

Salesforce Spring '23 Release Notes

Salesforce Overall

General Enhancements

- Multi-factor authentication (MFA) auto-enablement for direct logins
 - Starting in Spring '23 and phased throughout 2023
 - Enforced by making MFA a permanent part of login process
- Major Release Notification Emails streamlined
 - "Release Is Live" email now includes updated language about feature availability
 - "Features Enabled" email discontinued
- Limit on maximum number of loaded Lightning Console tabs in a session
 - Improves memory usage and scalability of console sessions
 - If limit exceeded, least recently used tabs unloaded
- Tab-Focused Dialogs feature postponed indefinitely
- Enhanced and partitioned domains change login URL formats
 - Autocomplete function includes new formats on login.salesforce.com and test.salesforce.com

Salesforce Scheduler

- Schedule video appointments with Amazon Chime
 - Allows for virtual appointments
- Enable service resources and customers to view past and upcoming appointments
 - Improves visibility and organization
- Use Omni-Channel service resources in Salesforce Scheduler
 - Allows for scheduling through multiple channels
- Show available service resources based on engagement channels
 - Allows for more efficient scheduling
- Other enhancements
 - Additional improvements to Salesforce Scheduler

Einstein Search

- Configure searchable fields, including picklists, with Search Manager
 - Allows for more tailored search results
- Receive specific answers from knowledge articles with Einstein Search Answers
 - Provides quick access to relevant information
- Use Einstein Search Learning Map to quickly onboard
 - Helps users become familiar with Einstein Search features and functionality

Analytics

Reports and Dashboards

- Enhancements to Lightning reports and dashboards
- Create Personalized Report Filters
 - Set up a single dynamic report filter that displays personalized results for each user
- Stay Informed on Dashboard and Report Subscriptions
 - Manage data access and scheduling and limits of subscriptions
 - Create a custom report type on Analytic Notifications to view the source, owner, running user, and schedule of subscriptions
- Subscribe to More Reports and Dashboards
 - Each user in an Unlimited Edition org can now subscribe to up to 15 reports and 15 dashboards
- Stay in Lightning Experience When Editing Lightning Reports
 - The Lightning Report Builder now has all the features of Salesforce Classic
- Stay Organized by Adding Reports and Dashboards to Collections
 - Use collections to organize reports and dashboards for easy access
 - Pin important collections to your home page and share collections with others
- Access Optimal Views on Mobile with Enhanced Reports (Generally Available)
 - Improved mobile experience with responsive UI, faster load times, and consistent performance
- Filter Report Types by Objects or Fields (Generally Available)
 - Quickly find custom report types that include selected objects or specific fields
- Enhance Lightning Dashboards with Text and Graphics (Beta)
 - Add rich text, company logos, flow diagrams, and embedded images to dashboards
- Focus Your View with More Dashboard Filters (Beta)
 - Refine and target dashboard data with up to five filters

CRM Analytics

Analytics Data Integration

- Connect Security Center and CRM Analytics with Data Sync
 - Analyze Security Center data in CRM Analytics without manually uploading CSVs
 - Security Center objects can be directly synced through the Salesforce Local connector in data sync
 - Available to users with CRM Analytics and the Security Center add-on subscription

Analytics Prebuilt Apps

- Refresh Templated Analytics App Data with One Click
 - Ensure that CRM Analytics templated apps are running with current data by refreshing an entire app with one click
 - Schedule automatic app refreshes to run all data assets in the required order
- Get Automated App Upgrades
 - CRM Analytics automatically upgrades Customer Insights, Design App, and Learning Adventure apps
 - Deletes previous versions and customizations
 - Option to disable auto-upgrade feature
- Improve Your Team Members' Efficiency
 - Use the new Team Performance dashboard to analyze team member performance and identify those needing attention

- Create the app in Analytics Studio using the Analytics for Communications - Order Tracking template
- Customize Dashboards and Manage Revenue Better
 - Use the new Revenue Management for Financial Services Cloud app to track and manage revenue for multiple sales processes
 - Easily customizable and adaptable to the financial service industry
 - Quickly build customized dashboards using the app's prepackaged component library
 - Create the app in Analytics Studio using the Revenue Management for Financial Services Cloud template

Analytics App Building

- Move Through Dashboards with a Single Click (Generally Available)
 - Create a flow to move between dashboard pages with a single click
 - Interactions available for chart, text, repeater, and table widgets
- Write Powerful Queries in Compact Form 2.0 (Generally Available)
 - Compact form 2.0 is a new representation of queries with JSON
 - Efficiently handles multiple datasets and different data sources
 - Includes advanced features such as data blending and interactions on columns
- Better Performance for Embedded Analytics Dashboards
 - Rendered with native Lightning web components (LWC) instead of iframes
 - Improves user experience and increases loading and rendering speed
- Edit Queries That Contain Interactions
 - Queries with interactions (bindings) are now editable
 - Can be opened to view as a lens and validate results or make format changes
- Use the Input Widget in More Ways
 - Input widget can be added to formulas as a column or in SAQL
 - Retrieves user inputs for use in other parts of the dashboard
- Migrate Conditional Formatting Assets
 - Updating dashboards with conditional formatting (assetXMD) and migrating across orgs is now fully supported
 - Includes automated checks and process modifications for a successful org migration
- Improve Dashboard Accessibility with High-Contrast Colors
 - Dashboards now include high-contrast color themes for better readability
 - Help differentiate content and improve end-user experience
- Highlight Important Content in Repeater Widgets with Conditional Formatting
 - Key data in repeater widgets can be made to stand out with formatting rules
 - Can define separate rule for each widget in the repeater based on value or range
 - Options vary depending on the widget type
- Save and Share Customer Data Platform Explorations
 - Customer Data Platform (CDP) explorations can now be saved and shared with others
- Other Improvements and Fixes
 - Other improvements and fixes include support for dashboard filters in Einstein Analytics for Mobile, enhanced data protection for data integrations, and improved dashboard sharing options.

Einstein Discovery:

- Hello Predictive Models, Farewell Stories
 - Einstein Discovery uses predictive modeling to make predictions and suggestions about future outcomes
 - Model creation and exploration have a more intuitive design
 - Every model still includes the insights that you're used to
- Get Einstein Discovery in Revenue Intelligence
 - Get predictions and recommendations from Einstein Discovery models directly on your dashboards
 - Use Account Discovery to predict potential growth of accounts and find which accounts need attention
 - Use the Revenue Insights dashboard to maximize deal size, increase win rate, and reduce time to close
- Improve Recommendations with Decision Optimization (Pilot)
 - Control Einstein's suggested improvements by incorporating business rules, objectives, and constraints
- See Estimated Model Run Time (Generally Available)
 - Einstein now shows approximately how much time it takes to create a model or update an existing one
- Make Einstein Easier to Understand
 - Customize the top predictor text of Einstein predictions
- Get Fine-Grain Model Performance on Specific Values (Generally Available)
 - Measure the quality of your model for each value group within a variable
- Queue Models for Einstein to Run
 - Save time by giving Einstein a to-do list
- Predict with Live Google BigQuery Data
 - Run predictions from your deployed models with live, external data
- Einstein Predictions Component Has a New Look
 - Einstein Prediction component on your lightning pages has a larger predicted value and less clutter
- Turn Big Data into Predictions Faster (Generally Available)
 - Build predictive models faster with smart sampling

CRM Analytics for Everyone

- Include Lightning Reports and Dashboards in Collections
 - Curate the perfect collection to stay more organized with analytics assets from multiple apps and Lightning folders
 - Unified Home for Analytics must be enabled on orgs that don't have a CRM Analytics license to support asset previews in collections
- Pin and Hide Collections
 - Give users more options to customize their home page
 - Pin collections to the top of the list for easy access
 - Hidden collections are still accessible through the collections management UI, a collection URL, or as an embedded Lightning component

- Browse Collections with Asset Previews
 - Provide additional context to make it easier for users to decide which items are relevant or require attention
 - Gives users a glimpse of what an asset is about
 - Do More with Analytics Links in Slack
 - Send links to analytics items, and give recipients more options with Slack link unfurling
 - If the recipients have the CRM Analytics for Slack app, they see options such as View Details and Open in Salesforce
 - Get More Context in Slack Notifications
 - CRM Analytics notifications in Slack can now include a snapshot of the widget where the notification is set
 - Notification also delivers an accessible PDF file of the widget's data
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Commerce

B2B and B2B2C Commerce

- Create a B2B Store Built on Lightning Web Runtime:
 - Use the new B2B LWR template for better performance, easier customization, and use of components shared with the B2C store template.
- Improve SEO with URL Slugs and Redirects (Pilot):
 - Create SEO-friendly URL snippets and dynamic rules for redirecting customers.
- Use Dynamic Redirect Rules in LWR Commerce Stores (Pilot):
 - Configure dynamic URL redirect rules with a pattern to identify and redirect to a Salesforce B2C Commerce URL.
- Promotions:
 - Create tiered promotions, BOGO deals, and automatically apply category promotions to variants.
- Show Related Products on One Product Detail Page:
 - Use product sets to group parent and child products on a single product detail page.
- Search:
 - Deliver AI-powered search results, search by SKU more easily, and spend less time rebuilding the search index.
- Commerce Data Import is Now Asynchronous:

