Salesforce Foundations

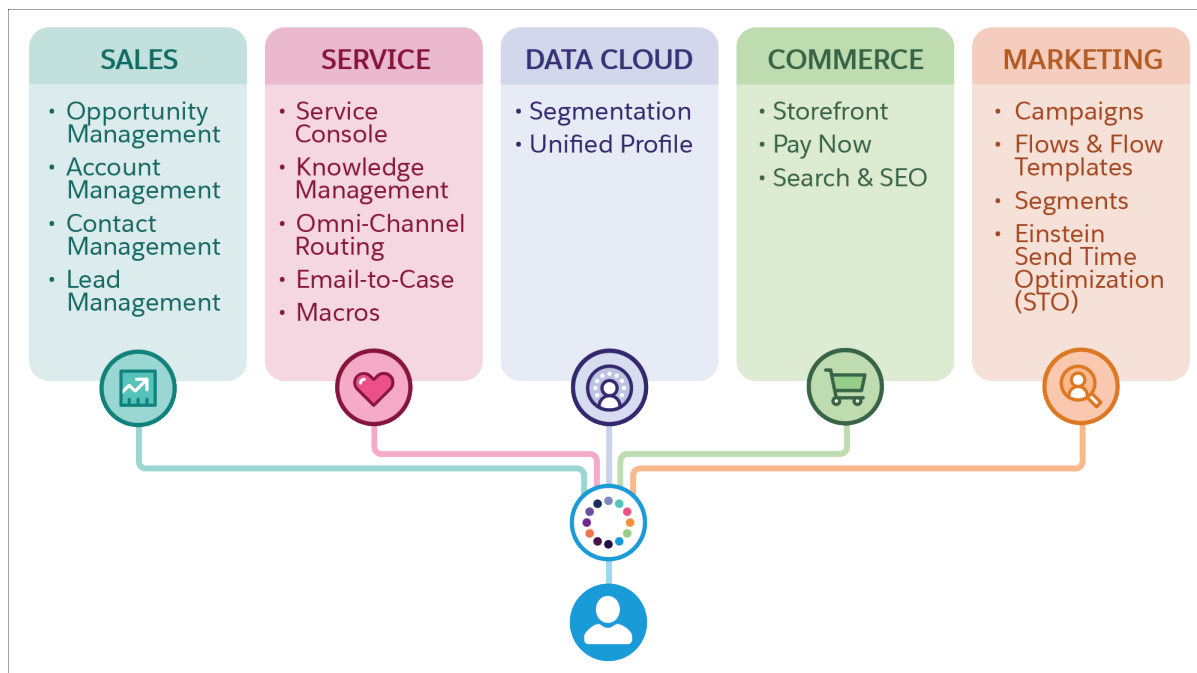# CONTENTS

Salesforce Foundations

Get more out of your Salesforce experience with Salesforce Foundations.

Note Salesforce Foundations is available on a limited basis in Summer '24. Contact your Salesforce account executive for more information.

Elevating Your CRM Experience with Foundational Features

Salesforce Foundations equips you with essential sales, service, marketing, and commerce capabilities, over a CRM foundation that's powered by Data Cloud. This suite is seamlessly built into your preexisting CRM, providing you with new capabilities and a 360-degree view of your customers–all at no extra cost.

What Makes Salesforce Foundations Special

Salesforce Foundations provides a 360-degree view of your customer relationships across sales, service, marketing, and commerce through integrated applications and unified data. It also boosts productivity with streamlined, visually friendly user interface improvements, that you can turn on or off per your requirements.

Supported Editions for Salesforce Foundations

Salesforce Foundations is included in supported editions of select Salesforce Clouds. This topic provides information about the editions and Clouds that support Foundations.

Included Features in Salesforce Foundations

Explore the features that come with Salesforce Foundations.

Knowing Which Salesforce Foundations Features You Can Turn On

The combination of your Salesforce product, product edition, and org status determines what Salesforce Foundations features you can turn on to enhance your Salesforce experience.

Considerations for Salesforce Foundations

Before deploying Salesforce Foundations, make sure you review key factors that can affect your implementation.

Implement Salesforce Foundations

After you've reviewed the considerations and determined which foundational features to add, you're ready to set up the suite experience. Turn on user interface and navigation settings, assign permissions to users, and set up features across Sales Cloud, Service Cloud, Marketing Cloud, Commerce Cloud, and Data Cloud.

Elevating Your CRM Experience with Foundational Features

Salesforce Foundations equips you with essential sales, service, marketing, and commerce capabilities, over a CRM foundation that's powered by Data Cloud. This suite is seamlessly built into your preexisting CRM, providing you with new capabilities and a 360-degree view of your customers–all at no extra cost.

REQUIRED EDITIONS

Available in: View supported editions.

Imagine you have a subscription to a streaming service that allows you to watch movies. It's a fantastic feature for movie nights, but it specializes only in movies. Now imagine the same service announces you can also watch TV shows, live sports, and documentaries. Plus, you get a full view of your engagement and access an improved user experience–all included in your existing subscription. That's the benefit of using Salesforce Foundations.

You have full control over when and what you enable for your Salesforce org. Your preexisting customizations aren't impacted by enabling Salesforce Foundations.

Get Started	**Explore the Basics**	**Set Up**
Trailhead: Salesforce Foundations Quick Look	What Makes Salesforce Foundations Special	Knowing Which Salesforce Foundations Features You Can Turn On
Trailhead Learning Path: Grow Your Business with Salesforce Foundations	Supported Editions for Salesforce Foundations	Considerations for Salesforce Foundations
	Included Features in Salesforce Foundations	Set Up Salesforce Foundations

What Makes Salesforce Foundations Special

Salesforce Foundations provides a 360-degree view of your customer relationships across sales, service, marketing, and commerce through integrated applications and unified data. It also boosts productivity with streamlined, visually friendly user interface improvements, that you can turn on or off per your requirements.

REQUIRED EDITIONS

Available in: View supported editions.

360-Degree View of Your Customers
Salesforce Foundations comes with integrated applications, the ability to unify your customer data, and dashboards that provide a comprehensive view of customer interactions. So every employee gets a full picture of the customer.

New Home Experience with the Home App
The Home app provides a visually friendly, uncluttered experience that helps you focus on the tasks that are most important to you.

Simplified Navigation and Easy Access to Important Tasks
Salesforce Foundations navigation makes it simpler and faster to find the information and tasks you need. It's important that you understand some key differences between standard Salesforce navigation and Salesforce Foundations navigation.

