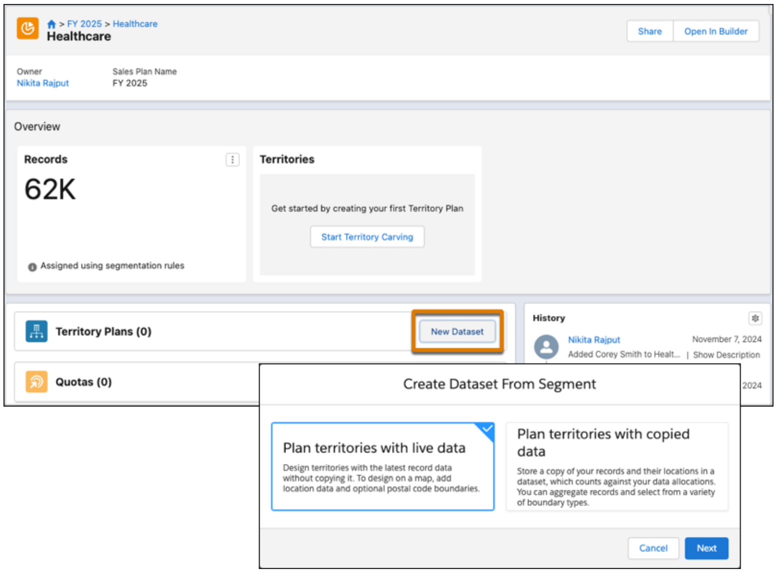
Design Sales Strategies with a More Intuitive Experience

Plan territories with the full context of segments in Sales Planning. Navigate easily among segmentation, territory planning, and quota planning disciplines without losing your place.

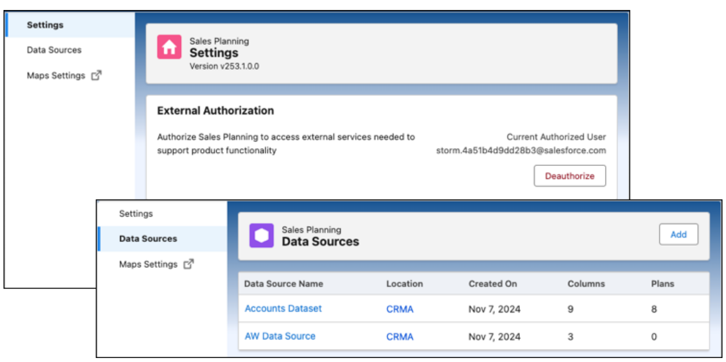
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

When: This feature is not part of the initial Spring '25 release and can be included afterward.

How: In Sales Planning, open a segment, and then click **New Dataset**. Then follow the prompts to create the dataset based on the segment.



Access settings for Sales Planning and Territory Planning together by searching for Sales Planning Settings in the app launcher.



Other Improvements Within Sales Performance Management

Identify improvements to Sales Planning and Territory Planning resulting from customer requests.

Where: This change applies to Lightning Experience and Salesforce Classic in Professional (except for Sales Planning), Enterprise, Unlimited, and Developer editions.

When: Sales Planning and Territory Planning improvements are not part of the initial Spring '25 release and can be included afterward.

How: Sales Planning and Territory Planning now include these improvements.

Product	Improvement
Sales Planning	Sales Planning now sets field types when importing data from CSV files and matching fields.

Product	Improvement
Territory Planning	Territory Planning now includes these enhancements. • When filtering data, planners can select the *Starts with* filter operator. • When carving territories, planners can now remove territories and their descendants in the territory hierarchy within Territory Planning, instead of only individual territories. • Planners can now select multiple records by pressing Shift+. • Planners can now identify the number of unique values, such as accounts and industries, within territories.
Sales Territories	Designated team members can now administer specific territories and their descendants. To designate team members, assign them the Administer Territory Operations permission. Then configure fields for the TerritoryAdminAssignment standard object through Salesforce API version 63 and later. Designated team members who administer at least one territory get read access to all records assigned to that territory and its descendants. Specify whether these team members can: • Update and delete the territory and its descendants, and create descendants. • Assign other team members to descendant territories. • Manage record assignments and rules for the territory and its descendants.

SEE ALSO:

Object Reference for the Salesforce Platform: TerritoryAdminAssignment (can be outdated or unavailable during release preview)

Salesforce Maps

Increase your reps' time with customers when you simplify timesheet entries for activities and qualified travel distances. Set parameters for distances that qualify for reimbursements, and establish a timesheet approval process. Familiarize yourself with the new permission set for communications with Hyperforce, and prepare all reps for the now standard, enhanced user experience.

IN THIS SECTION:

Simplify Activity Tracking and Reimburse for Qualified Travel Distances

Maximize your reps' time in the field when you simplify activity and distance tracking in Salesforce Maps. Specify distance parameters that qualify for reimbursements and establish an approval process for timesheets.

The Enhanced User Experience Is Now Standard

Set expectations among your teams who haven't yet worked with the enhanced user experience in Salesforce Maps. All reps can now experience dramatic performance improvements while plotting high-volume data including ArcGIS Online layers and complex shape layers. Your reps can also access modern and robust list views.

New Permission Set for Communications with Hyperforce

Know what change to expect when you install or update Salesforce Maps. For communicating with Hyperforce services, Salesforce Maps adds the new SF Maps Platform Integration User permission set and assigns it to the Platform Integration user.

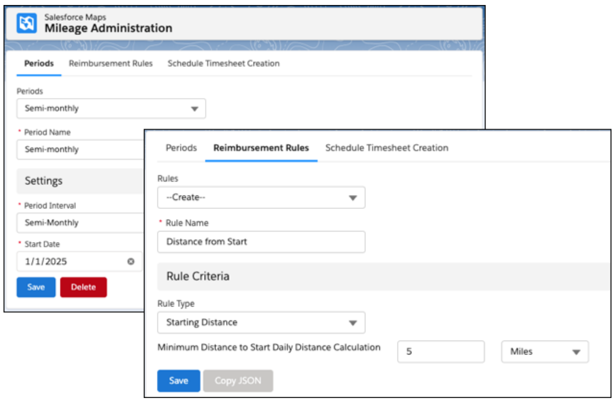
Simplify Activity Tracking and Reimburse for Qualified Travel Distances

Maximize your reps' time in the field when you simplify activity and distance tracking in Salesforce Maps. Specify distance parameters that qualify for reimbursements and establish an approval process for timesheets.

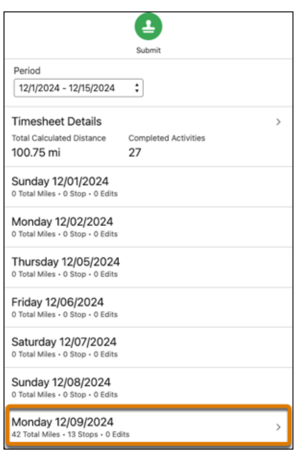
Where: This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Unlimited, and Developer editions.

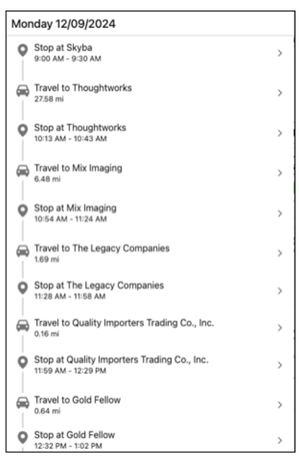
When: This feature is not part of the initial Spring '25 release and can be included afterward.

How: In Salesforce Maps Settings, click **Mileage Administration**. Create a timesheet period, such as semi-monthly, bi-weekly, or weekly. If only certain travel distances qualify for reimbursements, create a reimbursement rule. Schedule the timesheet creation Apex job, and then create or update permission groups and timesheet settings. Give access to managers by role or manager hierarchies. Next, assign reps to those permission groups.



Your reps manage their timesheets by using the Salesforce app. Timesheets capture activities, time spent with customers, and distances traveled between visits. Distance calculations consider historical traffic patterns, and not necessarily the actual routes that your reps travel. Reps can adjust timesheets to account for unscheduled or route changes. Your reps can then submit their timesheets for manager approval.





Managers gain clarity on their reps' activities, time, and distances traveled. Update multiple timesheets simultaneously. And review and approve timesheets individually.

My Team's Timesheets
Felix Ayaso

Show Approval Requests | Review Timesheets by Date 12/6/2024 | Update Timesheets

Name	User	Period	Status	Approver	Total Calculated Distance	Total Actual Distance	Manually Edited	Completed Activities	Total Stop Time	Last Calculated
Timesheet-000093	Williams, Sam	12/1/2024 - 12/15/2024	Pending	Felix Ayaso	542.35 mi	542.35 mi	0	29	14 hr 30 min	12/6/24, 9:51 AM
Timesheet-000092	Black, Tiffany	12/1/2024 - 12/15/2024	-	-	224.77 mi	224.77 mi	0	17	8 hr 30 min	12/6/24, 9:46 AM
Timesheet-000088	Lindstrom, Olaf	12/1/2024 - 12/15/2024	-	-	0 mi	0 mi	0	0	0 min	12/6/24, 9:36 AM
Timesheet-000089	Seravat, Rusty	12/1/2024 - 12/15/2024	Pending	Felix Ayaso	675.07 mi	675.07 mi	0	10	5 hr	12/6/24, 9:51 AM
Timesheet-000090	Driscoll, Trixie	12/1/2024 - 12/15/2024	Pending	Felix Ayaso	4.16 mi	4.16 mi	0	8	4 hr	12/6/24, 9:52 AM
Timesheet-000091	Covington, Donna	12/1/2024 - 12/15/2024	-	-	84.6 mi	84.6 mi	0	9	4 hr 30 min	12/6/24, 9:43 AM
Timesheet-000094	Yamaguchi, Pia	12/1/2024 - 12/15/2024	Removed	Pia Yamaguchi	100.75 mi	100.75 mi	0	27	13 hr 30 min	12/6/24, 9:49 AM

SEE ALSO:

Salesforce Help: Simplifying Timesheet Administration (can be outdated or unavailable during release preview)

The Enhanced User Experience Is Now Standard

Set expectations among your teams who haven't yet worked with the enhanced user experience in Salesforce Maps. All reps can now experience dramatic performance improvements while plotting high-volume data including ArcGIS Online layers and complex shape layers. Your reps can also access modern and robust list views.

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

When: This standard is not part of the initial Spring '25 release and can be included afterward.

SEE ALSO:

Salesforce Help: Getting More from Salesforce Maps with the Enhanced User Experience (can be outdated or unavailable during release preview)

New Permission Set for Communications with Hyperforce

Know what change to expect when you install or update Salesforce Maps. For communicating with Hyperforce services, Salesforce Maps adds the new SF Maps Platform Integration User permission set and assigns it to the Platform Integration user.

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

When: This feature is not part of the initial Spring '25 release and can be included afterward.

SEE ALSO:

Salesforce Help: Give Users Access to Salesforce Maps Products (can be outdated or unavailable during release preview)

Email, Calendar, and Integrations

Prepare for service account OAuth 2.0 retirement by upgrading to org-level OAuth 2.0 authentication. If you use Salesforce Inbox, allowlist `*.svc.sfdcfc.net`. And Salesforce for Outlook retires in December 2027.

IN THIS SECTION:

Einstein Activity Capture

Prepare for service account OAuth 2.0 retirement by upgrading to org-level OAuth 2.0 authentication.

Outlook Integration

Microsoft is making changes that impact the Salesforce Outlook integration. Take action before these changes are rolled out to maintain access to the integration.

[Gmail Integration](#)

Embed your Gmail integration in the Chrome side panel and take advantage of Agentforce.

[Salesforce Inbox](#)

To support the required email integrations, allowlist `*.svc.sfdcfc.net`.

[Salesforce for Outlook Is Being Retired in 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.

Einstein Activity Capture

Prepare for service account OAuth 2.0 retirement by upgrading to org-level OAuth 2.0 authentication.

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.

Upgrade Your Service Account Connections to Org-Level OAuth 2.0 Authentication

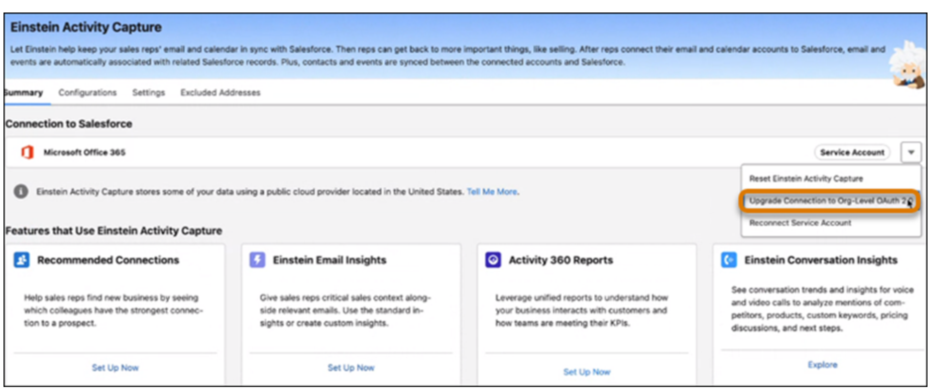
Microsoft is retiring the ApplicationImpersonation role in Exchange Online in February 2025. As a result, Salesforce is retiring service account OAuth 2.0 access to Microsoft Office 365 from Einstein Activity Capture. To make sure that Einstein Activity Capture continues working, upgrade to org-level OAuth 2.0 authentication.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions or through Einstein 1 Sales Edition, Sales Engagement, or Revenue Intelligence.

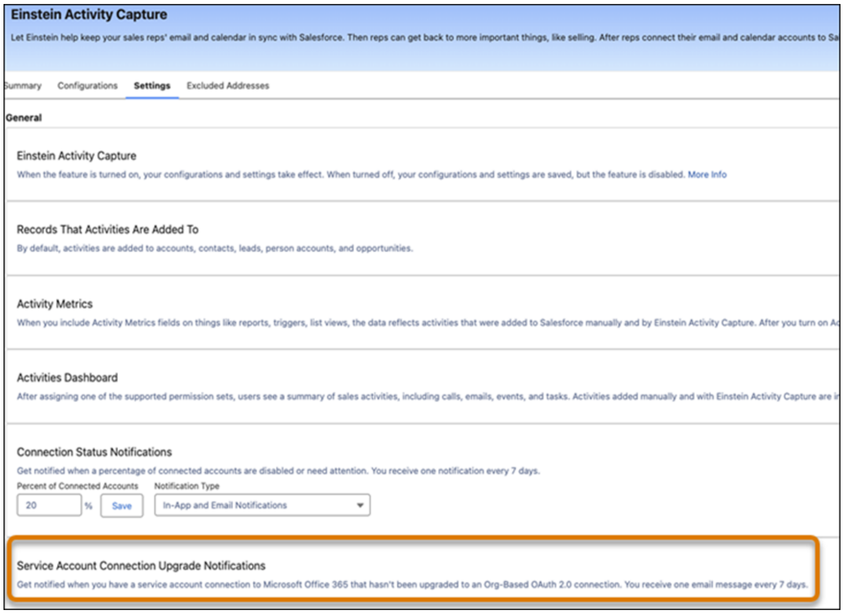
Why: Your Microsoft Office 365 connections that use service account OAuth2.0 authentication continue to work until February 2025. But if you haven't upgraded to org-level OAuth 2.0 by then, your Einstein Activity Capture connection stops working.

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)

Outlook Integration

Microsoft is making changes that impact the Salesforce Outlook integration. Take action before these changes are rolled out to maintain access to the integration.

IN THIS SECTION:

Maintain Access to the Outlook Integration

Microsoft is deprecating legacy features that impact the Salesforce Outlook integration. To maintain access to the integration, work with your Microsoft 365 admin to take action before these changes are rolled out.

Maintain Access to the Outlook Integration

Microsoft is deprecating legacy features that impact the Salesforce Outlook integration. To maintain access to the integration, work with your Microsoft 365 admin to take action before these changes are rolled out.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Unlimited, and Developer editions. This change impacts Exchange Online only.

When: For information on when Microsoft is deprecating legacy features, see Nested App Authentication and Outlook Legacy Tokens Deprecation FAQ.

How: In Setup, go to the Outlook Integration and Sync section. Use the Admin Consent Flow to make these changes and authorize the add-in for all users. Otherwise, individual users must manually authorize the integration after Microsoft rolls out the changes.

These scopes are required for the Salesforce Outlook integration to function.

- Calendars.ReadWrite.Shared
- email
- Mail.ReadWrite.Shared
- offline_access
- openid
- profile
- User.Read

SEE ALSO:

Salesforce Help: Set Up the Integration with Outlook (can be outdated or unavailable during release preview)

Knowledge Article: Microsoft Updating Salesforce Outlook Integration 2024

Gmail Integration

Embed your Gmail integration in the Chrome side panel and take advantage of Agentforce.

IN THIS SECTION:

Use Agentforce with Your Gmail Integration

When your Gmail integration is in the Chrome side panel, you can use Agentforce while working on emails and events.

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

Keep the Gmail integration email functionality while using other features in the Chrome side panel. 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.

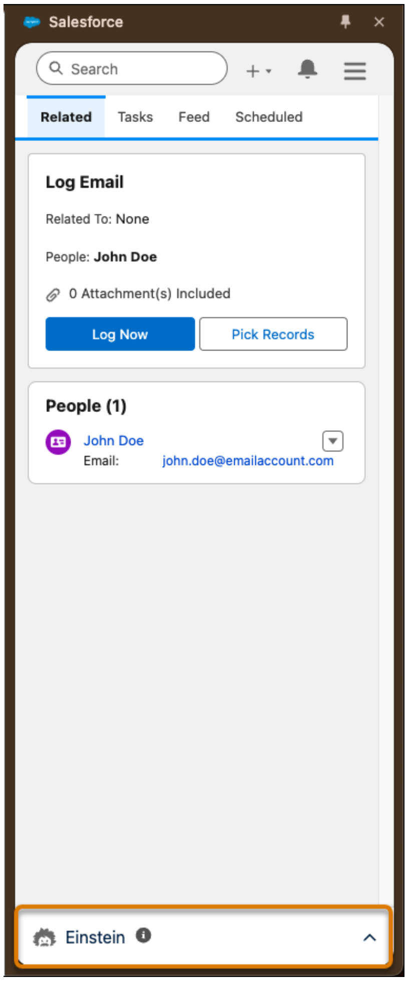
Use Agentforce with Your Gmail Integration

When your Gmail integration is in the Chrome side panel, you can use Agentforce 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 Agentforce in the side panel, click **Einstein**.



SEE ALSO:

Salesforce Help: Set Up the Outlook and Gmail Integrations (can be outdated or unavailable during release preview)

Salesforce Help: Set Up the Gmail Integration in the Chrome Side Panel (can be outdated or unavailable during release preview)

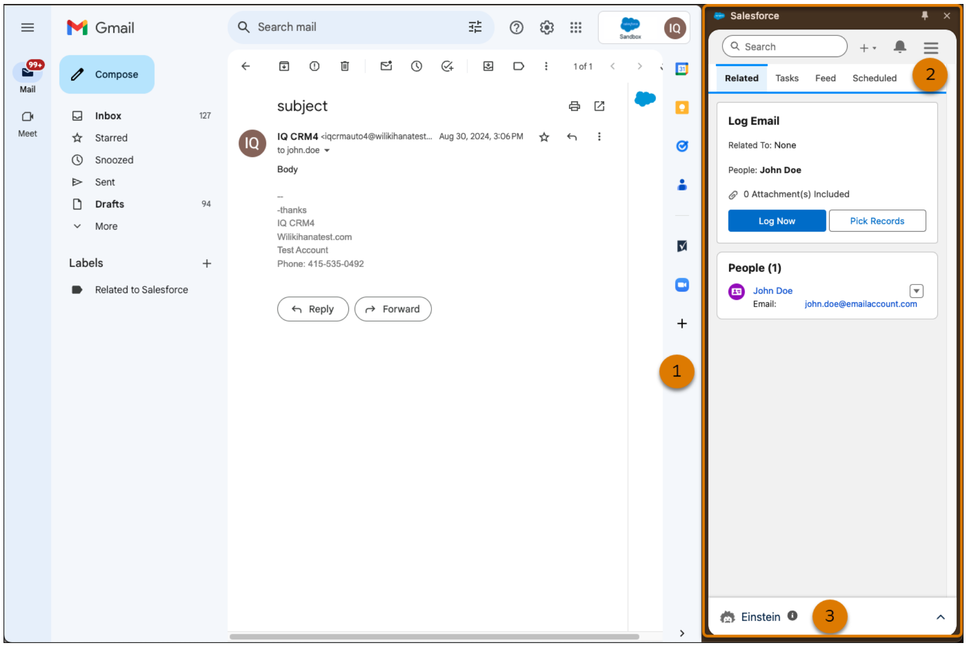
Salesforce Help: Agentforce: Agents and Copilot (can be outdated or unavailable during release preview)

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

Keep the Gmail integration email functionality while using other features in the Chrome side panel. 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.

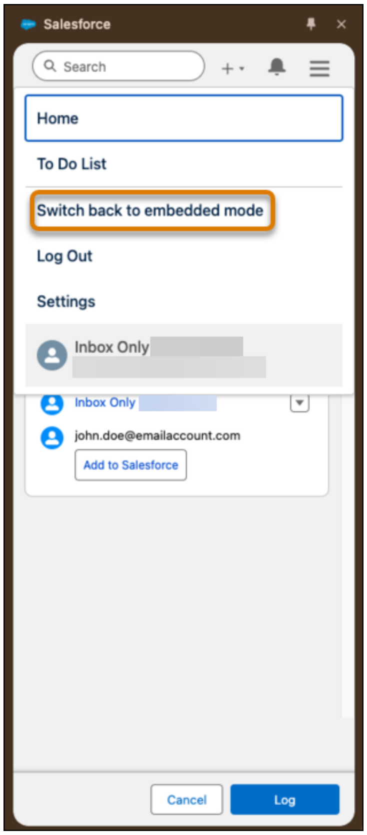
Where: This change applies to Lightning Experience Sales Cloud, Service Cloud, and Lightning Platform in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

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.



The updated side panel is in its own frame. (1) No matter which tab is active, the side panel is visible. It includes a menu (2) and, if available, Einstein copilot (3).

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:

Salesforce Help: Set Up the Outlook and Gmail Integrations (can be outdated or unavailable during release preview)

Salesforce Help: Set Up the Gmail Integration in the Chrome Side Panel (can be outdated or unavailable during release preview)

Salesforce Inbox

To support the required email integrations, allowlist `*.svc.sfdcfc.net`.

IN THIS SECTION:

Allowlist the Required Domain for Salesforce Inbox

To support the required email integration for Salesforce Inbox, add `*.svc.sfdcfc.net` to the allowlists for your network, firewalls, and proxies.

Allowlist the Required Domain for Salesforce Inbox

To support the required email integration for Salesforce Inbox, add `*.svc.sfdcfc.net` to the allowlists for your network, firewalls, and proxies.

Where: This change applies to Lightning Experience, Salesforce Classic (not available in all orgs), and all versions of the mobile app in Starter, Professional, Enterprise, Performance, and Unlimited Editions.

SEE ALSO:

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

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

Salesforce for Outlook Is Being Retired in 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.

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

How: When Salesforce for Outlook is retired, it will no longer sync contacts, events, or tasks. Admins and users also lose access to Salesforce for Outlook features, such as the side panel.

SEE ALSO:

Knowledge Article: Salesforce for Outlook Retirement

Salesforce Help: Move from Salesforce for Outlook to the Next-Generation Products (can be outdated or unavailable during release preview)

Trailblazer Community: Salesforce for Outlook Release Notes

Partner Relationship Management

Maximize channel sales, collaborate on shared business, and maintain trusted relationships with more efficient tools in your partner experience.

IN THIS SECTION:

Expand and Maintain Shared Business with Trusted Partners

Provide a more trusted, complete connection for the leads and opportunities that your company shares with partners through Partner Connect. Maintain a vendor connection in fewer clicks with new options for resending or deleting a field mapping. Maintain a partner connection more easily by importing an updated field mapping that a vendor sent you. Export lookup fields from a vendor org so you can share more data between Salesforce orgs.

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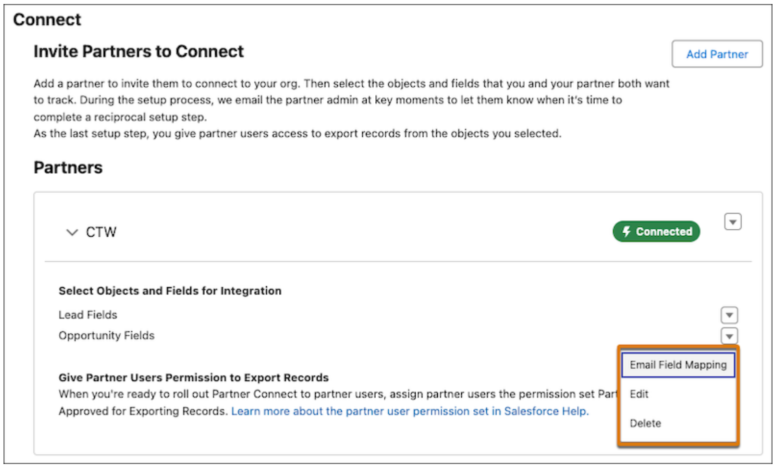
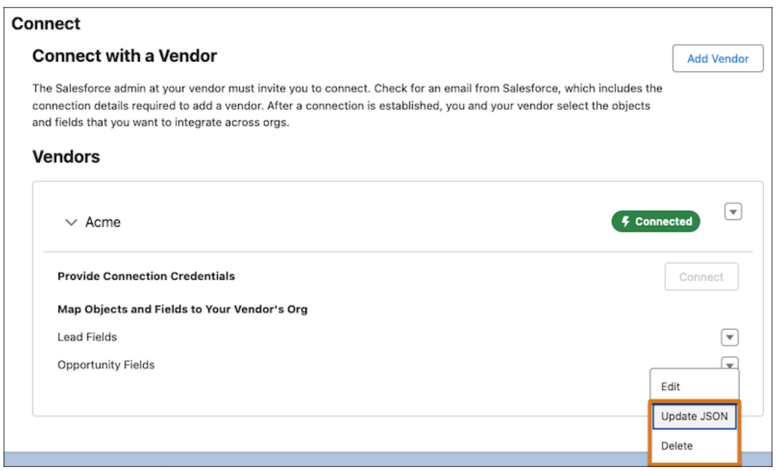
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Sales Cloud or Service Cloud. Vendors are required to purchase a PRM add-on license for the partner admin user and each partner user who vendors want to export records.

How: In a vendor's org, on the Partner Connect for Vendors page in Setup, the actions dropdown menu for an integrated object includes new options for editing, deleting, and emailing the field mapping.



In a partner's org, on the Partner Connect page in Setup, the actions dropdown menu includes a new Update JSON option for updating the field mapping with the new version that the vendor emailed.



In addition, a vendor can now export the Account Name and Primary Campaign Source lookup fields on the Opportunity object. When a partner then imports a field mapping that includes a lookup field, only the name of the referenced field is imported. Lookup fields can't sent or receive updates.

SEE ALSO:

Salesforce Help: Integrating Shared Business Across Salesforce Orgs with Partner Connect (can be outdated or unavailable during release preview)

Sales Cloud Everywhere

We streamlined navigation by moving top object shortcuts to a dedicated page and adding the recent records component. Sales reps can easily track achievement with the goals component from Seller Home.

IN THIS SECTION:

Access Your Records Easily in Everywhere

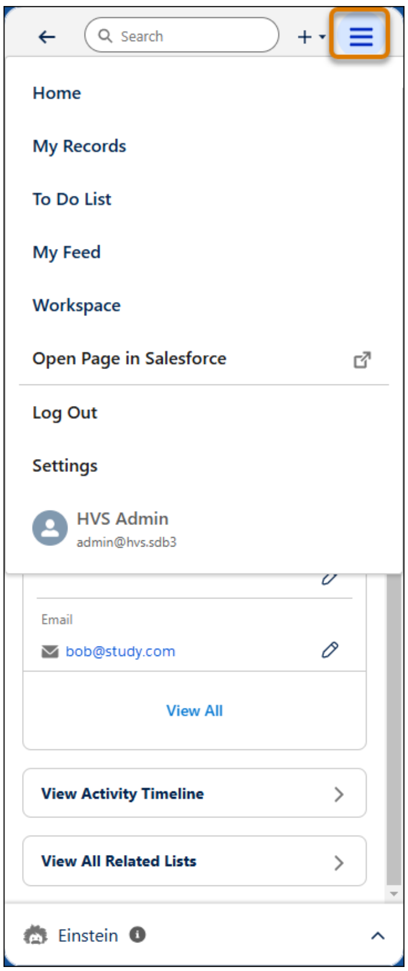
We streamlined the Everywhere landing page by moving frequently used object shortcuts to a dedicated My Records page. A recent records component provides quick navigation. And the landing page keeps reps focused on their weekly and monthly goals.

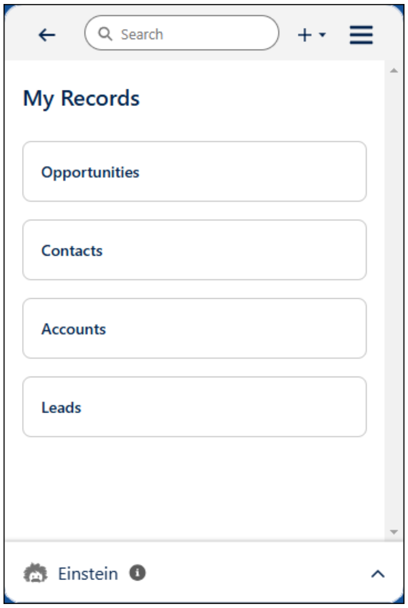
Access Your Records Easily in Everywhere

We streamlined the Everywhere landing page by moving frequently used object shortcuts to a dedicated My Records page. A recent records component provides quick navigation. And the landing page keeps reps focused on their weekly and monthly goals.

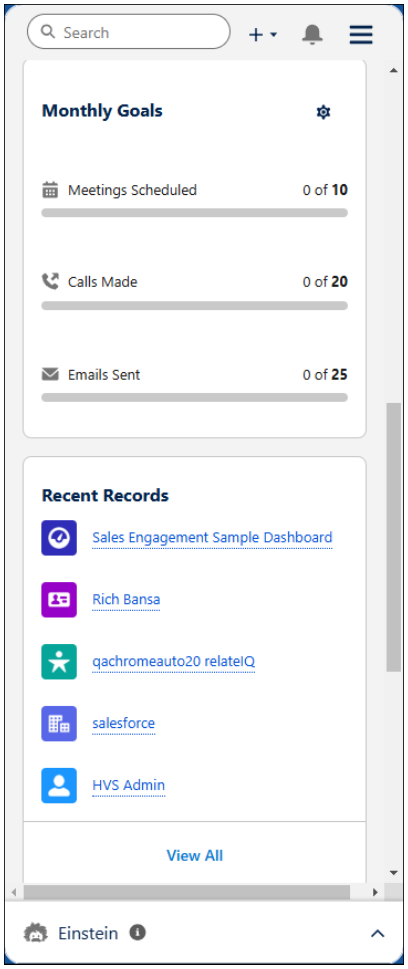
Where: Everywhere is available in Lightning Experience Sales Cloud in Enterprise, Performance, Unlimited, and Developer editions.

How: Use the updated menu to access the object shortcuts on their own My Records page.





The Everywhere landing page now displays metrics from Seller Home as well as recent records. Update goals here or in Seller Home.



SEE ALSO:

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

Sales Cloud on Mobile

Prepare for meetings in Seller-Focused Mobile Experience. Customize the app with Mobile Bulder for Seller-Focused Experience (Beta).

IN THIS SECTION:

Prepare for Meetings Without Opening Your Laptop

Seller-Focused Mobile Experience is the latest and best way to turn every lead into a sale from your phone or tablet. In Winter '24, the Seller-Focused Mobile Experience app became generally available. Now, we've redesigned the Events detail page to make your meetings more meaningful. Also, the Ask Einstein field is now the Ask Agentforce field.

Customize Seller-Focused Mobile Experience (Beta)

Seller-Focused Mobile Experience shows you the records that you need in order to plan meetings, connect with decision makers, and close deals. And now, with Mobile Builder for Seller-Focused Experience (beta) you can add native pages for custom objects and customize the layout of record home pages in the app.

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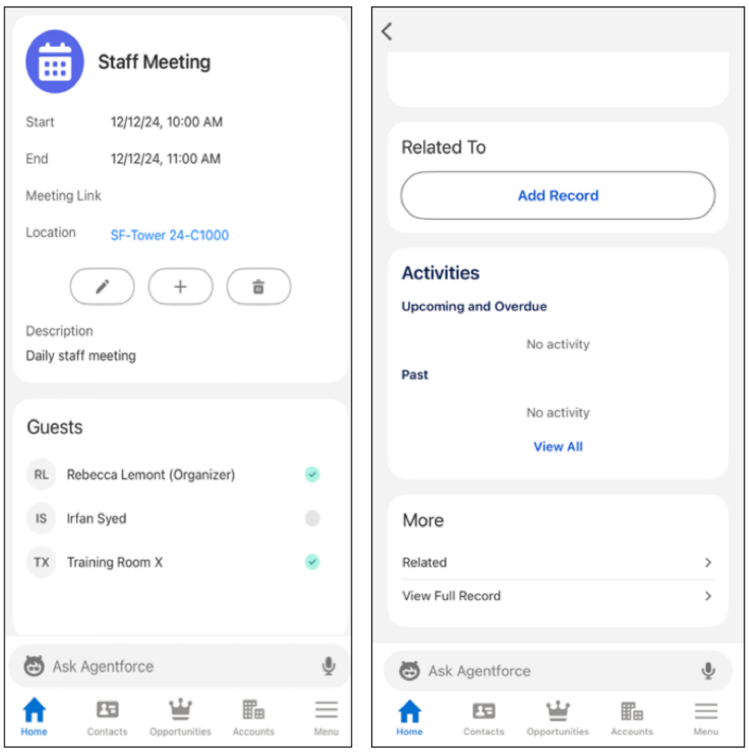
Seller-Focused Mobile Experience is the latest and best way to turn every lead into a sale from your phone or tablet. In Winter '24, the Seller-Focused Mobile Experience app became generally available. Now, we've redesigned the Events detail page to make your meetings more meaningful. Also, the Ask Einstein field is now the Ask Agentforce field.

Where: Seller-Focused Sales Mobile Experience is available for Android and iOS on phones and tablets in all editions, except Database.com.

Who: To use Seller-Focused Mobile Experience, you must have the Salesforce Mobile App: Native Seller Experience permission. Agentforce is available if you have the Use Agentforce Default Agent user permission.

How: To bring up the detail page for an event, tap the event. From the detail page, you can view and edit meeting details, view attendance responses, and related records.



SEE ALSO:

Salesforce Help: Seller-Focused Mobile Experience (can be outdated or unavailable during release preview)

Customize Seller-Focused Mobile Experience (Beta)

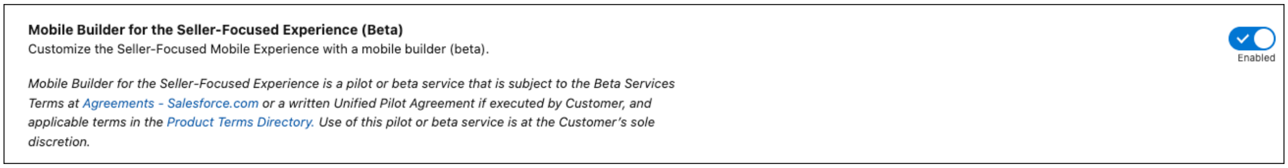
Seller-Focused Mobile Experience shows you the records that you need in order to plan meetings, connect with decision makers, and close deals. And now, with Mobile Builder for Seller-Focused Experience (beta) you can add native pages for custom objects and customize the layout of record home pages in the app.

Where: This feature is available in Lightning Experience in all editions. The Seller-Focused Mobile Experience for Android and iOS is available on phones and tablets in all editions, except Database.com.

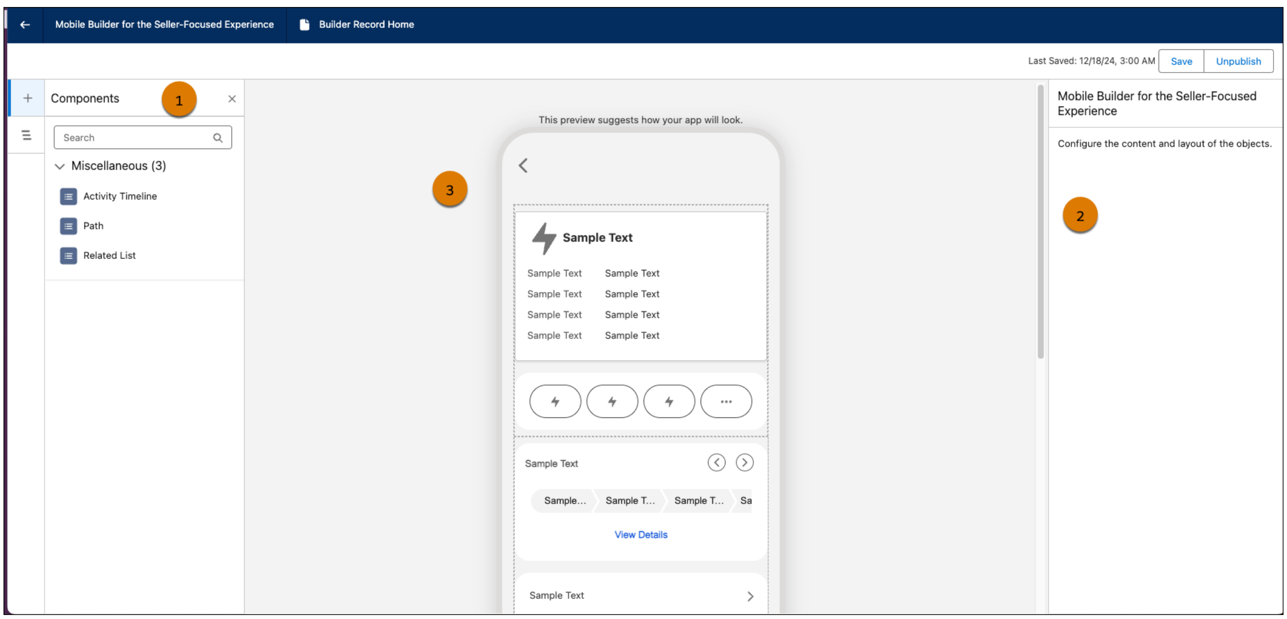
Note: Mobile Builder for Seller-Focused Experience is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Who: To use Seller-Focused Mobile Experience, users must have the Salesforce Mobile App: Native Seller Experience permission.

How: To use the mobile builder, enable Mobile Builder for Seller-Focused Experience in Salesforce Mobile App Setup. From Setup, in the Quick Find box, enter `Salesforce Mobile App` and select it. Enable Mobile Builder for Seller-Focused Experience (beta).



Drag the components on to the canvas. (1) Define component properties in the properties pane. (2) See your changes in the interactive canvas. (3)



Other Changes in the Sales Cloud

Anticipate other changes that can affect your sales teams.

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 in Einstein Activity Capture. This feature replaces Einstein Automated Contacts and gives users new capabilities.

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 in Einstein Activity Capture. 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

Salesforce Help: Automatic Contact Creation (can be outdated or unavailable during release preview)

Salesforce CMS

Classify CMS content with content taxonomy, then tag content to create dynamic collections. Clone content and save it to a shared workspace. Deliver content from any CMS workspace to any public or restricted channel, and remove more types of channels from enhanced CMS workspaces.

IN THIS SECTION:

Classify CMS Content with Content Taxonomy

Improve content organization and enhance discoverability when you create a content taxonomy and apply it to CMS content. In the Digital Experiences app, content taxonomists can create one overarching content taxonomy for an org and establish a hierarchical relationship between terms. Then, in the CMS content Tags tab, a CMS content admin or content manager applies those terms as tags to enhanced CMS content.

Streamline Content Management with Automated Tag-Based Conditions

Use taxonomy tags and define conditions to automatically organize enhanced CMS content into dynamic collections for your channels. The dynamic collection continuously updates with new content that meets these criteria. Apply conditions to content from multiple workspaces connected to the channel, and you can enhance content reach and utilization.

Save Time with Content Record Cloning in Your Shared Enhanced CMS Workspaces

After workspaces are shared, you can make copies of a shared content record and save it to a folder in a target enhanced CMS workspace. Previously, you could make and save copies of content only in the workspace where it was created.

Scale Content Delivery for High Performance

Orgs hosted on Hyperforce can use Dedicated Content Delivery to deliver image content types with high performance and low latency. This setting is on by default for all new public channels in an enhanced CMS workspace.

Deliver Content from Any CMS Workspace to Any Public or Restricted Channel

Now all public or restricted channels are enhanced, and you can deliver content to these channels from enhanced and non-enhanced CMS workspaces. Previously, some public or restricted channels created before Summer '24 were non-enhanced. These newly enhanced channels have the Use non-enhanced APIs setting enabled by default, so you can continue to use non-enhanced CMS Managed Content Resources without disrupting your current workflow.

Remove More Types of Channels from Enhanced CMS Workspaces

To better control where your content is available, remove Aura sites from enhanced CMS workspaces, and remove enhanced public or restricted channels that have the Use non-enhanced APIs setting enabled. Previously, you could remove only enhanced LWR sites and enhanced channels only when the setting was disabled.

Classify CMS Content with Content Taxonomy

Improve content organization and enhance discoverability when you create a content taxonomy and apply it to CMS content. In the Digital Experiences app, content taxonomists can create one overarching content taxonomy for an org and establish a hierarchical relationship between terms. Then, in the CMS content Tags tab, a CMS content admin or content manager applies those terms as tags to enhanced CMS content.

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

How: To create a content taxonomy, open the Digital Experiences app and select **Content Taxonomy** from the tab menu. Click **Create Content Taxonomy**. Add terms and save your changes.

To apply taxonomy tags to enhanced CMS content, open the content detail page. Click the **Tags** tab and search and add tags to the content. Save your changes. To make the changes available to your CMS channels, publish your changes.

SEE ALSO:

Salesforce Help: Understanding Content Taxonomy (can be outdated or unavailable during release preview)

Streamline Content Management with Automated Tag-Based Conditions

Use taxonomy tags and define conditions to automatically organize enhanced CMS content into dynamic collections for your channels. The dynamic collection continuously updates with new content that meets these criteria. Apply conditions to content from multiple workspaces connected to the channel, and you can enhance content reach and utilization.

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

How: Define conditions based on tags, and the enhanced CMS workspaces that are available to your channels are searched for content that meets the conditions. The collection search results can include up to 250 content items, ordered by relevance.

To create a dynamic collection, open the enhanced CMS workspace. Click **Add**, and select **Dynamic Collection**. Define conditions that automatically add content items to the collection. Preview content that appears in the collection by available channels. To make the collection available to your channels, publish the collection.

SEE ALSO:

Salesforce Help: Understanding Content Taxonomy (can be outdated or unavailable during release preview)

Save Time with Content Record Cloning in Your Shared Enhanced CMS Workspaces

After workspaces are shared, you can make copies of a shared content record and save it to a folder in a target enhanced CMS workspace. Previously, you could make and save copies of content only in the workspace where it was created.

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

How: There are two ways to clone content. From the content detail page in your enhanced CMS workspace, click **Clone**. Or, from the row-level actions in the workspace's content list, select **Clone**. You can clone variants of the content record, too.

SEE ALSO:

Salesforce Help: Create and Manage CMS Content (can be outdated or unavailable during release preview)

Salesforce Help: Share Content Across Enhanced CMS Workspaces (can be outdated or unavailable during release preview)

Scale Content Delivery for High Performance

Orgs hosted on Hyperforce can use Dedicated Content Delivery to deliver image content types with high performance and low latency. This setting is on by default for all new public channels in an enhanced CMS workspace.

Where: This change applies to enhanced CMS workspaces in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions hosted on Hyperforce.

How: To enable Dedicated Content Delivery 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)

Deliver Content from Any CMS Workspace to Any Public or Restricted Channel

Now all public or restricted channels are enhanced, and you can deliver content to these channels from enhanced and non-enhanced CMS workspaces. Previously, some public or restricted channels created before Summer '24 were non-enhanced. These newly enhanced channels have the Use non-enhanced APIs setting enabled by default, so you can continue to use non-enhanced CMS Managed Content Resources without disrupting your current workflow.

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

SEE ALSO:

Salesforce Help: CMS Channels (can be outdated or unavailable during release preview)

Connect REST API Developer Guide: CMS Managed Content Resources (can be outdated or unavailable during release preview)

Remove More Types of Channels from Enhanced CMS Workspaces

To better control where your content is available, remove Aura sites from enhanced CMS workspaces, and remove enhanced public or restricted channels that have the Use non-enhanced APIs setting enabled. Previously, you could remove only enhanced LWR sites and enhanced channels only when the setting was disabled.

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**. When you remove a channel from a workspace, all the workspace's content is unpublished from the channel. To prevent broken content links on your Aura site, make sure that the site isn't using any content from the workspace before you remove it.

SEE ALSO:

Salesforce Help: Add or Remove a Channel from a CMS Workspace (can be outdated or unavailable during release preview)

Salesforce Flow

Compose intelligent workflows with Flow Builder and Flow Orchestration. Build approval orchestrations with automated approvals. Integrate across any system with Flow Integration.