- Import product and related data asynchronously with standard CSV import file format up to 10,000 products with nine images each.
- Global Sales:
 - Configure multiple ship-to countries, multiple currencies, a contact point shipping address, and assign taxes.
- Checkout:
 - Create and customize checkout, reduce time to purchase, process orders asynchronously, switch accounts during checkout, and recalculate pricing and inventory.
- Upgrade Cart Components in Your B2C Store:
 - Replace legacy components with new options for improved performance and customization.
- Customize Components with Cart Data:
 - Specify which details to show in a customer's cart using expressions.
- Use the Nested Expressions Data Source in the Grid Component:
 - Bind data nested in the top-level data source with the Nested Expressions data source.
- Configure Menu Items with the User Profile Menu Component:
 - Replace the MyAccount component with the User Profile Menu component for a unified user experience, support for the account switcher functionality, and more.
- Order Settings Are Now Configured Automatically:
 - Order settings for B2B and B2B2C Commerce licenses are automated after setup.
- Use More Field Options for Customer Addresses:
 - The CPA form includes separate fields for First Name, Last Name, Company Name, and Phone Number.
- Programmatically Change a Web Store's Site Association:
 - Update the corresponding WebStoreNetwork record to programmatically associate a web store.
- Confirm That Your Products Are Ready to Sell:
 - Use Product Readiness to find products that aren't ready to be sold and update them to fit readiness guidelines.
- Develop B2C Stores in Developer Edition Orgs:
 - Developer edition orgs are now enabled for B2B and B2C.

Omnichannel Inventory

- Self-Provision the Connection Between B2C Commerce and Omnichannel Inventory:

- Use the new B2C Commerce Connections page in Salesforce to provision a connection to Omnichannel Inventory.
- Import More Inventory Records in Less Time:
 - Imported inventory records are aggregated more efficiently in Omnichannel Inventory, resulting in faster processing time. Up to 25 million records can be imported in 5 hours or less.
- Gain More Visibility into Shared Group Reservation Counts:
 - Omnichannel Inventory endpoints now provide information about group reservation counts when a single location is shared across multiple location groups.

Salesforce Order Management

- Place Orders on Behalf of Customers Using UI Flows:
 - Customer service representatives can place orders for shoppers directly using the Order on Behalf Of UI flow.
- Identify Whether an Order Summary Was Created on Behalf of a Customer:
 - The Order Summary object's Source Process field can be used to identify orders created on behalf of customers.
- Track and Manage Packing for Online Orders:
 - Store associates can add items to one or more shipments and set a reason for rejection if a product can't be shipped. Shipping labels can then be printed and the order shipped.
- Charge Fees for Simple Returns and Cancellations:
 - Fees can now be included when processing simple returns and cancellations via Connect REST API, Connect in Apex, or flow core actions.
- Automatically Update an Order Payment Summary When Canceling a Payment Authorization:
 - The Payment Authorization Reversal Service updates the order payment summary's Available to Capture and Authorization Reversed values when called on an authorization associated with an order payment summary.
- Use Salesforce Payments with B2C Commerce Orders:
 - Salesforce Payments can now be used to process payments and refunds for B2C Commerce orders.
- Provision and Deactivate B2C Commerce Connections via Self-Service:
 - The B2C Commerce Connections page in Setup can be used to manage storefront connections and related features.
- Deactivate High-Scale Orders Without Disrupting Order Data:

- The help clarifies how to avoid potential issues with in-progress orders when deactivating high-scale orders.
- Find Useful Resources for Order Management Developers:
 - The Order Management Developer Guide has been enhanced with useful links to Connect API, Salesforce Flow core actions, platform events, and more.
- Import Order Data from External Channels at High Scale (Developer Preview):
 - Order data can be imported at high scale from external channels other than B2C Commerce using the `/commerce/order-summaries` Connect REST endpoint.

Salesforce Payments

- Add Salesforce Payments to B2B Checkout
 - Provide credit card support for the LWR template's checkout component.

Customer Data Platform

- Track Changes Using Second-Generation Packages
 - Second-generation packages (2GP) developed with Salesforce Developer Experience CLI are source driven, allowing partners to manage package versions with their own tools and store metadata in their own version control system.
 - AppExchange partners can develop, distribute, and manage their apps and metadata using second-generation packages.
- Chain Processes in a Sequence with Workflow Orchestration
 - Trigger Customer Data Platform processes only when necessary or when a previous process has finished running.
 - Chain workflow processes such as ingestion, segments, and activation, and configure the sequence in which they run.
 - Define own workflows using Flow Builder.
- Save Time by Updating an Existing Data Kit
 - No longer need to create a new data kit when modifying CRM and B2C Commerce data streams or data models and mappings.
 - Update an existing data kit and retrieve or deploy the updated data kit from Customer Data Platform with Package Manager.
- Activate Segments for Google or Meta Advertising Platforms
 - Activate audience segments securely in Customer Data Platform to use in targeted Google and Meta advertising campaigns.
 - Use out-of-the-box activation connectors to send audience lists to Google and Meta with just a few clicks.

Customization

Fields

- Clean Up Inactive Picklist Values:
 - Manage inactive picklist values and enforce limits with bulk delete feature.
 - Available only for custom picklists with predefined values.
- Bulk Manage Picklist Values:
 - Delete, activate, deactivate, or replace multiple custom picklist field values at once.
 - Available only for custom picklists with predefined values.
- Limit the Number of Inactive Picklist Values:
 - Restrict the number of inactive picklist values in a custom picklist field.
 - Unlimited number of inactive picklist values removed.
- Capture Inclusive Data with Gender Identity & Pronouns Fields:
 - Optional picklist fields on Lead, Contact, and Person Account objects.
 - Default value sets or add your own picklist values.
 - Review privacy implications before adding to page layouts.

Lightning App Builder

- Enhance Record Pages with Dynamic Forms
 - Make your record pages more robust and configure them with Dynamic Forms.
- Dynamic Actions for Standard Objects
 - Add flexibility and control to actions on your record pages with dynamic actions for all standard objects, now generally available for desktop.
- Build Forecasts Pages in Lightning App Builder
 - Customize desktop forecast pages to include all the information needed to drive accurate forecasts.
- Add Save Options to Accounts, Cases, and Leads
 - Add a save option with Dynamic Forms when creating, editing, or cloning a case or lead or when editing an account.
- See More Records in Dynamic Related Lists
 - Related lists now include a View All link so that users can see a full list of related records.
- Pin Content on the Right Side of Record Pages

- Use the new Pinned Right Sidebar template to show important information on the right side of record pages.
- Access Information Easily on Object Record Pages
 - The new layout of the page title template makes record names available for screen readers and hover.

Sharing

- Enable Stronger Protection for Your Users' Personal Information (Release Update)
 - Secure more PII user record fields
 - Replace Hide Personal Information setting
 - Decide custom and standard user fields considered PII
 - Enforced in Spring '23
- Learn Who Can Access Records and Why
 - View record's sharing hierarchy
 - See user's reason for access
 - Check if access is blocked by restriction rule
- Recalculate Account Sharing Rules Faster (Beta)
 - Virtual implicit share records between accounts and child case records
 - Faster org-wide default and account sharing rule recalculation

Permissions

- Query Delegated Group Access via Tooling API
 - Run API queries on users granted delegated administrator roles
 - Confirm access for members of delegated group
 - Permissions granted to the delegated group
 - Users who are members of the delegated group
- Choose the Permission Sets Display When Setting Field-Level Security (Beta)
 - View by permission sets with object permissions or by all permission sets
 - Permission set API name and description displays
 - Columns are sortable
- Apply and Automate Mass Access with User Access Policies (Beta)
 - Apply user access policies to grant or remove access
 - Entitlement-based or user attribute-based criteria to identify users
 - Automatically apply access when users are created or updated

Globalization

- Update Outdated Country Names

- Türkiye
 - Eswatini
 - Czechia
 - North Macedonia
 - Kosovo
 - Japan
- Enable ICU Locale Formats
 - International standard for dates, times, currencies, addresses
 - Replaces JDK in Salesforce
- Prepare for Locale Format Changes
 - Evaluate changes to locales
 - Test filters, code, components as needed
- Get Locale Names in Local Languages
 - German example: Deutsch (Belgien)
- Review Updated Label Translations
 - 20+ languages
- Enjoy More Custom Address Field Functionality
 - Unlocked packages, feed tracking
 - Configure search results, validate Salesforce CLI
- Prepare for Japanese Katakana Style Change
 - Replace JIS with 1991 Cabinet Notification Directive
- Adopt New Currencies for Croatia & Sierra Leone
 - Croatia: EUR in place of HRK
 - Sierra Leone: SLE in place of SLL

External Services

- Register More API Specs:
 - Register API specs, operations, actions, objects.
 - Expanded limits.
- Track External Services Limits:
 - Five visual gauges show usage and max values.
 - Two lines show total and active actions.
- Specify Charset in the Header:
 - Optionally specify charset in schema.