See Also
User Interface and Navigation Enhancements

360-Degree View of Your Customers

Salesforce Foundations comes with integrated applications, the ability to unify your customer data, and dashboards that provide a comprehensive view of customer interactions. So every employee gets a full picture of the customer.
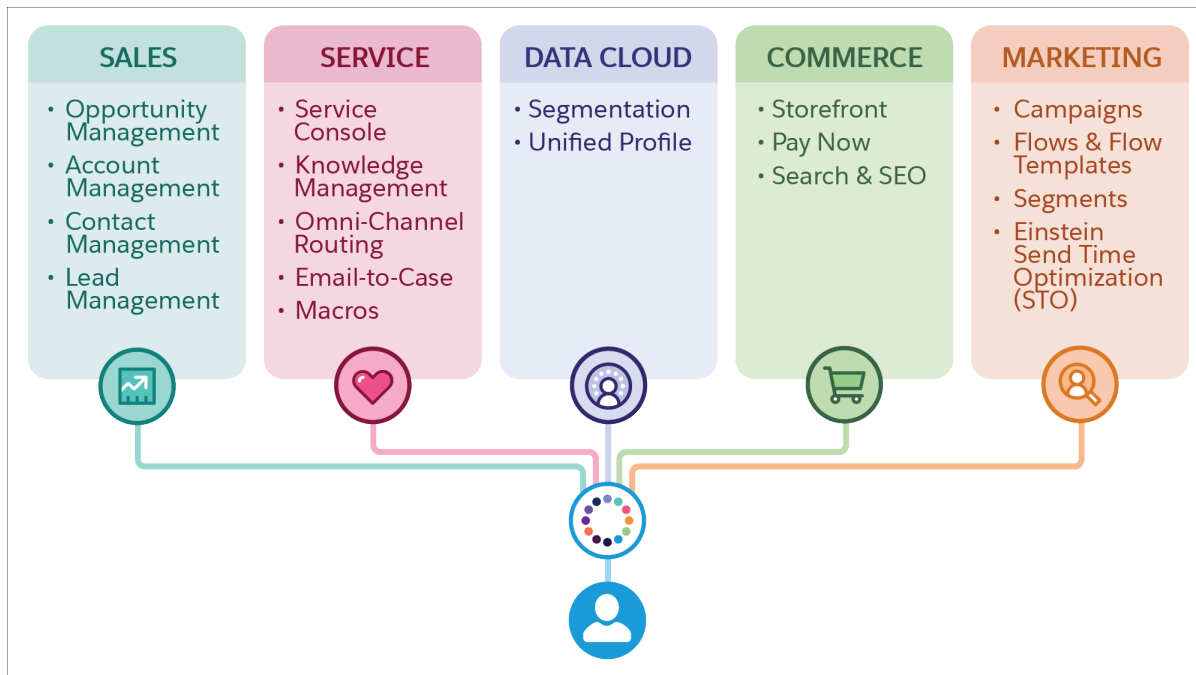
REQUIRED EDITIONS

Available in: View supported editions.

Already a Sales Cloud customer? Drive more revenue with sales, service, and marketing teams working in one place. Use foundational service functionality to keep opportunities on track with insights into service cases. Add relevant customers to marketing-created nurture campaigns.

Already a Service Cloud customer? Use foundational sales, marketing, and commerce functionality to strengthen your relationship with customers. Add customers to marketing onboarding journeys to create higher-touch onboarding experiences.

With a single view of your customer, your teams can create connected, personalized customer experiences that build stronger relationships. See Included Features in Salesforce Foundations and Supported Editions for Salesforce Foundations.

Centralized Data

Salesforce Foundations comes with Data Cloud running behind the scenes to unify your data and get it AI-ready. Get the real-time insights you need to personalize every customer experience, at every touchpoint.

See Also
   About Salesforce Data Cloud
   *Trailhead:* Salesforce Data Cloud: Quick Look

New Home Experience with the Home App

The Home app provides a visually friendly, uncluttered experience that helps you focus on the tasks that are most important to you.

REQUIRED EDITIONS

Available in: View supported editions.

Suggestions are provided to you based on your business needs and processes. These recommendations make it easy to accomplish tasks such as importing contacts and automating tasks. Click **View All Card** (1) to explore more suggestions. Get a panoramic view of your data (2) and keep up with what's most important to you. To review other filter options, click 🔍 (3). To change what appears on the Home app, click ▼ in the top-right corner of a card and select **Change Home Card** (4). Unlike other apps, the Home app can't be edited through the Settings Menu.
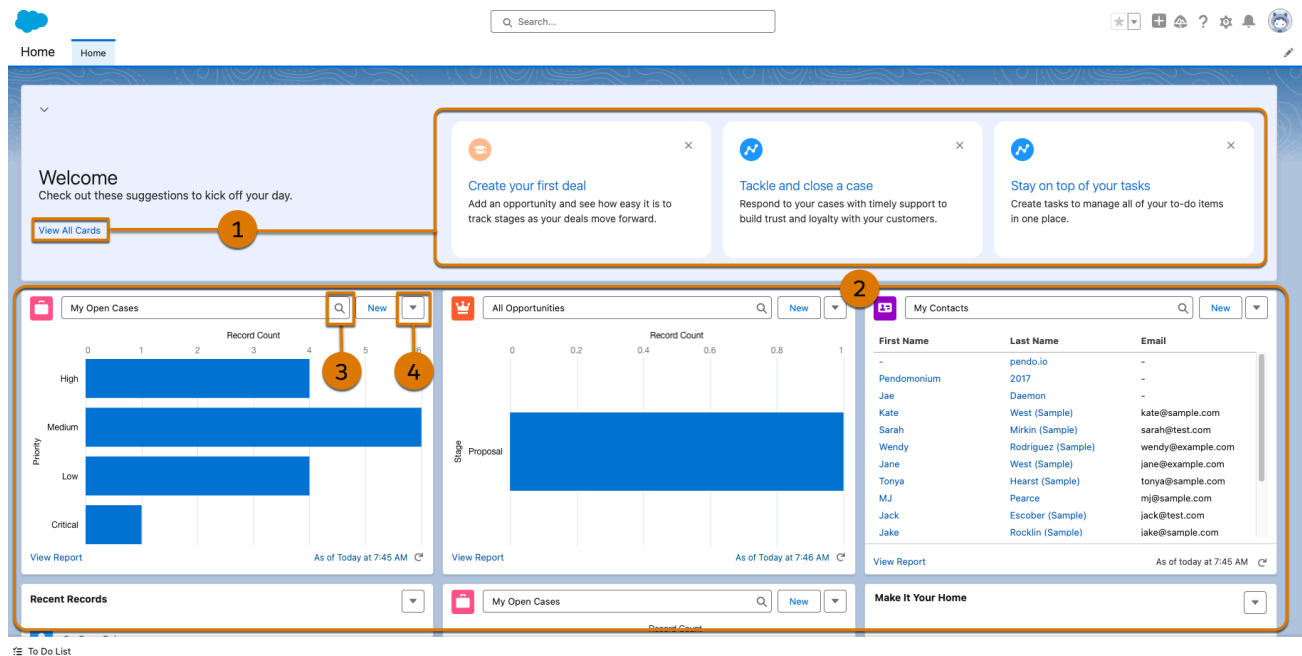
To access the Home app, it must be assigned to your profile. See Give Users Access to the Home App.

Simplified Navigation and Easy Access to Important Tasks

Salesforce Foundations navigation makes it simpler and faster to find the information and tasks you need. It's important that you understand some key differences between standard Salesforce navigation and Salesforce Foundations navigation.