IN THIS SECTION:

Flow Builder

Search and filter automations with the new flow creation experience. Build flows with Einstein and generative AI. Automate your responses to customer actions with automation events. Manually select a winning path in the Path Experiment element. Define flow triggers by using real-time data from Data Cloud. Enhance your Flow Builder emails by sharing documents or files with your recipients by using Send Email action. Have unlimited paused and waiting flows. Promote your tested Data Cloud triggered flows from sandbox to production environments.

Flow Orchestration

Create custom email notifications to assigned users. View improved orchestration details on the Orchestration Run details view.

Flow Approval Processes

Build approval orchestrations that involve multiple people over multiple stages with multiple flows. Assign an approval work item to an individual, a public group, or a queue. Send notifications to people who submit approvals and the assigned approvers and their delegates. Display approval work items to approvers on relevant record pages.

Streamline External System Integration with MuleSoft for Flow: Integration (Generally Available)

MuleSoft for Flow: Integration provides no-code connectivity to external systems using third-party connectors. Create flows where third-party connectors act as triggers or actions. These connectors facilitate data and information exchange between different systems and provide in-line field mapping capabilities for improved data accuracy. Manage all your org's connections in a single view with the new Connections tab in the Automation Lightning app.

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.

Flow Builder

Search and filter automations with the new flow creation experience. Build flows with Einstein and generative AI. Automate your responses to customer actions with automation events. Manually select a winning path in the Path Experiment element. Define flow triggers by using real-time data from Data Cloud. Enhance your Flow Builder emails by sharing documents or files with your recipients by using Send Email action. Have unlimited paused and waiting flows. Promote your tested Data Cloud triggered flows from sandbox to production environments.

IN THIS SECTION:

[Flow Builder Updates]

Assign stages to screen elements from the screen properties editor. Search and filter automations with the new flow creation experience. Build flows with Einstein and generative AI. Get more out of Data Cloud with support for new data types in flows. Launch active autolaunched flows as subflows from within a prompt flow. Undo, redo, and save as with new keyboard shortcuts.

[Flow for Marketing Cloud]

Automate your responses to customer actions with automation events. Manually select a winning path in the Path Experiment element. Define flow triggers by using real-time data from Data Cloud. Access data graph attributes in Decision elements, exit rules, and campaign emails. Debug flows more easily with a more readable Debug Details pane.

[Flow Runtime]

Versioned updates are available for flows that are configured to run on API version 63.0.

[Flow Management]

Promote your tested Data Cloud triggered flows from sandbox to production environments. View failed and paused flow interviews from the Automation Lightning app.

[Flow Extensions]

Create a Lightning web component that enhance a flow screen component's error message experience at run time.

[Flow and Process Release Updates]

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

Flow Builder Updates

Assign stages to screen elements from the screen properties editor. Search and filter automations with the new flow creation experience. Build flows with Einstein and generative AI. Get more out of Data Cloud with support for new data types in flows. Launch active autolaunched flows as subflows from within a prompt flow. Undo, redo, and save as with new keyboard shortcuts.

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[Screen Flow Updates]

Run autolaunched flows in the background when screen actions change. Screen components check if they have invalid inputs in real time. Use visual guides to lead users through the stages of your screen flow. Assign stages to screen elements from the screen properties editor.

[User Experience Updates]

Search and filter automations with the new flow creation experience. Find and select resources up to 10 layers deep with nested search. Find and manage different versions of a flow from within Flow Builder. Troubleshoot your flow with an improved Errors and Warnings pane. Undo, redo, and save as with keyboard shortcuts. Create text templates and formula flow resources more easily.

[Get Help Building Flows Faster and More Accurately with Einstein (Generally Available)]

Get Einstein to use the power of generative AI and automatically build flows for you based on your instructions. Describe what you want to automate, and Einstein takes care of the rest. This feature, which is now generally available, includes some changes since the beta release. Einstein now generates more accurate flows, and it does so faster than before. You can help Einstein get even better by using the prominent feedback buttons to provide feedback on your flows.

[Generate a Detailed Description of a Flow with Einstein]

Maintaining a flow can be challenging, especially if you didn't create it. Without a detailed flow description, it can be tough to figure out what the flow does. Now you can use Einstein to summarize an existing flow or a new one as you create it. The summary describes all the flow steps and includes the input and output variables, the objects that the flow changes, and the subflows that the flow refers to. You can then add the generated summary to the flow description to keep everyone informed.

Get Help Creating Flow Formulas with Einstein (Generally Available)

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. This feature is now generally available.

Join Collections with the Transform Element

Combine source collections from related flow resources into one target collection. For example, you can combine order records from an external system with Salesforce orders to get a combined data structure that is displayed in a data table in a flow screen. The flow screen shows each order along with the amount and the quantities.

Send Emails with Attachments in Flow Builder

Enhance your Flow Builder emails by sharing documents or files with your recipients by using Send Email action. To attach a file, provide the ID of a file to the Send Email action. The maximum size of the email created, including attachments, is 35 MB.

Retrieve More Information from Data Cloud by Using Newly Supported Data Types

Flow Builder now supports these additional data types from Data Cloud: Email, URL, Phone, Percent, Boolean, and Currency. Use Data Model Object (DMO) and Calculated Insight Object (CIO) fields of the newly supported data types to set entry conditions in Data Cloud triggered flows, send data to Data Cloud with the Send to Data Cloud action, and specify filter conditions in the Get Records element. Fields of these data types now appear in the $Record resource.

Launch an Active Autolaunched Flow as a Subflow Within a Prompt Flow

Now in Flow Builder, you can include an active autolaunched flow as a referenced flow in a prompt flow. Previously, you could only reference other prompt flows within a prompt flow. Referenced autolaunched flows with Wait elements aren't supported.

Enhance Flow Performance by Controlling the Number of Records Retrieved with Get Records

When you work with large datasets, you can hit performance issues or governor limits if you use the Get Records element to retrieve all records. If you set an upper limit to control data retrieval, you improve flow performance and reduce the risk of timeouts or errors. Use the All records, up to a specified limit option to set an upper limit on the number of records to retrieve.

Screen Flow Updates

Run autolaunched flows in the background when screen actions change. Screen components check if they have invalid inputs in real time. Use visual guides to lead users through the stages of your screen flow. Assign stages to screen elements from the screen properties editor.

IN THIS SECTION:

Create Responsive Screens with Automatically Triggered Screen Actions (Beta)

You can now run autolaunched flows automatically in the background when the input values associated with screen actions change. Previously, the only way to trigger a screen action was with the click of a button by using the Action Button component. The output can be displayed on the same screen, so your users can see the results of their actions on the same screen without clicking any buttons.

View Immediate Feedback from Screen Components with Invalid Values

Now your flow user can see whether an input value in a flow screen component is invalid when the user changes the focus to outside the component. For example, the user enters a value for an email component. The component validates that the input value contains the right domain as soon as your user clicks another screen component. Previously, component validation error messages appeared only when you moved to another screen or finished the flow.

Guide Users Through Screen Flows with Built-In Visual Progress Indicators

Visually guide your users through the stages of your screen flows by using the built-in progress indicator—no more writing custom code to create your own. Your users see which stage they're on and how many stages remain. Configure whether you want to show the progress indicator at the top of the screen or in the footer. Pick from a simple-style or a path-style progress indicator. Path-style progress indicators are supported only at the top of the screen.

Assign Stages to Screen Elements More Efficiently

Now you can assign stages to screen elements right from the screen properties editor instead of using assignment elements to set the $Flow.CurrentStage and $Flow.ActiveStages global variables. When a screen loads, $Flow.CurrentStage is automatically updated to the stage that's associated with the screen, and the stage is added to the end of $Flow.ActiveStages if it isn't an active stage already. To show users where they are in the flow and how many stages remain, use the built-in progress indicator or a custom progress indicator.

SEE ALSO:

Design Component Errors for a Better Experience

Create Responsive Screens with Automatically Triggered Screen Actions (Beta)

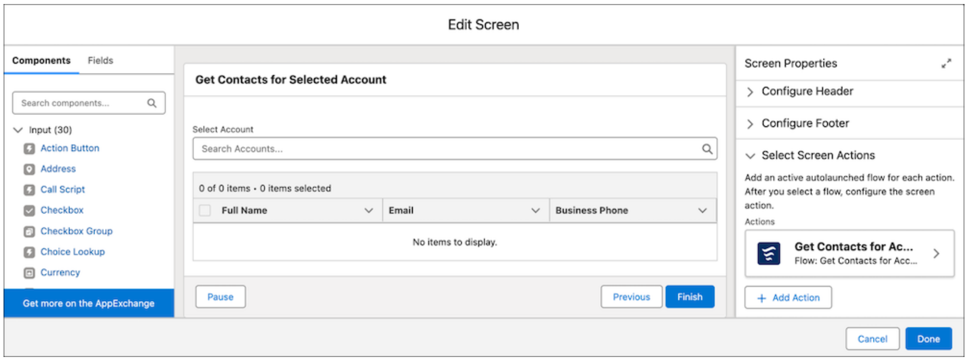
You can now run autolaunched flows automatically in the background when the input values associated with screen actions change. Previously, the only way to trigger a screen action was with the click of a button by using the Action Button component. The output can be displayed on the same screen, so your users can see the results of their actions on the same screen without clicking any buttons.

Where: This change applies to both Lightning Experience and Salesforce Classic (not available in all orgs) in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's supported only in Lightning runtime for flows.

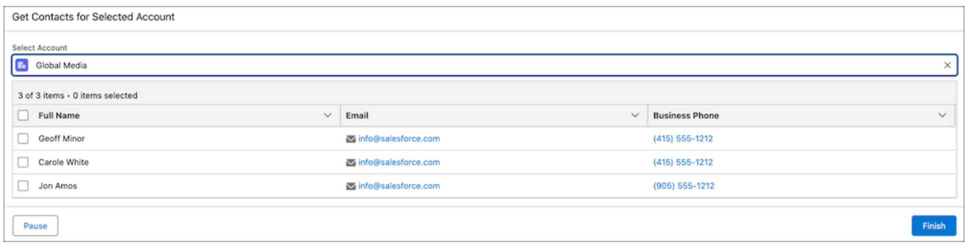
Note: Automatically triggering screen actions is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at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

How: In Flow Builder, create an autolaunched flow that retrieves data and saves that data in output variables. Activate the autolaunched flow. Then, create a screen flow and add a Screen element. Next, add a screen action and select the autolaunched flow that you created. Configure the screen action, and set input values. After that, add another component to the screen element that uses the output of the autolaunched flow. To use the output from the autolaunched flow, in the screen component's input, select the autolaunched flow, then Results, and finally the output variable from the autolaunched flow. You can see only the variables that were marked as Available for output. Then, save and run the flow.

For example, suppose you want to automatically show all contacts for a selected account record. Create an autolaunched flow that retrieves all contacts for an account. Activate the autolaunched flow. Then, create a Screen flow and add a screen element to it. Add a Lookup component so that users can select an account record. Add the activated autolaunched flow as a screen action and set the input values. This way, the autolaunched flow runs when the input values for the Lookup component change. Lastly, add a Data Table component, and add the Full Name, Email, and Business Phone columns. The output of the autolaunched flow automatically populates the Data Table when the lookup value changes.



At run time, when your user selects an account, they automatically see all the contacts for that account on the same screen—no button clicks required.



SEE ALSO:

Salesforce Help: Flow Screen Actions (can be outdated or unavailable during release preview)

View Immediate Feedback from Screen Components with Invalid Values

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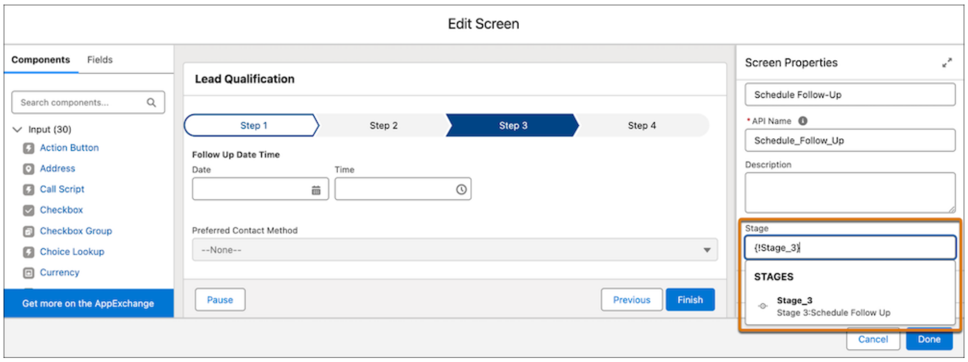
Guide Users Through Screen Flows with Built-In Visual Progress Indicators

Visually guide your users through the stages of your screen flows by using the built-in progress indicator—no more writing custom code to create your own. Your users see which stage they're on and how many stages remain. Configure whether you want to show the progress indicator at the top of the screen or in the footer. Pick from a simple-style or a path-style progress indicator. Path-style progress indicators are supported only at the top of the screen.

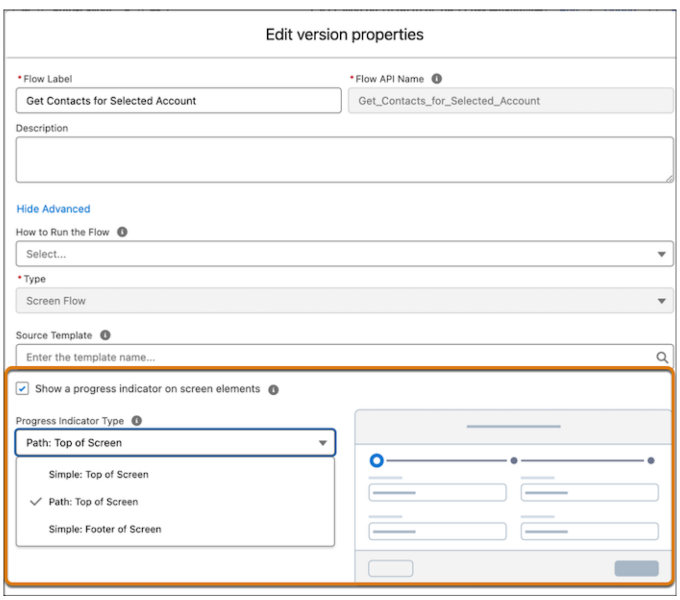
Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Professional, Enterprise, Performance, Unlimited, and Developer editions. It's supported only in Lightning runtime for flows. Built-in progress indicators are enabled by default for flows created in Spring '25 and later. For flows that were created in Winter '25 or earlier, the built-in progress indicators must be manually enabled. Built-in progress indicators aren't supported in Field Service Mobile or Salesforce Scheduler flows. The progress indicator settings are ignored when the flow is implemented in an Actions & Recommendations component because the component already displays the stages.

How: Progress indicators use stage variables to determine what stage the user is on. When a screen loads, `$Flow.CurrentStage` is automatically updated to the stage that's associated with the screen, and the stage is added to the end of `$Flow.ActiveStages` if it isn't an active stage already. Create stage resources and define the stage label, order, and whether the stage is active by default or not. Then, select the stage resource under the Stage field of the Screen element, or assign the stage resources manually by using assignment elements.

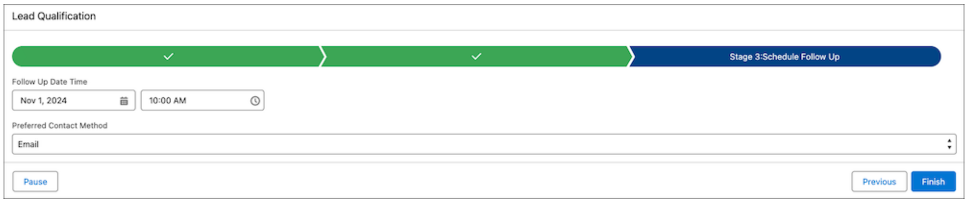
Note: Progress indicators show only active stages. To show all stages when the flow starts, set all stage resources to **Active by default**.



Finally, to show a visual progress indicator, open the flow version properties. Then, select **Show a progress indicator on screen elements** and then select the progress indicator type.



The user sees their progress on the page at run time.



SEE ALSO:

Salesforce Help: Show Users Progress Through a Flow with Stages (can be outdated or unavailable during release preview)

Assign Stages to Screen Elements More Efficiently

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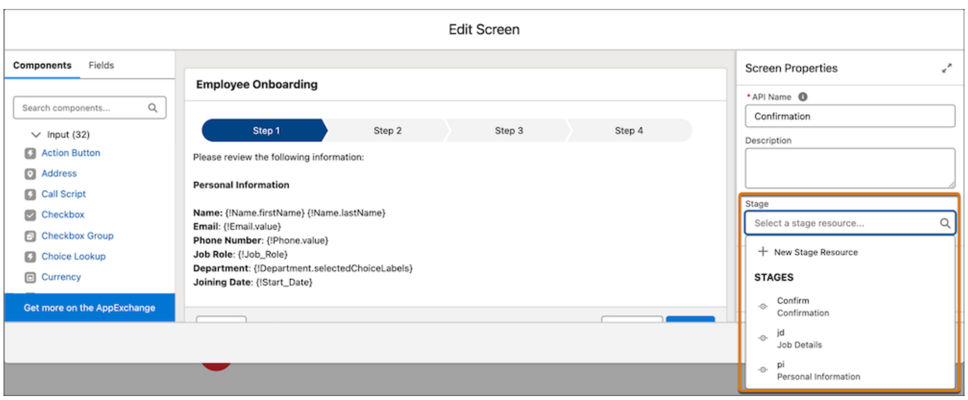
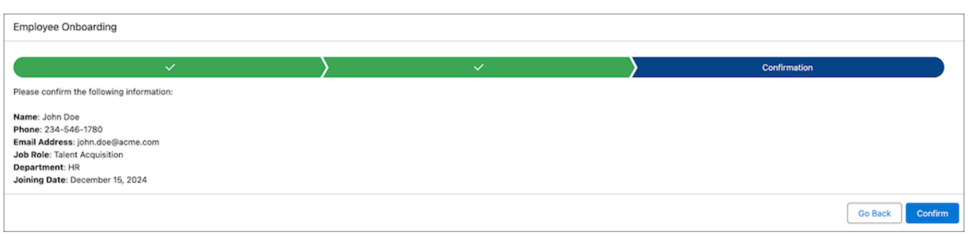
Where: This change applies to both Salesforce Classic (not available in all orgs) and Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Create your stage resources. For every stage resource, specify the stage label and order, and select whether the stage is active by default or not. Then, when you're ready to assign a stage to a screen element, from the Screen properties editor, find and select the stage resource under the Stage field.



When used together with the progress indicator, the user sees the stage that they're in at run time.



SEE ALSO:

Salesforce Help: Show Users Progress Through a Flow with Stages (can be outdated or unavailable during release preview)

User Experience Updates

Search and filter automations with the new flow creation experience. Find and select resources up to 10 layers deep with nested search. Find and manage different versions of a flow from within Flow Builder. Troubleshoot your flow with an improved Errors and Warnings pane. Undo, redo, and save as with keyboard shortcuts. Create text templates and formula flow resources more easily.

IN THIS SECTION:

Create Flows with a New Streamlined Creation Experience

We reorganized the flow creation window to help you create the automation you need quickly and more efficiently. Flows are separated into four main categories, and you can filter and search to find the automation you need.

Search for Nested Resources

When searching for and selecting resources in Flow Builder, resource pickers can now traverse up to 10 layers deep. Nested search is automatically enabled in Decision, Create Records, Assignment, Loop, Subflow, Sort, Orchestrator Stage, and Orchestrator Step elements. Nested search is also enabled for other elements, but can contain a mix of the older and newer resource pickers.

Access Flow Versions in Flow Builder

Quickly manage different versions of a flow and view the status of each version in Flow Builder. To see a flow's versions, click the flow's name in the Flow Builder navigation header. Clicking on a different version opens that version in Flow Builder in a new browser tab.

Troubleshoot Your Flow Configuration with Improvements to the Errors and Warnings Pane

Errors and warnings are now grouped by element in the Errors and Warnings pane so that you can address them more efficiently. The pane also includes more actionable messages for all elements, with links that direct you to the source of the error on the Flow Builder canvas.

Create New Text Template and Formula Flow Resources More Easily

Flow Builder extends enhanced resource selection in creating text template and formula flow resources with improved grouping and user-friendly labeling. These improvements make it easier for you to discover the resources that you need.

Navigate Collection Filter Flow Child Resources Efficiently

You can now search for and select child resources of the Collection Filter element in the updated resource menu within a flow. Previously, you selected the element of the child resource first, and then you selected the child resource.

Undo, Redo, and Save As with Keyboard Shortcuts

Increase your productivity with new keyboard shortcuts for undo, redo, and save as.

Create Flows with a New Streamlined Creation Experience

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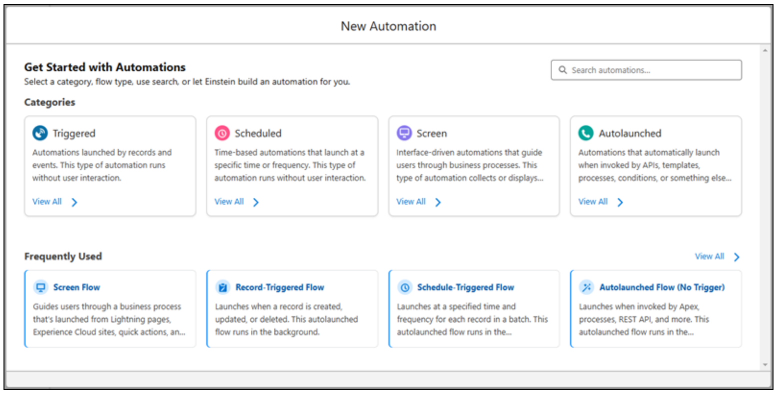
Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

How: To access the new flow creation experience, click **New Flow** from the Automation Lightning app.



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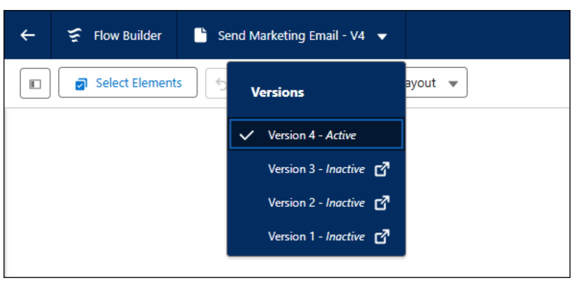

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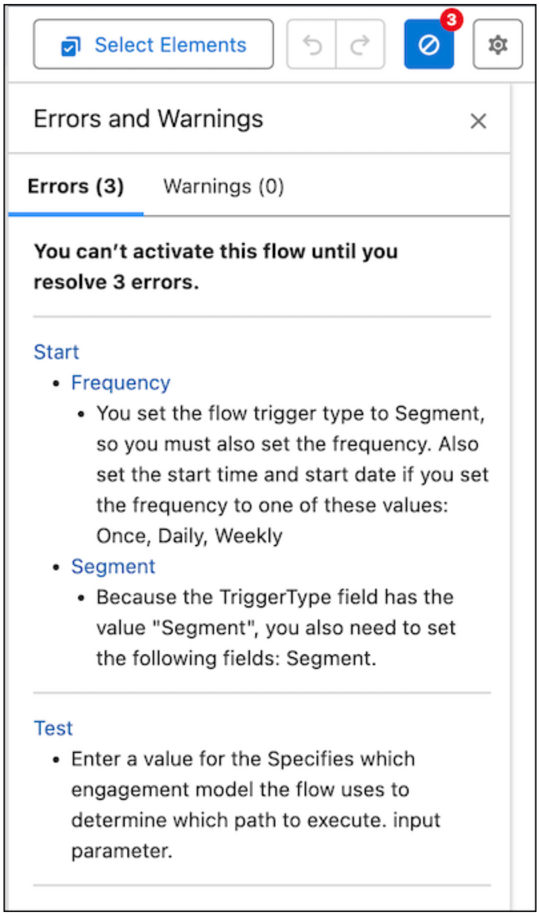
How: Create a flow, and then click the **Show Error** icon.



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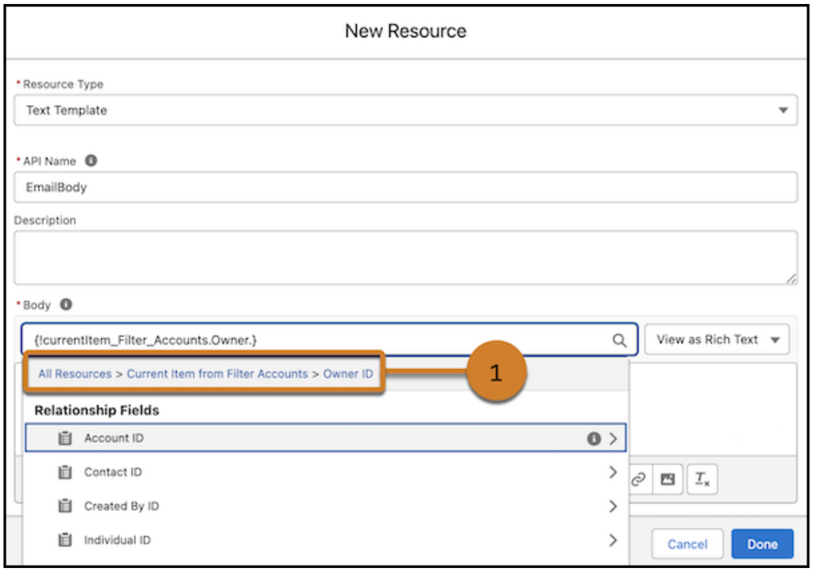
How: Create or open a flow in Flow Builder, and then click **New Resource** under the Manager panel. For the resource type, select **Text Template** or **Formula**. Insert a resource by entering a value or search for resources. The clickable breadcrumb path (1) helps you identify where you are and navigate resource groups. You can recognize resource types quickly with more intuitive icons.



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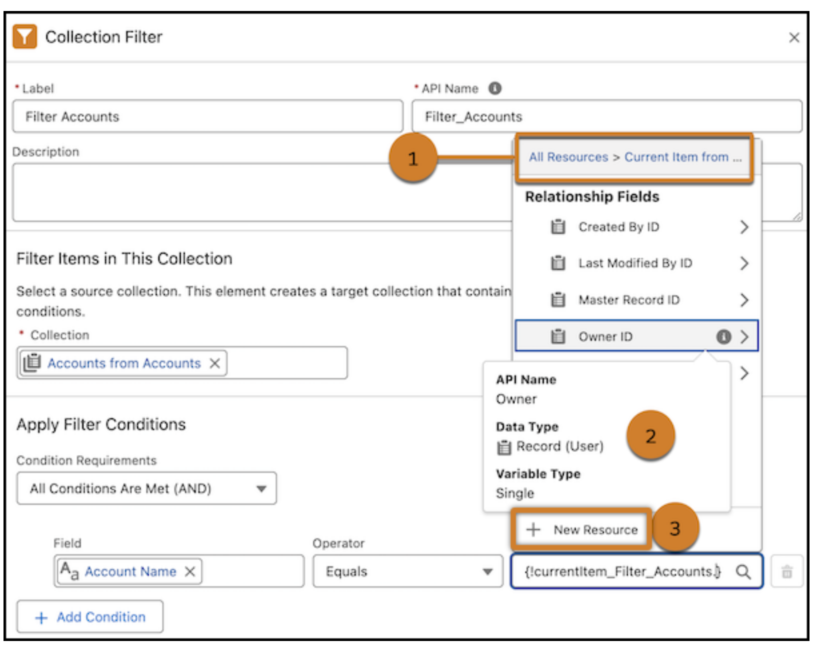
How: Create or open a flow. Then add or edit a Collection Filter element. Click in the Apply Filter Conditions field and value. The clickable breadcrumb path (1) helps you identify where you are and navigate resource groups. Recognize resource types quickly with more intuitive icons. To get helpful information (2) about a resource, hover over the resource's info icon. To create a resource quickly, click **New Resource** (3).



Undo, Redo, and Save As with Keyboard Shortcuts

Increase your productivity with new keyboard shortcuts for undo, redo, and save as.

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

How: Use these shortcuts to undo, redo, or save as:

Command	Shortcut
Undo	Windows: Ctrl+Z macOS: Cmd+Z
Redo	Windows: Ctrl+Y macOS: Cmd+Y
Save As	Windows: Shift+Ctrl+S macOS: Shift+Cmd+S

Note: These keyboard shortcuts are available on the Flow Builder canvas and element configuration panels. They aren't supported in element window pop-ups.

In Flow Builder, press Ctrl+/ or Cmd+/ to view keyboard shortcuts.

Get Help Building Flows Faster and More Accurately with Einstein (Generally Available)

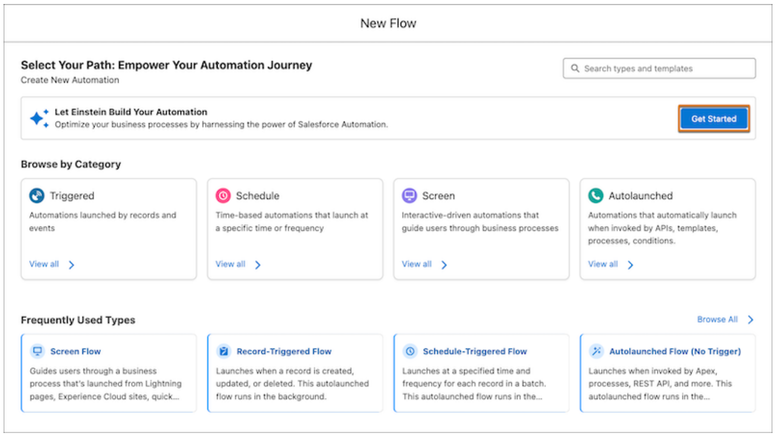
Get Einstein to use the power of generative AI and automatically build flows for you based on your instructions. Describe what you want to automate, and Einstein takes care of the rest. This feature, which is now generally available, includes some changes since the beta release. Einstein now generates more accurate flows, and it does so faster than before. You can help Einstein get even better by using the prominent feedback buttons to provide feedback on your flows.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Einstein generative AI is available in Lightning Experience. To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

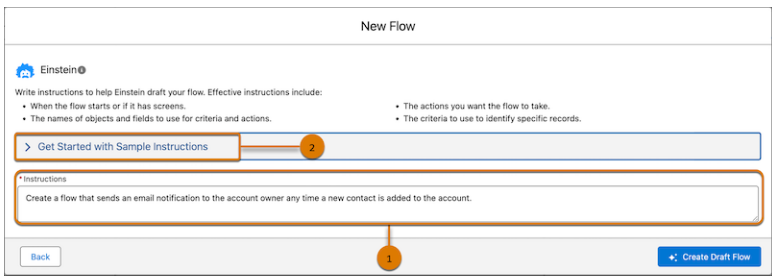
Important: Flow creation with Einstein consumes Einstein Requests credits. Einstein Requests is a usage metric for generative AI. The use of generative AI capabilities, in either a production or sandbox environment, consumes Einstein Requests. To learn more, see Einstein Usage.

How:

Turn on Einstein generative AI in Setup. Next, from Setup, in the Quick Find Box, enter `Flow Creation with Einstein`, and activate it. Create a flow by using the Automation Lightning app. In the Let Einstein Build your Automation section, click **Get Started**.

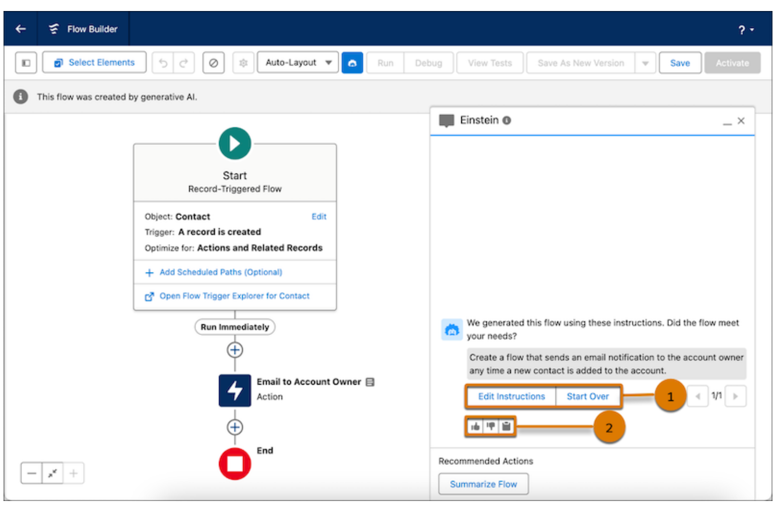


Write instructions from scratch (1), or get started with sample instructions (2).



After your draft flow opens in Flow Builder, check the flow for accuracy and safety. Also, before activating, be sure to debug and test the flow.

To get more accurate results from Einstein, share your feedback in the Einstein panel by clicking thumbs up or thumbs down (1). If the flow doesn't meet your needs, edit the instructions or start over (2) in a new window.



SEE ALSO:

Salesforce Help: Build a Flow with Einstein (can be outdated or unavailable during release preview)

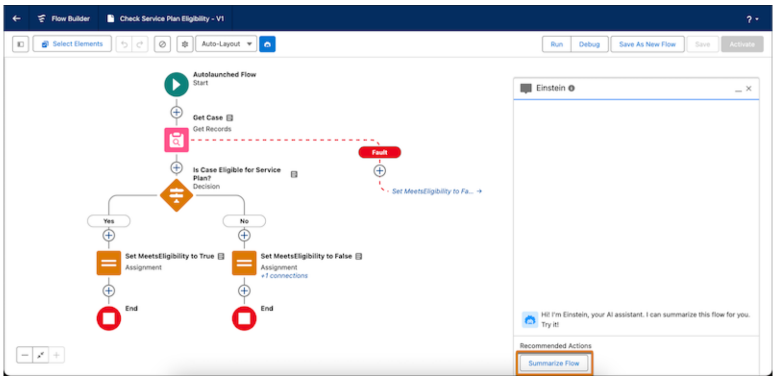
Generate a Detailed Description of a Flow with Einstein

Generate a Detailed Description of a Flow with Einstein

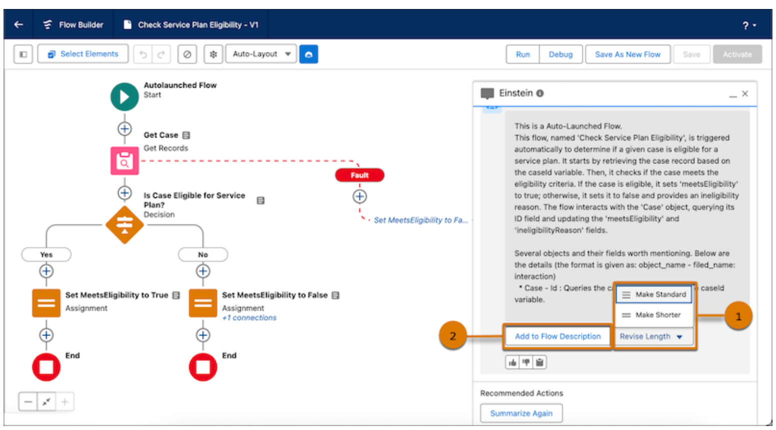
Maintaining a flow can be challenging, especially if you didn't create it. Without a detailed flow description, it can be tough to figure out what the flow does. Now you can use Einstein to summarize an existing flow or a new one as you create it. The summary describes all the flow steps and includes the input and output variables, the objects that the flow changes, and the subflows that the flow refers to. You can then add the generated summary to the flow description to keep everyone informed.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Einstein generative AI is available in Lightning Experience. To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

How: Turn on Einstein generative AI in Setup. Next, from Setup, in the Quick Find Box, enter `Flow Creation with Einstein`, and activate it. To summarize a flow, open it in Flow Builder. In the Einstein panel, click **Summarize Flow**. The Einsten panel is open by default. If you don't see it, click Einstein .



After you generate the summary, you can shorten or lengthen it (1). The standard summary provides a high-level overview and includes the objects that were modified in the flow. The shorter version summarizes the flow in one or two sentences.



You can then add the summary to the flow description (2). If your flow has an existing description, you can update the description. Updating the description replaces the existing description with the flow summary.

SEE ALSO:

Salesforce Help: Summarize Flows with Einstein (can be outdated or unavailable during release preview)

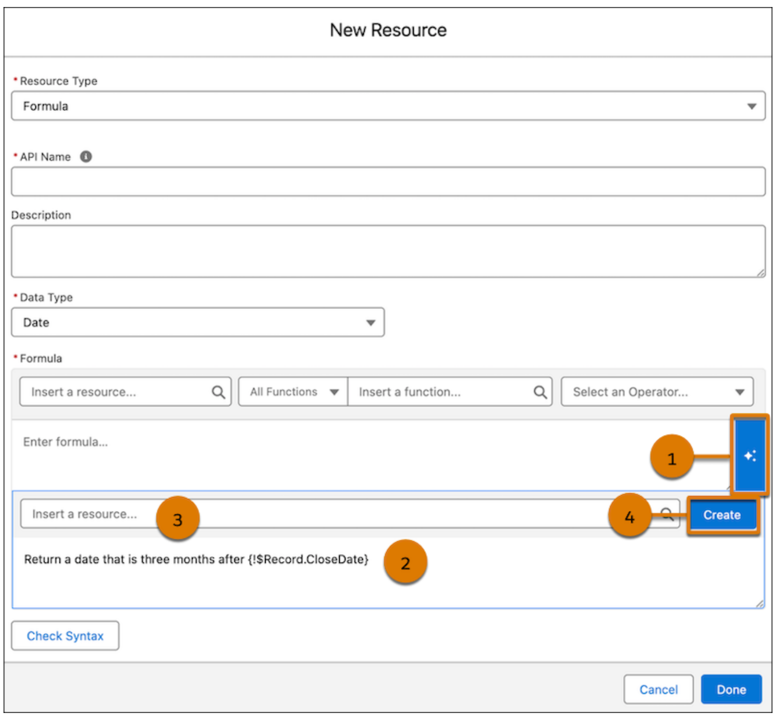
Get Help Creating Flow Formulas with Einstein (Generally Available)

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. This feature is now generally available.

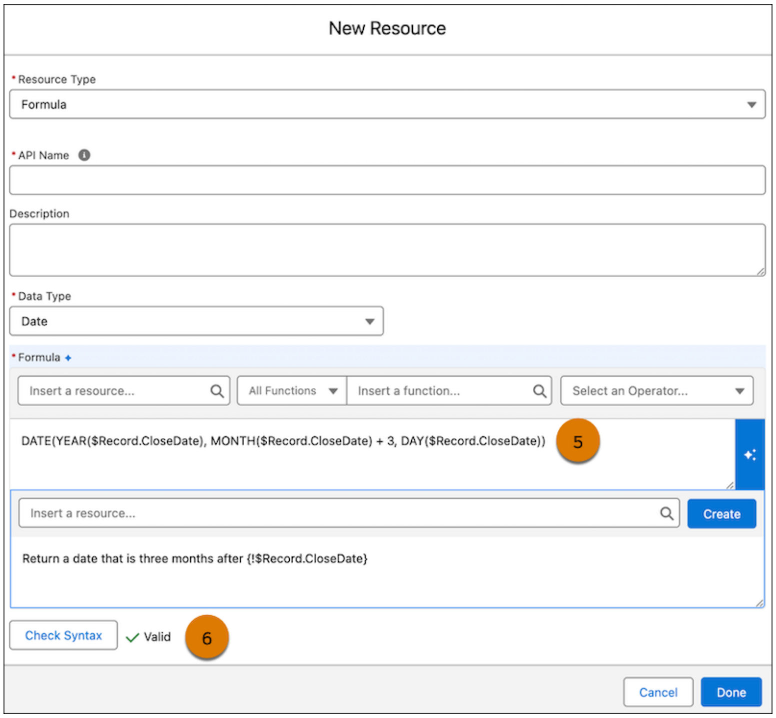
Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein for Platform add-on. Einstein generative AI is available in Lightning Experience. To purchase Einstein for Sales, Einstein for Platform, or Einstein for Service add-ons, contact your Salesforce account executive.

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:

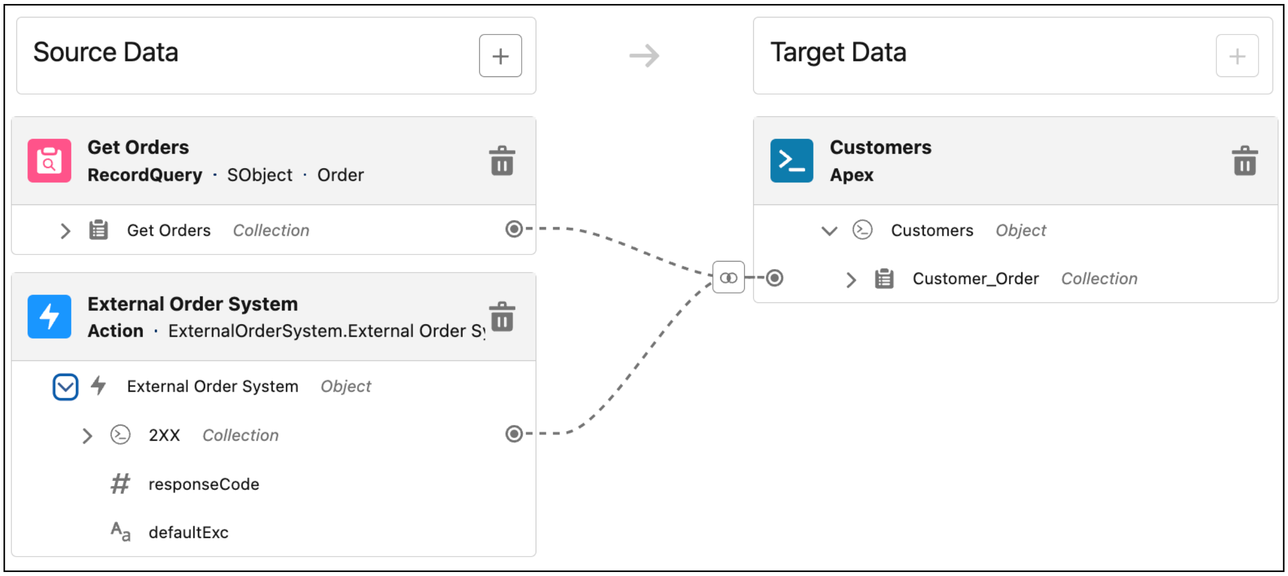
Salesforce Help: Creating Flow Formulas with Einstein (can be outdated or unavailable during release preview)

Join Collections with the Transform Element

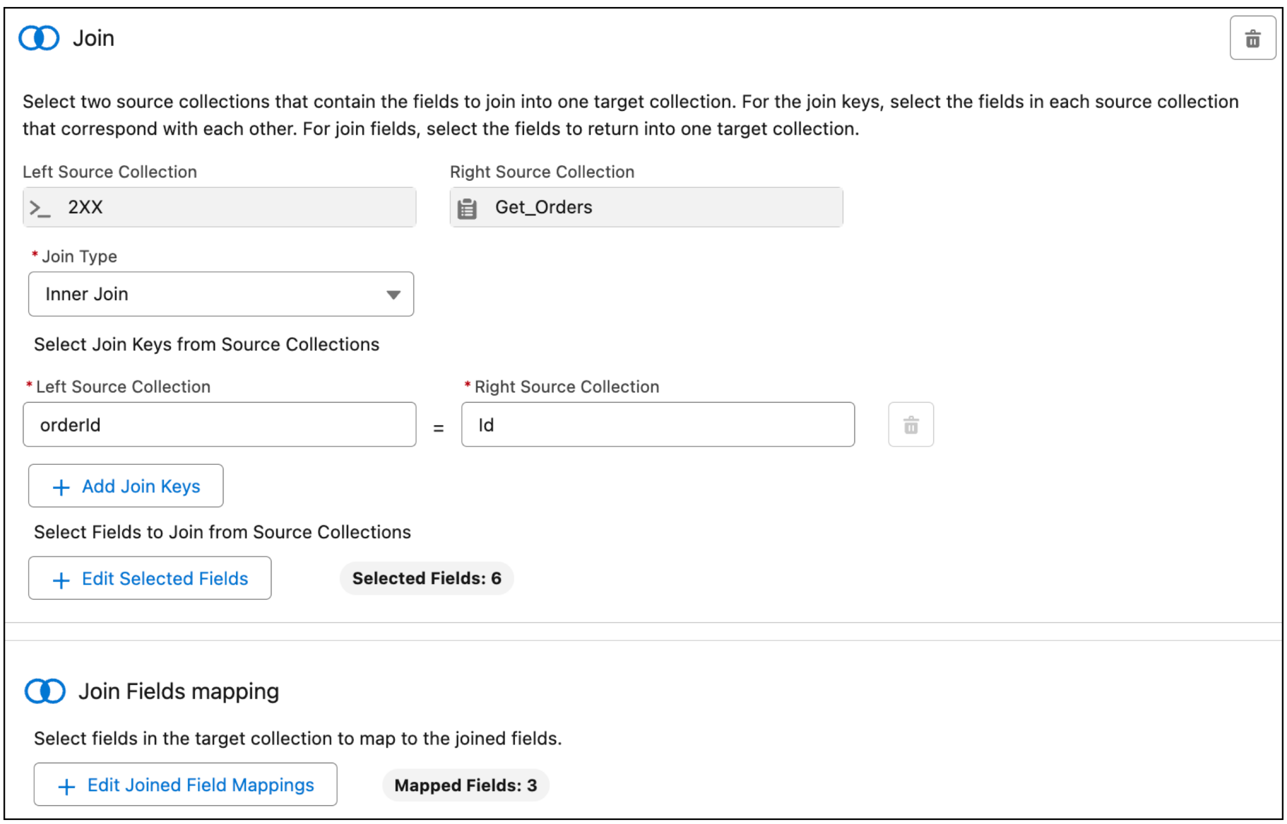
Combine source collections from related flow resources into one target collection. For example, you can combine order records from an external system with Salesforce orders to get a combined data structure that is displayed in a data table in a flow screen. The flow screen shows each order along with the amount and the quantities.