- No default charset=UTF-8.
- Get External Data into Flow Builder:
 - Create Flow Builder actions w/ web-based service APIs.
 - No code or middleware service.
- Connect Salesforce to MuleSoft:
 - Use new MuleSoft Services page to log in to AnyPoint Platform.
 - Credentials and permissions created in background.

Salesforce Connect

- Connect External Data Sources Managed via GraphQL from Salesforce (Pilot)
 - Use GraphQL adapter for access and integration
 - Optimized for AWS AppSync
 - Access to AWS data sources
- Set Up Amazon DynamoDB External Data Sources with Fewer Clicks
 - Use setup wizard to define external data source
 - Walk-through connecting and integrating data
 - Select DynamoDB table, create external object from sample data
- Get Support for Amazon DynamoDB Data Sources in Global Search
 - External objects searchable
 - Use search box for specific object or global search
 - Use other search tools for external objects
- General Setup
 - Return strings in reverse order with new formula function, view changes to activities with field history tracking for events and tasks.

Development

Lightning Components

- Use Lightning Web Security
 - LWS for Aura (beta) is enabled by default for new orgs
 - LWS for Lightning web components was enabled by default in Winter '23
 - If your org has no custom components, no impact
- Use Lightning Web Security Enablement
 - LWS for Lightning web components (GA) and LWS for Aura (beta) enabled for orgs with no custom components
- Fetch Data Using GraphQL Wire Adapter

- Built on Salesforce GraphQL API
 - Client-side caching and data management
- Query DOM Elements with Refs
 - Access elements in shadow DOM and light DOM
 - No need for `querySelector()`
- Improved Render Time for Lightning Web Components
 - Optimized framework to handle static elements
- Enable Third-Party Integrations with Light DOM
 - Light DOM allows global styling and third-party integrations
- Build Components in Mixed Shadow Mode
 - Lightning web components can use native shadow DOM
- Use Scoped Styles Only on Light DOM Components
 - Except for Experience Cloud sites, CMS content editor, and Sales Enablement environments
- Use Improved Conditional Directives
 - `lwc:if`, `lwc:elseif`, and `lwc:else`
- View Debug Information for Your Wired Properties
 - Access debug information via custom formatters
- Scoping in CSS Pseudo-Elements Is Fixed
 - Correctly scoped styles for synthetic shadow environments
- Disable `lwcRuntimeFlags`
 - No longer affects Lightning Web Components
- Use the UTAM Browser Extension
 - Identify page objects for Salesforce applications
- Generate UTAM Page Objects from HTML Files
 - UTAM Generator command-line tool
- Use Improved Linting for UTAM Page Objects
 - Linting to prevent bad practices
- Configure Code Completion for UTAM JSON Page Objects
 - Code completion with schema file
- Synchronize Component Data Without a Page Refresh
 - `RefreshView` API for LWC and Aura
- Security Enhancements for CSRF Tokens
 - Generate different tokens for each Lightning app

Apex

- Secure Apex Code with User Mode Database Operations (Generally Available)
 - The new Database and Search methods support an `accessLevel` parameter that lets users run database and search operations in user mode.
 - Field-level security and object permissions are respected in user mode.
 - Sharing rules always apply in user mode.
- Find Which Apex Classes Implement an Interface (Generally Available)
 - `ApexTypeImplementor` is available to find Apex classes that implement an interface.
 - Public or global Apex implementors can be found with a SOQL query.
- Use DataWeave in Apex to Enable Data Transformation to Different Formats (Beta)
 - DataWeave in Apex integrates the Mulesoft DataWeave library for data transformation.
 - Apex developers can focus more on business problems.

- Use the `System.enqueueJob` Method to Specify a Delay in Scheduling Queueable Jobs
 - A new optional override adds queueable jobs to the asynchronous execution queue with a specified delay.
 - Delay is ignored during Apex testing.
- Specify an Org-Wide Default Delay in Scheduling Queueable Jobs
 - Admins can define a default delay in scheduling queueable jobs without a delay parameter.
 - Slows default queueable job execution.
- Dynamically Pass Bind Variables to a SOQL Query
 - New Database methods resolve bind variables from a Map parameter.
 - No need for variables to be in scope.
- Discover the Source SObject of a DescribeFieldResult Instance
 - Use `getSObjectType()` to get the SObjectType of a DescribeFieldResult object.
 - Eliminates need for additional mechanisms.
- Run the `SandboxPostCopy` Script as Automated Process User
 - Test the `SandboxPostCopy` script with the same user access permissions as used by post-copy tasks.
 - Better simulate actual usage.
- Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)
 - Regardless of API version, REST response headers will have their names validated.
 - Available starting in Spring '23.
- Restrict Anonymous Apex Access to Core Users
 - Restrict anonymous Apex execution to core users with `RestrictCommunityExecAnon`.
 - Noncore users can't execute anonymous Apex.
- Discover Enhanced Debug Logs in Nested Execution Contexts
 - End of each code block execution is now logged in nested executions.
 - Debug logs are now updated with `CODE_UNIT_FINISHED` entries.

Lightning Design System

- Includes resources to create user interfaces consistent with Salesforce Lightning principles, design language, and best practices.

Visualforce

- Escape the Label Attribute of `apex:inputField` Elements
 - Escape malicious code in XSS attacks
 - Available in Winter '23
- Escape Expression Language Evaluations
 - Secure Visualforce pages & components
 - Expressions in script & style escaped
 - Available in Spring '23
- Enable `JsonAccess` Annotation Validation
 - Validate Apex classes
 - Available in Winter '23
- Validate Getter & Setter Access Modifier Enforcement
 - Postponed indefinitely
 - No customer impact

- Prevent Consecutive API Navigation Calls
 - Postponed indefinitely
 - Don't enable it

API

- Choose Any Name for a Global Value Set
 - When creating a custom global value set in API version 57.0 or later, the developer name is appended with the suffix __gvs.
 - Can create global value set with any name, not conflicting with standard entity of same name.
- Salesforce Platform API Versions 21.0 through 30.0 Retirement (Release Update)
 - API versions 21.0 through 30.0 are retiring in Summer '23, being deprecated and no longer supported.
 - Release Card available in Summer '21, announcement in October 2020.

Einstein Vision

- Extract handwritten text from a document.
- Map text to relevant document layout and associated fields.

Packaging

- Specify a Default Language for Unlocked and Second-Generation Managed Packages
 - Set language when creating new version
 - Default to user language if not specified
- Limit User Profile Access for Packages Installed via Metadata API
 - Specify which profiles have access
 - Default to all profiles
- Get Your Packages Ready for Enhanced Domains
 - Update hard-coded URLs for Salesforce hosted domains
 - Use relative path or dynamically generated hostname

DevOps Center (Generally Available)

- Bring DevOps best practices to development team.
- Deliver value to customers in repeatable and scalable way.

Development Environments

- Quickly Clone Partial and Full Sandboxes
 - Enhance speed of replication
 - Focus more time on building and testing
- Receive Fewer Emails for Impending Sandbox Deletions
 - Consolidate notifications
 - Receive one email for all inactive sandboxes
- Select Who Has Access When Creating a Sandbox
 - Manage access to only required users
 - Remove step for Salesforce admin to change user email

- Create public group to grant access to subset of users

Platform Development Tools

- Open and integrated experience that makes development easy.

Monitor and Analyze System Performance with Scale Center (Beta)

- Monitor production health and performance metrics.
- Identify scale hotspots and view detailed diagnostics.

Salesforce Functions

- Elastic compute and language flexibility.

AppExchange Partners

- Analyze CRM Analytics Recipe Usage
 - Filter package log file data by AnalyticsRecipe and log_record_type
- Explore Query Usage
 - Filter on operation_type by READ, SOSL_QUERY, or SOQL_QUERY
- Retrieve Clean Read Counts
 - Num_reads includes only record reads
- Discover Additional CRUD Activity
 - Retrieve CRUD data from custom objects with UnassociatedCrud log_record_type

Platform Events

- Publish standard events without using allocations.

Event Bus

- Pub/Sub API enhancements for events.