REQUIRED EDITIONS

Available in: View supported editions.

Vertical Navigation Bar

Salesforce Foundations provides a vertical navigation bar along the left side of the user interface. Now

there's a central location to access your Marketing, Sales, Service, and Commerce solutions. With our vertical navigation bar, the apps you need are in plain view, so you see everything at a glance.

Use the App Launcher to personalize what apps appear. To open the App Launcher, click **More**. Favorite the apps that you want to include in your vertical navigation bar using the star icon. You can order them the way you want directly in the navigation bar or in the App Launcher by dragging the app to the location you want.
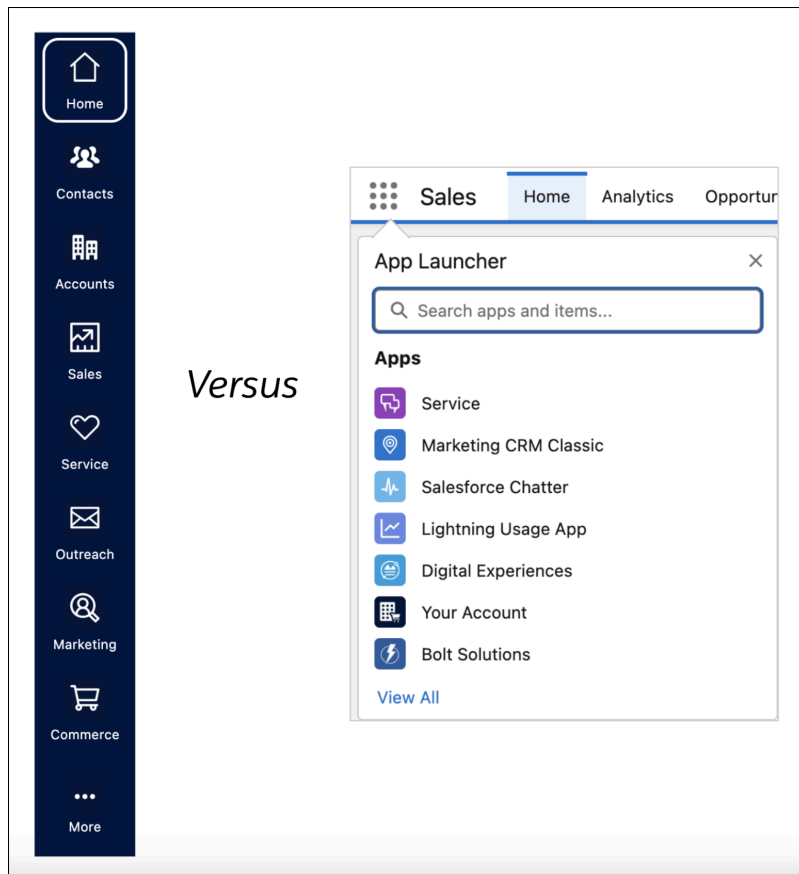
In addition, Salesforce Foundations provides dedicated apps for account and contact management. Salesforce admins can assign these apps to users, and users can add them to the vertical navigation bar.

Quick Settings

The traditional Setup navigation offers a comprehensive range of options, which can feel visually overwhelming. That's why Salesforce Foundations provides Quick Settings, a streamlined way for admins to complete the most common setup and customization tasks without navigating through the entire navigation list.
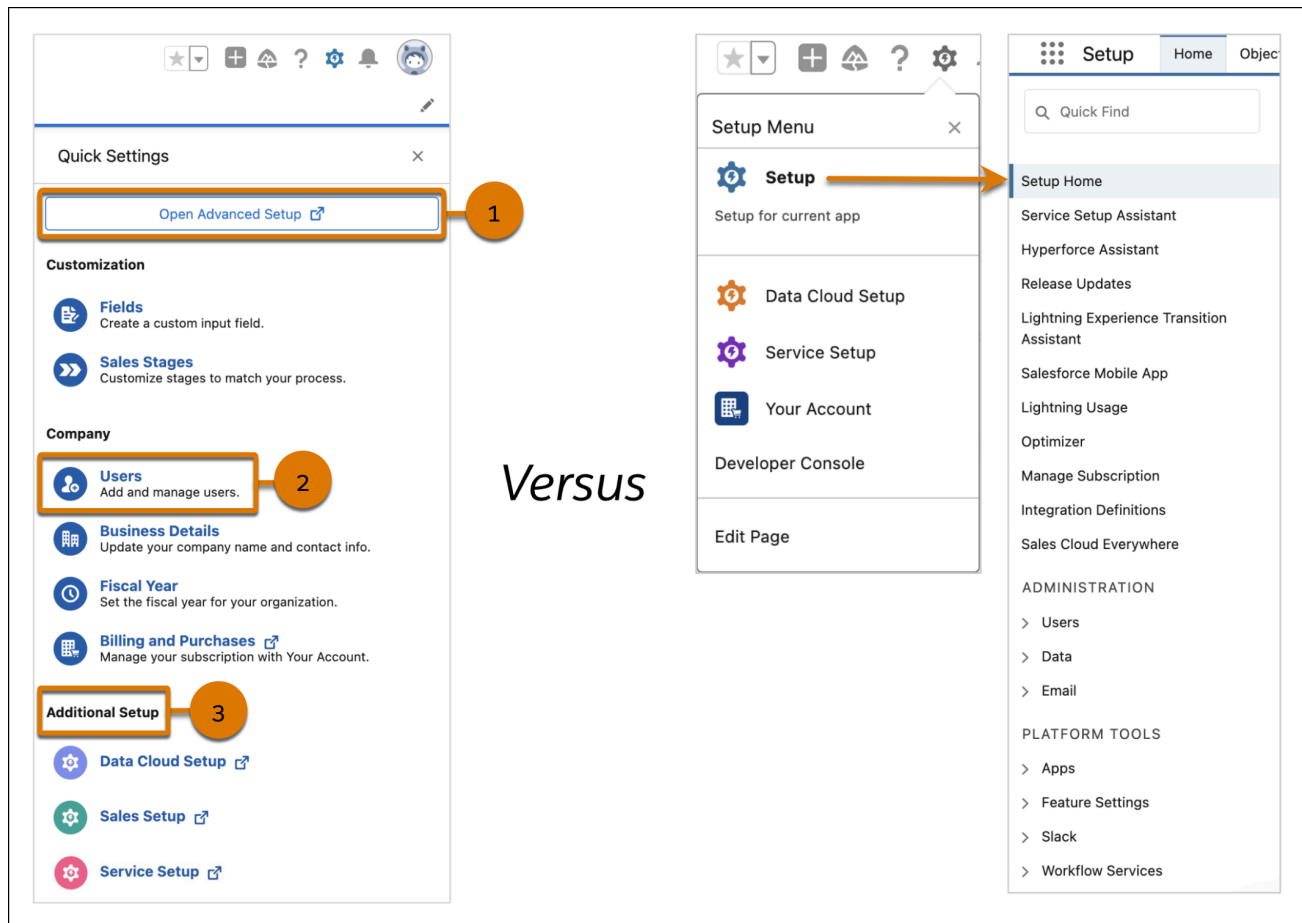
Quick Settings provides you with the most common setup, customization, and company settings, readily accessible from the ⚙ icon. And for those moments when you need more settings, click the **Advanced Settings** button to access the complete list of configuration settings (1).