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

How: From Flow Builder, add the Transform element. Add two flow resources for the source collections. Add a target collection that stores the combined data from the source collections.



Configure the join keys for each source collection, and select the join fields to return into the target collection.



SEE ALSO:

Salesforce Help: Join Collections in a Flow (can be outdated or unavailable during release preview)

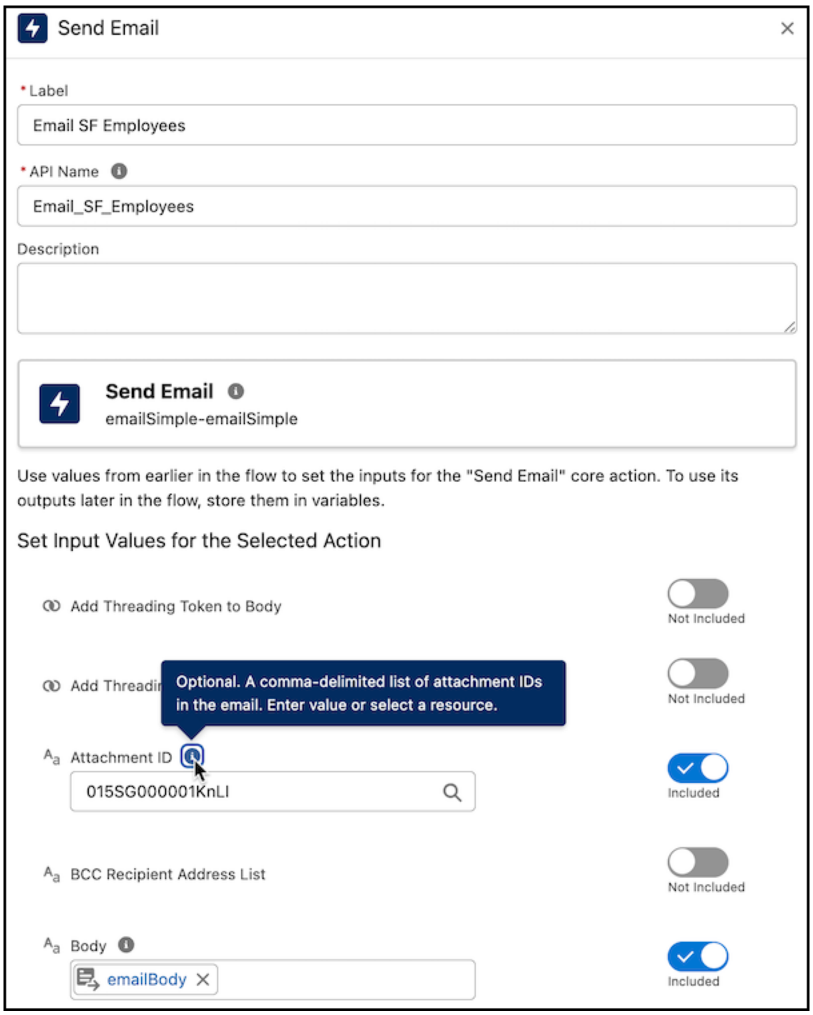
Send Emails with Attachments in Flow Builder

Enhance your Flow Builder emails by sharing documents or files with your recipients by using Send Email action. To attach a file, provide the ID of a file to the Send Email action. The maximum size of the email created, including attachments, is 35 MB.

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 and select **Send Email**. When you set input values, turn on the **Attachment ID** field, and then add the ID of the attachment. The ID can be of a Document, Content Version, or Attachment items. If you want to add more attachment IDs, enter them as a comma-delimited list.

Note: Using attachments in the Send Email action changes the API called by the action, which changes the daily email send limit to the General Email Limit instead of the Daily Workflow Email Limit.



SEE ALSO:

Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)

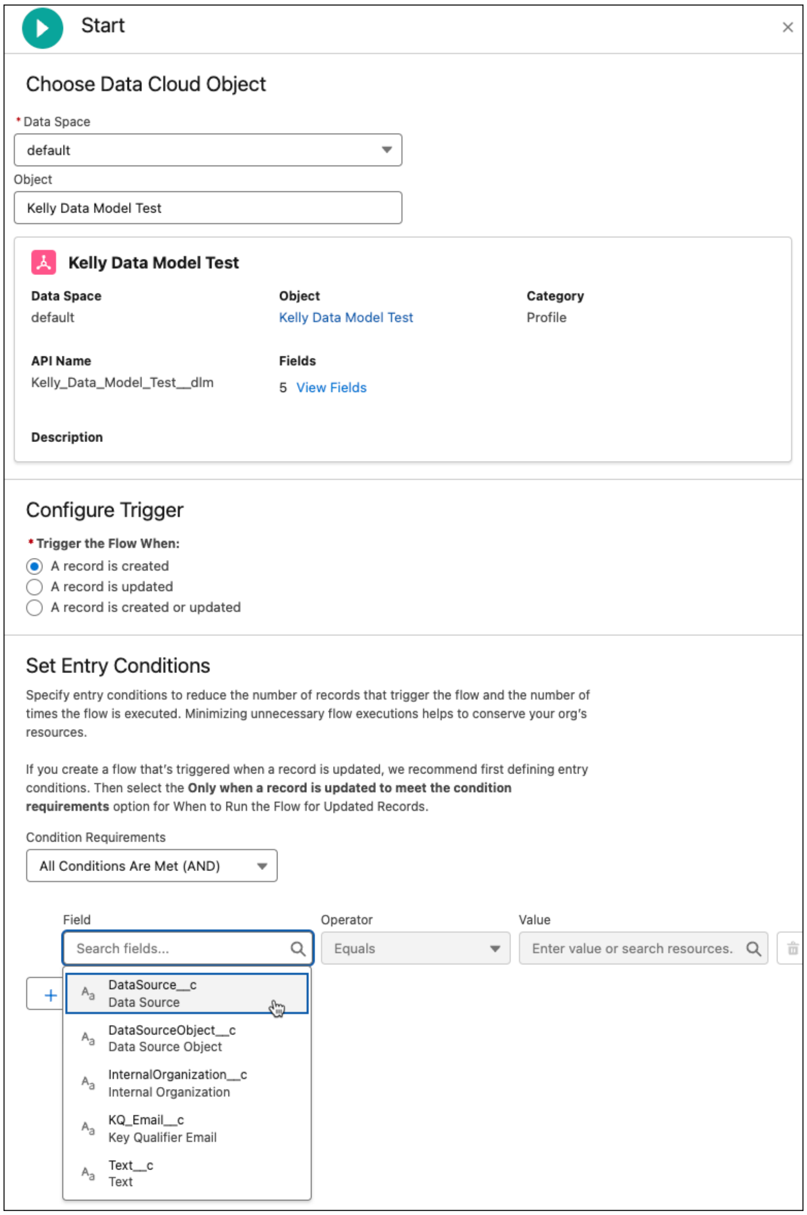
Apex Reference Guide: SingleEmailMessage Methods

Retrieve More Information from Data Cloud by Using Newly Supported Data Types

Flow Builder now supports these additional data types from Data Cloud: Email, URL, Phone, Percent, Boolean, and Currency. Use Data Model Object (DMO) and Calculated Insight Object (CIO) fields of the newly supported data types to set entry conditions in Data Cloud triggered flows, send data to Data Cloud with the Send to Data Cloud action, and specify filter conditions in the Get Records element. Fields of these data types now appear in the $Record resource.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions where Data Cloud is enabled.

How: Open a Data Cloud triggered flow. Where Data Cloud fields are supported, select a DMO or CIO field of one of the newly supported data types. Configure the rest of the flow. Save and run the flow.



Launch an Active Autolaunched Flow as a Subflow Within a Prompt Flow

Now in Flow Builder, you can include an active autolaunched flow as a referenced flow in a prompt flow. Previously, you could only reference other prompt flows within a prompt flow. Referenced autolaunched flows with Wait elements aren't supported.

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 then set the input data type. Add the Subflow element to the canvas. Search for and select the autolaunched 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.

SEE ALSO:

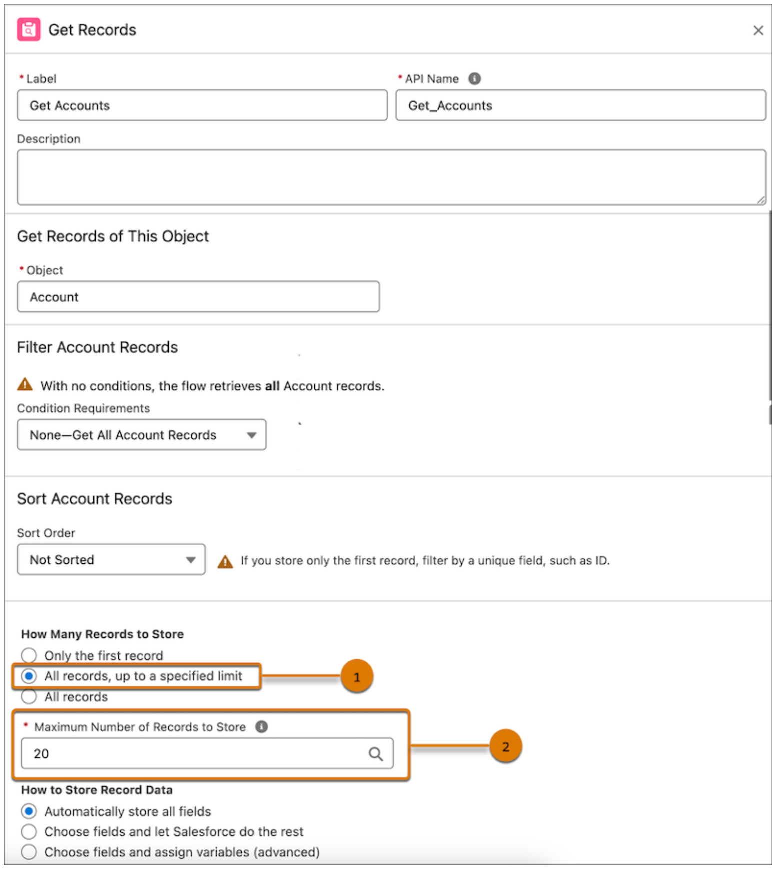
Salesforce Help: Flow Element: Subflow (can be outdated or unavailable during release preview)

Enhance Flow Performance by Controlling the Number of Records Retrieved with Get Records

When you work with large datasets, you can hit performance issues or governor limits if you use the Get Records element to retrieve all records. If you set an upper limit to control data retrieval, you improve flow performance and reduce the risk of timeouts or errors. Use the All records, up to a specified limit option to set an upper limit on the number of records to retrieve.

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: To set a limit on the number of records that the Get Records element retrieves, first add a Get Records element to your flow. Then, under How Many Records to Store, select **All Records, up to a specified limit** (1). Enter the maximum number of records to store (2). The Get Records element retrieves all the records that meet the criteria up to the specified limit.



SEE ALSO:

Salesforce Help: Flow Element: Get Records (can be outdated or unavailable during release preview)

Flow for Marketing Cloud

Automate your responses to customer actions with automation events. Manually select a winning path in the Path Experiment element. Define flow triggers by using real-time data from Data Cloud. Access data graph attributes in Decision elements, exit rules, and campaign emails. Debug flows more easily with a more readable Debug Details pane.

IN THIS SECTION:

Automate Your Responses to Common Customer Actions with More Automation Events

Streamline how you respond to customer behaviors with more Salesforce-provided events in automation event-triggered flows. Trigger a flow based on key business events such as WhatsApp channel subscriptions, message interactions, SMS link clicks, email engagements, cart abandonment, and communication issues such as bounced emails or failed message deliveries. You can also respond to events that signal an issue with one of your communication channels such as a bounced email or a failure to deliver a WhatsApp or SMS message.

Pick a Winning Path, Test Subsets of your Audience, and More in the Path Experiment Element

After you determine which path is working the best for your customer journey, you can manually select that winning path in the Path Experiment element. You can also set a subset of your audience to run the experiment on, keeping the remainder of your audience on hold as you determine the winning path. Path Experiment is now also supported in Automation Event-Triggered flows, so you can create experiments that are triggered off of form submissions and more.

Define Your Own Flow Trigger by Using Real-Time Data from Data Cloud

In an automation event-triggered flow, define event conditions that trigger the flow by using real-time data from Data Cloud without persisting the event to the Event Library. To define the event, you select a data graph and a data model object that include the fields that trigger the flow, and then specify the conditions that trigger the flow. You can choose to trigger the flow every time conditions are met, the first time conditions are met, or any time the conditions evaluate from false to true. You can also choose whether a user can start the flow multiple times concurrently.

Personalize Your Flows with Access to Data Cloud Data in More Elements

Now you can access data graph attributes in Decision elements, exit rules, and the Content tab of campaign emails. To access data graph attributes in a Decision element, your flow must include a Wait for Amount of Time element before the Decision element with the Amount of Time set to 24 hours or more. This delay gives Marketing Cloud's data engine time to establish the identity of the individual in the flow. Similarly, exit rules that reference data graph attributes are executed 24 hours after you activate the flow.

View Metrics in Flow Builder with Embedded Analytics

Your flow element metrics are more clearly displayed on the Flow Builder canvas with element cards. With element cards, detailed metrics are just a single click away. The embedded analytics include a more granular visual breakdown of the element's status. Previously, the element graph showed only successes and errors. This feature was formerly named on-canvas insights.

Preview and Test WhatsApp Messages

In the Send WhatsApp Message action, you can preview and test your messages to make sure that your messages are properly formatted before you send them out.

Debug Automation Event-Triggered Flows

Understand a customer's path through an automation event-triggered flow with support for debugging. Specify a triggering event and see how your flow responds. For example, see how your flow progresses when an order with a particular order number is placed or when an email subscription event is received for a given individual. Restart the flow anytime to specify different parameters.

Debug Flows at a Glance with the Improved Debugging Experience

The debugging experience for flows now includes element-level summaries to help you understand more quickly what happened at each point in a flow. For example, for an Update Records element, the Debug Details pane shows at a glance how many elements were updated after the element was executed.

Automate Your Responses to Common Customer Actions with More Automation Events

Streamline how you respond to customer behaviors with more Salesforce-provided events in automation event-triggered flows. Trigger a flow based on key business events such as WhatsApp channel subscriptions, message interactions, SMS link clicks, email engagements, cart abandonment, and communication issues such as bounced emails or failed message deliveries. You can also respond to events that signal an issue with one of your communication channels such as a bounced email or a failure to deliver a WhatsApp or SMS message.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition.

Who: To create automation event-triggered flows, users need the Manage Flow permission or the Create or Modify Automation Event-Triggered Flows permission.

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.

SEE ALSO:

Salesforce Help: Event Library (can be outdated or unavailable during release preview)

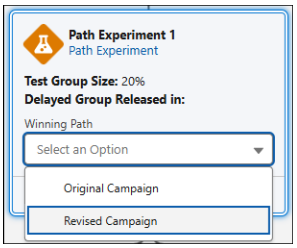
Salesforce Help: Triggering Flows After a Business Event with Automation Event Triggers (can be outdated or unavailable during release preview)

Pick a Winning Path, Test Subsets of your Audience, and More in the Path Experiment Element

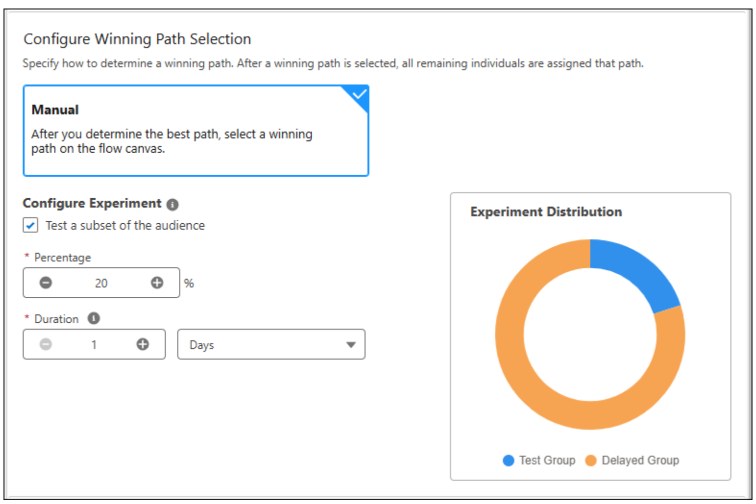
After you determine which path is working the best for your customer journey, you can manually select that winning path in the Path Experiment element. You can also set a subset of your audience to run the experiment on, keeping the remainder of your audience on hold as you determine the winning path. Path Experiment is now also supported in Automation Event-Triggered flows, so you can create experiments that are triggered off of form submissions and more.

Where: This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Advanced edition.

How: To select a winning path, select the Path Experiment element on the Flow Builder canvas. In the Winning Path dropdown, select the path that you want to designate as the winning path. Selecting a winning path sends all new, remaining, and delayed group members of your audience down that path, including audience members that have entered the flow but haven't yet entered the experiment. By selecting a winning path you can make changes to the flow without creating a new flow version.



To experiment on a subset of your audience, select **Test a subset of your audience** in the Path Experiment properties panel. Enter the percentage of the audience that you want to enter the experiment, and a duration for how long to leave the delayed group out of the experiment. If the duration expires, the delayed group is released to the experiment and randomly assigned paths based on your path distribution percentages. Testing a subset of the audience is available only for flows that are set to run once.



Define Your Own Flow Trigger by Using Real-Time Data from Data Cloud

In an automation event-triggered flow, define event conditions that trigger the flow by using real-time data from Data Cloud without persisting the event to the Event Library. To define the event, you select a data graph and a data model object that include the fields that trigger the flow, and then specify the conditions that trigger the flow. You can choose to trigger the flow every time conditions are met, the first time conditions are met, or any time the conditions evaluate from false to true. You can also choose whether a user can start the flow multiple times concurrently.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition.

Who: To create automation event-triggered flows, users need the Manage Flow permission or the Create or Modify Automation Event-Triggered Flows permission.

How: From the Flows or Campaigns tab, create an automation event-triggered flow. In the Start node, click **Select Event**. In the Event Library, select **Custom Real-Time Data Cloud Event**. Configure the event. Configure the rest of the flow. Save and run the flow.

SEE ALSO:

Salesforce Help: Event Library (can be outdated or unavailable during release preview)

Salesforce Help: Triggering Flows After a Business Event with Automation Event Triggers (can be outdated or unavailable during release preview)

Personalize Your Flows with Access to Data Cloud Data in More Elements

Now you can access data graph attributes in Decision elements, exit rules, and the Content tab of campaign emails. To access data graph attributes in a Decision element, your flow must include a Wait for Amount of Time element before the Decision element with the Amount of Time set to 24 hours or more. This delay gives Marketing Cloud's data engine time to establish the identity of the individual in the flow. Similarly, exit rules that reference data graph attributes are executed 24 hours after you activate the flow.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition.

Who: To manage flows, users need the Manage Flow permission or the View Flows, Create or Edit Flows, and Activate or Deactivate Flows permissions.

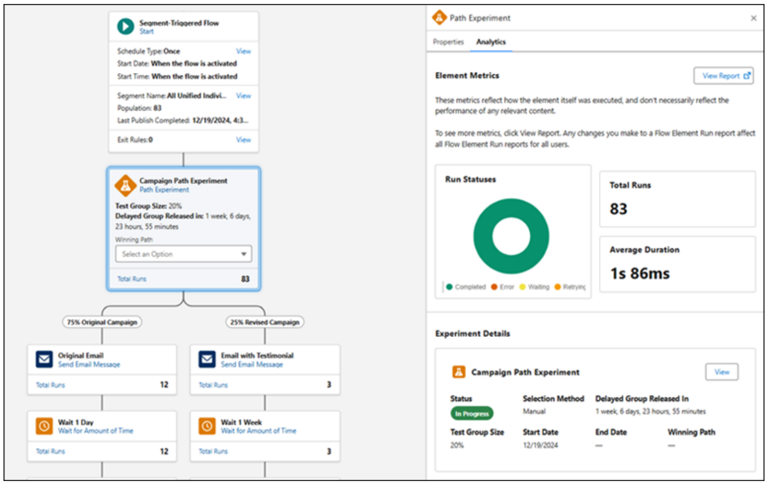
How: From the Flows or Campaigns tab, create a segment-triggered or automation event-triggered flow. Configure the flow and reference a data graph attribute in the flow. For example, add an exit rule to the flow with a condition that includes a data graph attribute as a resource. Save and run the flow.

View Metrics in Flow Builder with Embedded Analytics

Your flow element metrics are more clearly displayed on the Flow Builder canvas with element cards. With element cards, detailed metrics are just a single click away. The embedded analytics include a more granular visual breakdown of the element's status. Previously, the element graph showed only successes and errors. This feature was formerly named on-canvas insights.

Where: This feature is available in Lightning Experience for Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth or Advanced editions.

How: On the Flow Builder canvas, each element is represented by a card that shows its metrics. Click on a card to see a more detailed breakdown of the element's metrics.



Preview and Test WhatsApp Messages

In the Send WhatsApp Message action, you can preview and test your messages to make sure that your messages are properly formatted before you send them out.

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

How: In the element's configuration panel, click the dropdown menu on the WhatsApp message and then click **Preview and Test**. From there, you can preview the message by using a marketing segment, or send test messages to specific numbers.

Debug Automation Event-Triggered Flows

Understand a customer's path through an automation event-triggered flow with support for debugging. Specify a triggering event and see how your flow responds. For example, see how your flow progresses when an order with a particular order number is placed or when an email subscription event is received for a given individual. Restart the flow anytime to specify different parameters.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition.

Who: To create automation event-triggered flows, users need the Manage Flow permission or the Create or Modify Automation Event-Triggered Flows permission.

How: Open an automation event-triggered flow. Click **Debug**. Set the debug options and input variables. Click **Run**. Review the Debug Details pane.

Debug Flows at a Glance with the Improved Debugging Experience

The debugging experience for flows now includes element-level summaries to help you understand more quickly what happened at each point in a flow. For example, for an Update Records element, the Debug Details pane shows at a glance how many elements were updated after the element was executed.

Where: This feature is available in Lightning Experience for flows in Marketing Cloud Growth Edition.

How: Open a supported flow. Click **Debug**. Set the debug options and input variables. Click **Run**. Review the Debug Details pane.

Flow Runtime

Versioned updates are available for flows that are configured to run on API version 63.0.

IN THIS SECTION:

Flow and Process Run-Time Changes

Get new flow updates with these versioned changes.

Flow and Process Run-Time Changes

Get new flow updates with these versioned changes.

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. These updates affect flows only if they're configured to run on API version 63.0 or later.

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.

Clear a Reactive Data Table If the Source Collection Isn't Set

If a Data Table component's source collection is the output of a screen action, and the screen action's autolaunched flow doesn't set a value for the output collection, the Data Table contents are cleared. For example, let's say that a Data Table component is populated with records from a screen action's output record collection. Then, the screen action is triggered again, but this time the output record collection isn't assigned any records. The records that were in the Data Table from the first time the screen action ran are now cleared from the Data Table. Previously, the records that were in the Data Table from the first time the screen action ran would remain in the Data Table.

See Feedback from Screen Components with Invalid Values

Now your flow user can see whether an input value in a flow screen component is invalid when the user changes the focus to outside the component. Previously, component validation error messages appeared only when you moved to another screen or finished the flow. See View Immediate Feedback from Screen Components with Invalid Values.

Variables with Same Names in Parent and Referenced Flows Were Changed

Variables with the same API names in a referenced flow and parent flow no longer inherit values from the parent flow. For example, a screen flow creates an account that assigns a value to the group_type variable. The screen flow includes the Subflow element that executes a referenced flow. The referenced flow also includes a group_type variable. The Decision element in the referenced flow checks the value of the group_type variable that's set in the referenced flow and not inherited from the parent flow. The flow follows different outcome paths depending on the value of the group_type variable.

Flow Management

Promote your tested Data Cloud triggered flows from sandbox to production environments. View failed and paused flow interviews from the Automation Lightning app.

IN THIS SECTION:

Copy Data Cloud-Triggered Flows from Sandbox to Production

Integrate Data Cloud-triggered flow changes made in a sandbox environment back into the production environment using changesets. Thorough testing in a sandbox helps make sure that only high-quality changes are deployed to production, because you can identify and fix issues before they impact your production environment.

Monitor All Failed and Paused Flow Interviews from the Automation Lightning app

The new Monitor tab in the Automation Lightning app is your one-stop shop for finding all your failed and paused flow interviews. The Monitor tab provides valuable data about why a flow interview failed. Debug failed flow interviews and resume paused flow interviews all from the Automation Lightning app. Having the necessary information in one place helps ensure smooth and uninterrupted business operations and improves overall efficiency and productivity.

Copy Data Cloud-Triggered Flows from Sandbox to Production

Integrate Data Cloud-triggered flow changes made in a sandbox environment back into the production environment using changesets. Thorough testing in a sandbox helps make sure that only high-quality changes are deployed to production, because you can identify and fix issues before they impact your production environment.

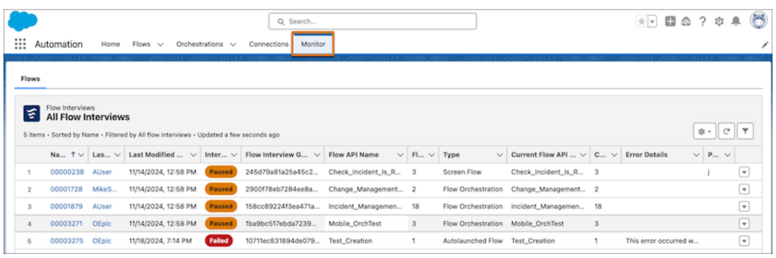
Where: This change applies to Lightning Experience and Salesforce Classic in all editions where Data Cloud is enabled.

Monitor All Failed and Paused Flow Interviews from the Automation Lightning app

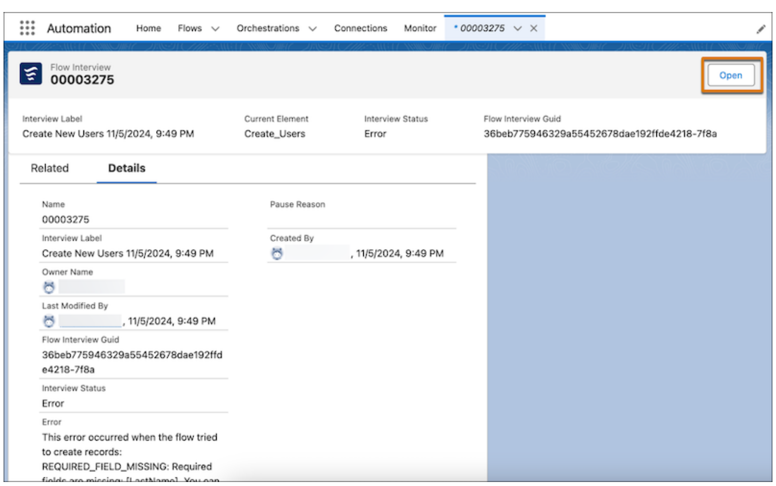
The new Monitor tab in the Automation Lightning app is your one-stop shop for finding all your failed and paused flow interviews. The Monitor tab provides valuable data about why a flow interview failed. Debug failed flow interviews and resume paused flow interviews all from the Automation Lightning app. Having the necessary information in one place helps ensure smooth and uninterrupted business operations and improves overall efficiency and productivity.

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

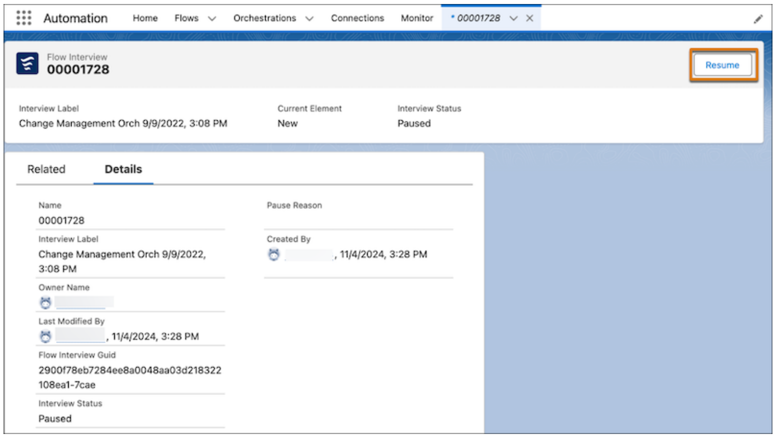
How: If you've enabled access to the Automation Lightning app, the Monitor tab automatically becomes available. View all the paused and failed flow interviews on the Monitor tab.



To debug a failed flow interview, on the Details page of the failed flow interview, click **Open**.



To resume a pause flow interview, on the Details page of the paused flow interview, click **Resume**.



SEE ALSO:

Salesforce Help: Monitor and Manage Paused and Failed Flow Runs (can be outdated or unavailable during release preview)

Flow Extensions

Create a Lightning web component that enhance a flow screen component's error message experience at run time.

IN THIS SECTION:

Design Component Errors for a Better Experience

Your developers can now enhance error handling at run time for your Lightning web component on a flow screen. Previously, the input validation error message from the flow appeared only under the component. Now components that manage their own validation can control how and where errors appear without the risk of showing duplicate errors. Use the `@api` interface to implement the existing `validate()` method and the new methods `setCustomValidity(externalErrorMessage: string)` and `reportValidity()`.

Design Component Errors for a Better Experience

Your developers can now enhance error handling at run time for your Lightning web component on a flow screen. Previously, the input validation error message from the flow appeared only under the component. Now components that manage their own validation can control how and where errors appear without the risk of showing duplicate errors. Use the `@api` interface to implement the existing `validate()` method and the new methods `setCustomValidity(externalErrorMessage: string)` and `reportValidity()`.

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: Previously, if the component contained an invalid input, the flow displayed an input validation error message below the component at run time. If the component also contained validation logic that displayed an error message, the flow user saw duplicate error messages. Now you can customize how to display the error messages.

How: For components that contain validation logic, you can now implement these methods to take control of rendering errors.

- `validate()`
- `setCustomValidity(externalErrorMessage: string)`
- `reportValidity()`

For existing component validation, you can keep the same logic that's contained in the `validate()` method. Like before, the flow calls the `validate()` method when a flow user navigates to the next screen or finishes the flow. The flow calls the new `setCustomValidity(externalErrorMessage: string)` method when there are input validation errors. When the `setCustomValidity(externalErrorMessage: string)` method is called, the component stores the input validation error message from the flow, so it can be displayed later. The flow calls the `reportValidity()` method when it's time to render any errors that your component is aware of.

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

IN THIS SECTION:

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 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. This release update was first available in Summer '24 and was scheduled to be enforced in Spring '25, but we postponed the enforcement date to Winter '26.

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

This update was scheduled to be enforced in Spring '25. Starting Spring '25, Salesforce no longer enforces this update, but recommends enabling it. Once enabled, it preserves data integrity by rolling back transactions that end in an exception. When you execute an Apex action using the REST API, the API call doesn't change Salesforce data if that exception occurs.

Enhance Flexibility and Reusability in Prompt Flows (Release Update)

This update removes the ability to specify a flex prompt template type from a template-triggered prompt flow. Instead, create template-triggered prompt flows that use manual inputs because the flows aren't limited to a single prompt template type. You must update existing flows that reference flex prompt template types to use manual inputs. This update is available starting in Winter '25.

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.

Restrict User Access to Run Flows (Release Update)

This update was first made available in Winter '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement to Winter '26. 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. Salesforce postponed the enforcement to allow additional time for admins to test and prepare for the change. There is no impact to admins who already enabled the update. We appreciate your adoption of this change.

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. This release update was first available in Summer '24 and was scheduled to be enforced in Spring '25, but we postponed the enforcement date to Summer '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.

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

Salesforce Help: Manage Redirections to External URLs

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. This release update was first available in Summer '24 and was scheduled to be enforced in Spring '25, but we postponed the enforcement date to Winter '26.

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

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

This update was scheduled to be enforced in Spring '25. Starting Spring '25, Salesforce no longer enforces this update, but recommends enabling it. Once enabled, it preserves data integrity by rolling back transactions that end in an exception. When you execute an Apex action using the REST API, the API call doesn't change Salesforce data if that exception occurs.

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

When: This update was first made available in Spring '23 and was scheduled to be enforced in Spring '25. Salesforce is no longer enforcing this update.

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

Enhance Flexibility and Reusability in Prompt Flows (Release Update)

This update removes the ability to specify a flex prompt template type from a template-triggered prompt flow. Instead, create template-triggered prompt flows that use manual inputs because the flows aren't limited to a single prompt template type. You must update existing flows that reference flex prompt template types to use manual inputs. This update is available starting in Winter '25.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

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: Before this update is enabled or enforced, flex prompt template types are available to template-triggered prompt flows. Only a flex prompt template type can run a template-triggered prompt flow that references the same flex prompt template type.

After this update is enabled or enforced, flex prompt template types are no longer available as prompt template types in template-triggered prompt flows. New and existing template-triggered prompt flows are no longer associated with a flex prompt template type.

You can create template-triggered prompt flows that use manual inputs because the flows aren't limited to a single prompt template type. Reuse the flows across various prompt template types.

How: When this update is enabled or enforced, existing template-triggered prompt flows that reference flex templates fail to run because the flex templates they referenced are now undefined. Existing flex templates are no longer available in template-triggered prompt flows.

Before you enable this update, you must update existing template-triggered prompt flows that reference flex templates to use manual inputs. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**. Open each template-triggered prompt flow that uses a flex prompt template type. Open the Start element. Make a note of the current inputs and their data types.

Change the prompt template input type from automatic to manual. For each input in the flex template, create a variable of the same data type with Available for input selected. Because you replaced the previous input with manual variables, you must update all references to inputs throughout the flow. Save and activate your flow.

To apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Enhance Flexibility and Reusability in Prompt Flows, follow the testing and activation steps.

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

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

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

When: Salesforce enforces this update in Summer '25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: To apply this update, from Setup, in the Quick Find box, enter *`Release Updates`*, and then select **Release Updates**. For Evaluate Criteria Based on Original Record Values in Process Builder, follow the testing and activation steps.

If you have a process with the *Do you want to execute the actions only when specified changes are made to the record?* option selected, or it uses the `ISCHANGED()` function in your criteria, this update can cause the process to behave differently.

SEE ALSO:

Release Updates

Restrict User Access to Run Flows (Release Update)

This update was first made available in Winter '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement to Winter '26. 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. Salesforce postponed the enforcement to allow additional time for admins to test and prepare for the change. There is no impact to admins who already enabled the update. We appreciate your adoption of this change.

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. See the knowledge article for frequently asked questions.

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. We recommend that you disable the Flow User preference in Setup for each user. If the Flow User preference is enabled in a user's details in Setup, the user can run all flows. To create, update, and delete a flow, add the Manage Flow permission. See the knowledge article for frequently asked questions.

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. This release update was first available in Summer '24 and was scheduled to be enforced in Spring '25, but we postponed the enforcement date to Summer '25.

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

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 Sort Apex Batch Action Results by Request Order release update, follow the testing and activation steps.

Flow Orchestration

Create custom email notifications to assigned users. View improved orchestration details on the Orchestration Run details view.

IN THIS SECTION:

Customize Email Notifications for Interactive Steps

You no longer have to create a background step to send custom notification emails to assignees. Now you can configure each interactive step to send a unique custom email notification to assignees when a work item is created. To configure a custom email notification, in the Properties panel, select Customize notification email and provide a subject and body. If a work item is reassigned, however, the orchestration still sends the default email notification.

View Improved Orchestration Run Details

The new layout for orchestration run details in the Automation Lightning app gives you instant insights into the execution of an orchestration. The Run Details tab shows information about all the stages and steps in the orchestration run, including completion times and assignees. The Work Items tab shows details about all the work items generated by the orchestration run so you can identify work items that you want to reassign. Use the quick menu to cancel, debug, or suspend a running orchestration. You can also resume an orchestration that was suspended or that failed because of a recoverable error from the detail page.

Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

Customize Email Notifications for Interactive Steps

You no longer have to create a background step to send custom notification emails to assignees. Now you can configure each interactive step to send a unique custom email notification to assignees when a work item is created. To configure a custom email notification, in the Properties panel, select Customize notification email and provide a subject and body. If a work item is reassigned, however, the orchestration still sends the default email notification.

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

How: To configure a custom email, in the Interactive Step Properties panel, select **Customize notification email**. To personalize the subject and body of the email, use text templates.

Note: To send default or custom emails to assignees, don't select the Stop Sending Orchestration Work Item Email Notifications setting in Process Automation Settings.

View Improved Orchestration Run Details

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

Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

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

Enhanced Sales To Do List

When you click an orchestration work item in the Sales To Do List, the link now takes you to the related record page, where you can complete the work item in the Work Guide.

Automatically Detect Background Step Processing

Background steps now automatically determine whether their referenced flow must be run synchronously or asynchronously. As a result of this change, we removed the Contains external callouts or wait elements checkbox from the Background Step properties panel.

Updated Process Automation Setting

Because you can now Customize Email Notifications for Interactive Steps, we changed the Process Automation setting controlling whether orchestrations send email notifications. The Stop Sending Orchestration Work Item Email Notifications replaces the Stop Sending Orchestration Work Item Default Email Notifications.

Improved Step Properties Panel

To save space in the Properties panel for orchestrations, we removed the graphic that used to appear when a flow referenced by an orchestration step has no input parameters.

Improved Validation Messages

Validation error messages are now clearer and easier to understand when you're building an orchestration.

Flow Approval Processes

Build approval orchestrations that involve multiple people over multiple stages with multiple flows. Assign an approval work item to an individual, a public group, or a queue. Send notifications to people who submit approvals and the assigned approvers and their delegates. Display approval work items to approvers on relevant record pages.

The Flow Approval Processes feature is suitable for complex and evolving business needs. It offers flexibility and customization, supporting detailed logging for compliance and audit trails. Approval orchestrations built with Flow Approval Processes support dynamic routing that adapts based on data and business rules. Approval processes built with classic Approval Processes are tied to specific objects with limited support for processes using conditions and rely on the Submit for Approval button. Approval orchestrations provide a more flexible and user-friendly interface, using record triggers or custom buttons in Lightning App Builder. Finally, when an approval orchestration runs, you can monitor its progress to gain insight into performance and to help identify bottlenecks.

IN THIS SECTION:

Assign Approval Steps to Groups or Queues

Keep approvals moving smoothly by assigning an approval step to a queue or public group instead of a specific person. All queue or public group members and their delegates receive an email when the approval work item is created. If more than one person starts the work item, the first person to approve or reject it completes the step. Anyone else who tries to approve or reject the work item gets an error. As soon as the first person approves or rejects the work item, no one else can see it on the related record. Public groups are groups with a type of Regular. Queues are groups with a type of Queue.

Send Notifications to Approval Users

Keep approval users apprised of the status of approvals they submit and notify approvers and their delegates when they have assigned approval work items. You can configure each approval step to send an email notification that includes details about the record to be approved. The custom email is sent to approvers and their delegates when the associated approval work item is created. If you reassign an approval work item, the newly assigned approver and their delegates receive default email notifications. You can also turn off emails to the people who submit approvals or to the approvers and their delegates.

Reply to Emails to Approve or Reject Approval Work Item

Approvers have choices when it comes to approving or rejecting their assigned approval work items. Approvers can run the screen flow associated with their approval step to approve or reject their assigned approval work item. Or approvers or their delegates can approve or reject the assigned approval work item by replying to their notification email.

Assign Approval Steps to Groups or Queues

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

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Keep approval users apprised of the status of approvals they submit and notify approvers and their delegates when they have assigned approval work items. You can configure each approval step to send an email notification that includes details about the record to be approved. The custom email is sent to approvers and their delegates when the associated approval work item is created. If you reassign an approval work item, the newly assigned approver and their delegates receive default email notifications. You can also turn off emails to the people who submit approvals or to the approvers and their delegates.

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

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

Streamline External System Integration with MuleSoft for Flow: Integration (Generally Available)

MuleSoft for Flow: Integration provides no-code connectivity to external systems using third-party connectors. Create flows where third-party connectors act as triggers or actions. These connectors facilitate data and information exchange between different systems and provide in-line field mapping capabilities for improved data accuracy. Manage all your org's connections in a single view with the new Connections tab in the Automation Lightning app.

IN THIS SECTION:

Enhance Data Exchange with Third-Party Connectors

Use third-party connectors in flows for no-code connectivity to external systems. Users can create a flow with a third-party connector as a trigger or an action. Also, users can use third-party connectors to facilitate data and information exchange between different systems.

Manage External System Integrations in the Connections Tab

Manage all your org's connections in a single view with the Connections tab in the Automation Lightning app. Each connection provides access and authorization configurations, along with metadata for specific APIs or objects. Use these connections multiple times in flows for enhanced automation and integration.

Trigger Flows from External Systems

Create External System Change-Triggered flows to connect and automate processes based on events from external systems. External System Change-Triggered flows are triggered when a third-party system is polled and the results indicate that there was a change in the connected external system. This new flow type improves workflow efficiency by managing external events with ease.

Map Flow Fields to Fields in Third-Party Systems

Use in-line transform capabilities to map fields in flows to fields in third-party connectors. Existing transform capabilities are now embedded in each connector action, allowing the connector to intelligently present the target data based on the third-party system. Apply transformations and formulas in-line to improve data integrity and workflow accuracy.

Enhance Data Exchange with Third-Party Connectors

Use third-party connectors in flows for no-code connectivity to external systems. Users can create a flow with a third-party connector as a trigger or an action. Also, users can use third-party connectors to facilitate data and information exchange between different systems.

For example, when using a third-party connector as a trigger, when creating a new Contact in NetSuite, the flow creates a Lead in Salesforce. Or, when using a third-party connector as an action, when an Order is created or updated in Salesforce, the flow creates a Sales Order in NetSuite.

The following connectors are generally available:

- Abstract Company Enrichment
- Abstract Email Validator
- Abstract Phone Validator
- Adobe Marketo Engage
- Anthropic
- Asana
- Bloomfire

- Calendly
- Clockify
- Courier
- DHL Tracking
- Discord
- Eventbrite
- Freshdesk
- Gmail
- Google BigQuery
- Google Calendar
- Google Gemini
- Google Sheets
- Guru
- HubSpot
- Intercom
- Jira
- Maxio (Chargify)
- Microsoft Entra ID
- Microsoft Excel
- Microsoft Outlook
- Microsoft Power BI
- Microsoft Teams
- Moosend
- NetSuite
- OpenAI
- OpenWeatherMap
- PagerDuty
- PayPal
- Qualtrics
- QuickBooks Online
- Salesforce

- Salesforce Marketing Cloud
- SignUpGenius
- Square
- SurveyMonkey
- Twilio
- WordPress
- Zendesk
- Zoom
- Zuora

Where: This change applies to Salesforce Classic and Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions. Connections can be edited or deleted only in the Automation Lightning app. Requires the MuleSoft for Flow: Integration add-on license, which is available in multiple offerings.

Who: To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: Use third-party connectors to either trigger a flow or as an action within a flow.

SEE ALSO:

Salesforce Help: Third-Party Connectors Reference (can be outdated or unavailable during release preview)

Salesforce Help: Third-Party Connectors and External System Change-Triggered Flows (can be outdated or unavailable during release preview)

Salesforce Help: Create a Flow with a Third-Party Connector as a Trigger (can be outdated or unavailable during release preview)

Salesforce Help: Create a Flow with a Third-Party Connector as an Action (can be outdated or unavailable during release preview)

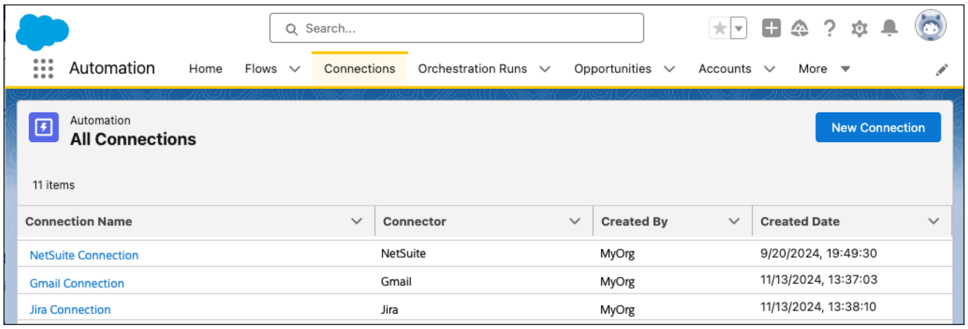
Manage External System Integrations in the Connections Tab

Manage all your org's connections in a single view with the Connections tab in the Automation Lightning app. Each connection provides access and authorization configurations, along with metadata for specific APIs or objects. Use these connections multiple times in flows for enhanced automation and integration.

Where: This change applies to Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions. Connections can be edited or deleted only in the Automation Lightning app. Requires the MuleSoft for Flow: Integration add-on license, which is available in multiple offerings.

Who: To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: To view the Automation Lightning app, in Setup, under Process Automation Settings, select **Enable the Automation Lightning app**. Then, in the Automation Lightning app, click the **Connections** tab.



SEE ALSO:

Salesforce Help: Connections Tab (can be outdated or unavailable during release preview)

Salesforce Help: Connect to an External System (can be outdated or unavailable during release preview)

Trigger Flows from External Systems

Create External System Change-Triggered flows to connect and automate processes based on events from external systems. External System Change-Triggered flows are triggered when a third-party system is polled and the results indicate that there was a change in the connected external system. This new flow type improves workflow efficiency by managing external events with ease.