New and Changed Items for Developers

- Numerous specific changes to APIs and components

Einstein

- Einstein Search
 - Get results tailored to your work
 - Configure searchable fields
 - Get answers from knowledge articles
 - Onboard with the Einstein Search Learning Map
- Einstein Discovery
 - Stories as models
 - Predictions & recommendations

- Estimate run time
 - Custom text for easier understanding
- Retail Banking and Wealth Management
 - More insightful customer churn predictions
 - Using features from responses to surveys
 - Sentiment behind responses
- AI Accelerator
 - Create use cases with predictions & NBA recommendations
 - Configure feature extractors
 - Batches or in real time
 - Upload sample features
- Einstein Relationship Insights
 - Analyze & filter types of relationships
 - Get updates on news & job changes
 - View relationship paths
 - Person & company record objects
- Intelligent Document Reader
 - Extract information
 - Improved UI
- Intelligent Form Reader
 - Extract information
 - Improved UI
- Einstein Conversation Insights
 - Reporting on voice & video calls
 - Embed conversation measures into Enablement programs
 - Personal information masked from recordings
- Einstein Classification
 - Add fields for training model (Pilot)
- Einstein Bots
 - Manage goals & monitor performance in one place
 - Cloning & routing improvements
 - Rich conversations with new types of content
 - Einstein Conversation Mining for automation opportunities
- Einstein Conversation Mining (Beta)
 - Identify automation opportunities
 - Build reports
 - Top reasons customers contact you
 - Create bots & dialogs directly in Bot Builder

Enablement and Guidance

Enablement

- Clarify and Formalize Enablement Goals with Distinct Program Outcomes
 - Keep users focused on goal

- Track users' progress
- Organize Your Programs with Sections
 - Group milestones and exercises
 - Section-specific analytics
- Add Einstein Conversation Insights in Enablement Programs
 - Coach reps on KPIs
 - Embed milestones and outcomes
- Get Step-By-Step Support When Building Enablement Measures
 - Practical prompts and tips
- Show and Manage Text-Based Content in Enablement Programs More Easily
 - Research-backed guidelines
 - Estimated reading times
- Create Enablement Programs and Measures More Efficiently
 - Clone existing programs and measures
- See Outcome and Milestone Progress Updates More Frequently
 - Reflect progress more often
- Analyze Outcome and Section Performance with Enablement Analytics
 - Default dashboard and reports
- Other Changes in Enablement
 - Enhancements in workflow

Guidance

- Get the Latest In-App Content
 - Stay up to date
 - Review Salesforce content
 - Minimize duplication
- Discover More Guidance Sets for Admins
 - Access new personalized setup
 - Align with experience level
 - Suggested resources
 - Not available in sandboxes

Experience Cloud

Components in Experience Builder

- Open Support Cases with the Contact Support Form Component in LWR Sites
 - Efficiently create cases
 - Easily contact support
 - Reduce cost-to-serve
 - Custom fields
- Use Micro-Batching to Process Guest Cases from the Contact Support Form
 - High-volume case creation
 - Process records in batches

- Create Component Visibility Rules in Enhanced LWR Sites (Pilot)
 - Hide/show individual components
 - Use user object fields
- Boost the Accessibility of Images in the Rich Content Editor Component
 - Add alt text from component
 - Screen readers read aloud
- Add Next and Previous Buttons to the Grid Component
 - Scroll through content
 - Change label/alignment/size
- Adjust the Margin Around Individual Components in Enhanced LWR Sites
 - Adjust spacing around components
 - Padding field
- Create an Actions Bar in LWR Sites (Beta)
 - Custom set of actions
 - Customize look/feel
- Add a Notifications Component to Your LWR Site (Beta)
 - One place for notifications
 - Customize text/color
- View and Edit Records Using the Record Detail Component in LWR Sites (Beta)
 - View/edit Salesforce records
 - Inherit formatting from branding

Aura and LWR Sites

- Improve Your Site SEO with Structured Data
 - Use script tag to add structured data to pages
 - Structured data helps search engines understand content
 - Search engines can display pages in more engaging ways
- Search for CMS Content in Your Enhanced LWR Microsites
 - Microsites can search for CMS content published from enhanced CMS workspaces
 - Content searches supported in enhanced sites created with LWR template
 - Content searchable in Rich Content Editor, HTML Editor, and page title metadata
- Search for CRM Records in Your LWR Sites (Beta)
 - Visitors can search for CRM records in sites created with LWR templates
 - Visitors can filter and sort search results
 - Customizable images and labels to complement company branding

Developer Productivity

- Migrate Aura Sites to Google Analytics 4
 - Upgrade JavaScript library from analytics.js to gtag.js
 - Update Google Analytics Tracking ID from UA-ID to G-ID
 - gtag.js library and G-ID required to collect analytics data after July 1, 2023
- Level Up Your Site Deployments with New Metadata Types
 - Use Metadata API DigitalExperienceBundle and DigitalExperienceConfig types
 - Source tracking enabled
 - Partial deployments

- Create Custom Property Editors and Property Types for LWR Sites
 - Custom property editors and property types for custom Lightning web components
 - Define validation rules
- Troubleshoot Deployment Errors More Easily
 - Clearer explanations in deployment error messages
 - Location of issue and steps to resolve included

Site Performance

- Exceed Person Account Ownership Limit
 - Selected users can exceed Salesforce portal user limit
 - No negative impact on site performance
- Get Notified About Micro-Batching Errors
 - Receive email notifications for errors
 - No need to query for failed records
- Validate Micro-Batching Apex Method with Tests
 - Add Apex tests for createRecordAsync method
 - More efficient creation of cases, leads, and custom objects
- Control Identity Experiences with Headless Login and Forgot Password Flows
 - Use Salesforce Headless Identity APIs for authentication
 - Log in, access protected data, and reset passwords without leaving app

Mobile for Experience Cloud

- Set Up the Navigation Tab Bar Declaratively for Mobile Enhanced LWR Sites (Beta)
 - Use Experience Builder to set up bottom navigation tab bar of app.
- Assign Unique String Property Values for Different Devices in Custom Lightning Web Components (Beta)
 - String properties of custom Lightning web components respond to device-screen size.
 - Programmatically declare properties that are screen-size responsive.
 - Use Experience Builder to assign property values.
- Receive Notifications Within Mobile Publisher for Experience Cloud Enhanced LWR Sites (Beta)
 - Use Notifications component to show notifications using in-app notification bell icon.
 - Users can view their messages from within their mobile app.

Security and Sharing

- Apply User Access Permissions to Navigation Menus Retrieved by Apex in Experience Cloud Sites (Release Update)
 - Restricts user access to navigation menus.
 - Enforces existing user access permissions.
 - First made available in Winter '23 and enforced in Spring '23.
- Require Granular Flow Permissions for Experience Cloud Guest Users (Release Update)
 - Discontinued Run Flows for Guest and External User profiles.
 - Requires explicit guest user permissions to run Flows.
 - Update sites to new permission structure before enforcement date.
 - First available in Summer '22, enforced in Spring '23.
- Upgrade SAML Single Sign-On Framework (Release Update)

- Upgrading SAML framework.
 - Affects integrations with third-party systems.
 - Applies to all SAML-based integrations.
 - Manage Access to Personally Identifiable Information
 - Hide Personal Information user management setting retired.
 - Use Enhanced Personal Information Management to secure PII fields.
 - Customize user fields concealed from external and guest users.
 - Hide First and Last Name Fields in the SOAP API Is Being Retired
 - Hide first and last name fields in SOAP API setting retired.
 - Enable Enhanced Personal Information Management to secure API calls.
 - Classify personal information fields.
-

Field service

Field Service Resource Management

- Enhanced Scheduling and Optimization
 - Schedule multiday appointments
 - Relocate resources to different territory
 - Define capacity-based resources
 - Create Same Start dependencies
 - Examine in-day optimization
- Get More Details When Manually Bundling Appointments
 - See details of all bundles at a glance
 - Select most optimal bundle
 - Previously selected bundle without details

Field Service Asset Management

- Track Asset Performance with Asset Attributes
 - Improve asset management
 - Define attributes that represent asset health
 - Define thresholds using recordset filter criteria
 - Check engine for faults by monitoring attributes
- Create Appointments with Auto-Populated Addresses
 - Reduce time to value
 - Pull asset address, visitor address, or shipping address
 - Add address to any service appointments
- Get Consistent Results with Standardized Work Order Generation
 - Work orders use rolling window
 - Align manual and automated methods
- Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules
 - Migrate frequency and frequency type data
 - Update available in Summer '22
 - Enforcement date postponed to Feb '23

- Impact on work order generation in Jan '24

Field Service Customer Engagement

- Visual Remote Assistant
 - Improve troubleshooting by sharing screen
 - Replace video background with an image
 - Gain insights with reports
- Streamline Appointment Assistant Experience
 - Let customers cancel/reschedule appointments
 - Notify mobile worker of changes
 - Let customers edit address when confirming appointment

Field Service Mobile

- Lightning Web Components
 - Use Lightning web components to shape the mobile app to best suit business needs.
- Shift Between Tasks Easily with Field Service Mobile for iPad
 - Use split-screen to view two apps at the same time.
 - Navigation bar moved to left side.
- See Only the Inventory You Need
 - Filter out unavailable inventory items.
- Ease Priming Tasks with Native Display of Primed Records
 - See primed records without creating a flow.
- Limit Mobile Workers' Location Tracking More Easily for Appointment Assistant
 - Set Limited Tracking in Field Service Mobile Settings.
- Guide Your Mobile Workers at the Right Place and the Right Time (Pilot)
 - Suggest next step when arriving or leaving appointment site.