Another benefit of Quick Settings is that you can manage and assign permission set groups right from the Users setting (2). In just a few clicks, you can tailor access with Salesforce Foundations permission set groups for your Sales, Service, Marketing, and Commerce teams. You can also assign custom permission set groups from this window.

Use the quick links under Additional Setup to easily get to other product-specific setup pages, such as Data Cloud Setup, Sales Setup, and Service Setup (3).
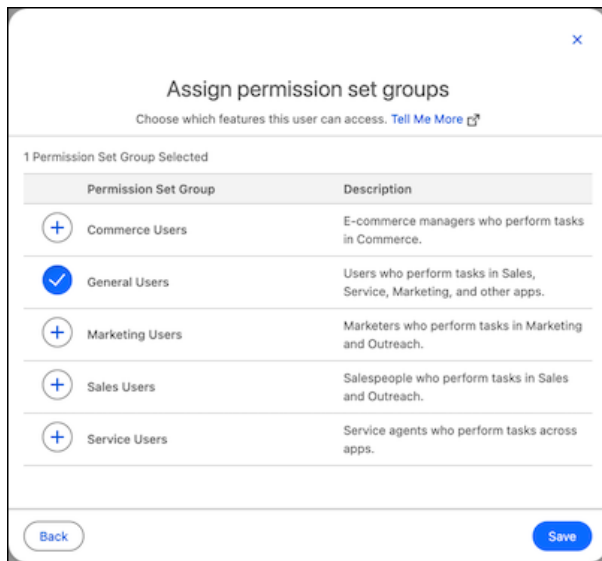
See Also

  Getting Started
  User Management in Starter and Pro Suite

Supported Editions for Salesforce Foundations

Salesforce Foundations is included in supported editions of select Salesforce Clouds. This topic provides information about the editions and Clouds that support Foundations.

Foundations is supported in these editions:

- Enterprise Edition
- Unlimited Edition
- Performance Edition
- Einstein 1 Sales Edition
- Einstein 1 Service Edition

Purchasing one or more of these Salesforce Clouds gives you free access to Foundations:

- Sales Cloud
- Service Cloud
- Industries

See Industries help for edition availability.

Salesforce Foundations feature updates apply to Lightning Experience and Salesforce Classic. User interface improvements are only available in Lightning Experience.

Included Features in Salesforce Foundations

Explore the features that come with Salesforce Foundations.

REQUIRED EDITIONS

Available in: View supported editions.

Marketing

Reach new audiences and engage with people who follow your brand. With the Marketing app, get streamlined access to powerful tools such as flows and segments that help you build effective campaigns.

📝 **Note** Marketing for Salesforce Foundations availability varies per region. Contact your Salesforce account executive for more information.

These Marketing features are included with Salesforce Foundations:

Feature	How You Use It	Resources
Campaigns	Plan and measure the effectiveness of your marketing efforts.	*Salesforce Help:* Promote My Business
Landing Pages and Forms	Create promotional pages for campaign content or calls to action.	*Salesforce Help:* Create and Manage Forms *Salesforce Help:* Create and Manage a Landing Page *Trailhead:* Lead Generation with Marketing Cloud Signup Forms
Segments	Categorize your customers and improve marketing engagement.	*Salesforce Help:* Marketing Segments
Send List	Create segments and send emails directly from your Contact and Lead list views.	*Salesforce Help:* Promote My Business
Flows and Flow Templates	Use flows to automate content distribution and data collection for your campaigns.	*Salesforce Help:* Promote My Business *Salesforce Help:* How Campaigns

Feature	How You Use It	Resources
		and Flows Work Together
Einstein Send Time Optimization (STO)	Make sure messages reach customers when they're most likely to engage.	*Salesforce Help:* Model Card: Einstein Send Time Optimization

Commerce

Boost your sales with direct-to-consumer (D2C) online stores. Take advantage of the store templates to create and customize your store. Define customer experiences, including search, carts, and checkouts. Get paid faster. When an opportunity closes, you can generate secure payment links for customers from the Sales Opportunity page.

📝 **Note** Commerce for Salesforce Foundations availability varies per region. Contact your Salesforce account executive for more information. Pay Now isn't available to Salesforce customers in India, Brazil, or Japan.

These Commerce features are included with Salesforce Foundations. Refer to the D2C content only for the resources provided.

Feature	How You Use It	Resources
Storefront*	Create a seamless shopping experience across mobile and web. Launch your D2C online store with easy, guided steps.	*Salesforce Help:* Create a Commerce Store Trailhead: Salesforce Commerce Basics
Pay Now	Create secure payment processing for your opportunities.	*Trailhead:* Salesforce Pay Now (see Pay Now with Salesforce Starter)
Search and SEO*	Drive more traffic to your D2C online store and make sure customers can easily find products.	*Salesforce Help:* Store Search *Salesforce Help:* SEO for Commerce

*This feature will be available later this year.

Data Cloud

Salesforce Foundations comes with Data Cloud to unify your data, power your segmentation, and make

sure your structured and unstructured data is integrated and AI-ready. Additionally, Data Cloud helps you manage marketing consent data and create targeted audiences for campaigns. It also powers features so you can send online store order confirmation emails and marketing messages.

These Data Cloud features are included with Salesforce Foundations:

Feature	How You Use It	Resources
Segmentation	Break down your data to understand, target, and analyze your customers.	*Salesforce Help:* Segmentation *Trailhead:* Segmentation and Activation
Unified Profile	Consolidate data into one view to better understand and engage with your customers.	*Salesforce Help:* Unify Source Profiles

AI Agents

Agents are goal-oriented, autonomous AI assistants that perform tasks and business interactions so your teams can focus on high-value work. With Salesforce Foundations, you get a set of agent conversations to get started with Agentforce for Sales and Agentforce for Service.

Feature	How It Helps You	Resources
Sales Coach	Intelligently gives reps personalized, actionable, and stage-specific feedback on their sales pitch or role-play session.	*Salesforce Help:* Sales Coach Agent
Sales Development Agent	Intelligently engages leads with personalized content, answers common questions, and schedules meetings.	*Salesforce Help:* Agentforce SDR
Service Agent	Intelligently supports your customers with common inquiries and escalates complex issues.	*Salesforce Help:* Agentforce Service Agent

Service

Provide personalized support to your customers, improve agent productivity, and deliver faster resolutions. Track customer support issues, share helpful information, and communicate with customers directly from your CRM. Each activity with your customers is available for reference so you or anyone on your service team can jump in with the most up-to-date information to help your customers.