Where: This change applies to Salesforce Classic and Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions. Connections can be edited or deleted only in the Automation Lightning app. Requires the MuleSoft for Flow: Integration add-on license, which is available in multiple offerings.

Who: To create and edit External System Change-Triggered flows owned by or shared with you, users need the Create or Edit Flows or the View Flows permission. To create and edit External System Change-Triggered flows in the Automation Lightning app, regardless of sharing settings, users need the Manage Flow, Create or Edit Flows, View Flows, or View All Non-Admin Flows permission. To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: In the Automation Lightning app, go to Flows and click **New**. Click **Triggered**, and then click **External System Change-Triggered Flow**.

SEE ALSO:

Salesforce Help: Flow Types

Salesforce Help: Create a Flow with a Third-Party Connector as a Trigger(can be outdated or unavailable during release preview)

Salesforce Help: Third-Party Connectors and External System Change-Triggered Flows (can be outdated or unavailable during release preview)

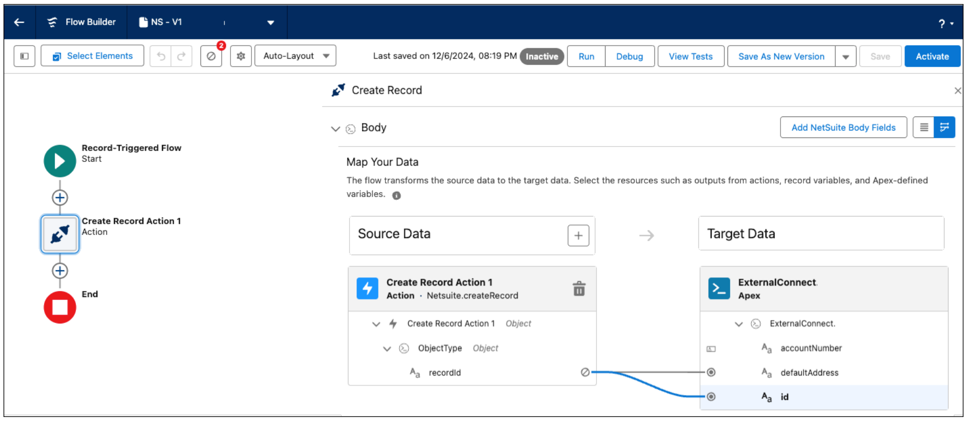
Map Flow Fields to Fields in Third-Party Systems

Use in-line transform capabilities to map fields in flows to fields in third-party connectors. Existing transform capabilities are now embedded in each connector action, allowing the connector to intelligently present the target data based on the third-party system. Apply transformations and formulas in-line to improve data integrity and workflow accuracy.

Where: This change applies to Salesforce Classic and Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions. Connections can be edited or deleted only in the Automation Lightning app. Requires the MuleSoft for Flow: Integration add-on license, which is available in multiple offerings.

Who: To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: Create a flow with a third-party connector as an action, in Body, click **Add <> Fields**, and then click **Apply**. Users can now map fields using the Transform View to map fields.



SEE ALSO:

Salesforce Help: Transform Data in Flow

Salesforce Help: Create a Flow with a Third-Party Connector as an Action(can be outdated or unavailable during release preview)

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: Flow Integration for Salesforce is available for an extra cost in Enterprise, Performance, and Unlimited editions that have enabled Lightning Experience.

For Composer release notes and help, see MuleSoft Composer for Salesforce.

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

Log in to Salesforce with your email address with the Log In with Email button on login.salesforce.com. Deliver convenient login experiences with headless user discovery. Use an external client apps to configure Salesforce as a SAML single sign-on identity provider. Use external auth identity providers to centralize your OAuth configurations for outbound callouts under named credentials. Define more HTTP status codes to refresh access tokens. Monitor details of Transaction Security Policy triggering events, and keep tabs on key certificate information. Monitor transactional database tenant secrets. To adopt the latest content security policy directives via a new release update, update your trusted URLs. A release update ends redirections for legacy host names in production and demo orgs, and another .

IN THIS SECTION:

[Domains]

A new release update ends redirections for legacy host names in production and demo orgs. And you can disable those redirections without disabling all previous My Domain host name redirections.

[Identity and Access Management]

Log in to Salesforce with only your email address by using the Log In with Email button on login.salesforce.com. Customize the welcome email that internal users receive when they first access your Salesforce org. Use external client apps to configure Salesforce as a SAML single sign-on (SSO) identity provider.

[Named Credentials]

Use external auth identity providers to centralize your OAuth configurations for outbound callouts under named credentials. Define more HTTP status codes to refresh expired or invalid access tokens.

[Privacy Center]

Bypass triggers and validation rules while processing records. Mask and anonymize inactive users.

[Salesforce Shield]

Access and visualize low-latency event log data via standard objects with the Event Log Object framework (generally available). You can bring your own data encryption keys for search indexes that use the latest Search framework. And you can now use named principal credentials with Cache-Only Keys.

[Security Center]

Keep tabs on key certificate information. Monitor transactional database tenant secrets. Easily navigate through your Security Center dashboard with a new and improved navigation menu. New prompts on the Security Landscape page help you get the most out of Security Center.

[Policy Center]

Meet Policy Center, your home for managing policies across your trusted privacy and security apps.

[Other Security Changes]

To adopt the latest content security policy (CSP) directives via a new release update, update your trusted URLs. Identify redirections that use malformed URLs more easily, and get more information about CSP violations and blocked redirections by using new event types.

Domains

A new release update ends redirections for legacy host names in production and demo orgs. And you can disable those redirections without disabling all previous My Domain host name redirections.

IN THIS SECTION:

[Update References to Legacy Host Names (Release Update)]

Prevent disruption for your customers and end users when the temporary redirection of legacy (non-enhanced) Salesforce host names ends. With this release update, legacy host name redirections end in production and demo orgs. Those redirections already ended in all other orgs in Winter '25. This update is available starting in Spring '25.

[Disable Redirections for Legacy Host Names]

After you update references to your legacy Salesforce domains in production, disable redirections for the related host names 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 host names, you disabled redirections for all previous My Domain host names.

Trailhead Playgrounds Use Salesforce Edge Network

To improve your Trailhead experience, newly created Trailhead Playgrounds use Salesforce Edge Network, which delivers improved download times and a consistent experience regardless of the user's location. To get those benefits in an existing Trailhead Playground, enable Salesforce Edge Network on the My Domain Setup page.

Update References to Legacy Host Names (Release Update)

Prevent disruption for your customers and end users when the temporary redirection of legacy (non-enhanced) Salesforce host names ends. With this release update, legacy host name redirections end in production and demo orgs. Those redirections already ended in all other orgs in Winter '25. This update is available starting in Spring '25.

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. This change affects production and demo orgs created in June 2022 or earlier.

When: In Summer '25 and in Winter '26, Salesforce automatically disables legacy host name redirections unless you opt out of that change before your org gets each release. In those releases, you can enable and disable legacy host name redirections. Salesforce enforces this update in Spring '26. With that enforcement, you can't reenable legacy host name redirections. To get the major-release upgrade date for your instance, go to Trust Status, search for your My Domain name or instance, and then click the maintenance tab.

To review the changes and your options in each release, see Enhanced Domains Timeline (can be outdated or unavailable during release preview).

How: To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Update References to Legacy Host Names, follow the testing and activation steps.

You can opt out of the automatic enablement of this change in Summer '25. From the My Domain page in Setup, in the Redirections section, click **Edit**. Turn on **Maintain legacy redirections during the Summer '25 upgrade**, and then save your changes. Repeat that step in each production or demo org where you want to opt out of that behavior. That setting has no impact on the final enforcement of this update.

SEE ALSO:

Salesforce Help: Prepare for the End of Redirections for Non-Enhanced Domains (can be outdated or unavailable during release preview)

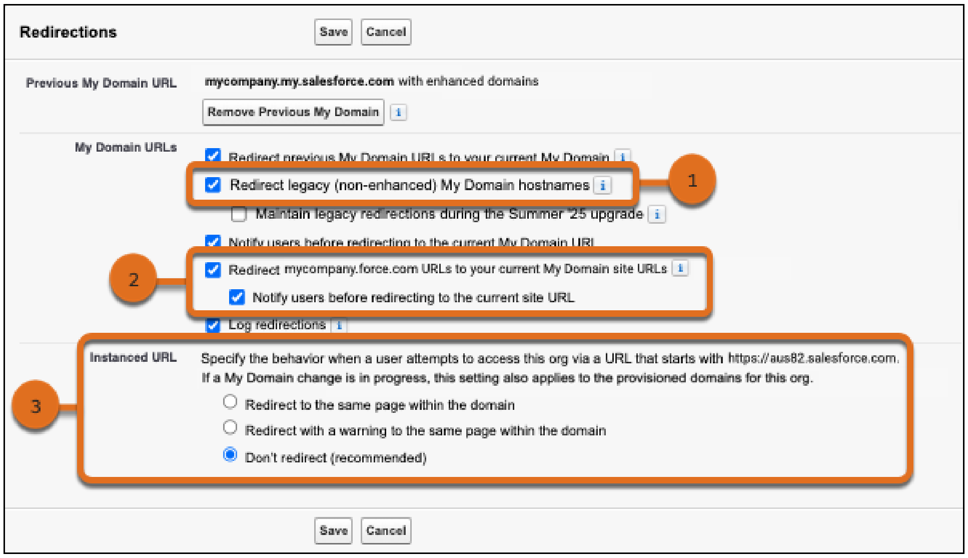
Release Updates

Disable Redirections for Legacy Host Names

After you update references to your legacy Salesforce domains in production, disable redirections for the related host names 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 host names, you disabled redirections for all previous My Domain host names.

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: In Setup, find and select **My Domain**. In the Redirections section, click **Edit**. Then disable **Redirect legacy (non-enhanced) My Domain hostnames** (1) and save your changes. This setting is enabled by default.



When you disable redirections to legacy My Domain host names, the settings for `force.com` site URL redirections (2) are unavailable. Also, the Instanced URL redirection option (3) is set to Don't redirect and you can't change it.

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 Legacy Host Names (Release Update)

Trailhead Playgrounds Use Salesforce Edge Network

To improve your Trailhead experience, newly created Trailhead Playgrounds use Salesforce Edge Network, which delivers improved download times and a consistent experience regardless of the user's location. To get those benefits in an existing Trailhead Playground, enable Salesforce Edge Network on the My Domain Setup page.

Where: This change applies to Trailhead Playground that use Lightning Experience and Salesforce Classic (not available in all orgs) in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. With this change, Salesforce Edge Network is available with Trailhead Playgrounds that use partitioned domains.

SEE ALSO:

Salesforce Help: Route My Domain Through Salesforce Edge Network (can be outdated or unavailable during release preview)

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

Identity and Access Management

Log in to Salesforce with only your email address by using the Log In with Email button on login.salesforce.com. Customize the welcome email that internal users receive when they first access your Salesforce org. Use external client apps to configure Salesforce as a SAML single sign-on (SSO) identity provider.

IN THIS SECTION:

Log In with Your Email Address

Log in to Salesforce with only your email address by using the Log In with Email button on login.salesforce.com. Previously, the log in with email experience was reserved only for Salesforce Starter and Base Suite Pro users. It's now available for anyone who logs in to Salesforce through the UI on login.salesforce.com. If you have access to more than one Salesforce org with your email address, see them all in the Environment Switcher dashboard.

Delivered Idea: Brand the Welcome Email for Internal Users

For more control of branding and user experience, customize the welcome email that internal users, such as employees and contractors, receive when they first access your Salesforce org. For example, change the look of the email to suit your brand, or change the text of the email to include onboarding instructions that are specific to your company. We delivered this feature thanks to your ideas on IdeaExchange.

Use Multi-Factor Authentication for Password Reset

To help users be more successful in resetting their passwords, users now verify their identity using their registered multi-factor authentication (MFA) method. This change simplifies password reset for users by giving them a familiar verification process that they already use frequently for login. Because it's hard for attackers to get access to an MFA method, this change also improves the security of password reset.

Password Reset Link Stays Valid After Multiple Clicks

Spend less time helping users reset their passwords. Users can now click the link in the password reset email multiple times. Previously, if a user accidentally clicked the link but didn't complete password reset, the link became invalidated. If a user wanted to finish resetting their password, they had to start from square one. Some email security tools also invalidated the link while scanning it for spam. Now, the link remains valid for 24 hours even when clicked or scanned.

Control Access to the setPassword() API More Easily

To control whether apps can change a user's password, you can now edit the Allow use of setPassword() API for self-resets setting in Password Policies regardless of whether you previously disabled it. Previously, if you deselected this setting, there was no way to re-enable it. Now you can freely enable and disable it as necessary.

Give Headless App Users More Ways to Log In

No username? No problem. With headless user discovery, deliver convenient login experiences where users log in with any identifier you want, like an email address, phone number, order number, or case number, along with their password. For a consistent experience across your app, complement your login implementation with a similar password reset experience.

Troubleshoot Errors with the Headless Registration Apex Handler

To make troubleshooting easier, the `/services/oauth2/authorize` endpoint now returns information about Apex errors that occur when executing the headless registration handler. Previously, if the handler threw an exception, the endpoint returned a generic error and the Apex errors were reflected only in Apex debug logs.

Issue JSON Web Token (JWT)-Based Access Tokens in Hybrid OAuth Flows

To improve compatibility with external systems, issue JSON Web Token (JWT)-based access tokens instead of opaque tokens in hybrid OAuth 2.0 flows. JWT-based access tokens can be a better option when you have a variety of third-party services and you want a Salesforce token that works with all of them. By introspecting JWT-based tokens locally, avoid repeated callouts to Salesforce endpoints, which can slow performance. This change applies to the hybrid web server flow and hybrid refresh token flow. JWT-based access tokens aren't supported for the hybrid user-agent flow.

Manage Sessions Associated with JSON Web Token (JWT)-Based Access Tokens

JSON Web Token (JWT)-based access tokens are now backed by sessions, making them easier to manage. View sessions that are associated with JWT-based access tokens on the Session Management page in Setup, and end suspicious sessions if necessary. Manage session security on the Session Settings page in Setup.

Additional Session Is Established When a User Logs In to the UI

When a user logs in to your Salesforce org and accesses Lightning Experience, Salesforce now establishes an additional session. Previously, Salesforce established multiple sessions, including sessions of these types: Aura, Content, TempAuraExchange, TempContentExchange, TempUiFrontdoor, and UI, all with Application as the login type. With this change, this list now includes a session where the session type is API and the login type is Unknown.

GET Requests with Access Tokens in the URL Query String Are Blocked for the Single Access Endpoint

To improve security, we now block GET requests to the `services/oauth2/singleaccess` endpoint if the request contains an access token as a URL query string parameter. To avoid service interruptions, update your integrations to use a more secure request format.

Enjoy Usability Improvements for Token Exchange Setup

We made some minor improvements to the Token Exchange Handlers page in Setup. We updated the text of the confirmation modal that displays when you remove an app from a token exchange handler. The new modal text clarifies that you can still re-enable an app anytime after you disable it. To help you resolve enablement issues faster, we also updated the text for the failure toast that appears when you try to enable an app that already has a default handler.

Integrate Single Sign-On Service Providers with the External Client Apps Framework

Use the external client apps framework, a new generation of the connected apps framework, to configure Salesforce as a SAML single sign-on (SSO) identity provider. Compared to the connected apps framework, the external client apps framework has a cleaner metadata structure and is more secure. Use it to configure an SSO flow where users log in to a third-party service provider with their Salesforce credentials.

Triple DES Encryption Is No Longer Supported for SAML Single Sign-On

To keep your SAML single sign-on (SSO) configurations secure, we no longer support encryption of SAML responses using the Triple DES encryption algorithm. This change applies to all SSO configurations that use the Triple DES algorithm, whether you use Salesforce as an identity provider or as a service provider. With Spring '25, you can't create configurations that use this algorithm. This change doesn't break configurations that existed before Spring '25, but we strongly recommend that you stop using the Triple DES algorithm to avoid future interruptions. To improve security, use the AES 128 or AES 256 encryption algorithms instead.

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 is enforced in Summer '25. To avoid potential service interruptions, test your SAML integrations as soon as Summer '25 sandboxes become available.

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 for production instances in Spring '26.

Enable Embedded Login

Although Salesforce doesn't recommend it, if you must use Embedded Login with your new Experience Cloud Site, you can contact Salesforce support to enable it. In Spring '25, Salesforce removed Embedded Login settings by default to encourage users to move to OAuth 2.0 Web Server Flow or OAuth 2.0 User-Agent Flow.

Log In with Your Email Address

Log in to Salesforce with only your email address by using the Log In with Email button on login.salesforce.com. Previously, the log in with email experience was reserved only for Salesforce Starter and Base Suite Pro users. It's now available for anyone who logs in to Salesforce through the UI on login.salesforce.com. If you have access to more than one Salesforce org with your email address, see them all in the Environment Switcher dashboard.

Where: This change applies to the UI log in experience on login.salesforce.com.

When: This feature is not part of the initial Spring '25 release and may be included at a later date.

Who: Log in with email isn't available for Sandbox users, users with a shared email account, or users who can't access emails sent to their email address. Also, users who are required to use My Domain can't log in with their email address.

Why: Your Salesforce account has both a username and a valid email address associated with it. Each username is formatted just like an email address, but it doesn't have to be an actual email address. Now, you can log in using only the email address that's associated with your Salesforce account.

How: On login.salesforce.com, select Log in with Email. Enter your email address and if you have only one Salesforce account, enter your password. If you have more than one Salesforce account, enter your email address, and then copy the verification code from the email that you receive to the verification code field.

The Environment Switcher opens to show all your accounts in one place. Choose the account to log in to and complete the login process.

The setting to prevent logins outside of my domain now includes both login.salesforce.com and welcome.salesforce.com. To require users to log in through My Domain, admins can select **Prevent login from https://login.salesforce.com and https://welcome.salesforce.com**.

SEE ALSO:

Salesforce Help: Log In with Your Email Address (can be outdated or unavailable during release preview)

Video: Log In with Your Email Address

Brand the Welcome Email for Internal Users

For more control of branding and user experience, customize the welcome email that internal users, such as employees and contractors, receive when they first access your Salesforce org. For example, change the look of the email to suit your brand, or change the text of the email to include onboarding instructions that are specific to your company. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: Create a custom classic email template. To make sure that users meet the email verification requirement, include the new `{!NewUserWelcomeEmailLink}` merge field. The field gets populated with a verification link. When users click the link, they start the email verification process.

From the Session Settings page in Setup, add the email template in the Welcome Email Template field.

SEE ALSO:

IdeaExchange: Customizable new-user email

Salesforce Help: Customize the Welcome Email for Internal Users (can be outdated or unavailable during release preview)

Use Multi-Factor Authentication for Password Reset

To help users be more successful in resetting their passwords, users now verify their identity using their registered multi-factor authentication (MFA) method. This change simplifies password reset for users by giving them a familiar verification process that they already use frequently for login. Because it's hard for attackers to get access to an MFA method, this change also improves the security of password reset.

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

When: This change is available on a rolling basis starting on February 17, 2025. The rollout concludes on March 31, 2025.

Who: This change applies only to internal users who access Salesforce orgs. It doesn't apply to external users, also known as customers and partners, who log in to Experience Cloud sites.

For internal users, this change applies under these conditions.

- The user is required to log in with MFA. This change applies whether you require MFA via your org settings or via user permissions.
- The user has an MFA method set up.

Note: All internal Salesforce users are contractually required to use MFA for every login through the user interface to Salesforce products (including partner solutions). The requirement applies equally to direct logins using a Salesforce username and password and to single sign-on (SSO) logins.

Otherwise, internal users verify their identity by answering a security question.

How: When a user clicks the forgot password link on the login page, they get an email with instructions to reset their password. When they click the link in the email, they're prompted to verify their identity by using their registered MFA method. After they complete the MFA challenge, they can reset their password.

SEE ALSO:

Salesforce Help: Reset Passwords for Your Users (can be outdated or unavailable during release preview)

Salesforce Help: Reset Your Forgotten Password (can be outdated or unavailable during release preview)

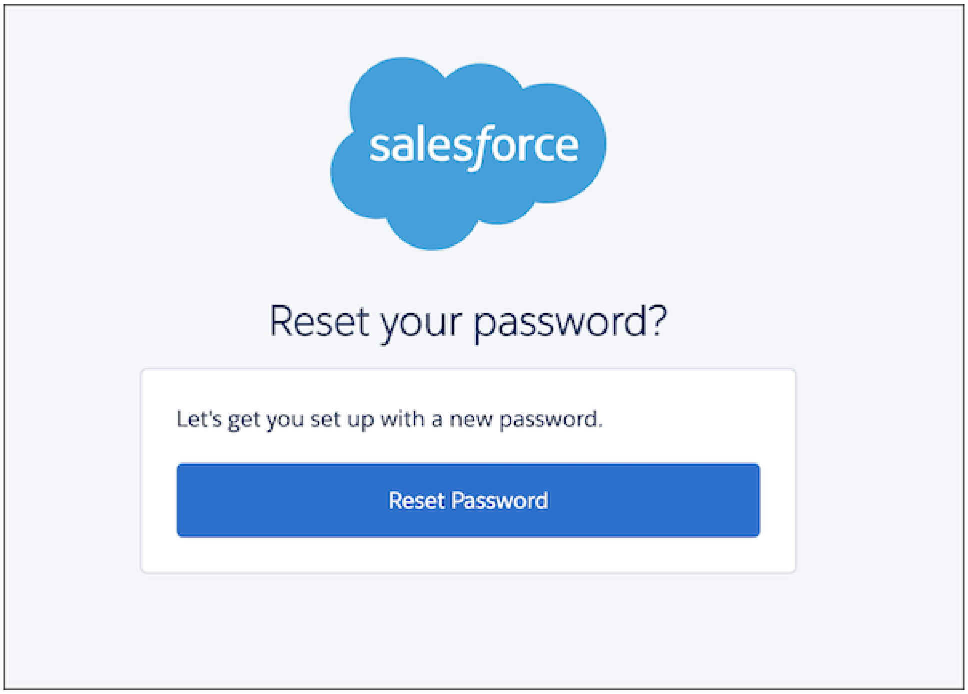
Salesforce Help: Multi-Factor Authentication for Salesforce Orgs (can be outdated or unavailable during release preview)

Password Reset Link Stays Valid After Multiple Clicks

Spend less time helping users reset their passwords. Users can now click the link in the password reset email multiple times. Previously, if a user accidentally clicked the link but didn't complete password reset, the link became invalidated. If a user wanted to finish resetting their password, they had to start from square one. Some email security tools also invalidated the link while scanning it for spam. Now, the link remains valid for 24 hours even when clicked or scanned.

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

How: This behavior is controlled by a new setting on the Identity Verification page in Setup, which is enabled by default. When the setting is enabled, there's an extra step to the password reset process. After users click the password reset link, Salesforce displays a page where the user confirms that they want to reset their password before moving on to the next step.



SEE ALSO:

Salesforce Help: Define Identity Verification Settings for Your Orgs and Experience Cloud Sites (can be outdated or unavailable during release preview)

Salesforce Help: Reset Passwords for Your Users (can be outdated or unavailable during release preview)

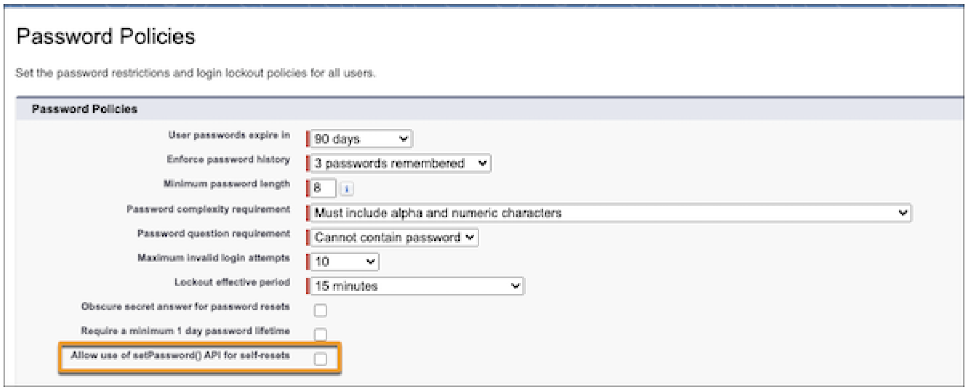
Salesforce Help: Reset Your Forgotten Password (can be outdated or unavailable during release preview)

Control Access to the setPassword() API More Easily

To control whether apps can change a user's password, you can now edit the Allow use of setPassword() API for self-resets setting in Password Policies regardless of whether you previously disabled it. Previously, if you deselected this setting, there was no way to re-enable it. Now you can freely enable and disable it as necessary.

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

How: To edit the setting, go to the Password Policies page in Setup. When the setting is enabled, apps can use the `setPassword()` API to change a user's password to a specific value. When the setting is disabled, apps can't directly change a user's password.



SEE ALSO:

Salesforce Help: Set Password Policies (can be outdated or unavailable during release preview)

SOAP API Developer Guide: setPassword() (can be outdated or unavailable during release preview)

Give Headless App Users More Ways to Log In

No username? No problem. With headless user discovery, deliver convenient login experiences where users log in with any identifier you want, like an email address, phone number, order number, or case number, along with their password. For a consistent experience across your app, complement your login implementation with a similar password reset experience.

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

Why: It can be tricky for users to remember all of the usernames that they use across different services. By giving users multiple ways to log in, save them from the frustration of forgetting their username and let them choose an easier login option.

You can also build experiences that help users get to the information they want as fast as possible. For example, you have a headless ecommerce app that sends users an order number when they make a purchase. With headless user discovery, develop an experience where users log in with their order number. Instead of logging in with a username and then navigating to their order, users see their order information as soon as they log in.

How: Develop an Apex class that implements the `Auth.HeadlessUserDiscoveryHandler` interface to find users based on an identifier of your choice. Add the Apex handler to your Experience Cloud settings. Then, configure headless login or password reset. Headless user discovery is supported for Headless Identity APIs and for flows that use the OAuth 2.0 for First-Party Applications draft standard.

During login, users enter the identifier along with their password. Your headless app sends the identifier in a `login_hint` parameter in its request to the `services/oauth2/authorize` endpoint or the `services/oauth2/v1/authorization_challenge` endpoint. Then, your Apex handler takes over to find the email address or phone number associated with the user identifier.

Similarly, during password reset, your app sends the user identifier to the `services/auth/headless/forgot_password` endpoint, and the Apex handler finds the user. Salesforce sends an OTP that the user enters to verify their identity before resetting their password.

SEE ALSO:

Salesforce Help: Headless Login Without a Username (can be outdated or unavailable during release preview)

Salesforce Help: Headless Identity for Customers and Partners (can be outdated or unavailable during release preview)

Troubleshoot Errors with the Headless Registration Apex Handler

To make troubleshooting easier, the `/services/oauth2/authorize` endpoint now returns information about Apex errors that occur when executing the headless registration handler. Previously, if the handler threw an exception, the endpoint returned a generic error and the Apex errors were reflected only in Apex debug logs.

Where: This change is available in Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Unlimited, and Developer editions.

How: During headless registration, your app sends a request to the `/services/oauth2/authorize` endpoint. The request includes information to help create a user. Salesforce passes this information to your implementation of the `Auth.HeadlessSelfRegistrationHandler` interface. The Apex handler tries to create the user and link it to an account. If there's an error that disrupts the execution of the handler, the endpoint returns an API error response with an `apex_error` field.

Here's an example error response.

```
{
    "error": "registration_error",
    "error_description": "user was unable to be created in apex",
    "apex_error": "MyException: exception message"
}
```

Because you can create custom exceptions, you can customize the exception message that's shown in the `apex_error` field. Here's an example Apex snippet to create a custom message.

```
throw new MyException('exception message');
```

SEE ALSO:

Salesforce Help: Headless Identity APIs: Headless Registration Flow for Public Clients (can be outdated or unavailable during release preview)

Salesforce Help: Headless Identity APIs: 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)

Issue JSON Web Token (JWT)-Based Access Tokens in Hybrid OAuth Flows

To improve compatibility with external systems, issue JSON Web Token (JWT)-based access tokens instead of opaque tokens in hybrid OAuth 2.0 flows. JWT-based access tokens can be a better option when you have a variety of third-party services and you want a Salesforce token that works with all of them. By introspecting JWT-based tokens locally, avoid repeated callouts to Salesforce endpoints, which can slow performance. This change applies to the hybrid web server flow and hybrid refresh token flow. JWT-based access tokens aren't supported for the hybrid user-agent flow.

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

How: When you develop an integration that uses a hybrid OAuth flow, enable your external client app or connected app to issue JWT-based access tokens.

If refresh token rotation is enabled for the external client app or connected app, you can't issue JWT-based access tokens for hybrid flows, even if you aren't actively using the refresh token flow.

SEE ALSO:

Salesforce Help: JWT-Based Access Tokens (can be outdated or unavailable during release preview)

Salesforce Help: OAuth 2.0 Hybrid Web Server Flow (can be outdated or unavailable during release preview)

Salesforce Help: OAuth 2.0 Hybrid App Refresh Token Flow (can be outdated or unavailable during release preview)

Manage Sessions Associated with JSON Web Token (JWT)-Based Access Tokens

JSON Web Token (JWT)-based access tokens are now backed by sessions, making them easier to manage. View sessions that are associated with JWT-based access tokens on the Session Management page in Setup, and end suspicious sessions if necessary. Manage session security on the Session Settings page in Setup.

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

How: View active sessions and their details on the Session Management page, where you can create custom list views that display specific information.

To end a session from the Session Management page, select the session and click **Remove**. For most Salesforce services, ending the session immediately revokes the associated token. For some services, it can take up to 30 minutes before the associated token is revoked.

To control security settings, such as how login IP ranges are enforced, go to the Session Settings page in Setup. You can't control timeout settings for JWT-based access tokens on this page. Configure the token timeout in your external client app or connected app policies instead.

SEE ALSO:

Salesforce Help: JWT-Based Access Tokens (can be outdated or unavailable during release preview)

Salesforce Help: View User Session Information on the Session Management Page (can be outdated or unavailable during release preview)

Salesforce Help: Modify Session Security Settings (can be outdated or unavailable during release preview)

Object Reference for the Salesforce Platform: AuthSession (can be outdated or unavailable during release preview)

Additional Session Is Established When a User Logs In to the UI

When a user logs in to your Salesforce org and accesses Lightning Experience, Salesforce now establishes an additional session. Previously, Salesforce established multiple sessions, including sessions of these types: Aura, Content, TempAuraExchange, TempContentExchange, TempUiFrontdoor, and UI, all with Application as the login type. With this change, this list now includes a session where the session type is API and the login type is Unknown.

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

How: To get session information, go to the Session Management page in Setup or use the AuthSession object.

SEE ALSO:

Salesforce Help: View User Session Information on the Session Management Page (can be outdated or unavailable during release preview)

Salesforce Help: User Session Types (can be outdated or unavailable during release preview)

Object Reference for the Salesforce Platform: AuthSession (can be outdated or unavailable during release preview)

GET Requests with Access Tokens in the URL Query String Are Blocked for the Single Access Endpoint

To improve security, we now block GET requests to the `services/oauth2/singleaccess` endpoint if the request contains an access token as a URL query string parameter. To avoid service interruptions, update your integrations to use a more secure request format.

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

Why: Access tokens are considered sensitive information because they grant access to protected Salesforce resources. If you pass access tokens in URL query string parameters, they can be leaked in the browser. Here's an example of an insecure request that gets blocked with this change.

```
https://mydomainname.my.salesforce.com/services/oauth2/singleaccess?access_token=<access
token>
&redirect_uri=lightning/setup/ManageUsers/home
```

How: Update your integrations to use a more secure request format.

For GET requests, send the access token in an Authorization header.

```
GET /services/oauth2/singleaccess? HTTP 1.1
Host: mydomainname.my.salesforce.com
Authorization: Bearer <access token>

redirect_uri=lightning/setup/ManageUsers/home
```

For POST requests, send the access token in an Authorization header or in the request body. Here's an example with an access token in the body of a POST request.

```
POST /services/oauth2/singleaccess? HTTP 1.1
Host: mydomainname.my.salesforce.com

access_token=<access token>&
redirect_uri=lightning/setup/ManageUsers/home
```

SEE ALSO:

Salesforce Help: Generate a Frontdoor URL to Bridge into UI Sessions (can be outdated or unavailable during release preview)

Enjoy Usability Improvements for Token Exchange Setup

We made some minor improvements to the Token Exchange Handlers page in Setup. We updated the text of the confirmation modal that displays when you remove an app from a token exchange handler. The new modal text clarifies that you can still re-enable an app anytime after you disable it. To help you resolve enablement issues faster, we also updated the text for the failure toast that appears when you try to enable an app that already has a default handler.

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

SEE ALSO:

Salesforce Help: OAuth 2.0 Token Exchange Flow (can be outdated or unavailable during release preview)

Integrate Single Sign-On Service Providers with the External Client Apps Framework

Use the external client apps framework, a new generation of the connected apps framework, to configure Salesforce as a SAML single sign-on (SSO) identity provider. Compared to the connected apps framework, the external client apps framework has a cleaner metadata structure and is more secure. Use it to configure an SSO flow where users log in to a third-party service provider with their Salesforce credentials.

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: Create an external client app via Metadata API and configure its SAML policies. A SAML-enabled external client app consists of these three metadata types.

- ExternalClientApplication—The parent external client app.
- ExtlClntAppConfigurablePolicies—The external client app policies where you enable the SAML plugin.
- ExtlClntAppSamlConfigurablePolicies—The external client app SAML configuration. Depending on your use case, this type can also include the ExtlClntAppSamlConfigurablePoliciesAttribute subtype.

Currently, you can't configure SAML in the External Client App Manager in Setup. SAML-enabled external client apps can't be packaged and distributed.

SEE ALSO:

Salesforce Help: Integrate a SAML SSO Service Provider as an External Client App (can be outdated or unavailable during release preview)

Salesforce Help: External Client Apps (can be outdated or unavailable during release preview)

Triple DES Encryption Is No Longer Supported for SAML Single Sign-On

To keep your SAML single sign-on (SSO) configurations secure, we no longer support encryption of SAML responses using the Triple DES encryption algorithm. This change applies to all SSO configurations that use the Triple DES algorithm, whether you use Salesforce as an identity provider or as a service provider. With Spring '25, you can't create configurations that use this algorithm. This change doesn't break configurations that existed before Spring '25, but we strongly recommend that you stop using the Triple DES algorithm to avoid future interruptions. To improve security, use the AES 128 or AES 256 encryption algorithms instead.

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

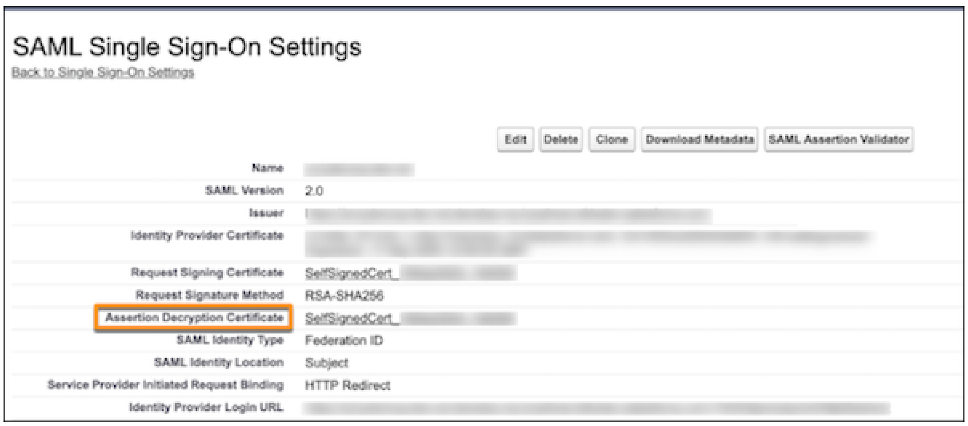
Why: The Triple DES algorithm uses a cryptographic key that's too short to be secure. The AES 128 and AES 256 algorithms use longer keys that make these algorithms harder to attack.

For more information about encryption algorithm security from the National Institute of Standards and Technology, go to https://csrc.nist.gov/pubs/sp/800/131/a/r3/ipd.

How: If you use Salesforce as an identity provider, check your connected app SAML configuration. First, go to your connected app Web App Settings and check the Block Encryption Algorithm setting. If Block Encryption Algorithm is set to Triple DES, update your connected app configuration to use a more secure algorithm. On the service provider, update your settings to decrypt the new algorithm.

Note: If you don't have the Encrypt SAML Response setting enabled, this change doesn't apply to you, and the Block Encryption Algorithm setting doesn't appear in your connected app configuration.

If you use Salesforce as a service provider, check with your identity provider to see what encryption algorithm they use. If they use the Triple DES algorithm, work with your identity provider to use a more secure algorithm and generate a new decryption certificate. In Salesforce, update the Assertion Decryption Certificate in your SAML Single Sign-On Settings.



For new configurations that are created after Spring '25, you can't use the Triple DES encryption algorithm. If your identity provider or service provider uses this algorithm, you get an error when you try to set up SSO with Salesforce. Use a more secure algorithm instead.

SEE ALSO:

Salesforce Help: Configure SSO with Salesforce as a SAML Service Provider (can be outdated or unavailable during release preview)

Salesforce Help: Salesforce as a SAML Identity Provider (can be outdated or unavailable during release preview)

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 is enforced in Summer '25. To avoid potential service interruptions, test your SAML integrations as soon as Summer '25 sandboxes become available.

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

When: This update is enforced in Summer '25. To get the major release upgrade date for your instance, go to Trust Status, locate your instance, and then click the maintenance tab.

This update was first made available in Winter '25 and was scheduled to be enforced in Spring '25, but we postponed the enforcement date to Summer '25.

Why: As part of ongoing maintenance, Salesforce is upgrading its SAML framework in Summer '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 Summer '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 these integrations.

- 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 Summer '25 sandboxes become available, set up a Summer '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.

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 for production instances in Spring '26.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) 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 '26 and was enforced for sandboxes in Summer '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

This update was first made available in Spring '24. It was scheduled to be enforced for all instances in Summer '24, but we enforced it only for sandboxes in Summer '24. We postponed the enforcement date for production instances to Spring '25 and then postponed it again to Spring '26.

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.

Enable Embedded Login

Although Salesforce doesn't recommend it, if you must use Embedded Login with your new Experience Cloud Site, you can contact Salesforce support to enable it. In Spring '25, Salesforce removed Embedded Login settings by default to encourage users to move to OAuth 2.0 Web Server Flow or OAuth 2.0 User-Agent Flow.

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

Why: We recommend that you use the web server flow, the user-agent flow, or another redirect-based OAuth 2.0 flow instead of Embedded Login. Embedded Login relies on third-party cookies, which are blocked or restricted in most browsers. And Embedded Login works only on Google Chrome and only as long as third-party cookies are allowed there by default.

How: To use Embedded Login on your Experience Cloud Site, contact support to enable the feature, and then enable it on the Login & Registration page. From Setup in the Quick Find Box, enter `Digital Experiences`, and then select **All Sites**. In the Digital Experiences picklist, select **Workspaces** and then click **Administration**. On the Login & Registration tab select **Allow embedded login on your Experience Cloud site**.

Named Credentials

Use external auth identity providers to centralize your OAuth configurations for outbound callouts under named credentials. Define more HTTP status codes to refresh expired or invalid access tokens.

IN THIS SECTION:

Simplify OAuth Configurations with External Auth Identity Providers

To streamline OAuth configurations for outbound callouts to external systems, create an external auth identity provider and link it to an external credential. Easily connect with external systems that require the Proof Key for Code Exchange (PKCE) extension to obtain an OAuth token. Define custom request parameters, such as key-value pairs, to interact with the identity provider's token endpoint without writing custom Apex code. Add an external auth identity provider component to second-generation managed packages (managed 2GP) and unlocked packages for distribution across many orgs or across development, test, and production environments.

Refresh Access Tokens for Named Credentials with More HTTP Status Codes

When you configure named credentials, you can account for more external systems that leverage nonstandard HTTP status codes for token refresh. In addition to the standard 401 and other 4xx responses, Salesforce can refresh tokens when the external system returns 6xx HTTP status codes or greater.

Simplify OAuth Configurations with External Auth Identity Providers

To streamline OAuth configurations for outbound callouts to external systems, create an external auth identity provider and link it to an external credential. Easily connect with external systems that require the Proof Key for Code Exchange (PKCE) extension to obtain an OAuth token. Define custom request parameters, such as key-value pairs, to interact with the identity provider's token endpoint without writing custom Apex code. Add an external auth identity provider component to second-generation managed packages (managed 2GP) and unlocked packages for distribution across many orgs or across development, test, and production environments.

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

Why: External auth identity providers offer greater flexibility and control over your OAuth connections with external systems. Here are a few things to keep in mind.

- You can create an external auth identity provider from the Named Credentials page in Setup or with Connect REST API or Apex.

- External auth identity providers currently support only integrations that use the OAuth 2.0 authentication protocol with the authorization code browser flow.

SEE ALSO:

Salesforce Help: Create or Edit an External Auth Identity Provider (can be outdated or unavailable during release preview)

Refresh Access Tokens for Named Credentials with More HTTP Status Codes

When you configure named credentials, you can account for more external systems that leverage nonstandard HTTP status codes for token refresh. In addition to the standard 401 and other 4xx responses, Salesforce can refresh tokens when the external system returns 6xx HTTP status codes or greater.

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

How: From Setup, in the Quick Find box, enter `Named Credentials`, and then select **Named Credentials**. Create or edit an external credential, and in the Additional Status Codes for Token Refresh field, enter 6`xx` status codes or greater, like `601` or `701`.

SEE ALSO:

Salesforce Help: Create or Edit an External Credential (can be outdated or unavailable during release preview)

Privacy Center

Bypass triggers and validation rules while processing records. Mask and anonymize inactive users.

IN THIS SECTION:

Process the User Object with Privacy Policies

Use Data Management or Right to Be Forgotten (RTBF) policies to anonymize or mask inactive users. When you anonymize a user, all standard fields are obfuscated, and the typical notifications for username changes aren't triggered. When you mask a user, you can specify how individual standard fields are processed. You can now also retain user records in your Privacy Center retention store. You can't use privacy policies to process active users or delete user records.

Bypass Triggers and Validation Rules While Processing Records

If a record has value restrictions or is used to trigger a flow, errors can occur during policy execution. To reduce job errors and avoid further record changes caused by record-triggered flows, use this bypass configuration. Add a custom permission to the trigger or validation rule that you want to bypass, and then assign the permission to your privacy policies via a session-based permission set.

Process the User Object with Privacy Policies

Use Data Management or Right to Be Forgotten (RTBF) policies to anonymize or mask inactive users. When you anonymize a user, all standard fields are obfuscated, and the typical notifications for username changes aren't triggered. When you mask a user, you can specify how individual standard fields are processed. You can now also retain user records in your Privacy Center retention store. You can't use privacy policies to process active users or delete user records.

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

SEE ALSO:

Salesforce Help: Anonymize Inactive Users (can be outdated or unavailable during release preview)

Bypass Triggers and Validation Rules While Processing Records

If a record has value restrictions or is used to trigger a flow, errors can occur during policy execution. To reduce job errors and avoid further record changes caused by record-triggered flows, use this bypass configuration. Add a custom permission to the trigger or validation rule that you want to bypass, and then assign the permission to your privacy policies via a session-based permission set.

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

SEE ALSO:

Salesforce Help: Bypass Triggers and Validation Rules During Policy Execution (can be outdated or unavailable during release preview)

Salesforce Shield

Access and visualize low-latency event log data via standard objects with the Event Log Object framework (generally available). You can bring your own data encryption keys for search indexes that use the latest Search framework. And you can now use named principal credentials with Cache-Only Keys.

IN THIS SECTION:

Event Monitoring

Store and query all of your event data via the API with the new event log object framework. Correlate Event Log Files and Event Log Objects to troubleshoot performance issues. Access all Event Monitoring data with the Event Monitoring User permission. Identify and address content security policy violations that originate from Lightning pages with the CSP Violation event type. Reduce end-user frustration by cleaning up blocked redirections.

Shield Platform Encryption

You can now bring your own data encryption keys for search indexes. And you can now use named principal credentials for cache-only keys.

Event Monitoring

Store and query all of your event data via the API with the new event log object framework. Correlate Event Log Files and Event Log Objects to troubleshoot performance issues. Access all Event Monitoring data with the Event Monitoring User permission. Identify and address content security policy violations that originate from Lightning pages with the CSP Violation event type. Reduce end-user frustration by cleaning up blocked redirections.

IN THIS SECTION:

Query Low-Latency Event Data with Event Log Objects (Generally Available)

Store your event data for the past 30 days and query any 15-day window within that stored data via the API by using the event log object framework, now generally available, that captures event data in standard objects.

Correlate Logs with a Custom Request Identifier

Quickly debug and troubleshoot performance issues by using the customizable Request Identifier field to correlate logs. This field is now available in all Event Monitoring logs.

Access All Event Monitoring Data with One Permission Set

Simplify manual permission set assignments with the new Event Monitoring User permission. You can access all your Event Monitoring data, including Event Log Files, Objects, Real-Time Events, and Threat Detection.

Monitor Content Security Policy (CSP) Violations

Identify and address content security policy violations that originate from Lightning pages with the CSP Violation event type. CSP directives control the types of resources that Lightning components, third-party APIs, and WebSocket connections can load from a trusted URL.

Dig into Details About Blocked Redirections

Reduce end-user frustration by cleaning up blocked redirections. To get information on blocked redirections to untrusted and malformed URLs, use the Blocked Redirect event type. This event type captures the page where the blocked redirection occurred and whether the target URL is malformed.