Spotlight on Field Service Content

- Enhanced Scheduling & Optimization learning map
- Videos about new Field Service features

Hyperforce

- Access Salesforce in More Regions with Hyperforce
 - Deploy Salesforce apps and services in global regions
 - Benefit from the public cloud power
 - Migrate to Hyperforce with Hyperforce Assistant
 - Upgrade to Hyperforce with assistant
 - Access assistant via in-app prompts or setup menu
-

Industries

Automotive Cloud

- Collaborate with Dealers and Customers Better with Experience Cloud
 - Share vehicle and asset details, work orders and warranties, visits and action plans, and customer details with dealer user groups
 - Create an external portal for customers to manage vehicle sales and services
- Track Complex Household Roles and Relationships
 - Record groups and households customer is a member of
 - Record different accounts and contacts customer is related to
 - Record customer roles in each of these relationships
- View Asset Participants Directly in Account and Contact Records
 - Add Asset Account Participants and Asset Contact Participants related lists to Account and Contact page layouts
 - Create asset account participants and asset contact participants from related lists
- Create Product Bundles with Parent and Child Products
 - Create Product records with type as Bundle
 - Create Product Relationship Type records to define parent and component products
 - Use Bundle Tree component to visualize product hierarchy
- Get Insights into Leads and Prioritize Your Vehicle Portfolio
 - Analyze lead conversion rates and identify high-value leads
 - Prioritize vehicle portfolio based on warranty expiry, work order details, and recalls
 - Use Analytics for Automotive template in Analytics Studio
- Service Experience Enhancements for Automotive
 - Verify customer and authorized representative identity over messaging
 - Add frequently used actions to Action Launcher
 - Select action deployments from filtered list in Lightning App Builder
 - Launch flow orchestration to quickly resolve customer requests
- Actionable Segmentation for Automotive
 - Create actionable lists for sales and service teams
 - Assign prioritized actionable lists to sales or service reps
 - Provide guidance on prospect or customer engagement

Consumer Goods Cloud

- Track Performance Using Analytics for Consumer Goods - Advanced Data Model App
 - Analyze business efficiency
 - Identify high-performers
 - Compare performance to previous year
 - Track newly launched products
 - Evaluate promotional effectiveness
- Record Customer Tasks Accurately with the New Mobile App Domain
 - Capture customer-reported issues accurately
 - Improve customer satisfaction
 - Show classification options for customer task

- Other Enhancements in Consumer Goods Cloud
 - Small but important improvements
- Changed Objects in Consumer Goods Cloud
 - Updated objects for more functionality

Financial Services Cloud

- Actionable Relationship Center
 - Customize ARC graph with enhancements
 - Use OmniScripts and Flexcards
 - View ARC error messages for custom metadata
 - View ARC graphs vertically
 - Customize fields and action labels
- Retail Banking and Wealth Management
 - Use customer responses to surveys to get more insightful customer churn predictions
 - Analyze sentiment behind responses
- Retail Banking
 - See real-time financial account details
 - View financial account transaction details
- New and Changed Financial Services Cloud Object Fields
 - Do more with new and updated Financial Services Cloud objects

Health Cloud

- Contact Center for Health Cloud
 - Address concerns quickly and securely
 - Verify caller's identity
 - Capture engagement details
 - View engagement events
 - View member's health data
 - Deploy pre-configured actions
 - Check insurance-related information
- Crisis Support Center Management
 - Answer calls
 - Record call participants
 - Capture notes
 - View client's engagement history
 - Share provider contact info
 - Share Knowledge articles
- Advanced Therapy Management Enhancements
 - Partial reschedule of appointment slots
 - Detailed view of enrollee count
 - Book, Reschedule, and Cancel Slots button visibility rules
 - Guided setup for Advanced Therapy Management
- Virtual Care
 - Connect more people in a secure video calling environment
 - Configure multiple AWS region types

- Moderate calls
- Intelligent Appointment Management
 - Find the best appointment for a patient
- Utilization Management Enhancements
 - Uninterrupted information exchange
 - Optimize cost of care
 - Foster smoother collaboration
- Health Cloud for Life Sciences
 - Engage customers and patients
- Intelligent Document Automation
 - Simplify document management process
 - Reduce manual data entry
 - Differentiate record types
- Identity Verification Enhancements
 - More options to verify identities
- Action Launcher
 - Search and launch flow orchestration
 - Configure up to 10 frequently used actions
 - Select deployments from list
- Unified Health Scoring Enhancements
 - Use new Salesforce Customer Data Platform data kit
- Replacing the EHR Data Model with the Clinical Data Model
 - Extended timeline for replacement
 - Future development on Clinical data model
- Health Cloud Has New and Changed Objects
 - Access more data through new and changed objects

Loyalty Management

- Configure Promotions with a Guided Wizard
 - Create promotion with eligibility and rewards
 - Activate promotion to create rules
 - All orgs with Loyalty Management can create promotions
- Customer Service for Loyalty Program Members
 - Use Identity Verification Flows and service console
 - Resolve issues, clarify questions, manage requests
- Issue Vouchers with Codes of Your Choice
 - Decide prefix, suffix, and length of codes
 - Loyalty Management generates unique voucher codes
- Member Referral Code
 - Generate or allow to specify own referral code
 - Regenerate referral code when necessary
- Member Engagement Widgets
 - Eight out-of-the-box widgets to engage loyalty members
 - Easily customize widgets using Loyalty Widget Designer
- Enable Customer Service Reps to Merge Memberships and Transfer Benefits Easily
 - Use Merge Loyalty Program Memberships template

- Add as quick action to Loyalty Program Member page
- Track Member Status Changes Including Subscriptions
 - Use Loyalty Membership Lifecycle records
 - Track changes in duration and status of subscription
- Promotion Setup
 - Search and select resources
 - Batch job to change member tier
- Call Loyalty Management Invocable Actions Using Invocable Namespace
 - Use classes and methods from Invocable namespace in Apex
- Track Member Engagement Easily
 - Use member engagement attributes to track and reward
- Easily Monitor Transactions and Prevent Fraud
 - Use Fraud Analytics dashboard to filter transactions
 - Identify potential fraud
- New and Changed Objects in Loyalty Management
 - New and updated Loyalty Management objects
- New Invocable Actions in Loyalty Management
 - New invocable actions for Loyalty Management
- New and Changed Loyalty Management Metadata Types
 - New and changed metadata types of Loyalty Management
- Changed Connect REST API Request Bodies
 - Changed request bodies

Manufacturing Cloud

- Sales Agreements Enhancements
 - Calculate revenue and custom metrics accurately up to five decimal places
 - Show metrics in Agreement Terms using metric groups
 - Control access to mass update button on Agreement Terms
- Control Access to Mass Update and Import CSV for Advanced Account Forecasting
 - Reduce data corruption due to user errors
 - Control access to Mass Update and Import CSV buttons
 - Control access to Import CSV is not supported for partner users
- Account No Longer Mandatory for Forecasts
 - Generate forecasts based on other dimensions
 - Use Advanced Account Forecast Set Use object instead of Partner object
- Manufacturing Sales Excellence Components
 - Help sales reps maximize their engagement outcome
- Improve Revenue and Profits with Support for Five Decimals for Metrics on Sales Agreements
 - Show up to five decimal places for revenue metrics
 - Support for up to five decimal places isn't available for quantity metrics
- View Data for Specific Metrics by Using Metric Groups for Sales Agreements
 - Create metric groups in sales agreement settings
 - View business metrics in Agreement Terms
- Control Access to Mass Update Button on Sales Agreement Terms
 - Reduce data corruption due to user errors
 - Control access to mass update button on Agreement Terms

Public Sector Solutions

- Composable Case Management
 - Use guided flow to capture referral details
 - Gain insights into constituent relationships
 - Capture & track relationships within a household
 - Access notes on interactions with constituents
- Provide Benefit Assistance
 - Offer monetary assistance
 - Extend resources or credits for social insurance, tax benefits, subsidies, etc.
- Administer Services to Constituents
 - Enroll in programs such as job readiness, youth development, refugee settlement, housing services, etc.
 - Assign & track benefits to eligible constituents
- Leverage Data Model for Grantmaking
 - Create funding opportunities
 - Set grant budgets
 - Award grants
 - Manage disbursements
- Easily Configure Your Org
 - Follow simple steps to configure a feature
- New & Changed Objects
 - New & changed Public Sector Solutions objects

Net Zero Cloud

- Take Advantage of More Fuel Types in Emissions Calculations
 - Include fuel types, units of measure, and conversion factors
 - Select fuel type and specify conversion factors
- Manage Social and Governance Data
 - Enter, store, extract, and report quantitative disclosures
 - Generate reports and dashboards with GRI standards
- Manage Carbon Accounting for Extended Organizational Boundaries
 - Account for emissions from company, subsidiaries, business units, or mergers
- Easily Generate Disclosures Through the Disclosure and Compliance Hub
 - Gather quantitative and qualitative data from questionnaires
 - Collaborate on responses and create approved reusable responses
- Identify Gaps and Lead Your DEI Initiatives by Using CRM Analytics
 - Use multi-dimensional visualizations to identify DEI gaps
 - Analyze distribution of employees by demographics and rank
- Plan for Short-Term Emission Reductions by Using Monthly Air Travel Emission Predictions
 - View emissions in past and predicted emissions for next six months
 - Prepare plan to reduce emissions
- Reduce Your Company's Carbon Footprint by Using Supply Chain Emission Predictions
 - Get predictions of carbon emissions from supply chain activities
 - Prepare plan to reduce emissions based on USEEIO categories
- New and Changed Objects for Net Zero Cloud