These Service features are included with Salesforce Foundations:

Feature	How You Use It	Resources
Foundations Service Console	Track customer support issues, share helpful information, and communicate with customers directly from your CRM.	*Salesforce Help:* Solve Customer Issues Faster
Knowledge Management	Save time searching for information and provide accurate help articles to your customers.	*Salesforce Help:* Create a Knowledge Base with Salesforce Knowledge *Trailhead:* Knowledge Basics for Lightning Experience
Omni-Channel Routing	Assign cases to the right agents based on availability and expertise.	*Salesforce Help:* Route Work with Omni-Channel *Trailhead:* Omni-Channel for Lightning Experience
Email-to-Case	Track email conversations related to customer support cases.	*Salesforce Help:* Email-to-Case Threading
Macros	Complete repetitive or complex tasks with one click.	*Salesforce Help:* Automate Repetitive Tasks with Macros *Trailhead:* Macros for Agents

Sales

Take advantage of the same sales features that you already have. Manage your leads, opportunities, and customer interactions in the Sales Console. Efficiently track tasks and use forecasting tools for informed decision-making. Take control of your entire sales pipeline, from prospecting to closing.

These Sales features are included with Salesforce Foundations:

Feature	How You Use It	Resources
Opportunity management	Manage your sales deals that are in progress.	*Salesforce Help:* Opportunities *Trailhead:* Leads and Opportunities

Feature	How You Use It	Resources
Account management	Store contact information about the groups or companies that you do business with.	*Salesforce Help:* Accounts *Trailhead:* Accounts and Contacts
Contact management	Store information about people who you do business with.	*Salesforce Help:* Contacts *Trailhead:* Accounts and Contacts
Lead management	Track information about your potential customers.	*Salesforce Help:* Leads *Trailhead:* Leads and Opportunities
Email Builder Lite	Create and send batch emails to your Sales contacts and leads directly from a List view.	*Salesforce Help:* Promote My Business

User Interface Improvements

These apps and user interface features are included with Salesforce Foundations:

Feature	How You Use It	Resources
Home app	Keep up with recent activity and personalize cards that appear to quickly access the most important things to you. Get activity suggestions to boost productivity.	*Salesforce Help:* Getting Started
Vertical navigation bar	Switch between apps more easily for an improved navigation experience.	
Accounts app	Use accounts to store information about customers or individuals you do business with. Salesforce Foundations provides a dedicated app for accounts, which you can add to the vertical	

Feature	How You Use It	Resources
	navigation bar.	
Contacts app	Use contacts to store information about the people you do business with. Contacts are most often associated with an account but can also be associated with other records such as opportunities. Salesforce Foundations provides a dedicated app for contacts, which you can add to the vertical navigation bar.	
Quick Settings	Access the most frequently used setup tools or access other advanced options.	*Salesforce Help:* Setup Best Practices Simplified Navigation and Easy Access to Important Tasks: Quick Settings

Knowing Which Salesforce Foundations Features You Can Turn On

The combination of your Salesforce product, product edition, and org status determines what Salesforce Foundations features you can turn on to enhance your Salesforce experience.

REQUIRED EDITIONS

Available in: View supported editions.

Use the information in this table to determine the Salesforce Foundations features you can turn on:

Determine the Salesforce Foundations features you can turn on.

If Your Salesforce Product Is...	And Your Edition Is...	And Your Org Status Is...	You Can Turn On...
Sales Cloud	Enterprise, Unlimited,	Upgraded from Starter	Service

If Your Salesforce Product Is...	And Your Edition Is...	And Your Org Status Is...	You Can Turn On...
	or Einstein 1 Editions		
Sales Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Pro Suite	Nothing to turn on. You have access to the entire feature set for Salesforce Foundations.
Sales Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Not an upgrade from Starter or Pro Suite	• User interface enhancements • Service • Marketing • Commerce • Data Cloud tools
Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Starter	Nothing to turn on. You have access to the entire feature set for Salesforce Foundations.
Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Pro Suite	Nothing to turn on. You have access to the entire feature set for Salesforce Foundations.
Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Not an upgrade from Starter or Pro Suite	• User interface enhancements • Sales • Marketing • Commerce • Data Cloud tools
Sales and Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Starter	Service
Sales and Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Upgraded from Pro Suite	Nothing to turn on. You have access to the entire feature set for Salesforce Foundations.

If Your Salesforce Product Is...	And Your Edition Is...	And Your Org Status Is...	You Can Turn On...
Sales and Service Cloud	Enterprise, Unlimited, or Einstein 1 Editions	Not an upgrade from Starter or Pro Suite	• User interface enhancements • Marketing • Commerce • Data Cloud tools

Considerations for Salesforce Foundations

Before deploying Salesforce Foundations, make sure you review key factors that can affect your implementation.

REQUIRED EDITIONS

Available in: View supported editions.

Setup Considerations

When planning your Salesforce Foundations implementation, you have the flexibility to choose which features to turn on, whether it's the entire suite or a tailored subset.

Managing Your Salesforce Foundations Compliance

If you're using Salesforce Foundations, you're responsible for your Health Insurance Portability and Accountability Act (HIPAA) compliance. Manage your compliance by enabling only HIPAA-ready Salesforce features and implementing them securely.

User Interface Settings Considerations

There are important permission and navigation considerations related to enabling Quick Settings and vertical navigation.

Service Console Considerations

Service console is the app where customer service reps and supervisors work. Service Cloud comes with different versions of the service console.

Marketing Considerations

Marketing for Salesforce Foundations gives you access to tools that help you collect, track, and store consent data.

Data Cloud Considerations for Salesforce Foundations

Data Cloud powers campaign segmentation and unified customer profiles for marketing and commerce use cases in Salesforce Foundations. With Data Cloud, users can take advantage of flexible consent data tools and create audiences for order confirmation emails and marketing messages.

Allocations for Salesforce Foundations

Review important allowances for Salesforce Foundations.

Usage-Based Pricing in Salesforce Foundations

Review important information about usage-based pricing in Foundations. Learn about your included credits and how to purchase more.

Setup Considerations

When planning your Salesforce Foundations implementation, you have the flexibility to choose which features to turn on, whether it's the entire suite or a tailored subset.

After you turn on foundational features for Sales Cloud, Service Cloud, Marketing Cloud, and Commerce Cloud, you can't turn them off again. You can turn off user interface improvements, such as Quick Settings and the vertical navigation bar. See User Interface and Navigation Enhancements.

Managing Your Salesforce Foundations Compliance

If you're using Salesforce Foundations, you're responsible for your Health Insurance Portability and Accountability Act (HIPAA) compliance. Manage your compliance by enabling only HIPAA-ready Salesforce features and implementing them securely.

REQUIRED EDITIONS

Available in: View supported editions.

These features offered in Salesforce Foundations aren't covered by the Business Associate Addendum (BAA): Einstein Activity Capture, Salesforce Inbox, and Einstein Send Time Optimization (STO). These features must remain disabled for the purposes of HIPAA compliance. You can confirm and update the status of these features in Setup.

Salesforce Foundations and Agentforce

While Agentforce is built on a HIPAA-compliant base, you must configure agents with security in mind in order to maintain compliance. For more about building agents that meet your individual security requirements, see the Agentforce documentation.