Query Low-Latency Event Data with Event Log Objects (Generally Available)

Store your event data for the past 30 days and query any 15-day window within that stored data via the API by using the event log object framework, now generally available, 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: Event Log Objects is not yet available in these regions: Asia Pacific (Seoul), Asia Pacific (Jakarta), South America (São Paulo), and Middle East (UAE).

Who: This change is available to Hyperforce customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: From Setup, in the Quick Find Box, enter *Permission*, and select **Permission Sets**. Select **View Event Log Object Data** to access Event Log Objects, or select **Event Monitoring User** to access all of your Event Monitoring data, including Event Log Objects.

Correlate Logs with a Custom Request Identifier

Quickly debug and troubleshoot performance issues by using the customizable Request Identifier field to correlate logs. This field is now available in all Event Monitoring logs.

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: In an API call to Salesforce, set the `X-SFDC-REQUEST-ID` header with a 32-character OTEL compatible TraceID or a 22-character alphanumeric ID.

Access All Event Monitoring Data with One Permission Set

Simplify manual permission set assignments with the new Event Monitoring User permission. You can access all your Event Monitoring data, including Event Log Files, Objects, Real-Time Events, and Threat Detection.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, and Unlimited editions where Event Monitoring is enabled.

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: From Setup, in the Quick Find Box, enter *Permission*, and select **Permission Sets**. Then enable the **Event Monitoring User** permission.

Monitor Content Security Policy (CSP) Violations

Identify and address content security policy violations that originate from Lightning pages with the CSP Violation event type. CSP directives control the types of resources that Lightning components, third-party APIs, and WebSocket connections can load from a trusted URL.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Unlimited, and Developer editions. The CSP Violation event type 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.

Why: The Trusted URL and Browser Policy Violations list in Setup summarizes CSP violations for the `font-src` (fonts), `frame-src` (iframe content), and `img-src` (image) directives. To help you manage that list, the CSP Violation event type provides details about those violations. The new event type also captures violations of other directives, such as `media-src` (audio and video) and `style-src` (style sheets).

How: To collect CSP violation details over multiple days, schedule a daily query of the CSP Violation event type via REST API.

SEE ALSO:

Object Reference for the Salesforce Platform: CSP Violation Event Type (can be outdated or unavailable during release preview)

Salesforce Help: Manage Trusted URL and Browser Policy Violations (can be outdated or unavailable during release preview)

Dig into Details About Blocked Redirections

Reduce end-user frustration by cleaning up blocked redirections. To get information on blocked redirections to untrusted and malformed URLs, use the Blocked Redirect event type. This event type captures the page where the blocked redirection occurred and whether the target URL is malformed.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Unlimited, and Developer editions. This event type captures blocked redirections that originate from components and pages that were built in Salesforce Classic. The Blocked Redirect event type 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.

How: To gather information about blocked redirections over time, schedule a daily query of the Blocked Redirection event type.

SEE ALSO:

Object Reference for the Salesforce Platform: Blocked Redirect Event Type (can be outdated or unavailable during release preview)

Salesforce Help: Manage Redirections to External URLs (can be outdated or unavailable during release preview)

Shield Platform Encryption

You can now bring your own data encryption keys for search indexes. And you can now use named principal credentials for cache-only keys.

IN THIS SECTION:

Bring Your Own Data Encryption Keys for Search Indexes

If you're using Salesforce root keys and data encryption keys (DEKs) to encrypt search indexes, you can now upload a DEK that you generate outside of Salesforce. With Bring Your Own Key (BYOK) support for DEKs, you control more of the lifecycle for keys that encrypt search indexes.

[Encrypt Data Cloud Search Indexes]

Platform Encryption for Data Cloud now encrypts search indexes in Data Cloud. This improvement expands the pool of data secured by your customer-managed keys.

[Used Named Principal Authentication with Cache-Only Keys]

Shield Platform Encryption Cache-Only Keys now supports the use of named principals to authenticate into your external key service. Some key management services require named principal authentication. Salesforce supports both the new named principal-based credentials and the legacy credentials that don't use named principals.

Bring Your Own Data Encryption Keys for Search Indexes

If you're using Salesforce root keys and data encryption keys (DEKs) to encrypt search indexes, you can now upload a DEK that you generate outside of Salesforce. With Bring Your Own Key (BYOK) support for DEKs, you control more of the lifecycle for keys that encrypt search indexes.

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

How: BYOK for DEKs works similarly to BYOK for tenant secrets. Before you get started, make sure that encryption for search indexes is turned on and that you have an active root key. You can generate your DEK with a tool of your choice, but it must be 256-bit size. Then, on the Key Management page in Setup, select the **Search Index** tab, and then click **Bring Your Own Key**. Click **Generate Certificate**, follow the prompts on the page, and save your work. When the page reloads, click **Download Certificate & Token**. Wrap your DEK with the certificate's public key. Then upload your wrapped DEK and session token.

Encrypt Data Cloud Search Indexes

Platform Encryption for Data Cloud now encrypts search indexes in Data Cloud. This improvement expands the pool of data secured by your customer-managed keys.

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

When: This functionality is available starting in January 2025.

How: On the Encryption Settings page in Setup, turn on **Manage Data Cloud Keys**. We generate a root key for you in Salesforce. Your root key encrypts and controls the data encryption key (DEK) in AWS that encrypts your Data Cloud data. Both new and existing DEKs automatically begin encrypting search index data.

SEE ALSO:

Salesforce Help: Encrypt Data Cloud with Customer-Managed Root Keys Encryption (can be outdated or unavailable during release preview)

Used Named Principal Authentication with Cache-Only Keys

Shield Platform Encryption Cache-Only Keys now supports the use of named principals to authenticate into your external key service. Some key management services require named principal authentication. Salesforce supports both the new named principal-based credentials and the legacy credentials that don't use named principals.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions that have Salesforce Shield or Shield Platform Encryption, and the Cache-Only Key Service add-on subscriptions.

Why: In Winter '23, Salesforce introduced an improved named credential that's extensible, customizable, and more secure. Though you can still use legacy named credentials with Cache-Only keys, we strongly recommend that you use this preferred credential instead of legacy named credentials.

How: Creating a cache-only key that uses the new named principal authentication is a six step process. In Setup, you create an external credential, an external named principal, and a permission set for the named principal. Assign the `autoproc` user to the permission set Create the named credential for the cache-only key, and then assign the named credential to your cache-only key.

SEE ALSO:

Salesforce Help: Optimize Security Using Named Credentials and Cache-Only Keys (can be outdated or unavailable during release preview)

Security Center

Keep tabs on key certificate information. Monitor transactional database tenant secrets. Easily navigate through your Security Center dashboard with a new and improved navigation menu. New prompts on the Security Landscape page help you get the most out of Security Center.

IN THIS SECTION:

Monitor Certificates Across Your Salesforce Landscape

Keep tabs on key certificate information, such as expiration dates, certificate type, creation date, and active status, without going into Setup.

Track your Transactional Database Encryption status with the Existing Encryption Policies metric

Monitor transactional database tenant secrets without diving into the Key Management pages for each of your orgs.

Discover More Ways to Optimize Security Center

New prompts on the Security Landscape page make it easy to set up Alerts and connect tenants—helping you unlock the full potential of Security Center.

Streamline Navigation with New Icons

Easily work your way through the Security Center dashboard with a new and improved navigation menu with updated icons.

Monitor Certificates Across Your Salesforce Landscape

Keep tabs on key certificate information, such as expiration dates, certificate type, creation date, and active status, without going into Setup.

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

Who: This change applies to customers with the Security Center add-on subscription.

How: Monitor the Certificates metric from your Security Center dashboard via the Configuration category.

Track your Transactional Database Encryption status with the Existing Encryption Policies metric

Monitor transactional database tenant secrets without diving into the Key Management pages for each of your orgs.

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

Who: This change applies to customers with the Security Center add-on subscription. Database Encryption is available to customers with a Shield or Shield Platform Encryption licenses and the Cache-Only Key add-on in select Hyperforce environments. Transactional Database Encryption must be enabled on the organization's instance.

How: Monitor the Encryption Policy metric from your Security Center dashboard via the Configuration category.

Discover More Ways to Optimize Security Center

New prompts on the Security Landscape page make it easy to set up Alerts and connect tenants—helping you unlock the full potential of Security Center.

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

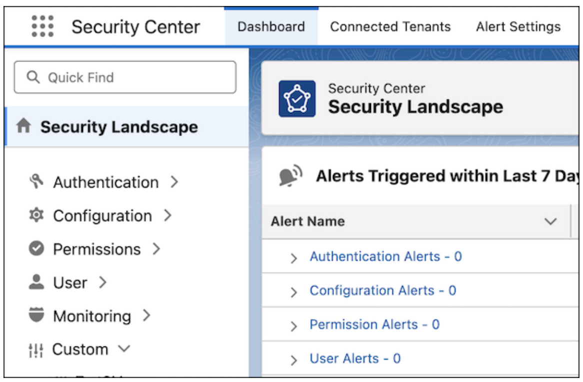
Who: This change is available to users with the Security Center add-on subscription.

Streamline Navigation with New Icons

Easily work your way through the Security Center dashboard with a new and improved navigation menu with updated icons.

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

Who: This change applies to customers with the Security Center add-on subscriptions.



Policy Center

Meet Policy Center, your home for managing policies across your trusted privacy and security apps.

IN THIS SECTION:

[Manage Privacy and Security Policies in Policy Center](#)
Streamline your policy management and creation across different privacy and security apps with Policy Center. See, edit, and create policies in one place from tools like Data Mask and Privacy Center.

Manage Privacy and Security Policies in Policy Center

Streamline your policy management and creation across different privacy and security apps with Policy Center. See, edit, and create policies in one place from tools like Data Mask and Privacy Center.

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

Who: Policy Center is available to users with the Modify All Policy Center Policies and View All Policy Center Policies permissions.

How: From the App Launcher, find and select **Policy Center**. Create a new policy from the Home tab, or view your existing policies on the Policies tab.

SEE ALSO:

Salesforce Help: Policy Center: Control Data Security and Management Policies

Other Security Changes

To adopt the latest content security policy (CSP) directives via a new release update, update your trusted URLs. Identify redirections that use malformed URLs more easily, and get more information about CSP violations and blocked redirections by using new event types.

IN THIS SECTION:

Update Your Trusted URLs for the Latest CSP Directives (Release Update)

To help protect your org from cross-site scripting (XSS) and other code-injection attacks, Salesforce updated the delivered content security policy (CSP) directives for Lightning pages. This change can prevent externally hosted fonts and images from loading. It can also prevent external websites from loading within an iframe on your Lightning pages. To adopt these required directives, review the impact and update your trusted URLs. This release update is available starting in Spring '25 and is enforced in Summer '25.

Diagnose Failed Redirections Faster

To help you address redirections on the Trusted URL and Browser Policy Violation list, that list now differentiates between redirections to a malformed URL and redirections that are blocked. Malformed URLs contain typos or mistakes that make them invalid. The violation type for blocked redirections to an untrusted URL was relabeled to Blocked Redirection for clarity. Previously, both types of failed redirections were labeled External Redirection. Also, to clarify when redirections are blocked and logged in the violations list, Salesforce Help was updated.

Locate the Source of Content Security Policy (CSP) Violations and Blocked Redirections

Learn more about each entry on the Trusted URL and Browser Policy Violations in Setup, including where each violation originated, with the Blocked Redirect and CSP Violation event types.

Test Automation That Generates Trusted URLs

To prevent errors when loading resources from external URLs and to avoid redirections to invalid URLs, Salesforce validates the syntax of new and updated entries on the Trusted URLs and Trusted URLs for Redirects allowlists. If you own a managed package, flow, or automated tool that generates the corresponding CspTrustedSite or RedirectWhitelistUrl objects, verify that automation against this change.

Secure Cross-Cloud Integrations Across Asia with Private Connect

As part of expanding the AWS partnership with Salesforce, Private Connect support for AWS integrations is available in new regions in Asia.

Update Your Trusted URLs for the Latest CSP Directives (Release Update)

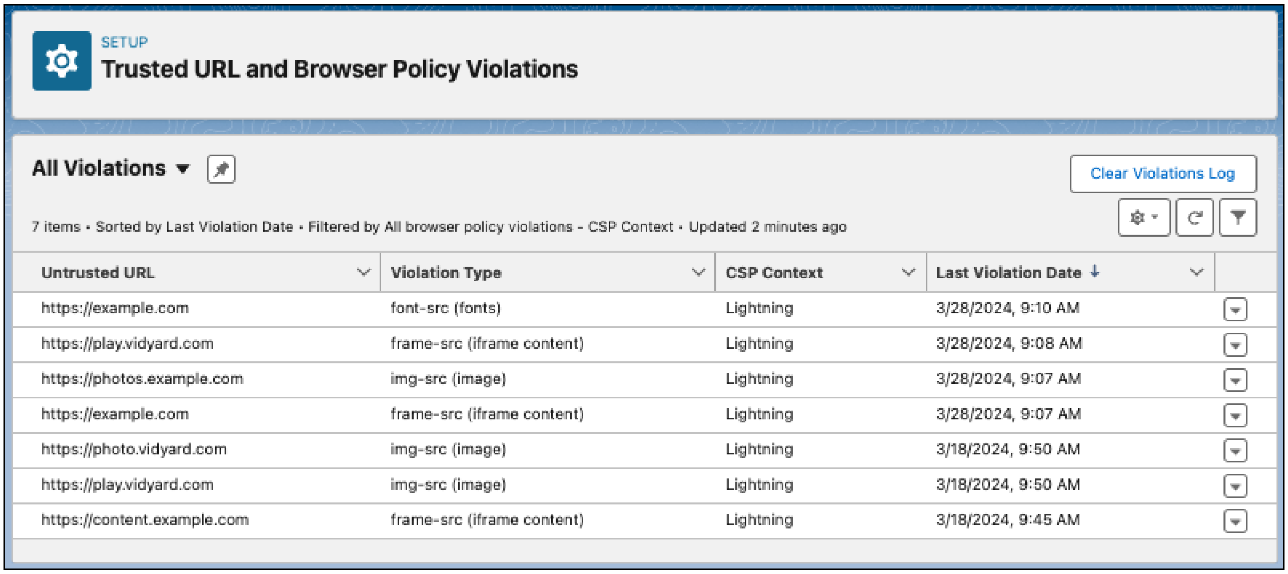
To help protect your org from cross-site scripting (XSS) and other code-injection attacks, Salesforce updated the delivered content security policy (CSP) directives for Lightning pages. This change can prevent externally hosted fonts and images from loading. It can also prevent external websites from loading within an iframe on your Lightning pages. To adopt these required directives, review the impact and update your trusted URLs. This release update is available starting in Spring '25 and is enforced in Summer '25.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions. The CSP Violations event type is available in the API but not in the Event Monitoring Analytics app. That event is free for all customers with a 24-hour data-retention period.

When: Salesforce enforces this update in Summer '25. In orgs created in Summer '24 and later, this release update is enabled by default. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and then click the maintenance tab.

Why: This release update replaces the canceled Adopt Updated Content Security Policy (CSP) Directives release update. To better help you analyze the impact of this change, Salesforce recalibrated the sampling process that generates the Trusted URL and Browser Policy Violations list in Setup. Also, to see details about each CSP violation, you can use the new CSP Violation event type.

How: To identify the impacted redirections, go to the Setup page Trusted URL and Browser Policy Violations, and then filter the list on Violation Type. Use the equals operator and select **img-src (image)**, **frame-src (iframe content)**, and **font-src (fonts)**. To help you make the required updates, this filtered list view includes resources that are blocked with this change, even if this release update isn't enabled for testing.



To get more detail about these violations, you can schedule a daily query of the CSP Violation event type. To allow a CSP directive for an untrusted URL, add the URL to the Trusted URLs allowlist.

To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For the release update Update Your Trusted URLs for the Latest CSP Directives, follow the testing and activation steps.

SEE ALSO:

Salesforce Help: Manage Trusted URL and Browser Policy Violations (can be outdated or unavailable during release preview)

Object Reference for the Salesforce Platform: CSP Violation Event Type (can be outdated or unavailable during release preview)

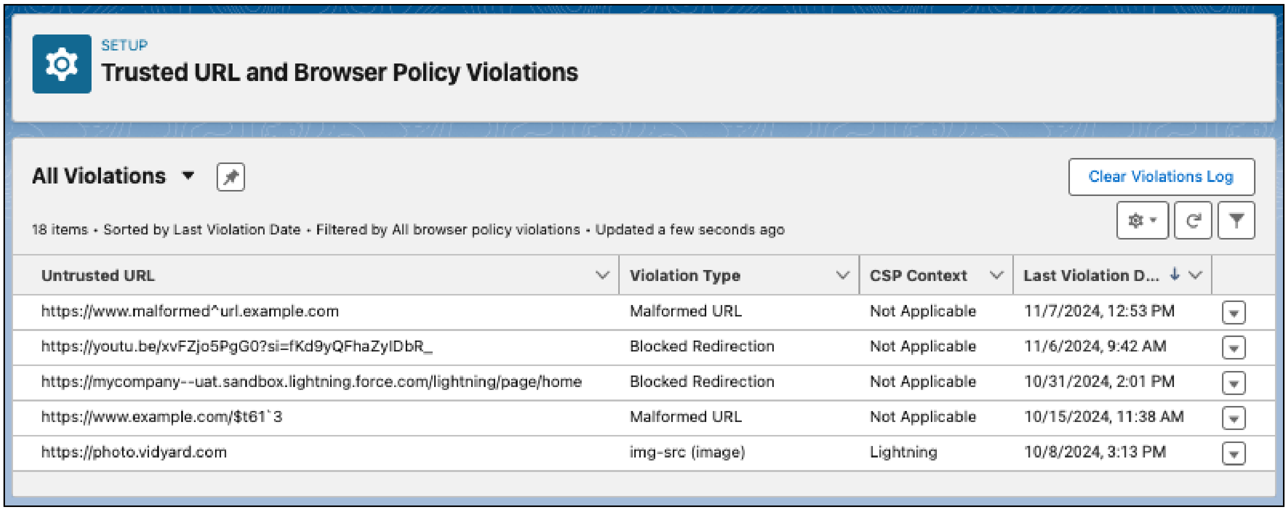
Release Updates

Diagnose Failed Redirections Faster

To help you address redirections on the Trusted URL and Browser Policy Violation list, that list now differentiates between redirections to a malformed URL and redirections that are blocked. Malformed URLs contain typos or mistakes that make them invalid. The violation type for blocked redirections to an untrusted URL was relabeled to Blocked Redirection for clarity. Previously, both types of failed redirections were labeled External Redirection. Also, to clarify when redirections are blocked and logged in the violations list, Salesforce Help was updated.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. The list captures qualifying failed redirections that originate from components and pages built in Salesforce Classic.

Why: Here's an example of the Trusted URL and Browser Policy Violations list in Setup with the new labels. Entries with the Malformed URL violation type represent a redirection for which the target URL failed a syntax check.



SEE ALSO:

Salesforce Help: Manage Trusted URL and Browser Policy Violations (can be outdated or unavailable during release preview)

Locate the Source of Content Security Policy (CSP) Violations and Blocked Redirections

Learn more about each entry on the Trusted URL and Browser Policy Violations in Setup, including where each violation originated, with the Blocked Redirect and CSP Violation event types.

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

SEE ALSO:

Dig into Details About Blocked Redirections

Monitor Content Security Policy (CSP) Violations

Test Automation That Generates Trusted URLs

To prevent errors when loading resources from external URLs and to avoid redirections to invalid URLs, Salesforce validates the syntax of new and updated entries on the Trusted URLs and Trusted URLs for Redirects allowlists. If you own a managed package, flow, or automated tool that generates the corresponding CspTrustedSite or RedirectWhitelistUrl objects, verify that automation against this change.

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: Manage Trusted URLs (can be outdated or unavailable during release preview)

Salesforce Help: Specify Trusted URLs for Redirections (can be outdated or unavailable during release preview)

Object Reference for the Salesforce Platform: CspTrustedSite

Object Reference for the Salesforce Platform: RedirectWhitelistUrl

Secure Cross-Cloud Integrations Across Asia with Private Connect

As part of expanding the AWS partnership with Salesforce, Private Connect support for AWS integrations is available in new regions in Asia.

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

How: To create a private connection between Salesforce and your data hosted within AWS, go to the Private Connect page in Setup, and then click **AWS Regions**.

The latest AWS regions that have direct connectivity to Salesforce data centers are:

- ap-northeast-3
- il-central-1

SEE ALSO:

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

Service

Get Case Resolution Assistance at the Click of a Button (Generally Available). Monitor Real-time Conversations Between Agentforce Service Agents and Customers. Integrate Knowledge with Data Cloud.

IN THIS SECTION:

Agentforce for Service Cloud

Help your service reps resolve cases faster with AI agents.

Einstein for Service

Supercharge your AI offerings with Einstein. Use Conversation Mining on Voice channels, customize the Einstein Service Replies for Email prompt template in Prompt Builder, get Work Summaries for Case (beta), and get AI features in more languages.

Employee Service

Explore the Alumni Portal for alumni services and networking. Employee Hub is now Employee Portal, and HR Service Workspace is renamed as HR Service Console. Manage employee life events with Employee Enablement Program. Manage Workday data in Salesforce by using the new MuleSoft integration apps.

Service Data Kit

Add more of your service data to Service Cloud and Data Cloud.

Service Insights

Explore your service performance with Service Insights.

Channels

Enjoy improved flexibility when refining automated emails. Customize your Messaging for Web text message bubbles with custom lightning web components (LWC). Route work items through a single system with Unified Routing for voice.

Knowledge

Integrate knowledge articles into Data Cloud to improve AI outcomes. Open links from articles ingested from third-party sources directly within Salesforce to avoid context-switching. Add and manage more complex, multi-stage approval processes to your knowledge base. Run the Lightning Knowledge Migration Tool to access Classic Knowledge.

Entitlements and Milestones

Empower your service agents excel in their roles and optimize overall service operations. By automating closure of milestones through flows and using custom Case Milestone report type, your agents can work more efficiently and effectively.

Self Service

Help your customers help themselves. Check out new features that enable your customers to find what they are looking for faster.

Routing

Redirect more types of work with work reassignment. Route voice calls using Omni-Channel Unified Routing.

Feedback Management

Capture more data by saving responses from partially completed surveys. Enhance Net Promoter Score questions with customizable labels for more meaningful feedback. Access survey data directly within messaging sessions and create tailored reports for deeper insights.

Customer Experience Intelligence

Unify customer data, extract product insights, and improve data quality for personalized customer experiences. Gain insights into customer engagement, identify top products, and refine product descriptions with the Customer Experience Intelligence agent topic.

Service Adoption

Explore different service areas available to you based on business goals and more.

Agentforce for Service Cloud

Help your service reps resolve cases faster with AI agents.

IN THIS SECTION:

Agentforce Service Agent

To optimize the support provided by Agentforce Service Agents, take advantage of these enhancements.

Agentforce Service Planner

Meet the latest addition to the AI agents for Service family: Agentforce Service Planner. As an assistive agent in the Case record page, it helps your service reps resolve cases faster with real-time case summaries and step-by-step resolution guidance grounded in your Case data. Check out the latest features and improvements here.

Agentforce Service Agent

To optimize the support provided by Agentforce Service Agents, take advantage of these enhancements.

IN THIS SECTION:

Monitor Real-time Conversations Between Agentforce Service Agents and Customers (Release Update)

To improve the quality of service, supervisors can now monitor live messaging sessions between this type of AI agent and your customers. Specifically, they can monitor enhanced Messaging and Messaging for In-App and Web sessions from within Omni Supervisor. To notify supervisors which conversations need human support, add the Raise Flag action to the AI agent. Supervisors can lower the flag and transfer conversations to human representatives.

Flag Supervisors to Help with Agentforce Service Agent Conversations

While hundreds of Service Agent conversations can happen simultaneously, help supervisors focus on the ones that need their assistance. Use the Raise Flag action to alert a supervisor if a conversation between the AI agent and a customer needs their attention. For example, alert the supervisor if a customer is upset or requests a refund.

[Agentforce Service Agent is Now ASA Messaging in Digital Wallet](#)

Agentforce Service Agent - Inbound is now called ASA Messaging in Digital Wallet, the account management tool for consumption-based products. On Digital Wallet's homepage, the Conversations consumption card now also summarizes the combined usage of ASA Messaging, along with usage data on Agentforce Sales Coach and Agentforce SDR. Additionally, Digital Wallet's Consumption Insights page offers a breakdown of your combined Agentforce usage by time period to help you detect trends over time.

[Enhance User Search Experience by Using Context-Driven Conversations with Agentforce Service Agent](#)

Empower your users with faster resolution to their queries by passing the real-time search context from site visitors to Agentforce Service Agent. Agentforce Service Agent suggests solutions to user queries by accessing the knowledge base.

[Chat with Agentforce Service Agent in Japanese (Generally Available)](#)

In addition to English, French, German, Italian, Portuguese, and Spanish in certain locales, Agentforce Service Agent now supports Japanese.

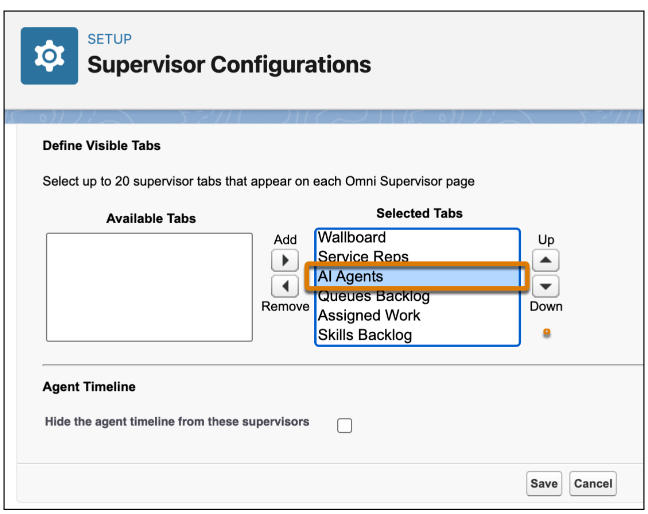
Monitor Real-time Conversations Between Agentforce Service Agents and Customers (Release Update)

To improve the quality of service, supervisors can now monitor live messaging sessions between this type of AI agent and your customers. Specifically, they can monitor enhanced Messaging and Messaging for In-App and Web sessions from within Omni Supervisor. To notify supervisors which conversations need human support, add the Raise Flag action to the AI agent. Supervisors can lower the flag and transfer conversations to human representatives.

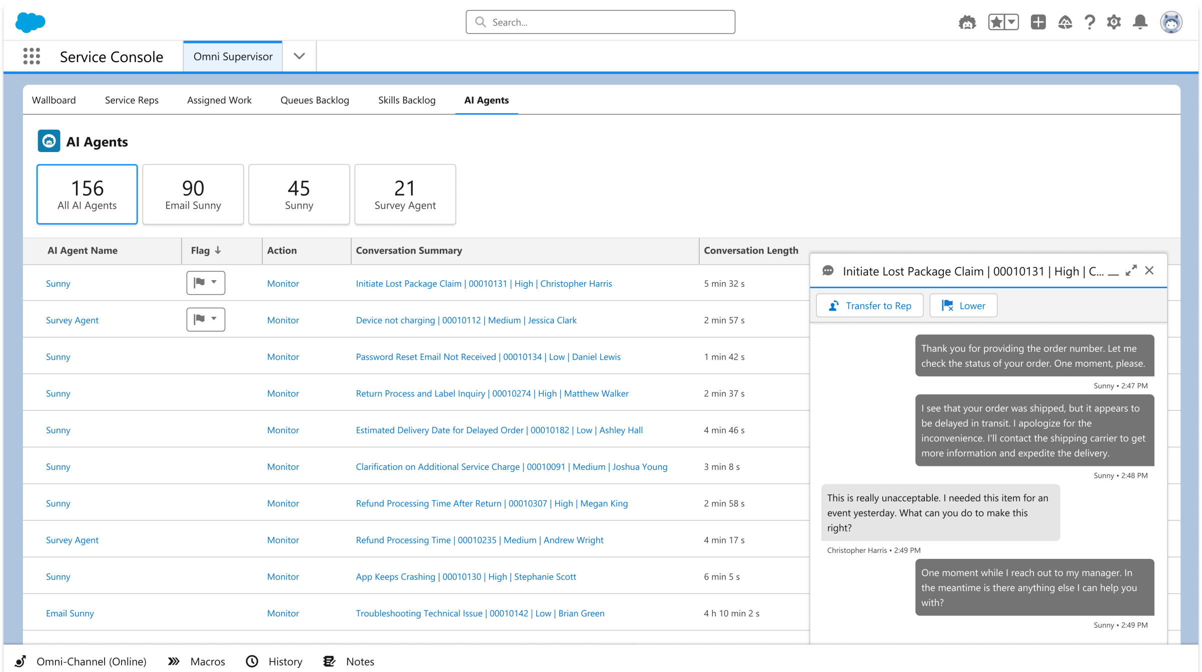
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer Editions with the Einstein for Service, Einstein Platform, or Agentforce Service Agent add-on.

When: This feature is not part of the initial Spring '25 release and may be included at a later date.

How: To set up this feature, add the Raise Flag action to your AI agents and, if a supervisor configuration is used, show the AI Agents tab in Omni Supervisor.



To view an active conversation between an AI agent and a customer, in the AI Agents tab of Omni Supervisor, a supervisor can click **Monitor**. If the AI agent needs help, the supervisor can reassign the conversation to a service rep.



SEE ALSO:

Salesforce Help: Monitor Agentforce Service Agents (can be outdated or unavailable during release preview)

Flag Supervisors to Help with Agentforce Service Agent Conversations

While hundreds of Service Agent conversations can happen simultaneously, help supervisors focus on the ones that need their assistance. Use the Raise Flag action to alert a supervisor if a conversation between the AI agent and a customer needs their attention. For example, alert the supervisor if a customer is upset or requests a refund.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer Editions with the Einstein for Service, Einstein Platform, or Agentforce Service Agent add-on.

When: This feature is not part of the initial Spring '25 release and may be included at a later date.

How: To define when a Service Agent raises a flag, modify the AI agent's topic instructions. To respond to a raised flag in Omni Supervisor, the supervisor can reassign the conversation to a service rep or lower the flag.

SEE ALSO:

Salesforce Help: Flag Conversations for a Supervisor (can be outdated or unavailable during release preview)

Agentforce Service Agent is Now ASA Messaging in Digital Wallet

Agentforce Service Agent - Inbound is now called ASA Messaging in Digital Wallet, the account management tool for consumption-based products. On Digital Wallet's homepage, the Conversations consumption card now also summarizes the combined usage of ASA Messaging, along with usage data on Agentforce Sales Coach and Agentforce SDR. Additionally, Digital Wallet's Consumption Insights page offers a breakdown of your combined Agentforce usage by time period to help you detect trends over time.

Where: Digital Wallet is available in Lightning Experience in Enterprise and Unlimited editions. ASA Messaging is part of Service Cloud Usage Billing and is available in Lightning Experience in Enterprise and Unlimited editions.

Who: Digital Wallet is available to users with the View Consumption user permission or Your Account access. Service Cloud Usage Billing is available to users with the Conversation add-on.

How: To get started with Digital Wallet, see Access Digital Wallet. To get started with ASA Messaging, see Set Up a Service Agent.

SEE ALSO:

Salesforce Help: Agentforce Service Agent

Salesforce Help: About Digital Wallet

Enhance User Search Experience by Using Context-Driven Conversations with Agentforce Service Agent

Empower your users with faster resolution to their queries by passing the real-time search context from site visitors to Agentforce Service Agent. Agentforce Service Agent suggests solutions to user queries by accessing the knowledge base.

Where: This change applies to Messaging for In-App and Web and all sites accessed through Lightning Experience and Salesforce Classic in Performance, Unlimited, and Developer Editions with the Einstein for Service, Einstein Platform, or Agentforce Service Agent add-on.

Why: Passing search context in real time enables Agentforce Service Agent to automatically suggest answers to user's search queries, providing a faster resolution and overall better support experience.

How: In the Experience Workspaces, go to the AI Experiences tile and turn on the **Share search queries with Agentforce Service Agent** option. When enabled, users' search context is passed to Agentforce Service Agent in real time. It then starts suggesting answers to search queries.

Chat with Agentforce Service Agent in Japanese (Generally Available)

In addition to English, French, German, Italian, Portuguese, and Spanish in certain locales, Agentforce Service Agent now supports Japanese.

Where: This feature is available in all enhanced Messaging channels. View required editions. Setup for AI Agents is available on the desktop site.

When: This change is available starting in January 2025.

How: In Agent Builder, on the Language Settings tab, specify a default language and select additional languages.

These language and locale codes are generally available.

- English (en_US, en_GB, en_AU)
- Japanese (ja_JA)

These language and locale codes are available as a beta service.

- French (fr_FR, fr_CA)
- German (de_DE)
- Italian (it_IT)
- Portuguese (pt_PT, pt_BR)
- Spanish (es_ES, es_MX)

Some LLMs generate responses that are close variants but not exact matches for the requested locale.

Agentforce Service Planner

Meet the latest addition to the AI agents for Service family: Agentforce Service Planner. As an assistive agent in the Case record page, it helps your service reps resolve cases faster with real-time case summaries and step-by-step resolution guidance grounded in your Case data. Check out the latest features and improvements here.

IN THIS SECTION:

Get Case Resolution Assistance at the Click of a Button (Generally Available)

Agentforce Service Planner reduces the need for service reps to spend time digging through your company's policies and standards, case history, or Knowledge Articles to determine how to resolve a case. As an AI assistant in the form of an Lightning web component in the Case record page, Service Planner uses generative AI to summarize a case and create a list of suggested steps for case resolution. Because Service Planner is grounded in your Case data and Agentforce topics, actions, and instructions, the suggested steps are trusted and tailored to your company's specific policies and standards.

Get Case Resolution Assistance at the Click of a Button (Generally Available)

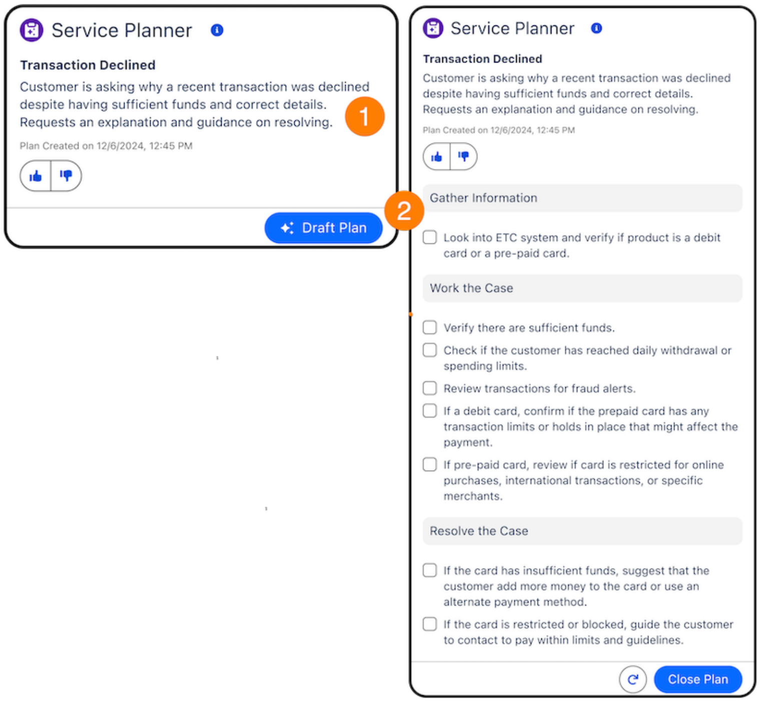
Agentforce Service Planner reduces the need for service reps to spend time digging through your company's policies and standards, case history, or Knowledge Articles to determine how to resolve a case. As an AI assistant in the form of an Lightning web component in the Case record page, Service Planner uses generative AI to summarize a case and create a list of suggested steps for case resolution. Because Service Planner is grounded in your Case data and Agentforce topics, actions, and instructions, the suggested steps are trusted and tailored to your company's specific policies and standards.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer Edition with Service Cloud and with Einstein for Service and Einstein 1 editions.

Who: To use this feature, you must have the Service Planner User permission set.

Why: Service Planner simplifies your service reps case handling workflow, helps them resolve cases faster, and boosts their productivity by:

- Automatically summarizing the case and providing general case resolution steps when the case record page is opened. The summarization features provide clear case context to your serice reps without requiring them to read through the case feed. (1)
- Giving service reps suggested steps to resolve the case when they click Draft Plan. Agents start solving cases faster so they don't spend time digging through your company's policies and standards, case history, or Knowledge articles. (2)



How: Go to the Service Planner Setup page and use the guided setup to complete general platform configurations, add the Service Planner component to the Case record page, and create your Service Planner Agent. Then, build topics, actions, and instructions that are based on your company's service policies and practices.

SEE ALSO:

Salesforce Help: Accelerate Case Resolution with Agentforce Service Planner

Einstein for Service

Supercharge your AI offerings with Einstein. Use Conversation Mining on Voice channels, customize the Einstein Service Replies for Email prompt template in Prompt Builder, get Work Summaries for Case (beta), and get AI features in more languages.

IN THIS SECTION:

Einstein Conversation Mining

Transform conversation data into service insights with Einstein Conversation Mining.

Einstein Reply Recommendations

Use the Service Replies for Email prompt template in Prompt Builder.

Einstein Work Summaries

Enjoy additional supported languages and rich content in Conversation Catch-Up, and, get Work Summaries for Case (beta) and customize Work Summaries for Case in Prompt Builder (beta).

Einstein Conversation Mining

Transform conversation data into service insights with Einstein Conversation Mining.

IN THIS SECTION:

Gain Insights from Customer Conversations in More Languages

Einstein Conversation Mining now supports French, German, Italian, and Spanish for all channels. Previously, Einstein Conversation Mining supported English only.

Mine Insights from Voice Conversations

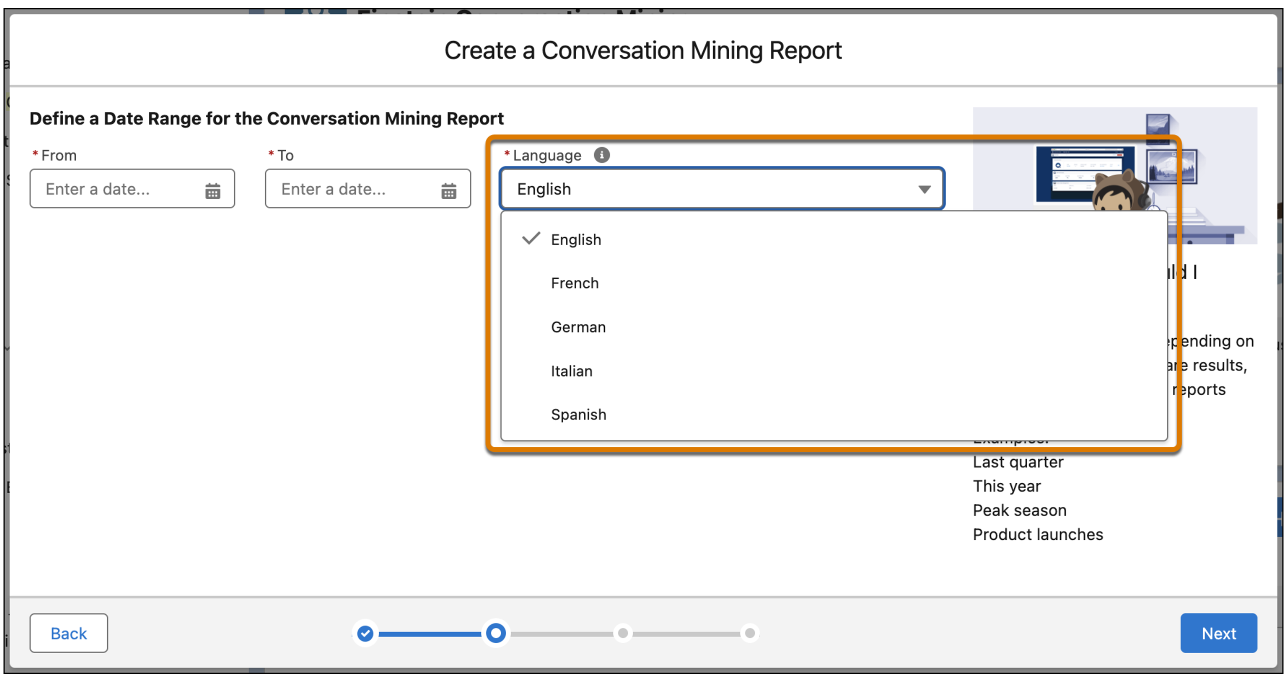
Create conversation mining reports with our newly supported channel, Voice. Identify frequent cases and inquiries, and pinpoint areas suitable for automation to streamline future cases.

Gain Insights from Customer Conversations in More Languages

Einstein Conversation Mining now supports French, German, Italian, and Spanish for all channels. Previously, Einstein Conversation Mining supported English only.

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 a channel, define a date range, and select the language that you want to use for your report.



SEE ALSO:

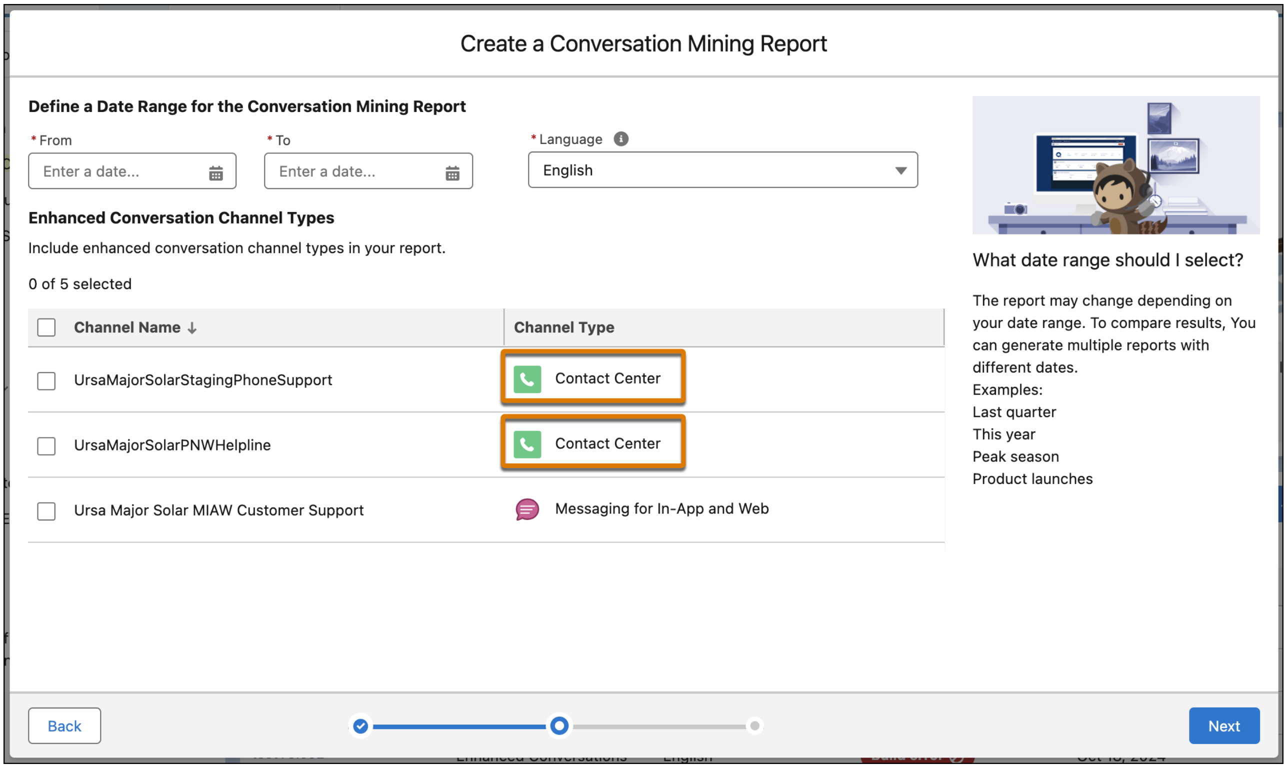
Salesforce Help: Guidelines and Limits for Einstein Conversation Mining (can be outdated or unavailable during release preview)

Mine Insights from Voice Conversations

Create conversation mining reports with our newly supported channel, Voice. Identify frequent cases and inquiries, and pinpoint areas suitable for automation to streamline future cases.

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. Then, select from the list of contact center channel types.



SEE ALSO:

Salesforce Help: Build an Einstein Conversation Mining Report (can be outdated or unavailable during release preview)

Einstein Reply Recommendations

Use the Service Replies for Email prompt template in Prompt Builder.

IN THIS SECTION:

Customize Service Replies for Email in Prompt Builder
Customize support emails with the Einstein Service Replies for Email prompt template in Prompt Builder. Make your emails informative and case-specific when you ground on relevant knowledge articles and case details. With the Get Grounding Data for Service Replies for Email action, your responses pull from the most relevant articles.

Customize Service Replies for Email in Prompt Builder

Customize support emails with the Einstein Service Replies for Email prompt template in Prompt Builder. Make your emails informative and case-specific when you ground on relevant knowledge articles and case details. With the Get Grounding Data for Service Replies for Email action, your responses pull from the most relevant articles.

Where: This change applies to Lightning Experience in Unlimited and Enterprise editions with the Einstein for Service add-on.

To purchase the Einstein for Service add-on, contact your Salesforce account executive.

When: This feature is available January 6, 2025.