- Do more with new and changed objects

Industries: Common Components

- Actionable Segmentation
 - Segment similar client profiles
 - Curate them
 - Design timely and personalized outreach programs
- AI Accelerator
 - Create use cases with AI
 - Get prediction scores in real time
 - Customize extractors to extract features
- Action Launcher
 - Indicate frequently used actions
 - Store sequence numbers of frequently used actions
- Actionable List Members
 - Get actionable list members
 - Update priority, OmniScript key, and assignees
- Business Rules Engine
 - Usability enhancements in Expression Set Builder
 - Enable features in scratch orgs
- Data Processing Engine
 - Run custom logic in custom nodes
 - Use Analytics From Dataset as source type
 - Save/update data as new/existing Analytics dataset
- Decision Explainer
 - Collection of setup objects to explain results
- Einstein Relationship Insights
 - Analyze and filter relationships
 - Get updates when Einstein finds news/job changes
 - Explore relationships with person and company objects
- Intelligent Document Reader
 - Extract information from ID documents
 - Improved UI
- Intelligent Form Reader
 - Extract information from ID documents
 - Improved UI
- Industry Integration Solutions
 - Configure authentication settings
 - View latest version details
 - Update named credentials format
 - Simplified API registration process
- Record Alerts
 - Store/retrieve record alerts
 - Set up categorization of record alerts

Marketing Cloud Account Engagement

- Improve Efficiency in Your Business Unit with Account Engagement Optimizer (Beta)
 - Get actionable recommendations to improve email send times, visitor tracking, and overall status.
 - Pause and prioritize actions with table action manager.
 - Sending Domain Validation Is Changing
 - Unique validation key for each domain.
 - Requires proof of ownership.
 - DKIM remains validated.
 - The DomainKey Policy Column Is Being Removed
 - DomainKey still present.
 - No longer required to validate domain.
 - The Default for Some Account Engagement Settings Is Changing
 - First-Party Tracking, Force HTTPS, Honor Do Not Track, and Request opt-in default on.
 - Max Tracking Cookie Duration default to 365 days.
 - The Option to Run Automation Rules in Real Time Is Being Retired
 - Option removed for new rules and existing rules no longer run in real time.
 - Monitor External Action Errors to Keep Automations Running Smoothly
 - Review error root causes and pinpoint affected automations, steps, and actions.
 - Review External Actions Usage
 - Review all third-party usage in one place.
-

Mobile

- Salesforce Mobile App
 - Retire legacy tablet experiences
 - Enhanced Contacts (beta)
 - Enable mobile features in Setup
 - Enhanced Reports generally available
 - Migrate custom attributes to UI
 - Mobile Publisher
 - Notifications component
 - Navigation tab bar for app
 - App Store screenshot size
 - Notifications
 - Custom notification types
 - Desktop, mobile, and Slack delivery
 - Briefcase Builder
 - Increase object limits per briefcase
-

Revenue

- Downsell a Subscription
 - Decrease quantity of subscription
 - Quantity decreases can start in system or self-service portal
 - Can decrease on next billing date or any date before end date
 - Price, Change Quantities and Cancel Subscriptions in Self-Service Channels
 - Display prices when customers logged in
 - Change quantity or cancel subscription
 - Sell More in a Single Transaction
 - Asset, order, invoice, payment records can have up to 100 lines
 - Cancel a Subscription as of a Future Date
 - Cancel subscription any time between today and next billing date
 - Automate Customer Refunds
 - Turn on Initiate Refunds setting to trigger Automate Refund action
 - Track Field History on Quotes and Quote Line Items
 - Turn on history tracking for fields on quotes and quote line items
 - See Whether Records Included in Invoice Batch Run Recovery Operations Were Processed
 - Show info on Invoice Batch Run details page and Invoice Batch Run Recovery details page
 - Get More Insight from Einstein Late Payment Risk (Beta)
 - More info for collections agents and managers
 - Void Invoices with Negative Lines (Beta)
 - Void invoice with negative lines, create offset invoice
 - Professional Edition Isn't Supported
 - Professional Edition not supported
 - Salesforce CPQ and Salesforce Billing
 - Changes to Asset Relationships Are No Longer Supported in Salesforce CPQ Plus or Salesforce Billing
-

Sales

- Core Sales Features
 - Work with new forecasts page
 - Track forecasts with custom dates
 - Territory Management
 - Dynamic Forms
- Productivity Features
 - Dynamic activity composer
 - Inbox link for customers to select best meeting time
 - Propose future meeting times with one click
 - Sales Engagement to use cadences
- Sales Engagement
 - Build processes to manage cadences
 - Create outreach templates
 - Add targets to multiple cadences
 - Complete cadences from To Do List
- Revenue Intelligence

- Dashboards and Einstein Discovery
 - Forecast trending chart
 - Switch between multiple forecasts
 - Pipeline Inspection
 - Metrics to track changes
 - Edit multiple opportunity types inline
 - Enablement for Sales Teams
 - Exciting new features
 - Einstein Conversation Insights
 - Build programs quickly and easily
 - Einstein Conversation Insights
 - Reporting on voice/video calls
 - Embed conversation measures into Enablement programs
 - Mask personal info from recordings
 - Integration with Microsoft®
 - Discover steps in migration to Einstein Activity Capture
 - Integration with Google
 - Discover steps in migration to Einstein Activity Capture
 - Salesforce Maps Portfolio
 - Marker layers
 - Identify errors before saving
 - Get sign-off to activate quickly
 - Other Changes in Sales Cloud
 - Usability improvements
-

Salesforce CMS

- Set a Cache Duration for CMS Content Served in Salesforce CDN Channels
 - Set cache duration for content
 - Expand CMS Content Collaboration with the Content Author Role
 - Assign content author role to workspace contributors
 - Publishing done by content admins
 - Approve Content and Create Workflows in Enhanced CMS Workspaces (Beta)
 - Create custom workflows from CMS content
 - Built-in approvals, translation requests
 - View and Restore Content Version History in Enhanced CMS Workspaces
 - Get point-in-time snapshot of content versions
 - See who published, when and restore
 - Explore Your Enhanced CMS Workspace Content with Smarter Searches
 - More comprehensive search capabilities
 - Review all content items in workspace
 - Publish Translation Variants and Related CMS Content in Enhanced CMS Workspaces
 - Select which languages to publish
 - Review and publish related content
-

Flow

Flow Builder

- Bring External Data into Flow Builder Without Code (Beta)
 - Automate processes with external data by calling web-based service APIs
 - Set up direct integrations without code or middleware
- Build Screens with Interactive Components (Beta)
 - Configure components to react to changes on same screen
 - Reduce number of screens
- Add Lookup Fields to Your Flow Screens with Ease
 - Easily add Lookup fields to flow screens
 - Create record directly from Lookup field
- Select Multiple Options in Dynamic Forms for Flow
 - Easily select multiple options from picklist
- See Element Descriptions on the Flow Canvas
 - See user-provided descriptions without opening element
- Get a Streamlined Flow Element Menu
 - Find elements with descriptions in tooltips
- Resume Behavior Changed for Flows Launched by Process Builder Processes
 - Flows resume in system context without sharing or context specified by flow
- Select a Value from a List of Choices with the Choice Lookup Component (Beta)
 - Select option from set of external data, picklist, static values, or filtered records
- Select Multiple Records from a Table in a Flow Screen (Generally Available)
 - Display table of records on flow screen
 - Set to read only or let users select one or more records
- Flow and Process Run-Time Changes in API Version 57.0
 - Updates affect only flows and processes configured to run on API version 57.0 or later
- Convert Processes to Flows with the Migrate to Flow Tool
 - Updated Migrate to Flow tool converts Process Builder processes into flows
- Use Flow Screen Components with Flow in Slack (Generally Available)
 - Screens in flows that run in Slack contain Checkbox, CheckboxGroup, etc.
- Send a Screen Flow to Slack with an Action (Generally Available)
 - Send message with button that invokes flow to run in Slack
- Run Screen Flows from Slack (Beta)
 - Run flows from shortcuts, button, app, or custom view
- Send Notification Actions Now Support Desktop and Mobile Notification Types
 - Send custom notification type enabled for desktop/mobile delivery
- Search for an Individual in a Flow
 - Use SOSL to find and filter contact/lead/employee records
- Disable Rules for Enforcing Explicit Access to Apex Classes (Release Update)
 - Disable requirement for user to have explicit access to Apex classes
- Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)
 - Evaluate field that began process with value of null
- Make Paused Flow Interviews Resume in the Same Context (Release Update)
 - Flows resume in same context as when paused