See Also

Salesforce Trust

Salesforce: Business Associate Addendum Restrictions

Salesforce Compliance: HIPAA

User Interface Settings Considerations

There are important permission and navigation considerations related to enabling Quick Settings and vertical navigation.

- In Starter and Pro Suite editions, Quick Settings and the vertical navigation bar are turned on by default. If you upgraded from Starter or Pro Suite to another edition, these settings remain turned on unless you turn them off in Setup.
- If you turn on Quick Settings, only users with the Customize Application and Modify All Data permissions see ⚙ and can access Setup. If a user previously accessed ⚙ via the View Setup and Configuration permission, they now need the Customize Application and Modify All Data permissions to access Setup.
- All users see the vertical navigation bar if this setting is turned on. They can customize the apps they have access to and the order in which they appear.
- If the vertical navigation bar is turned on, the App Launcher icon (⠿) disappears from the horizontal navigation bar. To access App Launcher, click More from the vertical navigation bar.

Service Console Considerations

Service console is the app where customer service reps and supervisors work. Service Cloud comes with different versions of the service console.

In addition to the general considerations for choosing a console version, consider these guidelines for Salesforce products with Salesforce Foundations.

- If you haven't chosen a service console version, we recommend that you use the Foundations Service Console.
- Consider only the console versions that support Salesforce products with Salesforce Foundations.

Compatible console versions depend on your Salesforce org's initial edition and any subsequent upgrades to other editions.

📝 **Note** To retain all existing Service functionality, orgs upgrading from Pro Suite to Sales Cloud Enterprise Edition need to purchase Service Cloud.

This table indicates which service console versions are supported (S) and which is available (A) by default under various scenarios. The available service console is automatically created for you.

Service console versions supported and available by default.

Salesforce Product	Edition	Org Status	Foundations Service Console	Service Setup Assistant Console	Lightning Service Console
Sales Cloud	Enterprise or Unlimited	Not an upgrade from Starter or Pro Suite	S, A	S	X
Service Cloud	Enterprise or	Not an	X	S	S, A

Salesforce Product	Edition	Org Status	Foundations Service Console	Service Setup Assistant Console	Lightning Service Console
	Unlimited	upgrade from Starter or Pro Suite			
Sales & Service Cloud	Enterprise or Unlimited	Not an upgrade from Starter or Pro Suite	X	S	S, A
Sales Cloud, Service Cloud	Enterprise, Unlimited, or Einstein 1	Upgraded from Pro Suite (applies specifically to Salesforce orgs created before August 21, 2024 in North America or August 22, 2024 in other regions)	S, A	S	X
Sales Cloud, Service Cloud	Enterprise, Unlimited, or Einstein 1	Upgraded from Pro Suite (applies specifically to Salesforce orgs created on or after August 21, 2024 in North America or August 22, 2024 in other regions)	S. A	X	X
Sales Cloud, Service Cloud, Sales & Service Cloud	Enterprise, Unlimited, or Einstein 1	Upgraded from Starter	S, A	X	X

See Also
  [Choosing the Right Service Console Version](#)

Marketing Considerations

Marketing for Salesforce Foundations gives you access to tools that help you collect, track, and store consent data.

To use tools for tasks, such as consent data import, enable Consent Management and Individual Creation settings. Contact Salesforce Customer Support if you want to turn off these settings after they're enabled.

To create landing pages with forms in the Marketing app, you must enable Digital Experiences. As of Spring '25, you can enable this setting on the Salesforce Foundations setup page. After you enable this setting, landing pages are hosted on an automatically generated Experience Cloud site called Marketing Landing Pages. If you create more Experience Cloud sites, some external site members you create can access images, files, and other content hosted on your CDN (Content Delivery Network). To secure content, [convert external user access](#).

To monitor usage of marketing emails, see the Usage-based Entitlements section of the Company Information setup page.

Data Cloud Considerations for Salesforce Foundations

Data Cloud powers campaign segmentation and unified customer profiles for marketing and commerce use cases in Salesforce Foundations. With Data Cloud, users can take advantage of flexible consent data tools and create audiences for order confirmation emails and marketing messages.

Salesforce Foundations requires a compatible Data Cloud license. If you're operating Data Cloud under a Customer Data Platform license, contact your Salesforce account executive. To determine whether you have a Customer Data Platform license, see [View and Manage Your Permission Set Licenses](#)

Architecture Considerations for Multiple Salesforce Orgs

If you have multiple orgs, consider which ones must be provisioned with Data Cloud and which ones can be connected as Data Cloud One companion orgs. To access all Salesforce Foundations features, Data Cloud must be provisioned on the org where you want to enable Foundations. To better understand other considerations for architecture with multiple orgs, see [Data Cloud Architecture Strategy](#).

Segments

Although the Segments tab in the Marketing app is also available in the Data Cloud app, there are some differences to consider. Segments used with campaign flows in the Marketing app must use the default data space and segment on the Unified Individual object. If you upgraded from Starter or Pro Suite to

another edition, we recommend that you continue to use the default data space and segment on the Unified Individual object to avoid issues.

To build segments with custom objects and fields, you must enable additional permissions. After you set up Data Cloud tools for Salesforce Foundations, see Enable Object and Field Permissions to Access Salesforce CRM in Data Cloud. Then, see Create a Salesforce CRM Data Stream to include the object and fields in your data stream.

Allocations for Salesforce Foundations

Review important allowances for Salesforce Foundations.

- Enterprise Edition customers refer to Salesforce Enterprise Edition Allocations.
- Unlimited Edition customers refer to Salesforce Unlimited Edition Allocations.
- For allocations related to foundational service, marketing, and commerce functionality, refer to Salesforce Pro Suite Edition Allocations.

You get a limited set of usage credits to get started with Agentforce, including 1,000 agent conversations and 200,000 Einstein requests. For more information on Agents and considerations, see Salesforce Help.

See Also
>   Salesforce Editions
>   Find Your Edition
>   Agentforce for Sales
>   Agentforce for Service
>   Foundations FAQ

Usage-Based Pricing in Salesforce Foundations

Review important information about usage-based pricing in Foundations. Learn about your included credits and how to purchase more.

See Also
>   About Digital Wallet
>   Generative AI Usage and Billing

Implement Salesforce Foundations

After you've reviewed the considerations and determined which foundational features to add, you're ready to set up the suite experience. Turn on user interface and navigation settings, assign permissions to users, and set up features across Sales Cloud, Service Cloud, Marketing Cloud, Commerce Cloud, and Data Cloud.

Salesforce Foundations Setup

Save time and effort with the Salesforce Foundations setup page. After you review the considerations, add products to your Salesforce org with Your Account and configure key settings to change feature and app availability.

User Interface and Navigation Enhancements

Learn how to turn on the user interface features that come with Salesforce Foundations. Boost your productivity with simplified navigation and manage app visibility for your users.