How: In Prompt Builder, personalize the default Einstein Service Replies for Email prompt template, or create your own by selecting **Save As** from the default template.

SEE ALSO:

Salesforce Help: Set Up Service Replies for Email and Prompt Builder

Einstein Work Summaries

Enjoy additional supported languages and rich content in Conversation Catch-Up, and, get Work Summaries for Case (beta) and customize Work Summaries for Case in Prompt Builder (beta).

IN THIS SECTION:

Enjoy Rich Text and Additional Supported Languages in Conversation Catch-Up

Conversation Catch-Up now supports Dutch, Mexican Spanish, Portuguese, Portuguese Brazilian, and Swedish. Previously, only French, German, Italian, Japanese, and Spanish were supported. In Messaging for In-App and Web and Enhanced Messaging Channels, Conversation Catch-Up now includes rich content messages. Summaries can include choices and choiceResponse messages. Previously, only static content messages were included.

Get a Quick Overview of a Case and Ongoing Developments with Case Summaries (Beta)

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 Work Summaries for Case Using the Summarize Case Prompt Template

Shape how the LLM drafts Work Summaries for Case. You can specify the information Einstein must include or tweak the response voice and tone to better align with your business needs.

Enjoy Rich Text and Additional Supported Languages in Conversation Catch-Up

Conversation Catch-Up now supports Dutch, Mexican Spanish, Portuguese, Portuguese Brazilian, and Swedish. Previously, only French, German, Italian, Japanese, and Spanish were supported. In Messaging for In-App and Web and Enhanced Messaging Channels, Conversation Catch-Up now includes rich content messages. Summaries can include choices and choiceResponse messages. Previously, only static content messages were included.

Where: These feature updates are available to Enhanced Messaging Channels and Messaging for In-App and Web. View required editions for Messaging. The new supported languages are available in Enhanced Voice Channels. View required editions for Voice.

SEE ALSO:

Salesforce Help: Show Agents and Supervisors Midconversation Summaries

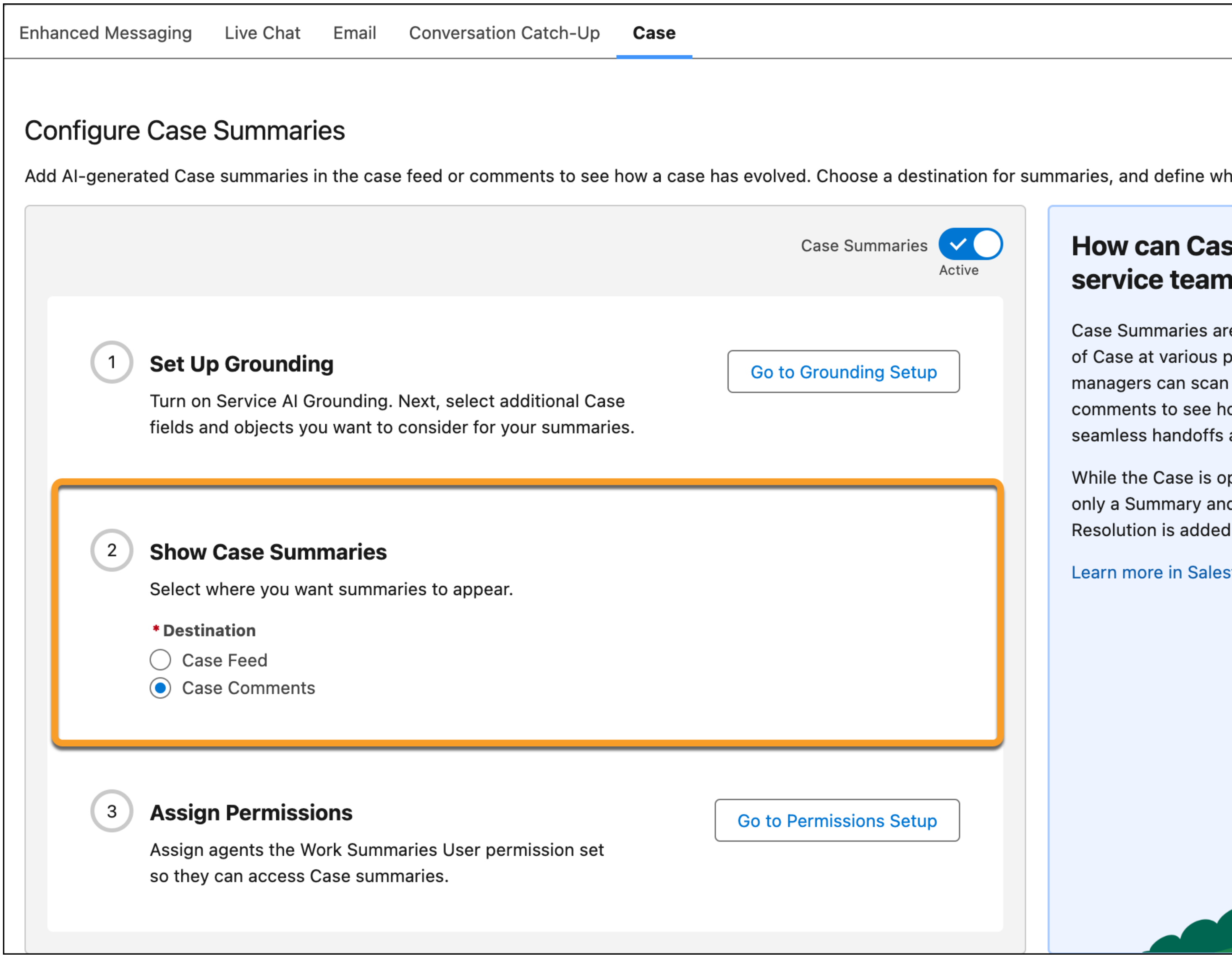
Get a Quick Overview of a Case and Ongoing Developments with Case Summaries (Beta)

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, and Unlimited editions with the Einstein for Service add-on or Einstein 1 edition.

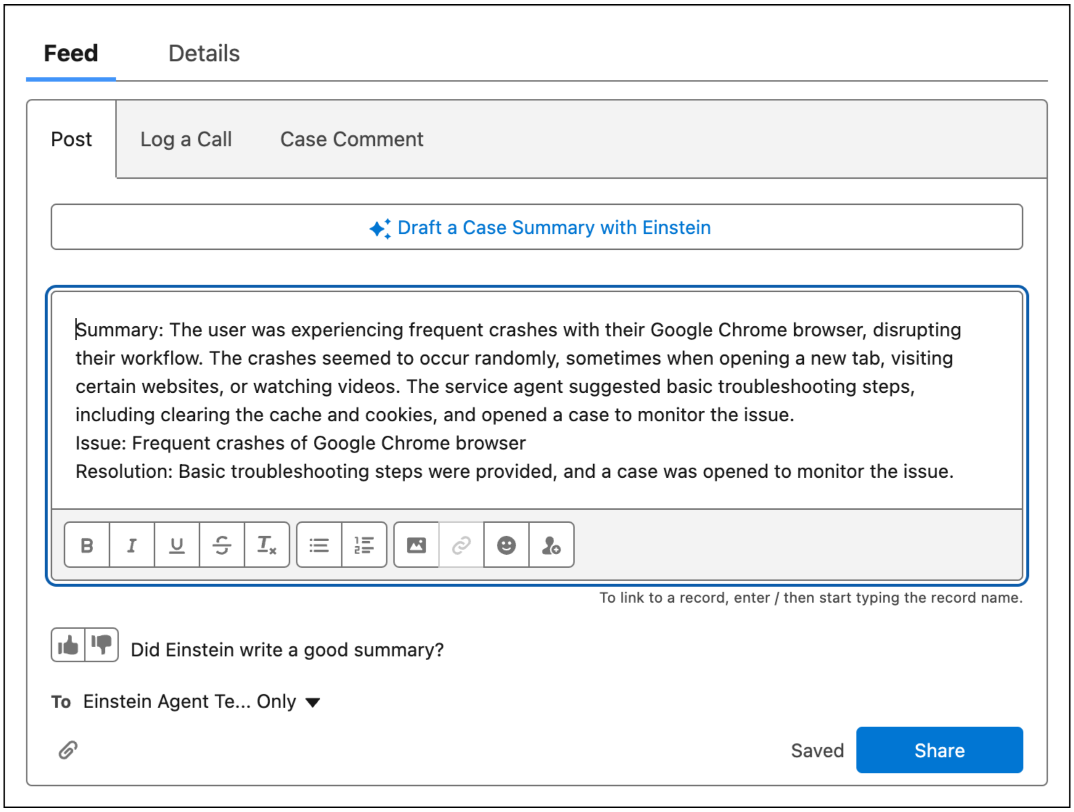
When: This change is available starting January 2025.

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:

Salesforce Help: Einstein Generative AI

Customize Work Summaries for Case Using the Summarize Case Prompt Template

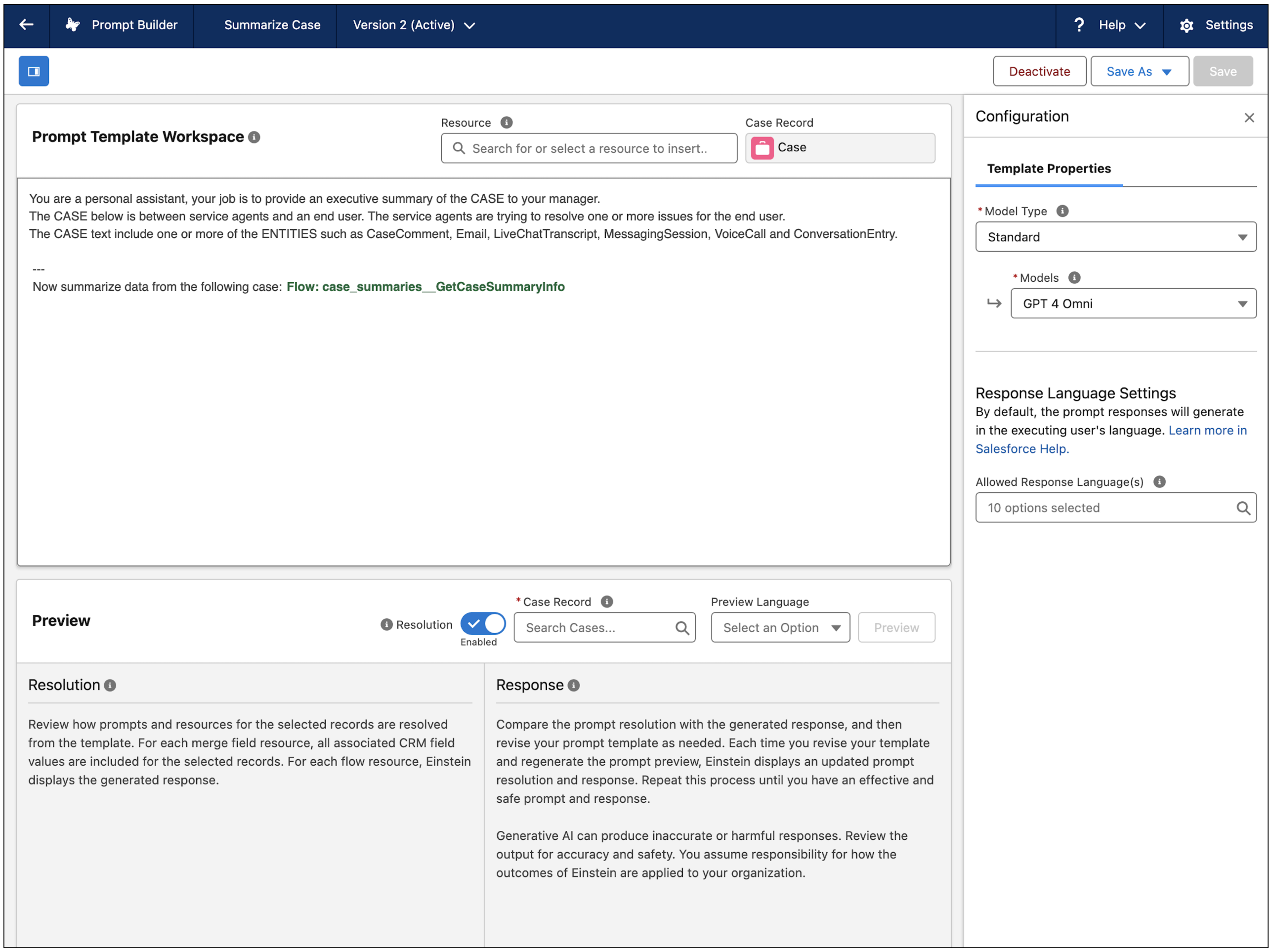
Shape how the LLM drafts Work Summaries for Case. You can specify the information Einstein must include or tweak the response voice and tone to better align with your business needs.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Service add-on, or in Einstein 1 edition.

Note: To purchase the Einstein for Service add-on or Einstein 1, contact your Salesforce account executive. Case Summaries 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 Consumption terms in the *Product Terms Directory*. Use of this beta service is at the Customer's sole discretion.

When: This change is available starting January 2025.

How: Customize the Summarize Case prompt template from Prompt Builder. We recommend that you copy and edit the standard prompt templates. In the standard prompt template we've added the key pieces of a successful prompt, including instructions for the LLM, links to the Case ID, and any response limits.



When agents request Work Summaries in the case feed, Einstein uses the last modified prompt template to draft the summary.

SEE ALSO:

Einstein Features

Salesforce Help: Customize the Work Summaries for Case Prompt Template

Salesforce Help: Standard Prompt Templates

Employee Service

Explore the Alumni Portal for alumni services and networking. Employee Hub is now Employee Portal, and HR Service Workspace is renamed as HR Service Console. Manage employee life events with Employee Enablement Program. Manage Workday data in Salesforce by using the new MuleSoft integration apps.

IN THIS SECTION:

Simplify Information Access, Service Requests, and Networking with Alumni Portal

Your alumni can use Alumni Portal 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 network with other alumni. For further support, alumni can create cases or contact human resource (HR) personnel through the email, voice, and messaging channels. Alumni can also manage their own profile information. You can customize the Alumni Portal template based on the organization's needs.

Experience Improved Clarity with the Renamed Employee Hub and HR Service Workspace Features

Employee Portal is the new name for Employee Hub, and HR Service Console is the new name for the HR Service Workspace feature. This change doesn't alter the functionality of the features, but the new names align better with the purpose of the features.

Equip Service Representatives with Historical Context by Rapidly Deploying a Preconfigured Timeline

Include a preconfigured Timeline component on the Employees page in Employee Portal, allowing quicker implementation. With Timeline, service representatives can provide personalized service to employees by viewing events in a chronological order and gaining better insights.

Efficiently Create Employee Records by Using CSV File Import

You now have another option to create employee records in Employee Service. With the advanced CSV data import feature, import employee data as a CSV file to the Employee2 and Person Account objects.

Showcase Actions and Simplify Navigation with Navigation Tiles

Give your users a visually engaging navigation experience in Employee Portal and Alumni Portal by configuring the Navigation Tiles component. The component presents the actions available to the users.

Ascertain that Important Information Reaches Employees with CMS Collection

Improve employee engagement by highlighting important content through the CMS Collection carousel component. The space-saving component maximizes the use of the Employee Portal and Alumni Portal's banner area by cycling through multiple collection items. Your employees can click an item to learn more about it.

Streamline Employee Life Events with Employee Enablement Program

Provide a structured, personalized, and compelling enablement experience to your employees throughout their tenure with your company. Your enablement admins can create programs for employee life events, such as onboarding and promotion. Employees can complete their assigned or self-enrolled enablement programs in Employee Portal.

Conveniently Comment on Cases By Using the Case Management Bot

Your employees and alumni can now view case comments and add new comments through the Case Management bot, without navigating to a case in Employee Portal or Alumni Portal.

Improve Accountability with Enhanced Approval Capabilities

The Work Guide component is now in the Approvals tab of the case details page for a better user experience. Your managers and employees can track the status of the approval requests on the Trace Approvals tab. Your employees can now also recall a request in Employee Portal if the request is no longer needed or requires modification. Together, these enhancements improve accountability by improving efficiency, flexibility, and transparency.

Improve Employee Service by Managing Feedback with Feedback Management

Configure Feedback Management to automatically send a survey to employees when their case reaches the Closed status. The survey responses help your service representatives gain actionable insights to improve the employee service experience.

Manage Workday Employee Data by Using Prebuilt MuleSoft Integrations

Seamlessly import the locations, associated companies, and manager details of employees from Workday to Salesforce by enabling the Workday Org, Location & Manager Sync integration app. Effortlessly sync the status of employees in Salesforce based on their Workday status by using the Workday Employee Offboarding integration app.

Changed Object in Employee Service

Use the changed object for creating employee enablement programs.

Simplify Information Access, Service Requests, and Networking with Alumni Portal

Your alumni can use Alumni Portal 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 network with other alumni. For further support, alumni can create cases or contact human resource (HR) personnel through the email, voice, and messaging channels. Alumni can also manage their own profile information. You can customize the Alumni Portal template based on the organization's needs.

Where: This change applies to Experience Cloud in Unlimited Edition with Service Cloud.

Who: To use this feature, users need the Alumni Portal Community User permission set license.

Experience Improved Clarity with the Renamed Employee Hub and HR Service Workspace Features

Employee Portal is the new name for Employee Hub, and HR Service Console is the new name for the HR Service Workspace feature. This change doesn't alter the functionality of the features, but the new names align better with the purpose of the features.

Where: This change applies to Lightning Experience and Experience Cloud in the Unlimited Edition with Service Cloud.

Who: To use this feature, users need the Service Cloud Employee Hub Community User Add-On license, Employee Hub Community User permission set license, Service Cloud Employee Hub HR Service Workspace Add-On license, and HR Service Workspace HR service personnel permission set license.

SEE ALSO:

Salesforce Help: Self-Service with Employee Portal (can be outdated or unavailable during release preview)

Salesforce Help: Employee Support with HR Service Console (can be outdated or unavailable during release preview)

Equip Service Representatives with Historical Context by Rapidly Deploying a Preconfigured Timeline

Include a preconfigured Timeline component on the Employees page in Employee Portal, allowing quicker implementation. With Timeline, service representatives can provide personalized service to employees by viewing events in a chronological order and gaining better insights.

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

How: Log in to HR Service Console. Navigate to the Employees page from the navigation menu. Edit an employee record page to add the Timeline component.

SEE ALSO:

Salesforce Help: View Events Using Timeline in Salesforce (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Person Account Page (can be outdated or unavailable during release preview)

Efficiently Create Employee Records by Using CSV File Import

You now have another option to create employee records in Employee Service. With the advanced CSV data import feature, import employee data as a CSV file to the Employee2 and Person Account objects.

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

Who: To use this feature, users need the Service Cloud Employee Hub HR Service Workspace Add-On license and these permission set licenses: HR Service Workspace HR service personnel, Basic CSV Data Import, and Advanced CSV Data Import.

How: From App Launcher, find and select **CSV File Import**. Click **Import using Data Processing Engine (DPE)**, and follow the instructions to import employee data.

SEE ALSO:

Salesforce Help: Import CSV Data into a Single Salesforce Object (can be outdated or unavailable during release preview)

Showcase Actions and Simplify Navigation with Navigation Tiles

Give your users a visually engaging navigation experience in Employee Portal and Alumni Portal by configuring the Navigation Tiles component. The component presents the actions available to the users.

Where: This change applies to Experience Cloud in Unlimited Edition with Service Cloud.

Who: To use this feature, employees need the Service Cloud Employee Hub Community User Add-On license and the Employee Hub Community User permission set license. Alumni need the Alumni Portal Community User permission set license.

How: Log in to Employee Portal or Alumni Portal to use the Navigation Tiles component on the home page. To access an action, click the corresponding tile in the component.

Ascertain that Important Information Reaches Employees with CMS Collection

Improve employee engagement by highlighting important content through the CMS Collection carousel component. The space-saving component maximizes the use of the Employee Portal and Alumni Portal's banner area by cycling through multiple collection items. Your employees can click an item to learn more about it.

Where: This change applies to Experience Cloud in Unlimited Edition with Service Cloud.

Who: To use this feature, employees need the Service Cloud Employee Hub Community User Add-On license and the Employee Hub Community User permission set license. Alumni need the Alumni Portal Community User permission set license.

How: Log in to Employee Portal or Alumni Portal to see the CMS Collection carousel component on the home page. To access a page, click the corresponding item on the carousel.

SEE ALSO:

Salesforce Help: CMS Collection (can be outdated or unavailable during release preview)

Streamline Employee Life Events with Employee Enablement Program

Provide a structured, personalized, and compelling enablement experience to your employees throughout their tenure with your company. Your enablement admins can create programs for employee life events, such as onboarding and promotion. Employees can complete their assigned or self-enrolled enablement programs in Employee Portal.

Where: This change applies to Experience Cloud in Unlimited Edition with Service 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 license.

How: In Employee Portal, click the **Enablement Programs** tab.

SEE ALSO:

Salesforce Help: Sales Programs and Partner Tracks with Enablement (can be outdated or unavailable during release preview)

Conveniently Comment on Cases By Using the Case Management Bot

Your employees and alumni can now view case comments and add new comments through the Case Management bot, without navigating to a case in Employee Portal or Alumni Portal.

Where: This change applies to Experience Cloud in Unlimited Edition with Service Cloud.

Who: To use this feature, employees need the Service Cloud Employee Hub Community User Add-On license and the Employee Hub Community User permission set license. Alumni need the Alumni Portal Community User permission set license.

How: To comment on a case by using the Case Management bot, employees or alumni must log in to Employee Portal or Alumni Portal and use the Case Management bot.

SEE ALSO:

Salesforce Help: Employee Hub Features (can be outdated or unavailable during release preview)

Improve Accountability with Enhanced Approval Capabilities

The Work Guide component is now in the Approvals tab of the case details page for a better user experience. Your managers and employees can track the status of the approval requests on the Trace Approvals tab. Your employees can now also recall a request in Employee Portal if the request is no longer needed or requires modification. Together, these enhancements improve accountability by improving efficiency, flexibility, and transparency.

Where: This change applies to Experience Cloud in Unlimited Edition with Service 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 license.

How: To perform an approval action, log in to Employee Portal as a manager. Open the required case details page, and click the **Approvals** tab.

SEE ALSO:

Salesforce Help: Manage Approvals (can be outdated or unavailable during release preview)

Improve Employee Service by Managing Feedback with Feedback Management

Configure Feedback Management to automatically send a survey to employees when their case reaches the Closed status. The survey responses help your service representatives gain actionable insights to improve the employee service experience.

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

Who: To participate in the survey, employees need the Service Cloud Employee Hub Community User Add-On license and the Employee Hub Community User permission set license. Alumni need the Alumni Portal Community User permission set license.

SEE ALSO:

Salesforce Help: Manage Cases (can be outdated or unavailable during release preview)

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

Manage Workday Employee Data by Using Prebuilt MuleSoft Integrations

Seamlessly import the locations, associated companies, and manager details of employees from Workday to Salesforce by enabling the Workday Org, Location & Manager Sync integration app. Effortlessly sync the status of employees in Salesforce based on their Workday status by using the Workday Employee Offboarding integration app.

Where: This change applies to Lightning Experience where MuleSoft Direct is enabled.

Who: To enable the MuleSoft integration apps, users must have the Salesforce Administrator or MuleSoft Administrator user permission.

How: In Setup, find and select **MuleSoft Direct**. Enable the MuleSoft integration apps.

SEE ALSO:

Salesforce Help: Salesforce-Workday Integration (can be outdated or unavailable during release preview)

Changed Object in Employee Service

Use the changed object for creating employee enablement programs.

Specify the type of the enablement program

Use the new enum value, `Employee Service Enablement Program`, in the `Type` field on the EnablementProgram object.

SEE ALSO:

Object Reference for the Salesforce Platform: EnablementProgram (can be outdated or unavailable during release preview)

Service Data Kit

Add more of your service data to Service Cloud and Data Cloud.

IN THIS SECTION:

Add More Service Data to Data Cloud for Greater Insights

Bring more of your service data into Service Cloud with Service Data Kit version 6.0. This update adds enhancements to the Digital Engagement and Field Service data bundles, and a new Service Plan data bundle with calculated insights. These improvements support Service Intelligence, Field Service Intellignece, and Service Insights, which offer key contact center metrics. You can also use the kit to import service data into Data Cloud and build custom applications.

Add More Service Data to Data Cloud for Greater Insights

Bring more of your service data into Service Cloud with Service Data Kit version 6.0. This update adds enhancements to the Digital Engagement and Field Service data bundles, and a new Service Plan data bundle with calculated insights. These improvements support Service Intelligence, Field Service Intellignece, and Service Insights, which offer key contact center metrics. You can also use the kit to import service data into Data Cloud and build custom applications.

Where: This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

When: Service Data Kit version 6.0 will be available sometime in February 2025.

How: If you have the Service data kit installed, upgrade or reinstall it to ensure that it's up to date. You can retrieve data assets for digital engagement, field service, service insights, and service intelligence only when those features are turned on. Upgrading the data kit is necessary to access the latest enhancements to Service data model objects (DMOs).

SEE ALSO:

Salesforce Help: Install Standard Data Bundles Powered by Data Kits (can be outdated or unavailable during release preview)

Salesforce Help: Install the Service Data Kit for Service Intelligence (can be outdated or unavailable during release preview)

Service Insights

Explore your service performance with Service Insights.

IN THIS SECTION:

Reduce Costs and Improve Operations with Service Insights

Make better service decisions with insights from your service trends, agent behaviors, and customer satisfaction scores across your service channels. Get a comprehensive view of your service team's caseload in the Case dashboards. Perform a deep dive into your customer satisfaction with CSAT dashboards. Quickly understand how Agentforce Service Agents help customers using the Agentforce dashboards.

Reduce Costs and Improve Operations with Service Insights

Make better service decisions with insights from your service trends, agent behaviors, and customer satisfaction scores across your service channels. Get a comprehensive view of your service team's caseload in the Case dashboards. Perform a deep dive into your customer satisfaction with CSAT dashboards. Quickly understand how Agentforce Service Agents help customers using the Agentforce dashboards.

Where: This change applies to Service Cloud in Lightning Experience and Einstein 1 Service.

Who: To use the Service Insights dashboards, you need the Tableau Einstein Included App Business User permission set. To manage the Service Insights dashboards, you need the Tableau Included App Manager permission set.

How: To enable Service Insights, from Setup, in the Quick Find box, enter **Service Insights**, and then select Service Insights Setup. Complete the required setup steps and enable Tableau Einstein. Assign the Service Insights permission sets to the users who you want to access Service Insights.

Channels

Enjoy improved flexibility when refining automated emails. Customize your Messaging for Web text message bubbles with custom lightning web components (LWC). Route work items through a single system with Unified Routing for voice.

IN THIS SECTION:

[Email](#)

Customize and refine automated emails, and check out improved Omni-Channel routing.

[Messaging](#)

Customize your Messaging for Web text message bubbles with custom lightning web components (LWC). Build trust with typing indicators for messaging end users and read and delivery receipts for inbound messages in Bring Your Own Channel and Bring Your Own Channel for CCaaS. Streamline User Interactions with Auto-Populated Language Data in Apple Messages for Business and Messaging for In-App and Web.

[Voice](#)

Route Work Items Through a Single System with Unified Routing for Voice. Maintain a consistent contact center experience during outages with Omni-Channel routing. Manage call actions from your headset. Empower agents to resolve customer issues faster with Einstein Article Recommendations for Voice.

Email

Customize and refine automated emails, and check out improved Omni-Channel routing.

IN THIS SECTION:

Enjoy Improved Flexibility When Refining Automated Emails

Service reps using Draft with Einstein can now elevate their emails by writing their own free-form instructions to draft an email, modifying generated emails for length and tone, and inserting generated content into email templates.

Omni-Channel Flow for Email-to-Case Is Now Invoked Synchronously

Previously, the Omni-Channel flow began asynchronously. Now the flow is invoked right after Email-to-Case records (Case, EmailMessage, Task, and ContentDocument) are committed, so the process is more precise and accurate.

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.

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.

Enjoy Improved Flexibility When Refining Automated Emails

Service reps using Draft with Einstein can now elevate their emails by writing their own free-form instructions to draft an email, modifying generated emails for length and tone, and inserting generated content into email templates.

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

How: In the Lightning Experience case email composer, click **Draft with Einstein**. Use the provided space to write instructions for the email in your own words, or search for premade instructions. After a draft is generated, click the pencil icon to revise the length or tone of the email. You can also revise emails that you write manually.

SEE ALSO:

Salesforce Help: Draft Personalized Emails with Service Email Assistant (can be outdated or unavailable during release preview)

Omni-Channel Flow for Email-to-Case Is Now Invoked Synchronously

Previously, the Omni-Channel flow began asynchronously. Now the flow is invoked right after Email-to-Case records (Case, EmailMessage, Task, and ContentDocument) are committed, so the process is more precise and accurate.

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

SEE ALSO:

Salesforce Help: Assign an Omni-Channel Flow to Route Cases from Email-to-Case

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, go to the Release Updates page in Setup. Follow the testing and activation steps for Disable Ref ID and Transition to New Email Threading Behavior.

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

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, test this update in your sandbox before you 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 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

Messaging

Customize your Messaging for Web text message bubbles with custom lightning web components (LWC). Build trust with typing indicators for messaging end users and read and delivery receipts for inbound messages in Bring Your Own Channel and Bring Your Own Channel for CCaaS. Streamline User Interactions with Auto-Populated Language Data in Apple Messages for Business and Messaging for In-App and Web.

IN THIS SECTION:

Customize the Style of Text Message Bubbles in Messaging for In-App and Web

Match your brand's unique look in the style of your text message bubbles by using custom Lightning web components (LWC). This customization applies only to the message bubble. It won't help you customize the avatar or any items around the bubble, such as read/delivery receipts, timestamps, or the resend function.

Warn End Users Before Automatically Inactivating Their Messaging Session

While automatic inactivation helps service reps maintain their SLAs, such as time to resolution, when an end user has gone silent, it can come as a surprise to the end user. Build trust with end users who've gone silent by warning them that the conversation is automatically inactivated if they don't respond within a specified time.

Messaging on the Mobile App to Include Attachments

To achieve parity with the desktop experience, the actions toolbar in the enhanced conversation component for the mobile app now lets service reps send attachments. Previously, reps messaging from the Salesforce mobile app could only send messages; transfer messages to other reps, bots, or queues; send messaging components; and send voice notes.

Blur Potentially Harmful Content Sent to Service Reps in Attachments

Protect your support team from seeing harmful content in all file preview thumbnails for files sent by an end user. Select the Blur File Preview checkbox when customizing the Enhanced Conversation Component.

Help Customers Contact You During a Service Downtime in Messaging for In-App and Web

Customize a fallback customer support experience in the event of a messaging service downtime. Create a fallback message that appears in the chat window, so you can encourage customers to reach out via your other support channels. Promote positive CSAT and NPS scores by helping your customers even when messaging may be down.

More Customers Can End a Messaging Session in Messaging for In-App and Web

In Messaging for In-App and Web, verified customers can now click End Chat to end a messaging session. Unverified customers in Messaging for In-App can also do this for the first time. This change achieves parity between the verified and unverified end user experiences in Messaging for Web. This change introduces the End Chat experience to end users in Messaging for In-App.

Notify End Users When a Salesforce Org Migration Happens in Messaging for In-App and Web

Customize the error message for an org migration. During a migration, Messaging for In-App and Web doesn't work, and a generic error message is shown to the end user. You can now customize your org migration error message to include backup support channels, such as phone or email.

Expand the Scope of Messaging for In-App and Web Engagement with Supported File Types

Service reps and end users in Messaging for In-App and Web can now send .xml, .xls, .xlsx, .csv, .docx, .doc, and .txt files. Previously, reps and end users could send only .pdf, .png, .jpeg, .jpg, .bmp, .tiff, and .gif files.

Start a Messaging Session from a Contact, Account, or Lead Record

Service reps can initiate outbound messaging sessions from a contact, account, or lead record page. These options are available in the Salesforce mobile app and the desktop site. Expanding the location of the business-initiated outbound messaging action to more record pages and to both messaging experiences gives service reps more flexibility in customer outreach. Previously, reps could initiate outbound messaging sessions only on the desktop site from the Global Actions icon or from the Send Message button on a Messaging User record page.

Conversation Catch-up for Messaging to Include Rich Text and Additional Supported Languages

Conversation Catch-Up in Enhanced Messaging and Messaging for In-App and Web now includes rich content messages in its summaries. Rich content includes choices and choiceResponse messages. Previously only static content messages were included. Conversation Catch-Up in Enhanced Messaging and Messaging for In-App and Web now supports Dutch, Mexican Spanish, Portuguese, Portuguese Brazilian, and Swedish. Previously, only French, German, Italian, Japanese, and Spanish were supported.

Collect Date Information from End Users in Secure Forms

Secure forms now support both Date and DateTime fields. Previously, secure forms offered both field types as options, but the results would display as a DateTime field. This change only applies to new Date and DateTime fields. Any pre-existing Date and DateTime fields on secure forms aren't automatically updated.

The Enhanced Messaging Component Gets a Style Update

To align with Salesforce UI design standards, the enhanced messaging component has a few style changes. Agent actions like the End Chat, agent tools, and Send Message actions all have a circular design. Previously, they were in square or rectangular boxes.

Empower Reps to Resolve Cases Faster with Einstein Article Recommendations for Messaging (Pilot)

Reduce handle time and improve customer satisfaction by providing service representatives with relevant articles in real time during calls.

Customize the Size of Your Customer-Facing Chat Window

Customize the size of your customer-facing chat window so it fits perfectly on your webpage. The default width is 320 pixels and the default height is 498 pixels.

Use a Custom Font on Your Messaging Window

You can use your own custom font on your messaging deployments to match the look and feel of your brand.

Insert Messaging Components in Service Rep Text Boxes and Send Messages on Their Behalf Using Lightning Console Methods

Add a messaging component or text to your service rep's text box by using the new Set Messaging Component Lightning Console method. Send a new message with a specified messaging component on behalf of the service rep by using the new Send Messaging Component method.

Improvements to Existing Lightning Console APIs

You can now import Lightning console API methods, which allow your background and non-rendered custom components to use the APIs.

Remove All Messaging Components from a Web Page by Using an API

Use the Remove All Components API method to remove all Messaging for Web components from a page on your website. Call the Clear Session API first to completely clean up both authenticated and unauthenticated conversations.

Ingest Third-Party Bot Conversation History into the Service Console by Using an API

The Conversation History API is useful when you have third-party bots helping customers with their queries before escalating the conversation to a service rep. For sessions that get escalated, service reps can see the conversation history and resolve queries faster. For sessions that are resolved by the bot and aren't escalated, this information can be used for data collection and usage metrics purposes. You can use the same API to ingest attachment history by uploading the attachment to Salesforce Files and generating a shareable link.

Mass Delete User Information to Comply with General Data Protection Regulation (GDPR) Guidelines by Using an API

Use the Conversation Service API to delete user information which includes Messaging End User, Messaging Session, Conversation, Conversation Entry, Conversation Participant, Participant Device, Intelligence Signals, Intelligence Signal Targets, Related Records, Participant, Context Param Maps, and VoiceCall.

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.

Get Added Support for Reply Messages in LINE

Immediate replies to end users now count as reply messages rather than push messages. If a representative or AI agent replies to a message or action from an end user in under a minute, the message is free and doesn't count toward the push message quota. Auto-replies, interactions between end users and AI agents, and other brief conversations are typically free or close to it.

Save Time with Automated Outbound Messages for LINE

Now agents don't need to send notification messaging components manually when using LINE. With automated outbound messaging, it's easy to keep users updated with messages triggered by flows.

Streamline User Interactions with Auto-Populated Language Data

To ensure that users receive messages in their own language, let Salesforce auto-populate a new Language field on all Messaging User records associated with a channel. Salesforce stores the end user's language to use in a variety of interactions and automations, and you can reference it in your own custom automation. The availability and source of the locale data varies by channel. For example, Apple provides this information each time an end user sends a message.

Use Rich Link Format in Enhanced LINE Links

Let service reps send links with custom images and text in LINE channels. LINE channels now support the Rich Link format for enhanced link messaging components. Previously, LINE only supported the default plain text format for enhanced links.

Bring Your Own Channel

Improve messaging experiences with new features in Bring Your Own Channel for Messaging and Bring Your Own Channel for CCaaS. You can now enable typing indicators and read and delivery receipts for end users. CCaaS providers can dynamically enable or disable call transfers via API. Link previews provide quick context for shared URLs.

Customize the Style of Text Message Bubbles in Messaging for In-App and Web

Match your brand's unique look in the style of your text message bubbles by using custom Lightning web components (LWC). This customization applies only to the message bubble. It won't help you customize the avatar or any items around the bubble, such as read/delivery receipts, timestamps, or the resend function.

Where: This change applies to Messaging for In-App and Web. View required editions.

SEE ALSO:

Messaging for Web Developer Guide: Customize Text Message Bubbles (can be outdated or unavailable during release preview)

Warn End Users Before Automatically Inactivating Their Messaging Session

While automatic inactivation helps service reps maintain their SLAs, such as time to resolution, when an end user has gone silent, it can come as a surprise to the end user. Build trust with end users who've gone silent by warning them that the conversation is automatically inactivated if they don't respond within a specified time.

Where: This change is available in Messaging for In-App and Web, Bring Your Own Channel, and Bring Your Own Channel for CCaaS. View required editions.

How: Create an auto-response component with an inactivation timeout warning message. In the Messaging Settings page for your Messaging Channel, add it to the Warning Message field, and set a time between warning and inactivation.

SEE ALSO:

Salesforce Help: Create and Send Auto-Response Components in Messaging Sessions (can be outdated or unavailable during release preview)

Messaging on the Mobile App to Include Attachments

To achieve parity with the desktop experience, the actions toolbar in the enhanced conversation component for the mobile app now lets service reps send attachments. Previously, reps messaging from the Salesforce mobile app could only send messages; transfer messages to other reps, bots, or queues; send messaging components; and send voice notes.

Where: This feature applies to Enhanced messaging channels and Messaging for In-App and Web. View required editions.

SEE ALSO:

Salesforce Release Notes: Send Attachments in Messaging on the Salesforce Mobile App (can be outdated or unavailable during release preview)

Blur Potentially Harmful Content Sent to Service Reps in Attachments

Protect your support team from seeing harmful content in all file preview thumbnails for files sent by an end user. Select the Blur File Preview checkbox when customizing the Enhanced Conversation Component.

Where: This feature applies to Enhanced messaging channels and Messaging for In-App and Web. View required editions.

Who: To edit the service console in the Lightning App Builder, a user needs the Customize Application and View Setup and Configuration permissions.

How: In the Lightning App Builder, open the Messaging Session page layout and click the Enhanced Conversation component. Select **Blue File Preview** in the Properties pane.

SEE ALSO:

Salesforce Help: Add Messaging to the Service Console (can be outdated or unavailable during release preview)

Help Customers Contact You During a Service Downtime in Messaging for In-App and Web

Customize a fallback customer support experience in the event of a messaging service downtime. Create a fallback message that appears in the chat window, so you can encourage customers to reach out via your other support channels. Promote positive CSAT and NPS scores by helping your customers even when messaging may be down.

Where: This feature applies to Messaging for In-App and Web. View required editions.

How: Select **Turn on Fallback Message** in the Edit page for your messaging channel. Then create a custom fallback message in the Custom Labels editor for your embedded service deployment.

SEE ALSO:

Salesforce Help: Use a Fallback Message to Help Customers During a Messaging for In-App and Web Downtime (can be outdated or unavailable during release preview)

More Customers Can End a Messaging Session in Messaging for In-App and Web

In Messaging for In-App and Web, verified customers can now click End Chat to end a messaging session. Unverified customers in Messaging for In-App can also do this for the first time. This change achieves parity between the verified and unverified end user experiences in Messaging for Web. This change introduces the End Chat experience to end users in Messaging for In-App.

Where: This change applies to Messaging for In-App and Web. View required editions.

Why: To complete this change, the End Conversation button's default text changed to "End Chat," and the "You ended the conversation at" default text changed to "You ended the chat at". If you customized the old version of these texts with custom labels, rewrite and republish your custom text.

How: A verified customer clicks the three-dot menu icon and then selects End Chat. "You ended the conversation at" appears in the messaging conversation window, followed by a time stamp.

You customize the new labels in the Set Custom Labels area of the embedded service deployment settings page.

SEE ALSO:

Salesforce Help: Considerations and Limitations for Messaging for In-App and Web (can be outdated or unavailable during release preview)

Notify End Users When a Salesforce Org Migration Happens in Messaging for In-App and Web

Customize the error message for an org migration. During a migration, Messaging for In-App and Web doesn't work, and a generic error message is shown to the end user. You can now customize your org migration error message to include backup support channels, such as phone or email.

Where: This feature applies to Messaging for In-App and Web. View required editions.

How: Go to the Set Custom Labels editor on the Embedded Service Deployment Settings page. Edit your error message under the General Chat Group, the new Error Label Group, and the Standard Label Type.

SEE ALSO:

Salesforce Help: Configure Custom Labels for Messaging for In-App and Web (can be outdated or unavailable during release preview)

Expand the Scope of Messaging for In-App and Web Engagement with Supported File Types

Service reps and end users in Messaging for In-App and Web can now send .xml, .xls, .xlsx, .csv, .docx, .doc, and .txt files. Previously, reps and end users could send only .pdf, .png, .jpeg, .jpg, .bmp, .tiff, and .gif files.

Where: This change applies to Messaging for In-App and Web. View required editions.

SEE ALSO:

Salesforce Help: Send Images and Files in Messaging Sessions (can be outdated or unavailable during release preview)

Start a Messaging Session from a Contact, Account, or Lead Record

Service reps can initiate outbound messaging sessions from a contact, account, or lead record page. These options are available in the Salesforce mobile app and the desktop site. Expanding the location of the business-initiated outbound messaging action to more record pages and to both messaging experiences gives service reps more flexibility in customer outreach. Previously, reps could initiate outbound messaging sessions only on the desktop site from the Global Actions icon or from the Send Message button on a Messaging User record page.

Where: This applies to all messaging types except Messaging for Web. View required editions.

How: Make sure that the contact, account, or lead record that you want to initiate a messaging session from has an associated Messaging User record. Click the downward arrow in the upper right of a contact, account, or lead record page, and select **Send Message**. Select the Channel that you'd like to send your message from. Write your message in the conversation composer that appears, and send your message.

SEE ALSO:

Salesforce Help: Start a Messaging Session with a Customer

Conversation Catch-up for Messaging to Include Rich Text and Additional Supported Languages

Conversation Catch-Up in Enhanced Messaging and Messaging for In-App and Web now includes rich content messages in its summaries. Rich content includes choices and choiceResponse messages. Previously only static content messages were included. Conversation Catch-Up in Enhanced Messaging and Messaging for In-App and Web now supports Dutch, Mexican Spanish, Portuguese, Portuguese Brazilian, and Swedish. Previously, only French, German, Italian, Japanese, and Spanish were supported.

Where: This feature is available to Enhanced Messaging Channels and Messaging for In-App and Web. View required editions for Messaging.

SEE ALSO:

Salesforce Release Notes: Enjoy Rich Text and Additional Supported Languages in Conversation Catch-Up

Collect Date Information from End Users in Secure Forms

Secure forms now support both Date and DateTime fields. Previously, secure forms offered both field types as options, but the results would display as a DateTime field. This change only applies to new Date and DateTime fields. Any pre-existing Date and DateTime fields on secure forms aren't automatically updated.

Where: This change applies to Messaging for In-App and Web. View required editions

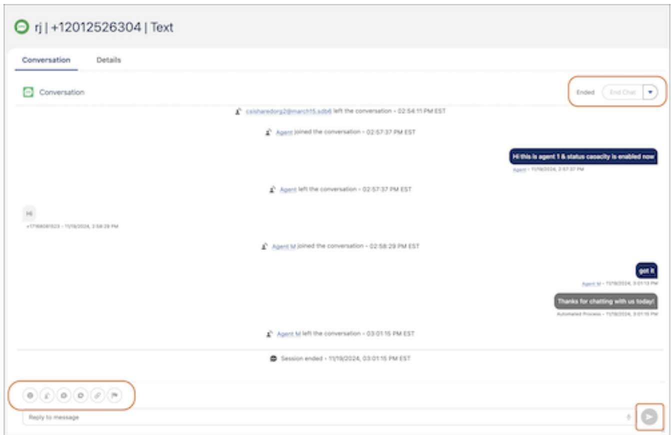
SEE ALSO:

Salesforce Help: Create and Send Secure Forms in Messaging Sessions

The Enhanced Messaging Component Gets a Style Update

To align with Salesforce UI design standards, the enhanced messaging component has a few style changes. Agent actions like the End Chat, agent tools, and Send Message actions all have a circular design. Previously, they were in square or rectangular boxes.

Where: This feature is available to Enhanced Messaging Channels and Messaging for In-App and Web. View required editions.



Empower Reps to Resolve Cases Faster with Einstein Article Recommendations for Messaging (Pilot)

Reduce handle time and improve customer satisfaction by providing service representatives with relevant articles in real time during calls.

Where: This change applies to Messaging for In-App and Web, enhanced Facebook Messenger, and enhanced WhatsApp channels.

Note: Einstein Article Recommendations 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:

Empower Reps to Resolve Cases Faster with Einstein Article Recommendations (Pilot)

Customize the Size of Your Customer-Facing Chat Window

Customize the size of your customer-facing chat window so it fits perfectly on your webpage. The default width is 320 pixels and the default height is 498 pixels.

Where: This change applies to Messaging for In-App and Web. View required editions.

How: Go to the Branding section of the Embedded Service Deployment Settings page, open your deployment and click **Branding**. Enter a width and height in pixels for your messaging window.