- Select Multiple Records from a Table in a Flow Screen (Generally Available)
 - Display table of records on flow screen
 - Set to read only or let users select one or more records
- Run Flows in User Context via REST API (Release Update)
 - Flow uses running user's profile and permission sets to determine object permissions
- Send Notification Actions Now Support Desktop and Mobile Notification Types
 - Send custom notification type enabled for desktop/mobile delivery
- Search for an Individual in a Flow
 - Use SOSL to find and filter contact/lead/employee records
- Disable Rules for Enforcing Explicit Access to Apex Classes (Release Update)
 - Disable requirement for user to have explicit access to Apex classes
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 - Screens in flows that run in Slack contain Checkbox, CheckboxGroup, etc.
- Send a Screen Flow to Slack with an Action (Generally Available)
 - Send message with button that invokes flow to run in Slack
- Run Screen Flows from Slack (Beta)
 - Run flows from shortcuts, button, app, or custom view

Flow Orchestration

- Use Advanced Settings for an Orchestration
 - Exercise control over usage and execution
 - Turn orchestration into template
- Create a Record-Triggered Orchestration on the Core Tab
 - Start in New Flow window
- Go Mobile with Assigned Orchestration Work
 - Complete assigned work in Work Guide
 - Supports mobile web and Salesforce app
- Enable Sharing for Flow Orchestration Objects (Release Update)
 - Manage Flow user permission no longer grants access
 - Manage Orchestration Runs and Work Items user permission control access
 - Run Flows user permission still required
- Other Changes to Flow Orchestration
 - Improvements to Flow Orchestration

OmniStudio

- Standard OmniStudio Runtime Setting Name Was Changed
 - Name changed to "Standard OmniStudio Content"
- OmniStudio FlexCards Updates
 - Style flyout action container
 - Reduce render time for large lists
 - Use merge fields for dynamic values
 - Disable Standard OmniStudio Content for custom labels
- OmniScripts Updates
 - Modal override in standard runtime
 - Multi-Language OmniScripts support custom labels
 - Confirm header & Cancel button label support custom labels
 - Removed "Licensing & Permitting" type
 - Table mode truncates columns
- OmniStudio DataRaptors & Integration Procedures Updates
 - Call from Apex to run in Core
- Style a FlexCard Flyout Container
 - Add custom CSS
- Append Data to a Record on a FlexCard
 - Use append action to reduce render time
- Create Dynamic Values for FlexCard Input Element Attributes
 - Use merge fields for min, max, minLength, maxLength, & mask
- Disable Standard OmniStudio Content to Use Custom Labels on FlexCard Combobox
 - Disable setting to use custom labels
- Override the OmniScript Modal in Standard Runtime
 - Override modal LWC in standard runtime
- Licensing & Permitting OmniScript Type Was Removed
 - Removed "Licensing & Permitting" type
- OmniScript Has a Known Limitation on the Edit Block Element
 - 7 or more elements truncates columns
- OmniScript Edit Block Confirm Title and Cancel Button Support Custom Labels
 - Confirm title & Cancel button support custom labels
- Multi-Language OmniScript in Standard Runtime Support Custom Labels
 - Custom labels supported in preview
- Call a DataRaptor from Apex to Run in Core
 - Run in standard runtime if RollbackDRChange is true
- Call an Integration from Apex to Run in Core
 - Run in standard runtime if RollbackDRChange is true
- OmniStudio for Vlocity FlexCards Updates
 - Style flyout action container
 - Reduce render time for large lists
 - Use merge fields for dynamic values
- OmniStudio for Vlocity OmniScripts Updates
 - OAuth 2.0 for DocuSign forms
 - Confirm header & Cancel button label support custom labels

- Removed "Licensing & Permitting" type
 - Table mode truncates columns
 - OmniStudio Migration Tool Updates
 - Test standard content in designers
 - Anonymous Apex to enable standard runtime
 - More detailed migration process
 - Create Dynamic Values for FlexCard Input Element Attributes
 - Use merge fields for min, max, minLength, maxLength, & mask
 - Style a FlexCard Flyout Container
 - Add custom CSS
 - Append Data to a Record on a FlexCard
 - Use append action to reduce render time
 - Licensing & Permitting OmniScript Type Was Removed
 - Removed "Licensing & Permitting" type
 - OmniScript Has a Known Limitation on the Edit Block Element
 - 7 or more elements truncates columns
 - OmniScript Edit Block Confirm Title and Cancel Button Support Custom Labels
 - Confirm title & Cancel button support custom labels
 - OmniScript Supports DocuSign OAuth 2 Support
 - Configure auth providers & named credentials
 - Test Standard Content in the Designers After Migration
 - Disable custom runtime to use standard
 - OmniStudio Migration Tool Docs Are Updated
 - Detailed migration docs
 - Test standard content in sandbox
 - Disable custom runtime for production
-

Security, identity, and privacy

Domains

- Deploy Enhanced Domains (Release Update):
 - Enable & deploy enhanced domains.
 - Include company-specific My Domain name in URLs.
 - Impact application & login URLs.
 - Deploy before enforcement.
- Review the Milestones for Enhanced Domains Deployment and Enforcement:
 - Deploy in Spring '23.
 - Postpone to Summer '23.
 - Disable until Winter '24.
- Test Enhanced Domains with Service Cloud Voice:
 - Work with provider for updates.
 - Salesforce updates configuration.
- Monitor More My Domain Settings:
 - Track changes to My Domain details.

- Capture enabling of Salesforce Edge Network.
 - Update existing My Domain events.
- Allow Partitioned Domains for Demo Orgs:
 - Maximize availability of orgs.
 - Includes word related to org type.
 - Update allowlists, network config & firewall.

Identity and Access Management

- MFA Auto-Enablement:
 - Auto-enables MFA in several phases
 - Phase 1: Spring '23
 - Phase 2: Summer '23
- Chatter Free and Chatter External Users:
 - Exempt from MFA requirement
 - Exclusion setting automatically applied
- Check Revocation Status of User Authentication Certificates:
 - Enhance security of certificate logins
 - Requires OCSP or CRL endpoints
- Insert Consumer Secrets:
 - Consumer secrets changed to placeholder in Nov 2022
 - Consumer secret must be inserted manually
- Monitor Connected App Logins:
 - View logins with user-agent or username-password
 - OAuth Flow Enhancements to block insecure flows
- Upgrade SAML Single Sign-On Framework:
 - Regular maintenance
 - Affects integrations with third-party systems
- Headless Login and Forgot Password Flows:
 - Create identity experiences
 - Salesforce authentication APIs for Login and Forgot Password

Health Check

- Evaluate URL Redirection Setting in Health Check
 - To monitor your security posture, view whether the Allow redirections to untrusted external URLs

Privacy Center

- Create Preference Forms for Subscriptions
 - Preference Manager has new template type for Communication Subscriptions
 - Choose brands and subscription info to include in consent template
 - Use template to create preference form
- Customize Channel Type Selections on Preference Forms
 - Four format options for end users to select channel types in Preference Builder Properties panel

Salesforce Shield

- Event Monitoring:
 - Opt in/out of generating event log files
 - Track user downloads with real-time notifications (beta)
 - Get more info on SOAP API exceptions & Apex Unexpected Exception events
 - More efficient upload of app datasets (beta)
- Shield Platform Encryption:
 - Add extra layer of protection to Financial Services Cloud interaction data

Security Center

- Execute CRM Analytics Features on Security Center Data
 - Connect to Security Center objects to execute CRM Analytics features on relevant data.
 - Build out dashboards based on use cases and report on Security Center data.
- Evaluate Data Quickly with Insightful Data Labels
 - Analyze charts within Configuration metric category with improved data labels.

Other Security Changes

- Enable Content Sniffing Protection (Release Update):
 - Help shield org & network from malicious attacks.
 - Browser won't load scripts disguised as other file types.
 - Winter '23 release, enforced in Spring '23.
- Use AWS Roles Anywhere with Named Credentials:
 - External credentials can employ AWS Signature v4 protocol.
 - AWS admin no longer needs to create IAM Users & store keys in Salesforce.
- Use OAuth JWT Bearer Flow with Named Credentials:
 - Configure external credentials to use JWT Bearer Flow.
 - Increased security with JSON Web Token & certificates to sign requests.
 - Custom claims supported with JWT Bearer Flow.
- Make a Private Connection with Named Credentials:
 - Configure named credentials with outbound network connection.
 - API traffic to AWS account privately routed, not traverse public internet.
- Review Your Clickjack Protection Settings:
 - Clickjacking uses trusted domain & malicious link.
 - Learn about clickjacking & Salesforce page types framed.
 - Review clickjack settings.

Service

Service Cloud Channels

- Send Structured Content with Messaging Components
 - Easily share links, ask questions, schedule appointments, surveys, etc.
 - Create library of components for enhanced Messenger and In-App/Web.
- Get Enhanced Messaging for Facebook Messenger
 - Transfer sessions, send structured content, use statuses to route/track.