Permission Set Groups for Salesforce Foundations

Give users access to Service Cloud, Marketing Cloud, Commerce Cloud, and Data Cloud for Salesforce Foundations. To save you time on permission assignment, Salesforce Foundations comes with standard permission set groups. These permission set groups are made up of standard permission sets that grant users access to common features and functionality based on user jobs. If you prefer permission sets for user management, assign the standard permission sets instead. To grant users access to other foundational features, review the corresponding Salesforce documentation.

Sales for Salesforce Foundations

If you have one of the supported editions, you have the foundational Sales features that come with Salesforce Foundations, and there is no setup. Review user interface and navigation settings that can help your sales teams work more efficiently. To incorporate lighter, faster email builder into your Sales experience, enable Email Builder Lite. If you upgraded from Starter or Pro Suite to another edition, you keep foundational Sales features and previous permission set group assignments.

Set Up Service for Salesforce Foundations

Assign the General User or Service User permission set group. These permission set groups grant users access to features like the Foundations Service Console.

Set Up Data Cloud for Salesforce Foundations

After the required products for Salesforce Foundations are added, you're ready to set up Data Cloud for Salesforce Foundations.

Set Up Marketing for Salesforce Foundations

Configure the required email settings and give users access to the Marketing app.

Set Up Commerce for Salesforce Foundations

Assign users access to the Commerce app and features.

Salesforce Foundations Setup

Save time and effort with the Salesforce Foundations setup page. After you review the considerations, add products to your Salesforce org with Your Account and configure key settings to change feature and app availability.
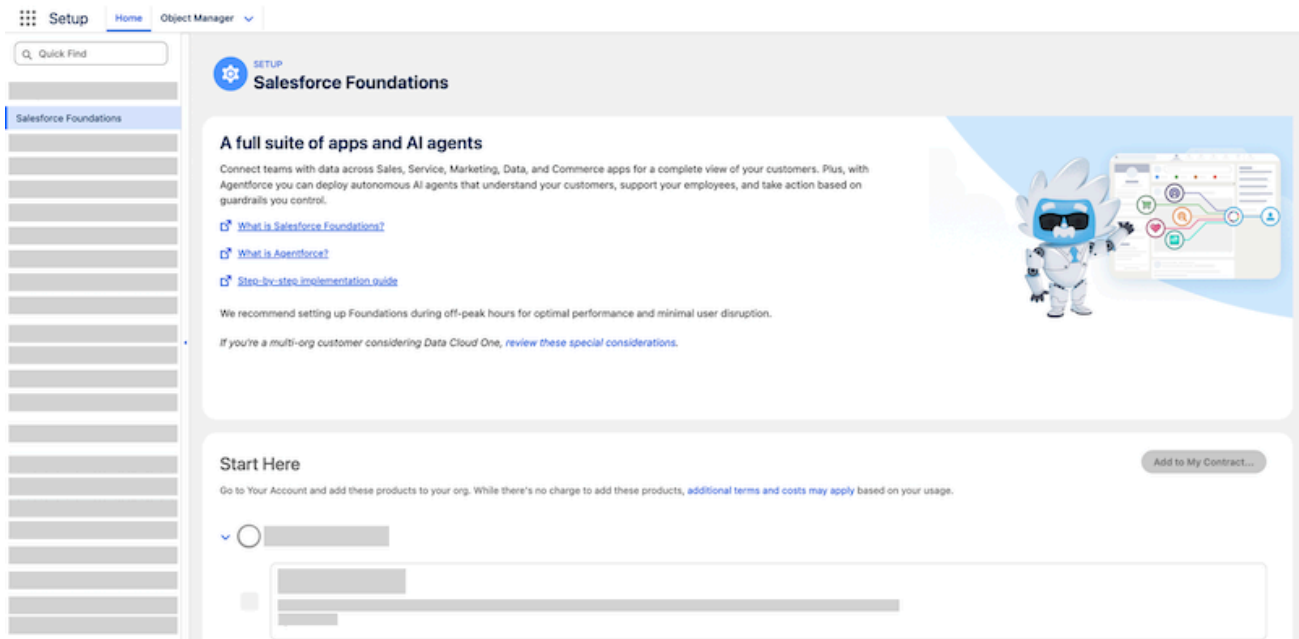
REQUIRED EDITIONS

View supported editions

✎ **Note** Salesforce Foundations and the setup page is available on a limited basis in Summer '24. Contact your Salesforce account executive for more information.

How It Works

Head to the Salesforce Foundations page in Setup. First, add the required products to your org with Your Account. These products power important foundational features, such as audience creation for marketing campaigns. Then, turn on key settings to add the Marketing app to your org and online store capabilities to the Commerce app. You have full control over which features to add and which users can access apps.

After you complete the steps on the setup page, reference Salesforce Help to configure additional settings and manage user access.

Required Permissions

To access the Salesforce Foundations setup page, you must have the View Setup and Configuration, Customize Application, and Modify All Data permissions.

To add the products that power key Salesforce Foundations features, you need access to Your Account. You must also have the Manage Billing or Your Account App Admin User permission set.

Some product settings on the Salesforce Foundations setup page require additional permissions before you can configure them. For example, to create an identity resolution ruleset, you need the appropriate Data Cloud permission set, and, if you're working in a companion org, you'll need to log into your home org.

See Also
Considerations for Salesforce Foundations
Turn on the Your Account App

User Interface and Navigation Enhancements

Learn how to turn on the user interface features that come with Salesforce Foundations. Boost your productivity with simplified navigation and manage app visibility for your users.

REQUIRED EDITIONS

Available in: View supported editions

Turn On Quick Settings
Easily access important settings such as user management and business details in a few clicks.

Turn On the Vertical Navigation Bar
Get to your favorite apps seamlessly with the vertical navigation bar. After you turn it on, all users can customize the apps included in the navigation bar, open apps without refreshing the page, and access App Launcher from the More button.

Give Users Access to the Home App
Grant access to the Home app. To streamline navigation, we recommend you also turn on vertical navigation settings.

Turn On Quick Settings

Easily access important settings such as user management and business details in a few clicks.