Use a Custom Font on Your Messaging Window

You can use your own custom font on your messaging deployments to match the look and feel of your brand.

Where: This change applies to Messaging for In-App and Web. View required editions.

How: Create a static resource by uploading a .ttf, .otf, or .woff2 font file, give it a unique name, and set the cache control to `public`. Go to the Branding section of the Embedded Service Deployment Settings page, select your service deployment, and click on **Branding**. Select the custom font option and specify the name of the font file that you uploaded as a static resource.

SEE ALSO:

Salesforce Help: Configure a Messaging for Web Deployment (can be outdated or unavailable during release preview)

Salesforce Help: Define Static Resources (can be outdated or unavailable during release preview)

Insert Messaging Components in Service Rep Text Boxes and Send Messages on Their Behalf Using Lightning Console Methods

Add a messaging component or text to your service rep's text box by using the new Set Messaging Component Lightning Console method. Send a new message with a specified messaging component on behalf of the service rep by using the new Send Messaging Component method.

Where: This change applies to enhanced Messaging channels and Messaging for In-App and Web. View required editions.

SEE ALSO:

Salesforce Developer Guide: LWC Methods for Enhanced Messaging in Lightning Experience (can be outdated or unavailable during release preview)

Improvements to Existing Lightning Console APIs

You can now import Lightning console API methods, which allow your background and non-rendered custom components to use the APIs.

The messaging window now shows typing indicators when you use the `setAgentInput` method. The `conversationAgentSend` event now supports choice messages, which is a messaging component that displays different choices for the messaging end user to select. The `endUserNewMessage` method supports end user's response to the choice message component added to the `conversationAgentSend` method.

Where: This change applies to enhanced Messaging channels and Messaging for In-App and Web. View required editions.

SEE ALSO:

Salesforce Developer Guide: LWC Methods for Enhanced Messaging in Lightning Experience (can be outdated or unavailable during release preview)

Salesforce Developer Guide: Aura Methods for Enhanced Messaging in Lightning Experience (can be outdated or unavailable during release preview)

Remove All Messaging Components from a Web Page by Using an API

Use the Remove All Components API method to remove all Messaging for Web components from a page on your website. Call the Clear Session API first to completely clean up both authenticated and unauthenticated conversations.

Where: This change applies to Messaging for In-App and Web. View required editions.

SEE ALSO:

Messaging for Web Developer Guide: Utilities API (can be outdated or unavailable during release preview)

Ingest Third-Party Bot Conversation History into the Service Console by Using an API

The Conversation History API is useful when you have third-party bots helping customers with their queries before escalating the conversation to a service rep. For sessions that get escalated, service reps can see the conversation history and resolve queries faster. For sessions that are resolved by the bot and aren't escalated, this information can be used for data collection and usage metrics purposes. You can use the same API to ingest attachment history by uploading the attachment to Salesforce Files and generating a shareable link.

Where: This feature applies to Messaging for In-App and Web and Bring Your Own Channel for CCaaS. View required editions.

When: This feature is not part of the initial Spring '25 release and may be included at a later date.

SEE ALSO:

Messaging for In-App and Web API Guide: Configure Your Deployment to Ingest Third-Party Bot Conversation History (can be outdated or unavailable during release preview)

Mass Delete User Information to Comply with General Data Protection Regulation (GDPR) Guidelines by Using an API

Use the Conversation Service API to delete user information which includes Messaging End User, Messaging Session, Conversation, Conversation Entry, Conversation Participant, Participant Device, Intelligence Signals, Intelligence Signal Targets, Related Records, Participant, Context Param Maps, and VoiceCall.

Where: This change applies to Messaging for In-App and Web. View required editions.

When: This feature is not part of the initial Spring '25 release and may be included at a later date.

How: See the Get Started with Conversation Service APIs page to configure your Salesforce org and use the API.

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: Conversation Intelligence Service 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:

Optimize Business Processes Based on the Sentiment and Intent of Real-Time Conversations (Pilot)

Get Added Support for Reply Messages in LINE

Immediate replies to end users now count as reply messages rather than push messages. If a representative or AI agent replies to a message or action from an end user in under a minute, the message is free and doesn't count toward the push message quota. Auto-replies, interactions between end users and AI agents, and other brief conversations are typically free or close to it.

Where: This change applies to enhanced LINE channels. View required editions.

Save Time with Automated Outbound Messages for LINE

Now agents don't need to send notification messaging components manually when using LINE. With automated outbound messaging, it's easy to keep users updated with messages triggered by flows.

Where: This change applies to enhanced LINE channels. View required editions.

How: To auto-send outbound messages, create a notification messaging component in Setup. Add and configure the Rich Link format to include a link in your message, or just configure the default text format. Then use Flow Builder to create a flow that sends your new component under the conditions you specify.

SEE ALSO:

Salesforce Help: Send Automated Messages in Enhanced Messaging Channels

Streamline User Interactions with Auto-Populated Language Data

To ensure that users receive messages in their own language, let Salesforce auto-populate a new Language field on all Messaging User records associated with a channel. Salesforce stores the end user's language to use in a variety of interactions and automations, and you can reference it in your own custom automation. The availability and source of the locale data varies by channel. For example, Apple provides this information each time an end user sends a message.

Where: This change applies to Messaging for In-App and Web and enhanced Apple Messages for Business channels. View required editions.

Why: The language associated with each end user is used to automatically populate the Language field of any new Messaging Sessions created for that user. Salesforce also uses the Language field to select the appropriate language for translated messaging components. As a result, messaging components are always sent out in the end user's language when a translation is available.

How: On the Messaging Settings page in Setup, click a channel name and select **Identify preferred language of messaging users**. When you select this option, the Language field for this channel's messaging users is auto-populated if their locale is known.

Use Rich Link Format in Enhanced LINE Links

Let service reps send links with custom images and text in LINE channels. LINE channels now support the Rich Link format for enhanced link messaging components. Previously, LINE only supported the default plain text format for enhanced links.

Where: This change applies to enhanced LINE channels. View required editions.

How: On the Messaging Components page in Setup, create an enhanced link messaging component. Then, add the Rich Link format and configure its properties. Service reps can select and send the component during a LINE messaging session.

Bring Your Own Channel

Improve messaging experiences with new features in Bring Your Own Channel for Messaging and Bring Your Own Channel for CCaaS. You can now enable typing indicators and read and delivery receipts for end users. CCaaS providers can dynamically enable or disable call transfers via API. Link previews provide quick context for shared URLs.

IN THIS SECTION:

Build Trust with Messaging Typing Indicators and Read and Delivery Receipts

Reassure Messaging end users that reps are actively engaged in resolving their problems. Enable event-driven settings so customers see whether reps are typing or have received and read their inbound messages. Previously, typing indicators for reps and outbound message acknowledgements were supported and enabled by default. Beginning in Spring '25, typing indicators for messaging end users and inbound message acknowledgments are available with admin opt-in.

Customize the Messaging Experience Dynamically

Contact Center as a Service (CCaaS) provider partners can now extend or modify messaging functionality programmatically to customize the Messaging experience for service reps based on business requirements. Beginning in Spring '25, you can disable or enable transferring calls by using Interaction Service API. This change gives partners more control over capabilities per Messaging session.

Get Context Faster with Link Previews in Inbound and Outbound Messages

Give customers and reps information about URLs shared in Messaging sessions with no setup required. After link previews are enabled by a Messaging or Contact Center as a Service (CCaaS) partner, reps can send and receive them without using messaging components. Just send a URL in a Messaging session, and a link preview shows a thumbnail image, title, and URL.

Stay Updated on Bring Your Own Channel Terminology

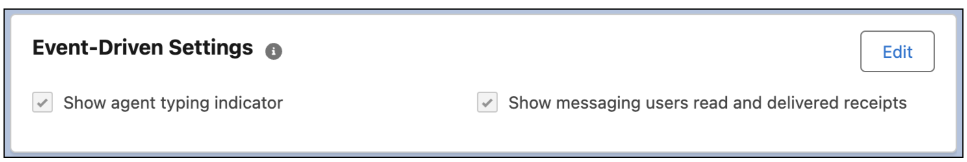
Clarify your understanding of the Bring Your Own Channel ecosystem with updated terminology. As of Spring '25, Bring Your Own Channel for Messaging refers to Messaging channels that connect an external Messaging provider to Salesforce. This channel type was previously known as Bring Your Own Channel or Partner Messaging. Bring Your Own Channel for CCaaS still refers to Messaging channels that connect an external contact center as a service (CCaaS) provider to Salesforce in a contact center. The Bring Your Own Channel category includes both Bring Your Own Channel for Messaging and Bring Your Own Channel for CCaaS.

Build Trust with Messaging Typing Indicators and Read and Delivery Receipts

Reassure Messaging end users that reps are actively engaged in resolving their problems. Enable event-driven settings so customers see whether reps are typing or have received and read their inbound messages. Previously, typing indicators for reps and outbound message acknowledgements were supported and enabled by default. Beginning in Spring '25, typing indicators for messaging end users and inbound message acknowledgments are available with admin opt-in.

Where: This change applies to Bring Your Own Channel for Messaging and Bring Your Own Channel for CCaaS. View required editions.

How: Visit the channel's Messaging Settings page in Setup to select **Show agent typing indicator** and **Show messaging users read and delivered receipts** in Event-Driven Settings. These options are available if your Messaging or CCaaS provider supports them in the Messaging channel's Conversation Channel Definition.



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Where: This change applies to Bring Your Own Channel for CCaaS. View required editions.

How: Pass action enabled or disabled information in the payload for the `/agentWork` endpoint in Interaction Service API.

SEE ALSO:

Bring Your Own Channel for CCaaS Developer Guide: Dynamically Control Messaging Actions (can be outdated or unavailable during release preview)

Get Context Faster with Link Previews in Inbound and Outbound Messages

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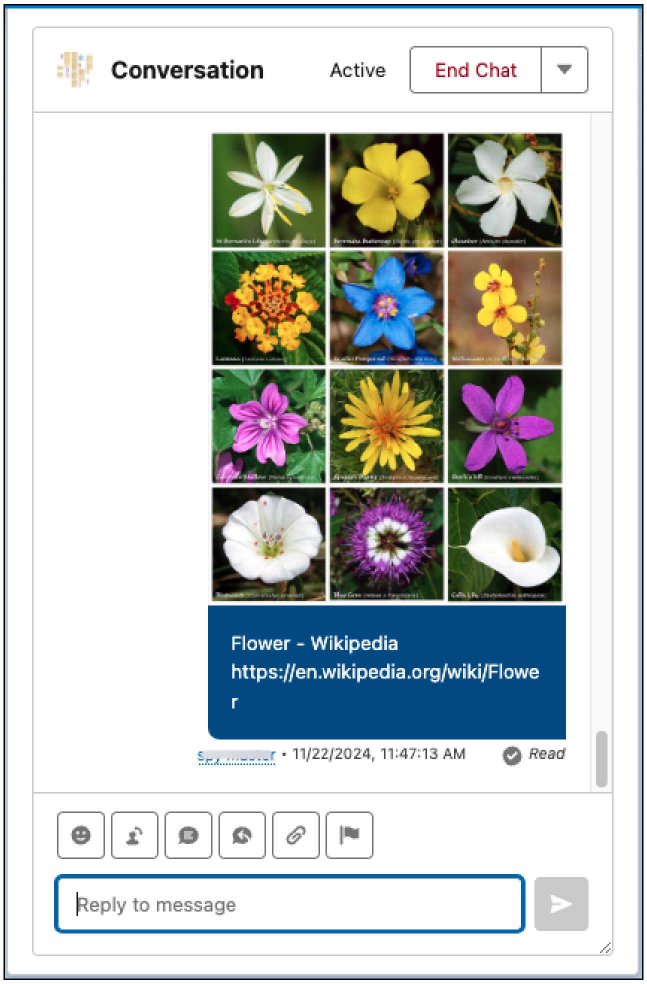
Where: This change applies to Bring Your Own Channel for Messaging and Bring Your Own Channel for CCaaS. View required editions.

How: Paste a URL into the messaging field in a Conversation component, and the messaging end user receives a rich link. Receive URLs sent by Messaging end users as rich links too. Partners must enable this feature.



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Where: This change applies to Bring Your Own Channel for Messaging and Bring Your Own Channel for CCaaS. View required editions.

SEE ALSO:

Salesforce Help: Bring Your Own Channel to Salesforce

Voice

Route Work Items Through a Single System with Unified Routing for Voice. Maintain a consistent contact center experience during outages with Omni-Channel routing. Manage call actions from your headset. Empower agents to resolve customer issues faster with Einstein Article Recommendations for Voice.

IN THIS SECTION:

Route Work Items Through a Single System with Unified Routing for Voice (Pilot)

Route voice calls alongside other channel types in Salesforce by using Omni-Channel Unified Routing. Unified Routing allows Salesforce to serve as the single system for routing voice calls. Routing takes place in Salesforce instead of in the telephony system. Previously, Omni-Channel provided end-to-end routing support to other channel types only. Turn on Unified Routing to support skill-based routing and direct-to-rep routing for voice calls in an Amazon Connect contact center. Additionally, reps now have more than 20 seconds to accept a call.

Use Omni-Channel Routing with Automatic Queue and User Sync During Disaster Recovery

During disaster recovery, queue and agent capacity resources sync automatically to support Omni-Channel routing in the secondary contact center instance. Omni-Channel routing makes sure that the calls are routed to the same agent or team respecting agent capacity, even if you switch between primary and secondary contact center instances due to an outage. This change ensures business continuity and resiliency of contact center operations in case of an outage in the AWS regions.

Manage Call Actions from Your Headset

Control call actions such as accept, mute, hold, and unmute from your headset to manage calls without interrupting your workflow or navigating away from important information in the browser tab. This change enhances rep efficiency, reduces distractions, and ensures smooth interactions with the customer. This feature results in faster response times and improved multitasking abilities for the rep which increases rep productivity.

Empower Reps to Resolve Cases Faster with Einstein Article Recommendations (Pilot)

Reduce handle time and improve customer satisfaction by providing service representatives with relevant articles in real time during conversations. During real-time conversations, Einstein recommends relevant articles directly to service representatives 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 service representatives are ready to leverage them, go to the Einstein Article Recommendations setup page and select the option to provide article recommendations only on-demand.

Customize Softphone Options to Support Call Handling Compliance

To support compliance with internal policies and industry regulations such as the Telephone Consumer Protection Act (TCPA), you can now disable options such as end call, phone book, and dial pad in the softphone to control the call handling actions of the reps. This change mitigates the risks associated with non compliance and promotes a customer-focused approach to call handling.

Use Desk Phones Without Another Audio Device

Reps in contact center orgs with strict security and compliance requirements can seamlessly use desk phones for voice calls, even when browser audio devices are restricted. There's no need to enable browser audio or to plug an audio device into your computer. This change ensures a secure and compliant contact center operation and provides reps with the flexibility and familiarity of using the desk phones. If you were previously using a deskphone, you must select your phone type again because this update resets the phone type selection to default softphone option.

Leverage Customized Usernames for Contact Centers

Service Cloud Voice now supports customized username formats for your Amazon Connect usernames. This change reduces the time to onboard your agents in Amazon Connect to Voice and enables you to maintain username formats used with your pre-existing identity provider for authenticating to Amazon Connect from Voice.

Use External ID for Provisioning Role for Additional Security

For an additional layer of security for provisioning roles, generate a unique external ID for the IAM provisioning role in the Service Cloud Voice setup. When external ID is enabled, Service Cloud Voice assumes a provisioning role and performs contact center admin actions in your AWS account only after external ID validation. External ID validation is applicable for all the provisioning roles.

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. Spring '25 includes Contact Center version 17.0. To test the updates before they go live in production, deploy them to your sandbox.

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.

Updated Format of Usage Details Field in Amazon Connect Usage and Amazon Lex Reports

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Conversation Catch-Up Offers Additional Supported Languages

Get supervisor and agent summaries in additional supported languages, including Dutch, Mexican Spanish, Portuguese, Portuguese Brazilian, and Swedish. Previously, only French, German, Italian, Japanese, and Spanish were supported.

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Gain deeper insights into your voice call data by filtering reports based on role hierarchy. Filtering custom voice call reports for calls overseen by a specific role in a company helps you compare call data across divisions or managers. With this information, you can make better decisions about how to allocate resources and improve customer service.

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Actively monitor the WebRTC audio stats of voice calls in real time by leveraging new events in the Service Cloud Voice Toolkit API. Display the data, including packets transmitted and roundtrip times, in your own dashboards with updates published every 30 seconds

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Keep your Voice Call record pages tidy by disconnecting voice call recordings you no longer need from their associated voice calls. After it's disconnected, the voice call recording along with the Call Recording Player no longer appear in the Voice Call record page.

Focus on Primary Tasks by Using Voice in an App with Standard Navigation (Beta)

Get more flexibility in Service Cloud Voice for app type and capacity model. Help service reps stay focused on their primary tasks by using Service Cloud Voice in apps with standard navigation. Previously, Service Cloud Voice relied on tab-based capacity and was available only in console apps. With standard app support for Voice, status-based capacity is now available in all service channel types, including voice calls.

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.

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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, Sales, and Government Clouds.

Note: Unified Routing 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:

Route Voice Calls with Other Channels by Using Omni-Channel (Pilot)

Use Omni-Channel Routing with Automatic Queue and User Sync During Disaster Recovery

During disaster recovery, queue and agent capacity resources sync automatically to support Omni-Channel routing in the secondary contact center instance. Omni-Channel routing makes sure that the calls are routed to the same agent or team respecting agent capacity, even if you switch between primary and secondary contact center instances due to an outage. This change ensures business continuity and resiliency of contact center operations in case of an outage in the AWS regions.

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This features is also available in Messaging for in-App and Web, enhanced Facebook Messenger, and enhanced WhatsApp channels.

Note: Einstein Einstein Article Recommendations 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:

Empower Reps to Resolve Cases Faster with Einstein Article Recommendations for Messaging (Pilot)

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Service Cloud Voice with Amazon Connect	Service Cloud Voice with Partner Telephony from Amazon Connect	Service Cloud Voice with Partner Telephony
✗	✗	✓

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

SEE ALSO:

Service Cloud Voice for Partner Telephony Developer Guide: Disable Call Actions (can be outdated or unavailable during release preview)

Use Desk Phones Without Another Audio Device

Reps in contact center orgs with strict security and compliance requirements can seamlessly use desk phones for voice calls, even when browser audio devices are restricted. There's no need to enable browser audio or to plug an audio device into your computer. This change ensures a secure and compliant contact center operation and provides reps with the flexibility and familiarity of using the desk phones. If you were previously using a deskphone, you must select your phone type again because this update resets the phone type selection to default softphone option.

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For an additional layer of security for provisioning roles, generate a unique external ID for the IAM provisioning role in the Service Cloud Voice setup. When external ID is enabled, Service Cloud Voice assumes a provisioning role and performs contact center admin actions in your AWS account only after external ID validation. External ID validation is applicable for all the provisioning roles.

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SEE ALSO:

Salesforce Help: Amazon Connect IAM Roles and Provisioning Policies 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. Spring '25 includes Contact Center version 17.0. To test the updates before they go live in production, deploy them to your sandbox.

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SEE ALSO:

Knowledge Article: Service Cloud Voice Contact Center Updates (can be outdated or unavailable during release preview)

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.

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Note: Conversation Intelligence Service 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 the Conversation Intelligence Rules setup page, create a rule, and then set Einstein Conversation Intelligence Service as a Signal Source. Use "Intent," "Customer Sentiment," or "Agent Sentiment" as the Signal Type that defines when to take conditional actions.

SEE ALSO:

Optimize Business Processes Based on the Sentiment and Intent of Real-Time Messages (Pilot)

Updated Format of Usage Details Field in Amazon Connect Usage and Amazon Lex Reports

To maintain unique identifiers in the usage report for the different AWS accounts within a Salesforce org, the Usage Details field in the Amazon Connect Usage report and Amazon Lex report now uses the AWSRegionName_AWSAccountId format. Previously, this field used the AWSRegionName_SalesforceOrgId format.

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Conversation Catch-Up Offers Additional Supported Languages

Get supervisor and agent summaries in additional supported languages, including Dutch, Mexican Spanish, Portuguese, Portuguese Brazilian, and Swedish. Previously, only French, German, Italian, Japanese, and Spanish were supported.

Where: This feature is available to Enhanced Messaging Channels, Messaging for In-App and Web, and Enhanced Voice Channels. View required editions for Messaging. View required editions for Voice.

SEE ALSO:

Salesforce Release Notes: Enjoy Rich Text and Additional Supported Languages in Conversation Catch-Up (can be outdated or unavailable during release preview)

Get More Granular Voice Call Report Data with Role Hierarchy Filters

Gain deeper insights into your voice call data by filtering reports based on role hierarchy. Filtering custom voice call reports for calls overseen by a specific role in a company helps you compare call data across divisions or managers. With this information, you can make better decisions about how to allocate resources and improve customer service.

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Service Cloud Voice with Amazon Connect	Service Cloud Voice with Partner Telephony from Amazon Connect	Service Cloud Voice with Partner Telephony
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All models of Service Cloud Voice are available as an add-on license in Service, Sales, and Government Clouds.

How: Create a custom report type that includes the Voice Call object, and generate a report that uses the new custom report type. Apply filters to display either all voice calls or a team's voice calls, and select roles for role hierarchy filtering.

SEE ALSO:

Salesforce Help: Filter Report Data by Role Hierarchy

Display Voice Call Audio Statistics in Real Time Using the Service Cloud Voice Toolkit API

Actively monitor the WebRTC audio stats of voice calls in real time by leveraging new events in the Service Cloud Voice Toolkit API. Display the data, including packets transmitted and roundtrip times, in your own dashboards with updates published every 30 seconds

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How: Subscribe to the new Service Cloud Voice Toolkit API `AUDIO_STATS` event for Aura components or `audiostats` event for Lightning web components.

SEE ALSO:

Service Cloud Voice for Partner Telephony Developer Guide: Service Cloud Voice Aura Toolkit API Telephony Events (can be outdated or unavailable during release preview)

Service Cloud Voice for Partner Telephony Developer Guide: Service Cloud Voice Lightning Web Component (LWC) Toolkit API (can be outdated or unavailable during release preview)

Dissociate Voice Call Recordings from Voice Calls

Keep your Voice Call record pages tidy by disconnecting voice call recordings you no longer need from their associated voice calls. After it's disconnected, the voice call recording along with the Call Recording Player no longer appear in the Voice Call record page.

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How: Use your preferred method, such as the Developer Console, to delete the Salesforce VoiceCallRecording record that links the voice call recording to the voice call.

SEE ALSO:

Salesforce Help: Dissociate Voice Call Recordings from Voice Call Records (can be outdated or unavailable during release preview)

Focus on Primary Tasks by Using Voice in an App with Standard Navigation (Beta)

Get more flexibility in Service Cloud Voice for app type and capacity model. Help service reps stay focused on their primary tasks by using Service Cloud Voice in apps with standard navigation. Previously, Service Cloud Voice relied on tab-based capacity and was available only in console apps. With standard app support for Voice, status-based capacity is now available in all service channel types, including voice calls.

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Note: Service Cloud Voice in lightning apps with standard navigation 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.

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.

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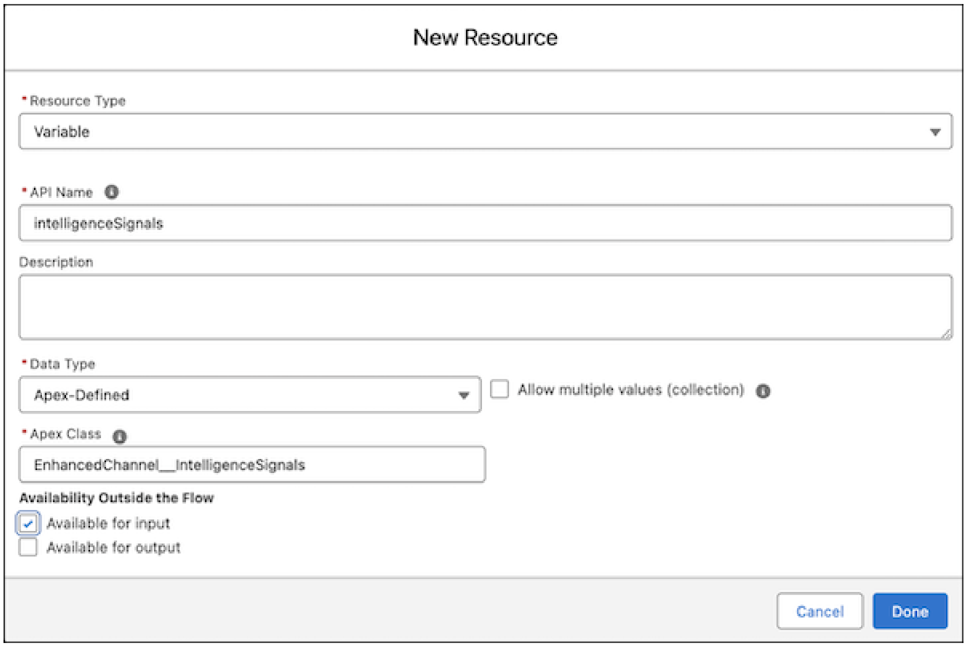
When: Salesforce enforces this update in Spring '25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

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)

Knowledge

Integrate knowledge articles into Data Cloud to improve AI outcomes. Open links from articles ingested from third-party sources directly within Salesforce to avoid context-switching. Add and manage more complex, multi-stage approval processes to your knowledge base. Run the Lightning Knowledge Migration Tool to access Classic Knowledge.

IN THIS SECTION:

Create Advanced Approval Processes for Knowledge Articles

Add and manage more complex, multi-stage approval processes to your knowledge base. Ensure that content created with generative AI is accurate and reviewed by multiple stakeholders, such as senior editors, product experts, or legal teams. Use a Flow Orchestration for easier customization, integration, error handling, and scalability of article approvals.

Revise Knowledge Articles for Grammar and Readability with Einstein Knowledge Edits (Generally Available)

Revise fields on your Knowledge articles by using Einstein generative AI with predefined edit prompts. Predefined edit prompts can improve the grammar, conciseness, and readability of your knowledge articles. This feature, now generally available, includes some changes since the pilot release.

Leverage Data Cloud Connectors to Ingest Knowledge Articles

Use Data Cloud connectors to bring knowledge articles from third-party sources into Data Cloud. Consolidate your knowledge articles into a single, comprehensive knowledge base to improve AI accuracy, so service reps can resolve customer cases faster and deliver more personalized customer experiences.

Sync Knowledge with Data Cloud

Bring all your knowledge from the Einstein 1 Platform to Data Cloud to form a comprehensive, integrated knowledge base. This integration improves AI outcomes, enhances data management, and ensures better visibility across generative AI, the Service Console, and Self-Service experiences for increased efficiency.

Unify Knowledge with MindTouch Connector

Enhance your Unified Knowledge integration with MindTouch connector. This integration unifies your company's knowledge across all service rep and customer search experiences and improves generative AI features for Einstein for Service.

Get More Done in the Lightning Article Editor

The improved Lightning Article Editor helps you write knowledge articles more efficiently and take advantage of streamlined features to create great content.

Open Ingested Article Links from Third-Party Sources in Salesforce

You can now open links from articles ingested from third-party sources directly within Salesforce to avoid switching to another application. This feature is available for articles ingested through these connectors in Unified Knowledge: Salesforce Knowledge Article, Zendesk, Confluence Cloud Knowledge Article, Confluence Server Knowledge Article, ServiceNow Knowledge, Sitemap, Guru, Atlassian Jira Cloud, Atlassian Jira Server, and Helpjuice.

Sync Options Enhanced for Your Knowledge Base

You asked, and we listened. With Force Sync in Unified Knowledge, you can now synchronize all your knowledge articles from the source system, even if they haven't changed since the last sync. Force sync ensures your knowledge base is up to date. If you want to sync only the latest changes, use Incremental Sync. It's scheduled to run periodically, but you can manually trigger it within that interval for faster updates.

Run the Lightning Knowledge Migration Tool (Release Update)

To access Classic Knowledge, run the Lightning Knowledge Migration Tool. To prepare for the retirement of the Classic Knowledge data model, upgrade to Lightning Knowledge. The upgrade offers enhanced article editing, improved search, and AI-driven features like Einstein Article Recommendations, Einstein Search for Knowledge, and Agentforce Service Agents. After you migrate, you can still use Classic Knowledge with the limitations described below. Orgs created after Spring '25 have no access to Classic Knowledge.

Alert Agents to Knowledge Articles with Einstein Knowledge Creation Async Notification

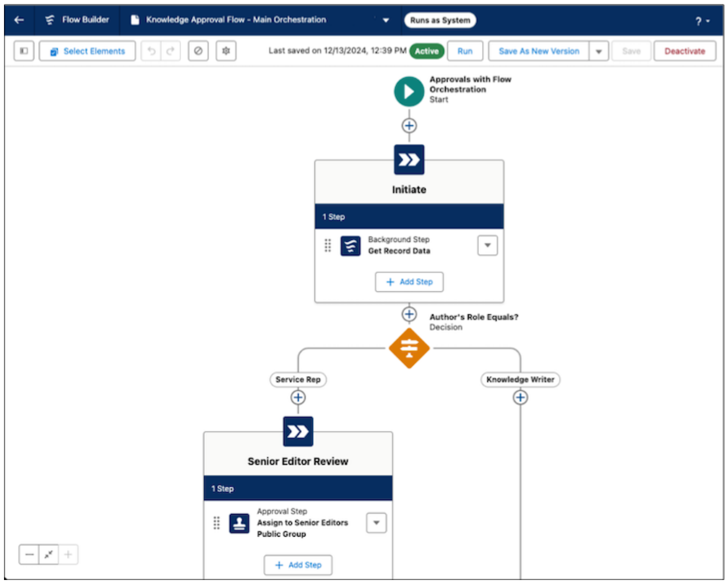
Agents can now respond to other cases while they wait for their knowledge article to be generated, which increases agent productivity. Previously, agents were unable to act for up to 3 minutes while Einstein generated a knowledge article for their case.

Create Advanced Approval Processes for Knowledge Articles

Add and manage more complex, multi-stage approval processes to your knowledge base. Ensure that content created with generative AI is accurate and reviewed by multiple stakeholders, such as senior editors, product experts, or legal teams. Use a Flow Orchestration for easier customization, integration, error handling, and scalability of article approvals.

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

How: Use the Flow Builder and orchestrations to design approval processes tailored to your business needs. In the orchestration, include decision elements to manage the flow based on specific outcomes. Define requirements for each stage and step, ensuring they're triggered by relevant record changes. Assign interactive steps to appropriate users, groups, or queues. Activate the orchestration and select it in Knowledge Settings under Approval Settings to ensure it integrates with your Knowledge articles.



Approvers can complete or track steps using the Work Guide and Approval Trace components on Knowledge page layouts. They can also use the Approvals app, available on the App Picker, to review their work items or history. Additionally, approvers can create and run Lightning reports to see similar information.

SEE ALSO:

Salesforce Help: Flow Approvals for Lightning Knowledge (can be outdated or unavailable during release preview)

Salesforce Help: Automate Complex Processes with Orchestrations (can be outdated or unavailable during release preview)

Revise Knowledge Articles for Grammar and Readability with Einstein Knowledge Edits (Generally Available)

Revise fields on your Knowledge articles by using Einstein generative AI with predefined edit prompts. Predefined edit prompts can improve the grammar, conciseness, and readability of your knowledge articles. This feature, now generally available, includes some changes since the pilot release.

Where: This change applies to Unlimited and Enterprise editions with the Einstein for Service add-on. Einstein for Service is available in Lightning Experience.

Who: To use Knowledge Edits, agents must have the Prompt Template User and the Einstein Knowledge Creation permission sets.

Why: Create customized edit prompts through Prompt Builder by editing or creating a prompt with the Knowledge Field Update type. Specify what information Einstein includes, how Einstein formats article information, or adjust the voice and tone of the output to fit your business needs.

How: For the Knowledge article that you want to revise, from the quick action menu select **Edit**. From the toolbar, click **Revise with Einstein**. Revise specific parts of the text by highlighting it and clicking **Revise with Einstein**.

Leverage Data Cloud Connectors to Ingest Knowledge Articles

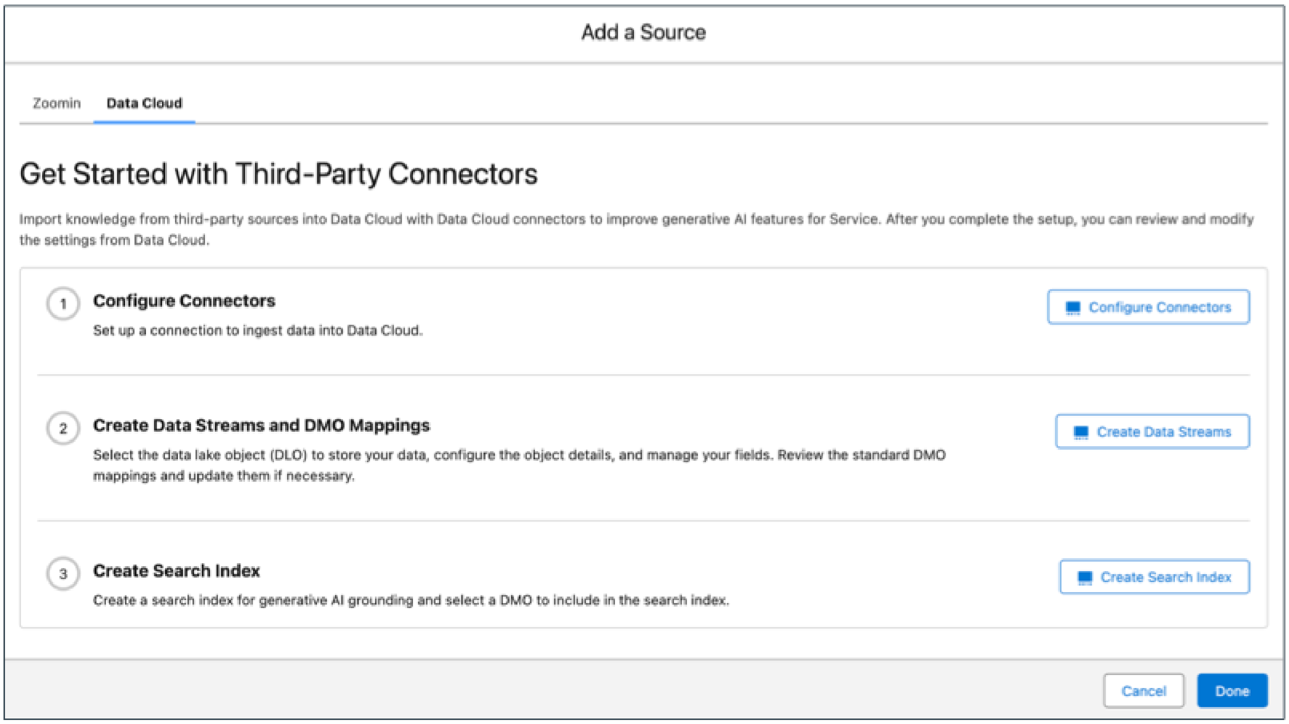
Use Data Cloud connectors to bring knowledge articles from third-party sources into Data Cloud. Consolidate your knowledge articles into a single, comprehensive knowledge base to improve AI accuracy, so service reps can resolve customer cases faster and deliver more personalized customer experiences.

Where: This change applies to Lightning Experience in Unlimited Edition and all other editions with the Knowledge add-on license.

Why: With the Knowledge Article DMO, you can access your knowledge base on Data Cloud. The Data Cloud infrastructure supports the large-scale integration of transactional knowledge, such as Slack posts and chat transcripts, alongside curated articles, to meet the needs of enterprise customers.

Who: This change applies to all Knowledge and Unified Knowledge customers who purchase Data Cloud consumption credits.

How: First, set up Data Cloud in your Salesforce org. Then in Setup, go to the Unified Knowledge page and click **Add a Source**. On the Add a Source page, go to the Data Cloud tab. Then configure a connector, create a data stream, and set up the search index.



SEE ALSO:

Salesforce Help: Set Up Third-Party Connectors with Data Cloud (can be outdated or unavailable during release preview)

Salesforce Help: Data Cloud: Connectors and Integrations (can be outdated or unavailable during release preview)

Salesforce Help: Create a Search Index Configuration with Easy Setup (can be outdated or unavailable during release preview)

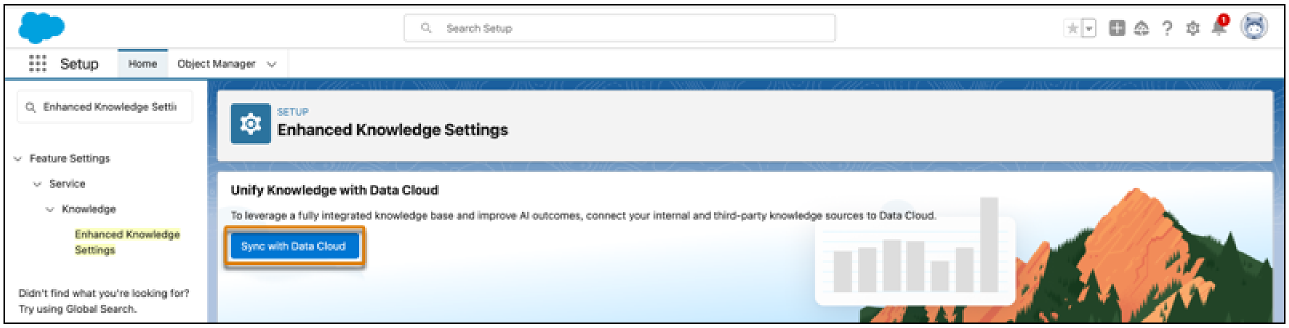
Sync Knowledge with Data Cloud

Bring all your knowledge from the Einstein 1 Platform to Data Cloud to form a comprehensive, integrated knowledge base. This integration improves AI outcomes, enhances data management, and ensures better visibility across generative AI, the Service Console, and Self-Service experiences for increased efficiency.

Where: This change applies to Lightning Experience in Unlimited Edition and all other editions with the Knowledge add-on license.

Who: This change applies to all Knowledge and Unified Knowledge customers who purchase Data Cloud consumption credits.

How: First, set up Data Cloud in your Salesforce org. Then in Setup, go to the Enhanced Knowledge Settings page and click **Sync With Data Cloud**.



SEE ALSO:

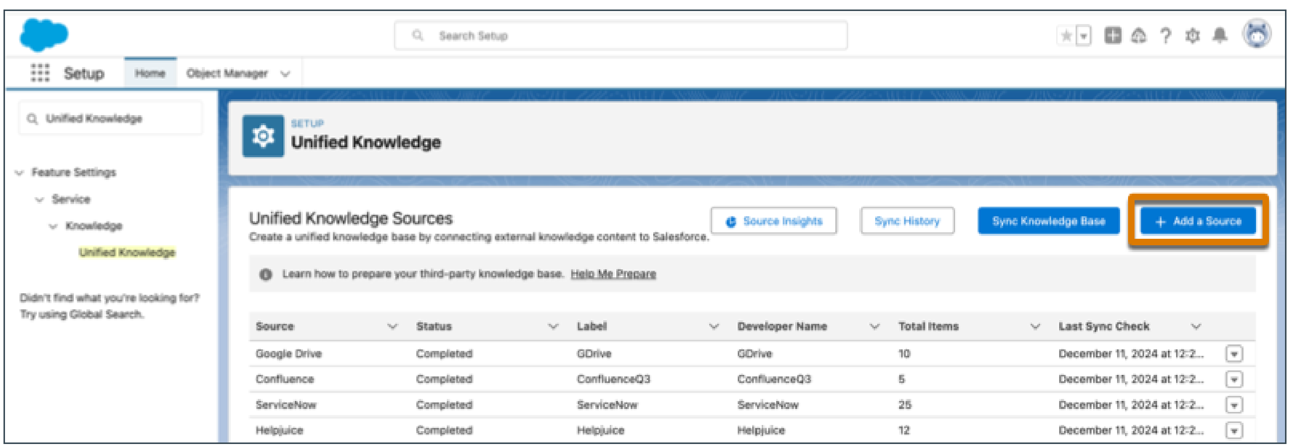
Salesforce Help: Sync Knowledge with Data Cloud (can be outdated or unavailable during release preview)

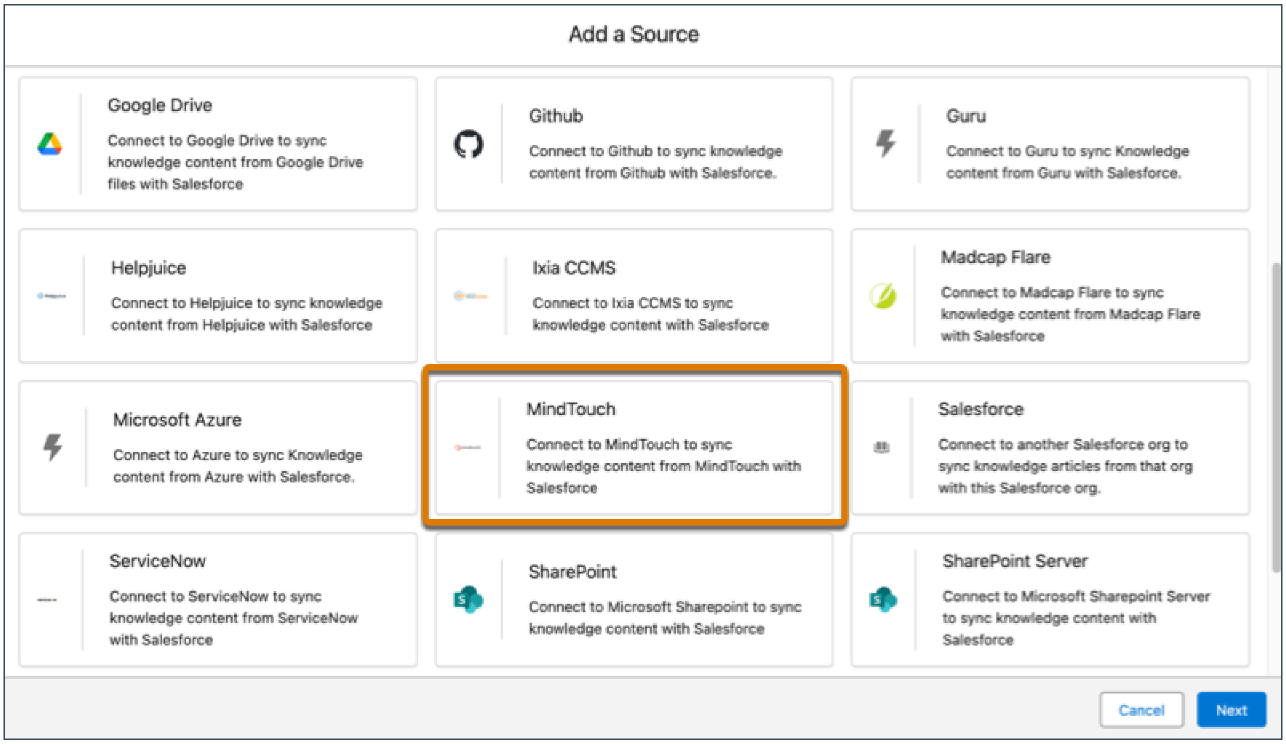
Unify Knowledge with MindTouch Connector

Enhance your Unified Knowledge integration with MindTouch connector. This integration unifies your company's knowledge across all service rep and customer search experiences and improves 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. Zoomin from Salesforce offers you Unified Knowledge and is available as a free trial for 90 days, including three connector instances to third-party knowledge sources. After the trial, you can extend your free trial through your Salesforce account executive.

How: Before adding a connector, review any connector requirements in the Zoomin documentation. Then in Setup, go to the Unified Knowledge page, click **Add a Source**, and then select **MindTouch** in the Zoomin tab.





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)

Salesforce Help: Unified Knowledge Considerations (can be outdated or unavailable during release preview)

Salesforce Help: Unified Knowledge for Salesforce (can be outdated or unavailable during release preview)

Get More Done in the Lightning Article Editor

The improved Lightning Article Editor helps you write knowledge articles more efficiently and take advantage of streamlined features to create great content.

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

How: In Spring '25, improvements to Lightning Article Editor include:

- Replacing placeholder text with field labels in the Find... and Replace with... fields, to enhance accessibility and user experience.
- Improving image resizing. You can now manually enter the dimensions.
- Enhancing image insertion by fixing the error message when you're entering alt text and addressed intermittent freezing during copying and pasting.
- Adjusting button sizes in the source code editor for better usability.
- Changing the dark mode button color to match the dark mode theme, which improves the overall user experience.