- Customize Your Consent Conversations for Facebook Messenger
 - Determine whether customers must consent, use keywords/responses.
- Manage Consent in Customers' Preferred Languages for Facebook Messenger
 - Set keywords/responses in multiple languages.
- Collect Valuable Customer Data with Hidden Pre-Chat Fields in Messaging for In-App and Web
 - Capture info without asking customer, send data to Salesforce.
- Let Authenticated Customers Access Messaging for In-App and Web History with User Verification
 - Securely connect customers to their own messaging history.
- Quickly Add Context to Conversations with Knowledge Component Actions
 - Send article URLs/snippets to customers, now for enhanced Messenger and In-App/Web.
- Increase Agent Productivity with the Actions & Recommendations Component in Messaging
 - Give agents flows, actions, and recommendations.
- Mark Messaging Sessions Inactive
 - If customer stops responding, agents can mark session inactive.
- Choose an Action for Your Enter or Return Key in Messaging for Web
 - Optimize messaging experience, admins determine action for key press.
- Connect Leads to Messaging Users
 - Learn more about customer, link to their presale activity.
- Attach Larger Files and Share Files More Broadly in Messaging for In-App
 - Send/receive files up to 25MB, share attachments.
- Explore Messaging with Trailhead
 - Discover Service Cloud Messaging capabilities in new module.
- Reduce Agent Handling Time with Conversation Intelligence
 - Trigger real-time actions in Service Cloud Voice for scripts/recommendations.
- Unify Queue Management in Salesforce and Your Telephony Provider (Generally Available)
 - Supervisors can reassign groups/agents, copy changes to telephony system.
- Sync Agent Presence Statuses Automatically for Each Contact Center
 - Automatically sync Omni-Channel presence statuses.
- Customize Softphone Controls and Voice Extensions
 - Build user interfaces, add buttons for video/screen captures, metrics.
- Automate Agent Tasks with Customized Screen Pops
 - Launch screen flow on agents' screens for incoming calls.
- Add a Flow Template for Find Contact Associated with Voice Call
 - Customize search criteria, record creation, match screens, output parameters.
- Track More AWS Cost and Usage Metrics with Service Cloud Voice
 - Run reports on cost/usage with 3 new fields.
- Update Service Cloud Voice After a My Domain Change
 - Update URLs after deploying My Domain, update hard-coded connect API URLs.
- Reach Your Customers Using High-Volume Outbound Calls
 - Remind customers of appointments, deliveries, payments, market products.
- Build Your Voice Call Journeys with Modularized Flows in Amazon Connect
 - Add subflows to handle voice calls, add callback subflow.
- Fewer Permissions Required to Manage Your Contact Center
 - No longer use ProvisioningRole IAM role, use new SCVAmazonConnectManagementRole IAM role.
- Increase Productivity with an Improved Softphone

- Clearer buttons, no callouts, DTMF, auto-focus phone number field.
- Give Your Developers the Latest Service Cloud Voice Features
 - Enhancements for the latest features.

Einstein for Service

- Add More Fields When You Train Your Classification Model (Pilot)
 - Train model w/ custom text fields
 - Einstein considers Subject & Description from closed cases
- Optimize Bot Performance with Goals Enhancements
 - Goals page to manage goals & monitor performance
 - Attach goals to Dialogs page
- Enhanced Bots
 - Easier to clone enhanced bot from standard bot
 - Send rich content & use system routing
- Einstein Conversation Mining Integrations (Beta)
 - Review conversation transcripts & identify top reasons
 - Access Conversation Mining reports in Einstein Bots
 - Automatically create bot or dialogs
- Use the Redirect to Variable Dialog for Enhanced Navigation
 - Redirect to object variable
 - Give customers multiple paths
- Analyze Bot Performance with New Standard Reports
 - New metric type & 8 prebuilt standard reports
 - New Einstein Bot Reports Spring '23 folder
- Bots Moved to the Setup Node for Added Visibility
 - Einstein Bots moved to Einstein section of Setup page
- Learn More about Change Sets and Einstein Bots in Salesforce Help
 - Learn how to move bots between sandbox & production
- Create a Bot from Template Using Your Einstein Conversation Mining Data (Beta)
 - Create bot from template using Conversation Mining data
 - Select multiple contact reasons
- Build a Bot Dialog Using Your Einstein Conversation Mining Data (Beta)
 - Add dialog using Conversation Mining results
 - Excerpts convert to utterances
- Get to Know Einstein Conversation Mining (Beta)
 - Discover customers' most common requests
 - Group & rank requests
- Use Einstein Conversation Mining (Beta) with Einstein Bots Integrations
 - Generate effective bots & dialogs
 - Select dialogs based on contact reasons
 - Add dialogs & convert to intent utterances

Swarming

- Dive Deeper into Swarms with Expanded Reporting Functionality
 - Unlock swarm insights

- Granular lookup field support
- Object support expanded
- Report on a swarm member's work and skills
- Request the Right Swarm Member with Searchable Skills
 - Easier for agents to find the right expert
 - Search for exact skill combination
- Catch Up on Service Cloud for Slack App Features
 - Swarm on customer issues from Slack
 - Slack conversations embedded in Salesforce record
 - Knowledge articles created from Slack messages
 - CSI record creation from Slack

Customer Service Incident Management

- Share Incident Updates Internally with Broadcast Slack Messages and Alerts
 - Send mass communications to internal stakeholders and relevant teams
 - Save time manually keeping stakeholders in the loop
 - Send timely progress reports
 - Send disruptive in-app notifications
- Minimize Service Disruptions with the Flow Automation Pack for Incident Management
 - Automate incident detection
 - Send cross-cloud multichannel notifications
 - Manage incident efficiently at various stages
 - Determine validity and scope
 - Determine who needs to be involved
 - Determine status and next steps

Routing

- Interrupt Long-Running Work to Handle Time-Sensitive Work (Pilot)
 - Reduce wait times
 - Provide more responsive service
 - Focus on time-sensitive work
 - Designate longer duration work as interruptible
- Monitor Contact Center Health in the Omni-Channel Wallboard (Pilot)
 - Key metrics for supervisors
 - Insights into workload management
- Find Work Items or Agents with the Right Skills
 - Filter by skills more precisely
 - Identify needed skill sets
- Notify Agents About New Work Using Alerts
 - Browser alert for new work
 - Open Service Console when clicked
- Let Supervisors Manage Queues and Shrink Wait Times
 - Adjust queue assignments
 - No need for admin privileges
- Migrate Supervisor Configurations with Ease

- Capture and replicate configs
- Migrate from sandbox to prod
- Improvements to Omni-Channel Flows
 - Take advantage of enhancements

Knowledge

- Get Actionable Knowledge Insights
 - Monitor performance of published articles
 - Identify internal articles for publishing
 - Identify top contributors
- Change Knowledge Record Types for Translated Articles
 - Change/add record type for knowledge articles
- Report on Draft Knowledge Articles in CRM Analytics
 - Get comprehensive view of published/drafted articles
- Embody Knowledge Best Practices with Updated AppExchange Packages
 - Content Standard Checklist for Knowledge
 - Lightning Knowledge Feedback AppExchange packages
 - Article quality audits
 - Customizable questions
 - Customizable feedback screens
 - Attachment support
 - Feedback notifications
- Quickly Add Context to Conversations with Knowledge Component Actions
 - Send customers article URLs/snippets
 - Insert pre-written information into conversations

Cases

- Prevent Duplicate Cases with Lightning Threading in Email-To-Case
 - Matches incoming emails to cases using token- and header-based threading
- Disable Ref ID and Transition to New Email Threading Behavior (Release Update)
 - Turns off Ref ID threading and transitions to Lightning threading
 - Uses new secure token in subject/body or email metadata headers
- Shrink Outgoing Emails and Include Only New Content
 - Excludes previous thread content when agents reply via email
- Meet Corporate Policy by Sending Case-Related Emails with Your Servers
 - Allows Gmail/Outlook to send case-related emails
 - Applies email filters/rules to comply with business practices/policies
- Use a Default No-Reply Address as System Address for Case Email Notifications (Release Update)
 - Configures default No-Reply address from Organization-Wide Addresses in Setup
 - Verifies address, sets up Test Run in Release Update
 - Postponed enforcement date to Summer '23
- Log a Call from a Case's Activities Component
 - Agents can log a call directly from the Activities component in Lightning Experience

Shift Scheduling for Salesforce Contact Center

- Improve Contact Center Operations with Efficient Shift Scheduling
 - Assign agents to best support customers
 - Match agents to shifts based on rules, constraints, and objectives
- Build Shifts Fast with Shift Patterns
 - Save time creating multiple shifts
 - Create repeating shift patterns

Feedback Management

- Distribute Surveys Through Recipient-Preferred Channels
 - Send survey invitations through SMS, WhatsApp, or Facebook.
 - Use Messaging Notification Flow action.
- Build Better UIs for Custom Surveys
 - Use enhanced Survey Response Connect API.
 - Create surveys with multiple pages and branching logic.
 - Insert content in questions or thank you messages.
 - Collect survey responses with greater flexibility.