SEE ALSO:

Salesforce Help: Unify Knowledge form Various Sources (can be outdated or unavailable during release preview)

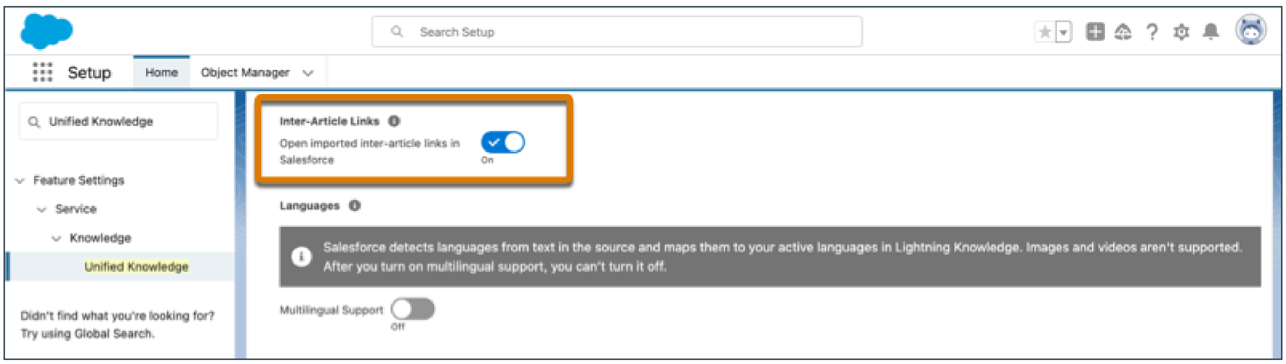
Open Ingested Article Links from Third-Party Sources in Salesforce

You can now open links from articles ingested from third-party sources directly within Salesforce to avoid switching to another application. This feature is available for articles ingested through these connectors in Unified Knowledge: Salesforce Knowledge Article, Zendesk, Confluence Cloud Knowledge Article, Confluence Server Knowledge Article, ServiceNow Knowledge, Sitemap, Guru, Atlassian Jira Cloud, Atlassian Jira Server, and Helpjuice.

Where: This change applies to Lightning Experience in Unlimited Edition and all other editions with the Knowledge add-on license.

How: In Setup, go to the Unified Knowledge page, click **Add a Source**, choose a connector that matches your knowledge source, and then click **Next**. On the Add a Source page, turn on **Open imported inter-article links in Salesforce**.

Note: If you change the name of your knowledge base, the links in the ingested articles break. To fix this, sync your knowledge base name. Go to the Unified Knowledge page in Setup and click **Sync KB Name**.



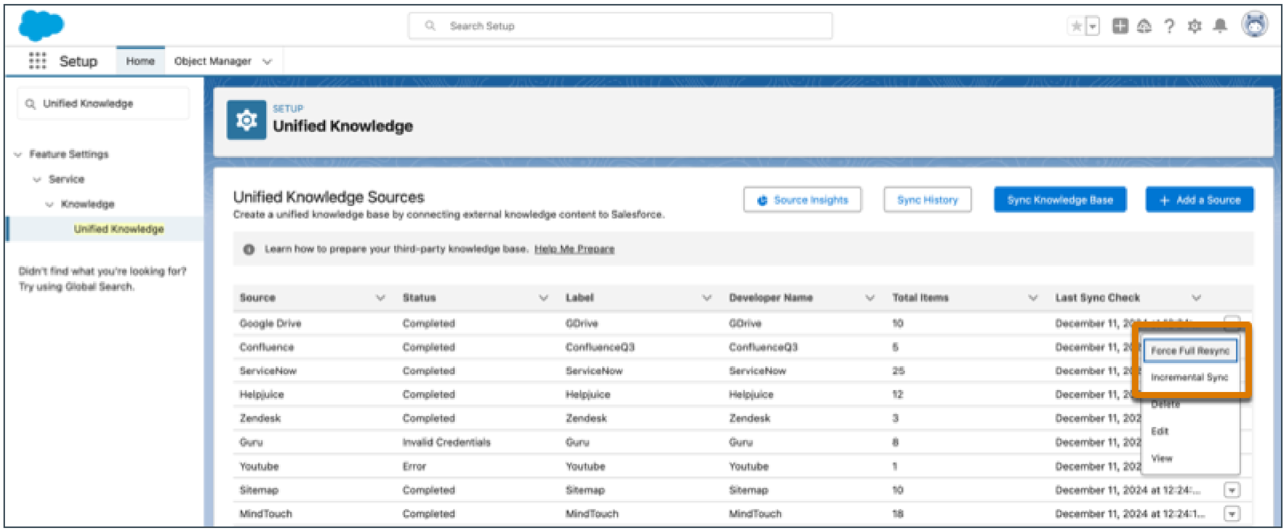
Sync Options Enhanced for Your Knowledge Base

You asked, and we listened. With Force Sync in Unified Knowledge, you can now synchronize all your knowledge articles from the source system, even if they haven't changed since the last sync. Force sync ensures your knowledge base is up to date. If you want to sync only the latest changes, use Incremental Sync. It's scheduled to run periodically, but you can manually trigger it within that interval for faster updates.

Where: This change applies to Lightning Experience in Unlimited Edition and all other editions with the Knowledge add-on license.

How: To sync all knowledge articles from the source system, go to the Unified Knowledge page in Setup, find the connector that you want to force sync. Next, click the Options icon, and select **Force Full Resync**. To sync only the latest changes, select **Incremental Sync**.

Note: With incremental sync, new articles or updates to existing content sync to your knowledge base. But changes to the metadata of your articles might not always sync during incremental sync.



Run the Lightning Knowledge Migration Tool (Release Update)

To access Classic Knowledge, run the Lightning Knowledge Migration Tool. To prepare for the retirement of the Classic Knowledge data model, upgrade to Lightning Knowledge. The upgrade offers enhanced article editing, improved search, and AI-driven features like Einstein Article Recommendations, Einstein Search for Knowledge, and Agentforce Service Agents. After you migrate, you can still use Classic Knowledge with the limitations described below. Orgs created after Spring '25 have no access to Classic Knowledge.

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

When: Salesforce enforces this update in Summer '25.

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)

Alert Agents to Knowledge Articles with Einstein Knowledge Creation Async Notification

Agents can now respond to other cases while they wait for their knowledge article to be generated, which increases agent productivity. Previously, agents were unable to act for up to 3 minutes while Einstein generated a knowledge article for their case.

Where: This change applies to Unlimited and Enterprise editions with the Einstein for Service add-on. Einstein for Service is available in Lightning Experience.

Who: To use Einstein Knowledge Creation Async Notification, agents must have the Einstein Knowledge Creation permission sets, the Knowledge User permission, the Manage Articles permission, and the Publish Articles permission.

How: When drafting a knowledge article, agents see an in-app notification on completion of the request. Additionally, agents receive an email when your knowledge article has been drafted. Salesforce admins can disable desktop notifications in Setup under Notification Delivery Settings. You can't disable email notifications.

Entitlements and Milestones

Empower your service agents excel in their roles and optimize overall service operations. By automating closure of milestones through flows and using custom Case Milestone report type, your agents can work more efficiently and effectively.

IN THIS SECTION:

Boost Rep Productivity and Reporting Accuracy by Automating Milestone Completion with Flows

Configure flows to set milestone completion criteria based on case status or other relevant fields. This makes sure that milestones are auto-completed when the criteria is met, without any manual intervention.

Optimize Data Analysis, Reporting, and Decision Making with the Case Milestones Report Type

Create custom reports for cases with or without milestones with the Case Milestones report type. With the Case Milestones report type, you can generate reports related to case milestone fields, which helps you track and analyze SLA violations and entitlements efficiently. This report type also helps you analyze how an SLA has performed in the past, so you can make decisions more easily.

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Configure flows to set milestone completion criteria based on case status or other relevant fields. This makes sure that milestones are auto-completed when the criteria is met, without any manual intervention.

Where: This change applies to Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

How: From Setup, in the Quick Find box, enter `Entitlement Process`, and then select **Entitlement Process**. Create or open a milestone from an entitlement process. Under Completion Criteria, create and save the flow. Go to Flow Builder to define completion criteria and activate this action.

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Where: This change applies to Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

How: From the Report Types page, click a new custom report type by selecting **Case Milestones** as the primary object. Click **Edit Layout** to edit its properties. To generate custom reports with this report type, select the report type you created with the **Case Milestones** object and save.

Self Service

Help your customers help themselves. Check out new features that enable your customers to find what they are looking for faster.

IN THIS SECTION:

Resolve User Search Queries Faster by Using Context-Driven Conversations with Agentforce Service Agent
Empower your users who are in mission-critical situations with faster resolution to their search queries by passing site visitor's search context to Agentforce Service Agent in real time. Agentforce Service Agent automatically suggests answers to users' search queries by searching the knowledge base.

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Where: This change applies to Messaging for In-App and Web and all sites accessed through Lightning Experience and Salesforce Classic in Performance, Unlimited, and Developer Editions with the Einstein for Service, Einstein Platform, or Agentforce Service Agent add-on.

Why: Passing search context in real time enables Agentforce Service Agent to automatically suggest answers to user's search queries, providing a faster resolution and overall better support experience.

How: In the Experience Workspaces, go to the AI Experiences tile and turn on the **Share search queries with Agentforce Service Agent** option. When enabled, users' search context is passed to Agentforce Service Agent in real time. It then starts suggesting answers to search queries.

Routing

Redirect more types of work with work reassignment. Route voice calls using Omni-Channel Unified Routing.

IN THIS SECTION:

Reassign Work Items from Service Channels
Reps can already transfer Voice calls and Messaging sessions using Omni-Channel. To transfer other types of work with Omni-Channel, instead of changing the Owner field of the work record, reps can now reassign the work to different queues, service reps, AI agents, skills, and Omni-Channel flows. After the work is reassigned, Omni-Channel routes the work to the new destination. To improve resolution time and improve SLA attainment, Omni-Channel places the reassigned work item higher in the queue, as if it had originally started there. This feature is available in Enhanced Omni-Channel only.

Manage Your Workforce More Efficiently with Agentforce

Supervisors can now chat with Agentforce (Default) on a desktop or the Salesforce mobile app to efficiently manage queues and skills assigned to Omni-Channel users. Using the Update Omni-Channel User Configuration agent action, they can add or remove queue assignments, add or remove skill assignments, and change skill levels for users. For example, to decrease wait time, increase customer satisfaction, and increase operational efficiency, the supervisor can temporarily assign idle agents to the busiest queues. Using the conversational interface, they explicitly identify skill levels by number and agents, skills, and queues by name. A supervisor can modify only the Omni-Channel users, queues, and skills that are visible based on their supervisor configuration.

Perform Actions from More Flow Types

The Check Availability for Routing and Add Screen Pop flow actions are now available in all Salesforce flow types. Previously, they were limited to Omni-Channel flows.

Increase Rep Productivity with Omni-Channel Sidebar

To view and quickly change their statuses, reps can now use the collapsed Omni-Channel sidebar. To notify reps about work that's been auto-accepted or resumed after being paused, these updated work items now appear in the Omni-Channel sidebar.

Other Enhancements for Routing Work to Agentforce Service Agents

The Route Work action now has a simplified process for routing work to Service agents using an Omni-Channel flow. To troubleshoot why an Omni-Channel flow fails to route work to a destination, review the new, detailed error messages.

Route Voice Calls with Other Channels by Using Omni-Channel (Pilot)

Route voice calls alongside other Salesforce channel work items by using Omni-Channel Unified Routing. Turning on Unified Routing enables skill-based routing and direct-to-rep routing for voice calls in an Amazon Connect contact center. Improve your contact center to better handle use cases where reps work on different types of work items. Additionally, reps now have more than 20 seconds to accept a call.

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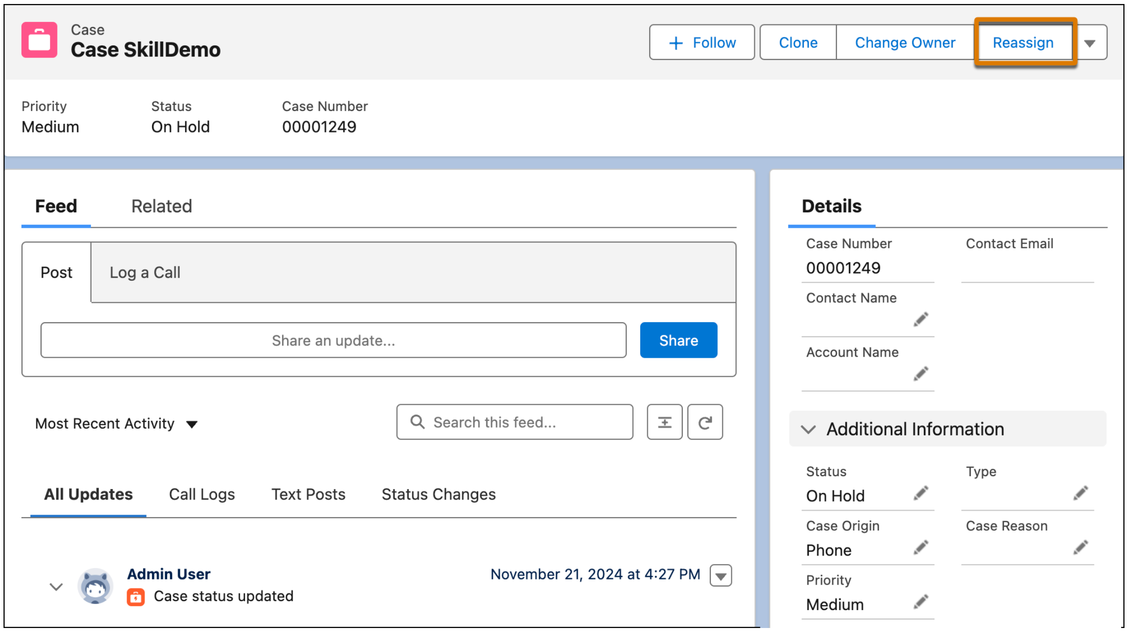
Reps can already transfer Voice calls and Messaging sessions using Omni-Channel. To transfer other types of work with Omni-Channel, instead of changing the Owner field of the work record, reps can now reassign the work to different queues, service reps, AI agents, skills, and Omni-Channel flows. After the work is reassigned, Omni-Channel routes the work to the new destination. To improve resolution time and improve SLA attainment, Omni-Channel places the reassigned work item higher in the queue, as if it had originally started there. This feature is available in Enhanced Omni-Channel only.

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

How: Add the Reassign button to the record page. To reassign a work item, on the record page, a rep can click **Reassign** and select the new routing destination.



Tip: To reassign work items without a routing configuration to a skill or specific rep, you can now define a default routing configuration for the service channel. For example, work that wasn't originally routed by Omni-Channel doesn't have a routing configuration.

SEE ALSO:

Salesforce Help: Set Up Work Reassignment (can be outdated or unavailable during release preview)

Salesforce Help: Reassign Work Manually (can be outdated or unavailable during release preview)

Manage Your Workforce More Efficiently with Agentforce

Supervisors can now chat with Agentforce (Default) on a desktop or the Salesforce mobile app to efficiently manage queues and skills assigned to Omni-Channel users. Using the Update Omni-Channel User Configuration agent action, they can add or remove queue assignments, add or remove skill assignments, and change skill levels for users. For example, to decrease wait time, increase customer satisfaction, and increase operational efficiency, the supervisor can temporarily assign idle agents to the busiest queues. Using the conversational interface, they explicitly identify skill levels by number and agents, skills, and queues by name. A supervisor can modify only the Omni-Channel users, queues, and skills that are visible based on their supervisor configuration.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Einstein for Sales, Einstein for Service, or Agentforce Platform add-on. Setup for Agentforce (Default) is available on the desktop site.

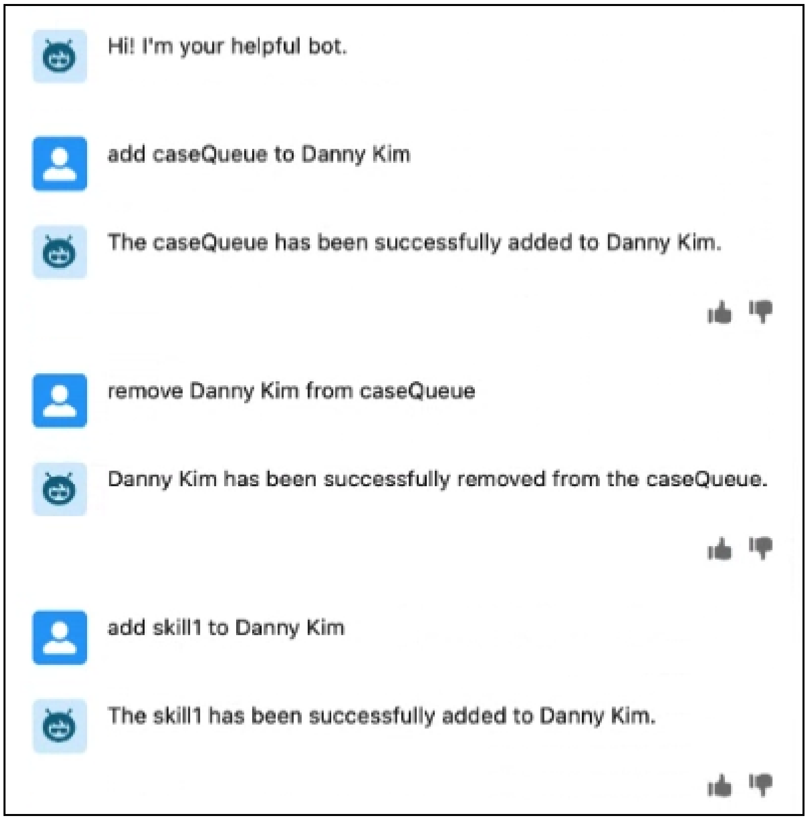
To purchase the Einstein for Sales, Einstein for Service, or Agentforce Platform add-on, contact your Salesforce account executive.

When: This feature is not part of the initial Spring '25 release and may be included at a later date.

Who: Agentforce (Default) is available to users with the Use Agentforce Default Agent user permission.

How: To enable supervisors to use Agentforce to change queue and skill assignments of Omni-Channel users, verify that skills-based routing and Enhanced Omni-Channel is enabled, and then set up Agentforce (Default).

To change an assignment using Agentforce (Default), click , and then enter your request. For example, enter *`Remove Anelly Jackson from the Phone and Chat queues`*.



SEE ALSO:

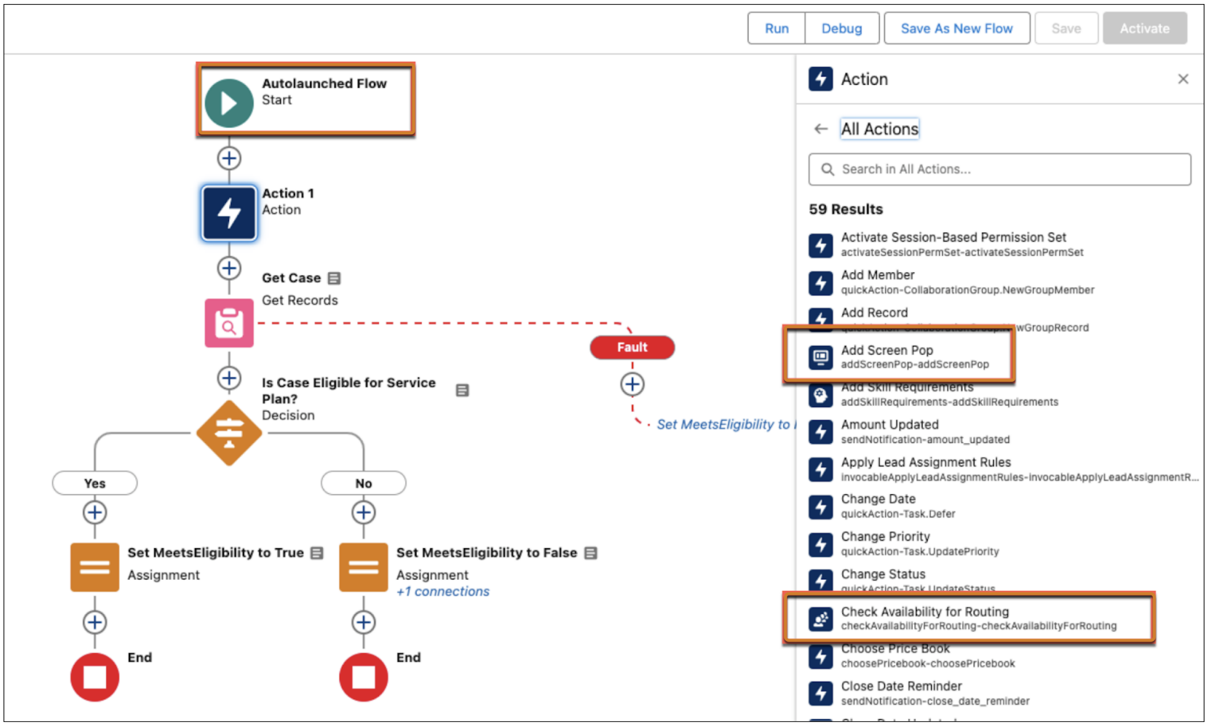
New and Changed Standard Agent Topics and Actions
Einstein Features
Salesforce Help: Agent Action: Update Omni-Channel User Configuration (can be outdated or unavailable during release preview)

Perform Actions from More Flow Types

The Check Availability for Routing and Add Screen Pop flow actions are now available in all Salesforce flow types. Previously, they were limited to Omni-Channel flows.

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

How: To add an action, drag the action from the Action menu to the flow, and then connect it.

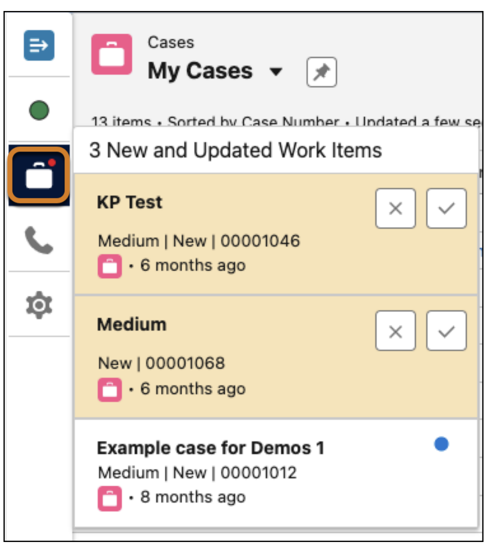


Increase Rep Productivity with Omni-Channel Sidebar

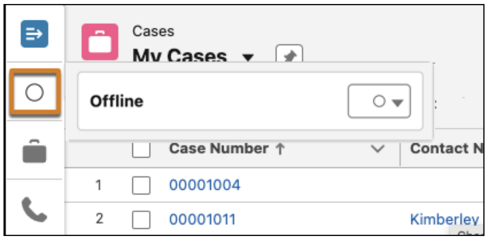
To view and quickly change their statuses, reps can now use the collapsed Omni-Channel sidebar. To notify reps about work that's been auto-accepted or resumed after being paused, these updated work items now appear in the Omni-Channel sidebar.

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

How: To view the updated work items, hover over the Case icon in the Omni-Channel sidebar. The inbox shows assigned work first, then opened work, and finally paused work. Within each of those groups, the inbox organizes work items from most recently updated to least, with the most recent ones appearing higher in the list.



To view and change their status, a rep can hover over the Status icon while the sidebar is collapsed.



SEE ALSO:

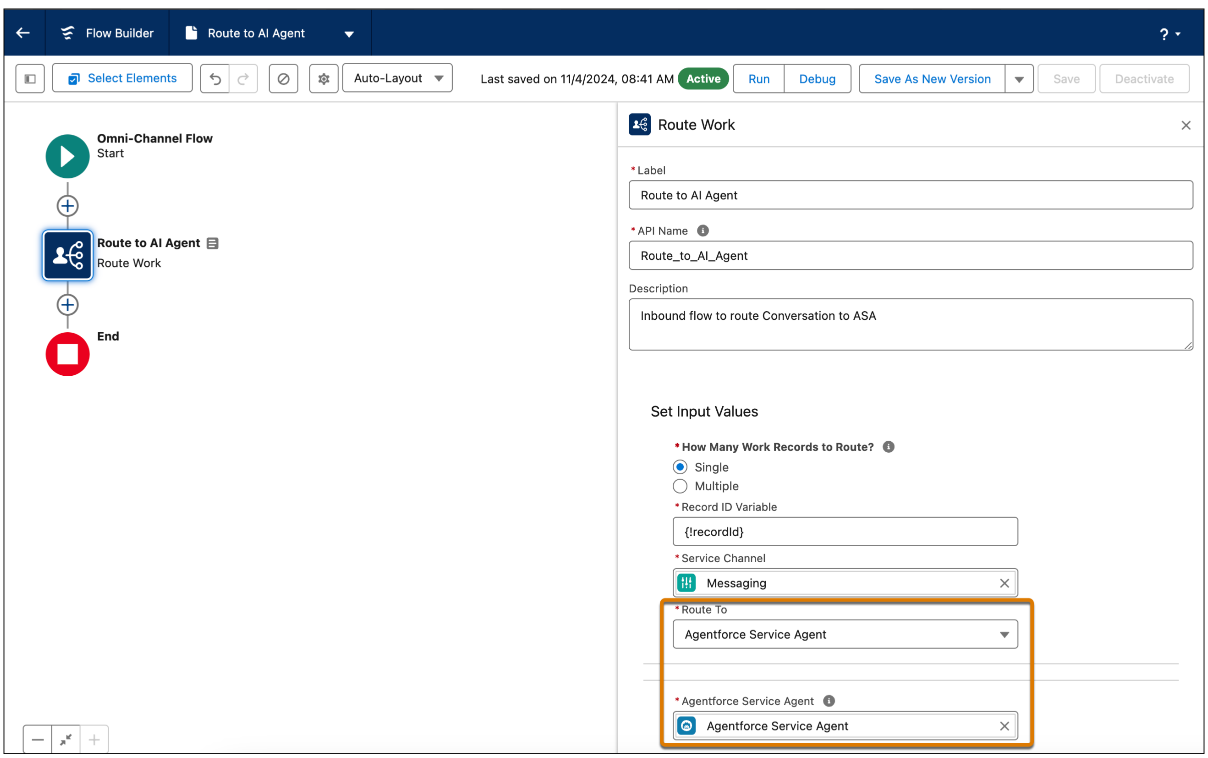
Salesforce Help: Use the Omni-Channel Component to Work with Customers (can be outdated or unavailable during release preview)

Other Enhancements for Routing Work to Agentforce Service Agents

The Route Work action now has a simplified process for routing work to Service agents using an Omni-Channel flow. To troubleshoot why an Omni-Channel flow fails to route work to a destination, review the new, detailed error messages.

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

How: To route work to an Agentforce Service Agent, modify the Omni-Channel flow. In the Route Work action, select **Agentforce Service Agent** in the Route To field and the name of the AI agent in the Agentforce Service Agent field.



SEE ALSO:

Salesforce Help: Route Work to an Agentforce Service Agent (can be outdated or unavailable during release preview)

Route Voice Calls with Other Channels by Using Omni-Channel (Pilot)

Route voice calls alongside other Salesforce channel work items by using Omni-Channel Unified Routing. Turning on Unified Routing enables skill-based routing and direct-to-rep routing for voice calls in an Amazon Connect contact center. Improve your contact center to better handle use cases where reps work on different types of work items. Additionally, reps now have more than 20 seconds to accept a call.

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

Note: Unified Routing 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: Contact your Salesforce account executive to request access to the pilot. In Salesforce, associate all Salesforce queues with one contact center group, and then associate the contact center group with a Voice channel in an Amazon contact center. In Amazon Connect, update your Amazon flows for inbound, outbound, and transfer scenarios. Then enable **Unified Routing** in the Contact Center details in Salesforce.

SEE ALSO:

Route Work Items Through a Single System with Unified Routing for Voice (Pilot)

Salesforce Help: Comparison of Standard and Enhanced Omni-Channel (can be outdated or unavailable during release preview)

Feedback Management

Capture more data by saving responses from partially completed surveys. Enhance Net Promoter Score questions with customizable labels for more meaningful feedback. Access survey data directly within messaging sessions and create tailored reports for deeper insights.

IN THIS SECTION:

Improve Data Gathering with Partial Survey Responses

Capture responses from partially completed surveys. Participants can resume the survey from where they left off even if they don't manually pause the survey when they abandon it.

Customize NPS Question Labels for Better Relevance

Tailor your Net Promoter Score (NPS) questions to better resonate with participants by customizing the labels for the lowest and highest scores. Edit and translate the labels to more accurately describe the scores and enhance their relevance for survey respondents.

Access Customer Feedback Directly from the Messaging Sessions Page

Enhance service quality with access to survey invitations and responses within the messaging sessions page. Get a complete overview of all responses in a customizable messaging sessions report.

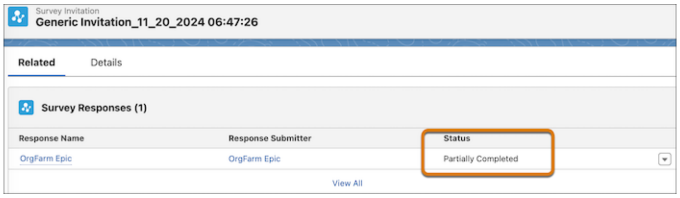
Improve Data Gathering with Partial Survey Responses

Capture responses from partially completed surveys. Participants can resume the survey from where they left off even if they don't manually pause the survey when they abandon it.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Feedback Management - Growth is enabled.

Who: To use partial surveys, users need the Salesforce Surveys Advanced Features permission.

How: From the App Launcher, find and select **Surveys**. On the Surveys list view, click **New**. In the New survey window, select **Save partially completed survey**. Click **Continue** to create the survey and share it with your participants.



SEE ALSO:

Salesforce Help: Capture Responses from Partially Completed Surveys (can be outdated or unavailable during release preview)

Customize NPS Question Labels for Better Relevance

Tailor your Net Promoter Score (NPS) questions to better resonate with participants by customizing the labels for the lowest and highest scores. Edit and translate the labels to more accurately describe the scores and enhance their relevance for survey respondents.

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

Access Customer Feedback Directly from the Messaging Sessions Page

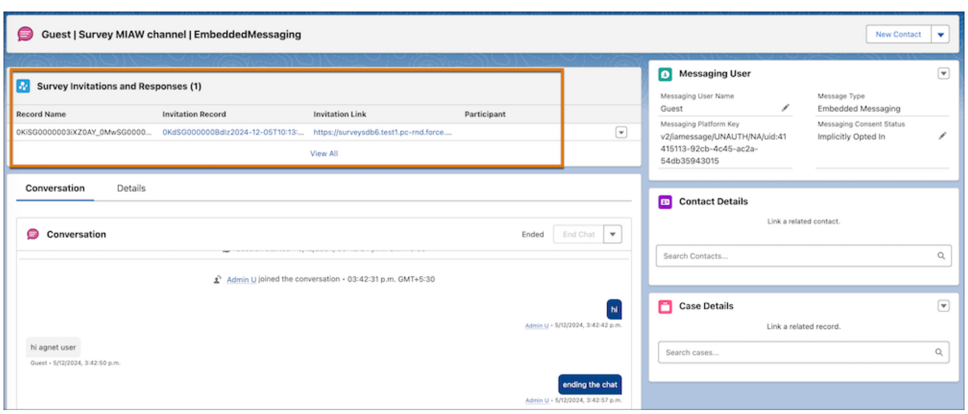
Enhance service quality with access to survey invitations and responses within the messaging sessions page. Get a complete overview of all responses in a customizable messaging sessions report.

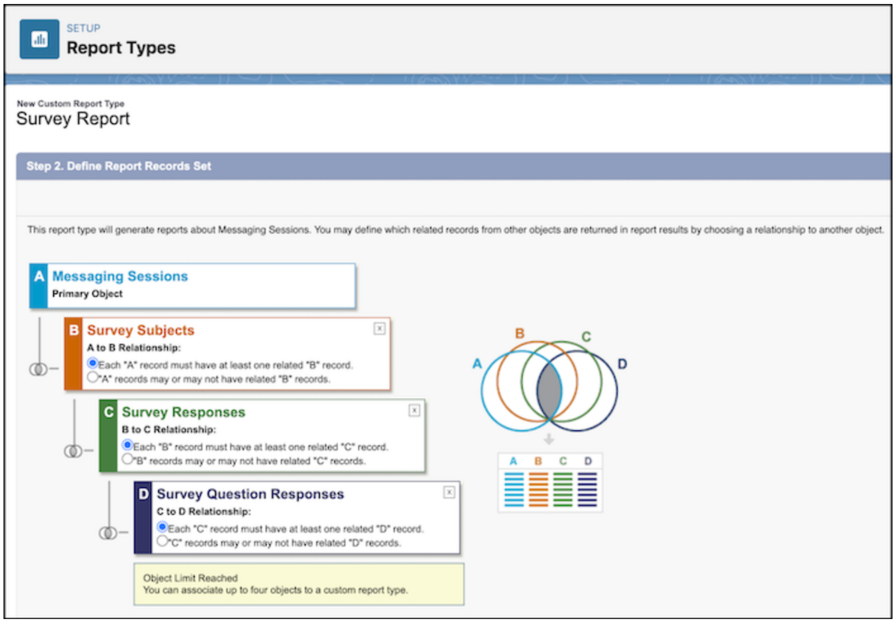
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled.

Who: To access survey invitations and responses on the messaging sessions page, users need the Salesforce Advanced Features Starter permission or the Salesforce Surveys Advanced Features permission.

How: From Object Manager, go to Messaging Session and select **Page Layouts**. Within the Messaging Session Layout, add **Survey Invitations and Responses** to the Related Lists, and then save your work.

To create a report type to view survey responses, use Messaging Sessions as the primary object and relate it to Survey Subjects, Survey Responses, and Survey Question Responses. Use this custom report type to create a report that shows survey responses.





SEE ALSO:

Salesforce Help: Set Up Post-Chat Surveys for Messaging for In-App and Web (can be outdated or unavailable during release preview)

Customer Experience Intelligence

Unify customer data, extract product insights, and improve data quality for personalized customer experiences. Gain insights into customer engagement, identify top products, and refine product descriptions with the Customer Experience Intelligence agent topic.

IN THIS SECTION:

Unify Customer Data for a Holistic Profile

Create a single, coherent view for each customer by collating data from multiple sources. Use this comprehensive view to better understand customer needs and deliver more personalized experiences.

Extract Product Insights from Customer Interactions

Identify product mentions and associated sentiments from customer interactions. Use the Product Insights Extraction AI service to extract meaningful insights about your customers' feedback, pain points, and product issues.

Enhance Data Quality by Restricting the Length of Key Phrases

Extract the most relevant key phrases from customer conversations in Customer Experience Intelligence by setting a minimum key phrase length, ranging from 2 to 5.

Improve Customer Experience with Email Insights

Capture detailed customer feedback via email, and derive actionable insights from email data. Use the data to improve service rep interactions and empower decisions.

Optimize Engagement Efficiency by Analyzing Interactions Across Products

Analyze customer engagement across channels, focusing on interactions related to specific products, sentiment, key influencing factors, contact reasons, and location. Use the new analytics dashboard to monitor trends in Net Promoter Score (NPS), Customer Satisfaction Score (CSAT), and sentiment over time. Gain insights into the sentiment of interactions for specific products, identify patterns in customer satisfaction, and refine your support strategy.

Boost Productivity by Creating Multiple Cases Simultaneously

Save time and effort by creating multiple cases directly from the Customer Intelligence Experience analytics dashboard. Act swiftly on customer sentiments without going to the case creation page. Know the status of your case creation requests with instant notifications.

Get a Comprehensive Summary of Customer Engagement, Experience, and Data

Gain a complete understanding of customer engagement across all channels with the Customer Experience Intelligence agent topic. Use the Find Similar Interactions action to search interaction records by related terms or channels, including case, chat, email, surveys, and voice, to generate summaries of key issues or reasons for contact. The Summarize Product Reviews action identifies top products from a specified list based on customer feedback. The Enhance Product Description action compares customer reviews from various channels with the product description to identify gaps and suggest more accurate and impactful descriptions.

Unify Customer Data for a Holistic Profile

Create a single, coherent view for each customer by collating data from multiple sources. Use this comprehensive view to better understand customer needs and deliver more personalized experiences.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Data Cloud enabled and the Customer Exprc Intel add-on.

Who: To unify profiles on the Customer Experience Intelligence setup page, users need the Scoring Framework Admin and Data Cloud Admin user permission sets.

How: From Setup, find and select **Customer Experience Intelligence**. Turn on **Customer Experience Intelligence** and start the setup process. On the Channels page, turn on **Unified Profiles**.

SEE ALSO:

Salesforce Help: Select Channels to Get Data (can be outdated or unavailable during release preview)

Extract Product Insights from Customer Interactions

Identify product mentions and associated sentiments from customer interactions. Use the Product Insights Extraction AI service to extract meaningful insights about your customers' feedback, pain points, and product issues.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Data Cloud enabled and the Customer Exprc Intel add-on.

Who: To activate Product Insights Extraction on the Customer Experience Intelligence setup page, users need the Scoring Framework Admin and Data Cloud Admin user permission sets.

How: From Setup, in the Quick Find box, enter `Customer Experience Intelligence`, and then select **Customer Experience Intelligence**. Turn on **Customer Experience Intelligence** and start the setup process. On the AI Services page, turn on **Product Insights Extraction**.

SEE ALSO:

Salesforce Help: Select AI Services (can be outdated or unavailable during release preview)

Enhance Data Quality by Restricting the Length of Key Phrases

Extract the most relevant key phrases from customer conversations in Customer Experience Intelligence by setting a minimum key phrase length, ranging from 2 to 5.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Data Cloud enabled and the Customer Exprc Intel add-on.

Who: To set the minimum length of key phrases on the Customer Experience Intelligence setup page, users need the Scoring Framework Admin and Data Cloud Admin user permission sets.

How: From Setup, find and select **Customer Experience Intelligence**. Turn on **Customer Experience Intelligence** and start the setup process. On the AI Services page, select **Configure Additional Settings** to set the minimum key phrase length.

Improve Customer Experience with Email Insights

Capture detailed customer feedback via email, and derive actionable insights from email data. Use the data to improve service rep interactions and empower decisions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Data Cloud enabled and the Customer Exprc Intel add-on.

Who: To use email as a channel on the Customer Experience Intelligence setup page, users need the Scoring Framework Admin and Data Cloud Admin user permission sets.

How: From Setup, find and select **Customer Experience Intelligence**. Turn on **Customer Experience Intelligence** and start the setup process. On the Channels page, turn on **Email**.

SEE ALSO:

Salesforce Help: Select Channels to Get Data (can be outdated or unavailable during release preview)

Optimize Engagement Efficiency by Analyzing Interactions Across Products

Analyze customer engagement across channels, focusing on interactions related to specific products, sentiment, key influencing factors, contact reasons, and location. Use the new analytics dashboard to monitor trends in Net Promoter Score (NPS), Customer Satisfaction Score (CSAT), and sentiment over time. Gain insights into the sentiment of interactions for specific products, identify patterns in customer satisfaction, and refine your support strategy.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Customer Experience Intelligence is enabled.

Who: The dashboard is part of the Customer Experience Intelligence Analytics app. To create the app, you need the CRM Analytics Plus Admin and Customer Experience Intelligence Analytics admin permission sets. To use the app dashboards, you need the CRM Analytics User and Customer Experience Intelligence Analytics User permission sets.

How: From Setup, in the Quick Find box, enter `Customer Experience Intelligence`, and then select **Customer Experience Intelligence**. Go to the Customer Experience Intelligence Analytics section, and follow the instructions in the setup flow.

Boost Productivity by Creating Multiple Cases Simultaneously

Save time and effort by creating multiple cases directly from the Customer Intelligence Experience analytics dashboard. Act swiftly on customer sentiments without going to the case creation page. Know the status of your case creation requests with instant notifications.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Customer Experience Intelligence.

Who: To create the Customer Experience Intelligence Analytics app, users need the CRM Analytics Plus Admin and Customer Experience Intelligence Analytics Admin permission sets. To use the app dashboards, Customer Experience Intelligence users need the CRM Analytics Users and Customer Experience Intelligence Analytics User permission sets.

How: On the Customer Experience Intelligence Analytics dashboard, click **Create Records**. Add the context about the case records. To assign the records, select a user segment or up to 20 users, or both.

Get a Comprehensive Summary of Customer Engagement, Experience, and Data

Gain a complete understanding of customer engagement across all channels with the Customer Experience Intelligence agent topic. Use the Find Similar Interactions action to search interaction records by related terms or channels, including case, chat, email, surveys, and voice, to generate summaries of key issues or reasons for contact. The Summarize Product Reviews action identifies top products from a specified list based on customer feedback. The Enhance Product Description action compares customer reviews from various channels with the product description to identify gaps and suggest more accurate and impactful descriptions.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Data Cloud enabled, and the Customer Exprc Intel and Einstein GPT Copilot add-ons. Setup for Agentforce is available on the desktop site.

Who: Agentforce is available to users with the Use Agentforce Default Agent user permission. To access the Customer Experience Intelligence setup page, users need the Scoring Framework Admin and Data Cloud Admin user permission sets.

SEE ALSO:

Salesforce Help: Set Up Agent Actions (can be outdated or unavailable during release preview)

Service Adoption

Explore different service areas available to you based on business goals and more.

IN THIS SECTION:

Discover More Service Capabilities with My Service Journey (Generally Available)

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 Agentforce feature, and more.

Discover More Service Capabilities with My Service Journey (Generally Available)

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 Agentforce feature, and more.

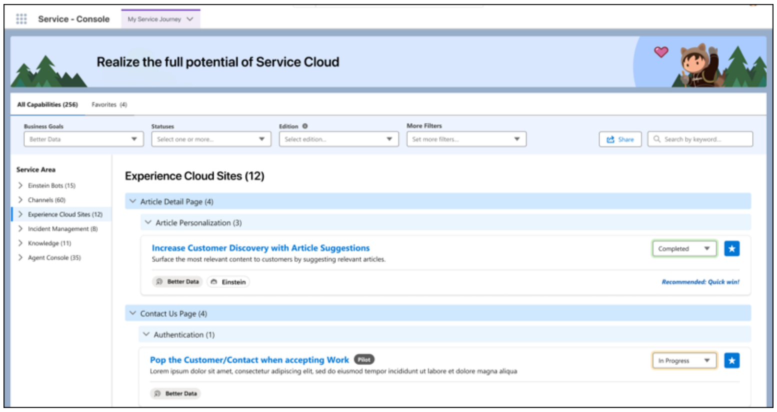
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

Why: Learn more about the service features available to you. With My Service Journey generally available:

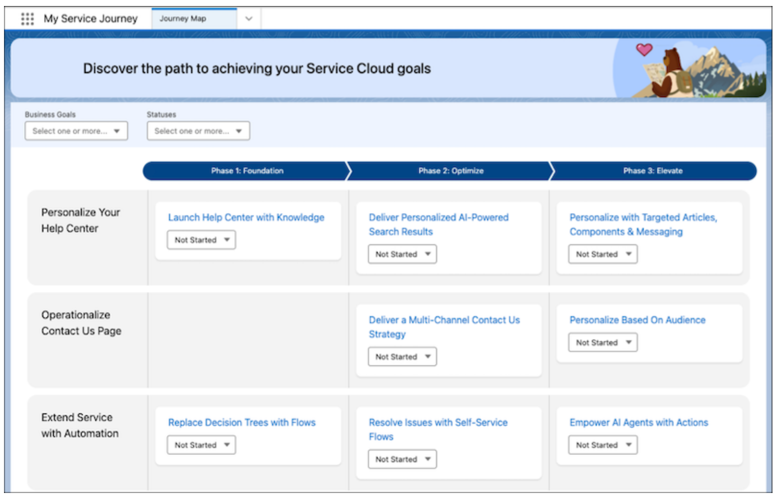
- Explore a journey map of prescriptive service capabilities across foundation, optimize, and elevate phases. Capabilities are organized into progressing initiatives to increase productivity and self-service, and completing them updates their status on the map.
- Click **Contact Us** to reach out to Salesforce with any questions about capabilities.
- View My Service Journey in 16 fully supported languages.
- Access My Service Journey in Developer edition.

Who: Available to all Service Cloud users.

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.



To explore the Journey Map, click Journey Map on the tab.



SEE ALSO:

Salesforce Help: Service Cloud Functionality with My Service Journey (can be outdated or unavailable during release preview)

Salesforce Help: Supported Languages (can be outdated or unavailable during release preview)

Trailhead: My Service Journey App: Quick Look

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 innovative tools, 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 Spring '25 include:

- Signature
  - Customer Success Score enhancements
    - Signature customers will now experience enhanced Product Adoption Score insights with richer data into license and feature usage.
      - Added License Usage Signals for:
        - Communications Cloud
        - Net Zero Cloud
        - Media Cloud
        - Education Cloud
      - Added Feature Usage Signals for:
        - Financial Services Cloud
        - Health Cloud
    - Technical Health Score has been expanded for additional products::
      - Tableau
      - Service Cloud Voice
  - Proactive Monitoring Enhancements
    - Signature customers can now access Proactive Monitoring on Help for Marketing Cloud Account Engagement.
    - Signature customers have access to 4 new alerts for the Salesforce Platform.
      - Service Cloud Omni Channel (2 alerts)
      - Order Management System (OMS) (2 alerts)
- Premier:
  - DORA Support
    - Premier & Signature customers can now get help and mitigate risks with DORA incident assistance. Customers can contact Salesforce Technical Support for DORA-related incidents and get the answers they need to stay compliant. They will experience frequent updates from support, recaps of incident findings, and possible mitigation recommendations to help lower recurrence risks so they have the information needed to report to regulators.
  - New Virtual Interactive Workshops
    - Customers can now learn directly from Salesforce experts in 90-minute workshops with demos, interactive guidance, and step-by-step exercises in their practice environment.
  - Enhanced Individual Expert Coaching Sessions
    - Individual Expert Coaching Sessions have been streamlined so customers can simply reach out and connect with an expert. Speak one-to-one with a Salesforce expert on any topic or product. Customers get personalized guidance and best practices specific to their business use cases, challenges, and objectives.

- Success Reviews
  - Premier customers can now request an ongoing review of their Success Path with insights to track their performance against goals that were set during Onboarding. This review also includes an examination of actions taken based on recommendations. During the review, customers have the opportunity to revise any goals or Success KPIs that have been established in the Success Path. Premier customers can sign up for Success Reviews twice per year per contract per product.

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.