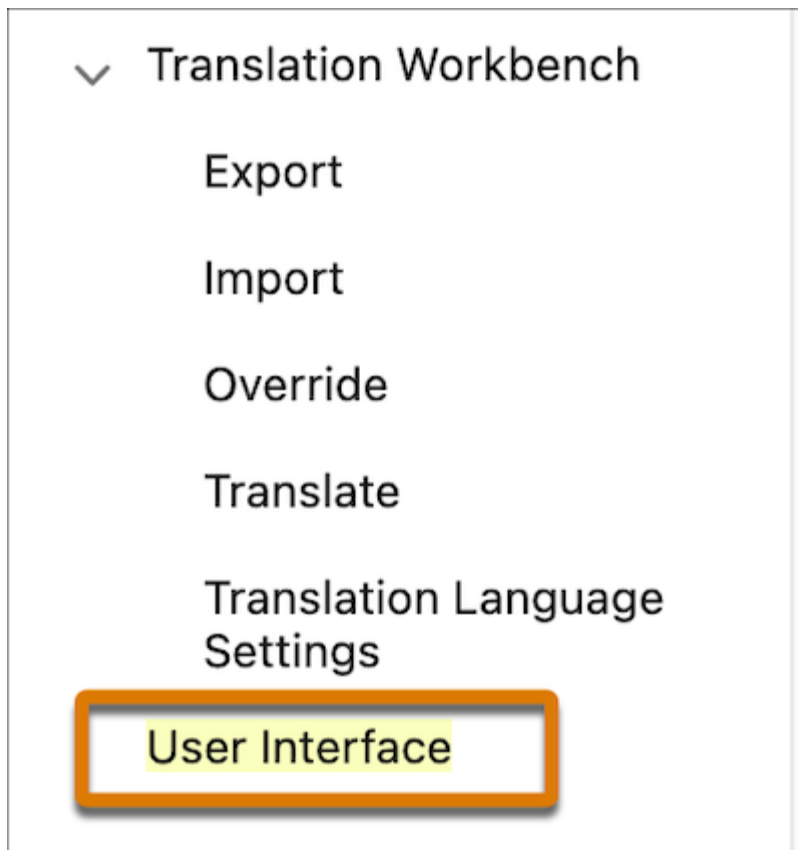REQUIRED EDITIONS

Available in: View supported editions

USER PERMISSIONS NEEDED	
To modify user interface settings:	Customize Application

1. From Setup, in the Quick Find box, enter `Interface`, and then select **User Interface**.
2. Select **Show the Quick Settings Panel** and save.

See Also
   Simplified Navigation and Easy Access to Important Tasks
   User Interface Settings Considerations

Turn On the Vertical Navigation Bar

Get to your favorite apps seamlessly with the vertical navigation bar. After you turn it on, all users can customize the apps included in the navigation bar, open apps without refreshing the page, and access App Launcher from the More button.

REQUIRED EDITIONS

Available in: View supported editions

USER PERMISSIONS NEEDED

To modify user interface settings:	Customize Application

1. From Setup, in the Quick Find box, enter `Interface`, and then select **User Interface**.
2. Under User Interface, select **Show Lightning vertical navigation**. Selecting this setting also selects the

Enable Seamless App Switching in Lightning Experience Vertical Navigation setting.
3. Save.

After you turn on the vertical navigation bar, review the corresponding Salesforce documentation to give users access to apps. Users sometimes need to refresh or log out and back in to Salesforce to see changes.

Give Users Access to the Home App

Grant access to the Home app. To streamline navigation, we recommend you also turn on vertical navigation settings.

REQUIRED EDITIONS

Available in: View supported editions

USER PERMISSIONS NEEDED	
To edit app visibility settings:	Manage Profiles and Permission Sets

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📝 **Note** If you prefer managing app access with profiles, assign the Home app from profile settings. Assign the Home app as the default app for a cross-app view.

1. From Setup, in the Quick Find box, enter and select **Salesforce Foundations**.
2. Under Foundations Apps, turn on the Foundations Home App.
3. From Setup, in the Quick Find box, enter *Manager*, and then select **App Manager**.
4. Click the action menu next to the Home app (developer name: EasyHome), and then select **Edit**.
5. From the User Profiles tab, select the user profiles you want to grant access to the app and save.

Permission Set Groups for Salesforce Foundations

Give users access to Service Cloud, Marketing Cloud, Commerce Cloud, and Data Cloud for Salesforce Foundations. To save you time on permission assignment, Salesforce Foundations comes with standard permission set groups. These permission set groups are made up of standard permission sets that grant users access to common features and functionality based on user jobs. If you prefer permission sets for user management, assign the standard permission sets instead. To grant users access to other

foundational features, review the corresponding Salesforce documentation.

REQUIRED EDITIONS

Available in: View supported editions

Salesforce Foundations Standard Permission Set Groups
Salesforce Foundations comes with standard permission set groups that bundle standard permission sets by user jobs for faster and easier user management. If you enable Quick Settings, assign these standard permission set groups from the user management window. If you don't enable Quick Settings, assign them from the permission set group page in Setup.

Salesforce Foundations Standard Permission Sets
Salesforce Foundations comes with standard permission sets that grant users access to apps and common permissions for features. Assign these permission sets from the permission set or user detail page in Setup. For faster assignment, use the standard permission set groups.

Assign Permission Set Groups from Quick Settings
In Quick Settings, assign permission set groups in a few clicks.

Salesforce Foundations Standard Permission Set Groups

Salesforce Foundations comes with standard permission set groups that bundle standard permission sets by user jobs for faster and easier user management. If you enable Quick Settings, assign these standard permission set groups from the user management window. If you don't enable Quick Settings, assign them from the permission set group page in Setup.

REQUIRED EDITIONS

Available in: View supported editions

If you upgraded from Starter or Pro Suite to other editions, the permission set groups you assigned to users remain the same. See User Permissions in Starter and Pro Suite.

Unlike Starter and Pro Suite, Salesforce Foundations isn't an independent feature. It comes with the purchase of Sales Cloud or Service Cloud. Salesforce Foundations permissions can be assigned only to users with licenses to access Sales Cloud, Service Cloud, or both.

Permission Set Group	Description
General User	Grants users access to all the assigned apps and permissions included in the Service User, Marketing User, and Commerce User permission set groups.
Service User	Grants users access to the preconfigured service console app and common service tasks, such as

Permission Set Group	Description
	knowledge management.
Marketing User	Grants users access to the Marketing app and common marketing tasks, such as campaign management.
Commerce User	Grants users access to the Commerce app and common tasks, such as payment method management.

See Also

Assign Permission Set Groups from Quick Settings

Assign Permission Set Groups to Users

Permission Set Groups and Combined Permissions View

Salesforce Foundations Standard Permission Sets

Salesforce Foundations comes with standard permission sets that grant users access to apps and common permissions for features. Assign these permission sets from the permission set or user detail page in Setup. For faster assignment, use the standard permission set groups.

REQUIRED EDITIONS

Available in: View supported editions

📝 **Note** These permission sets are automatically updated as new features become available. We recommend that you assign standard permission sets, individually or via the standard permission set groups, to make sure users have access to all features and functionality.

Permission Set	What It Gives Access To	Included in These Permission Set Groups
Service Starter app	Foundations Service Console	General User and Service User
Lightning Knowledge Manager	Salesforce Knowledge management	General User and Service User
Macros Manager	Macros management	General User and Service User
Marketing Starter app	Marketing app	General User and Marketing User
Marketing Manager	Campaigns, segments, and campaign flows management	General User and Marketing User
Commerce Starter app	Commerce app	General User and Commerce User

Permission Set	What It Gives Access To	Included in These Permission Set Groups
Payments Administrator	Payments administrative tasks, such as merchant account and payment method set management	General User and Commerce User

See Also

    Standard Permission Sets
    View Permissions Enabled in a Permission Set or Permission Set Group
    Manage Permission Set Assignments

Assign Permission Set Groups from Quick Settings

In Quick Settings, assign permission set groups in a few clicks.

REQUIRED EDITIONS

Available in: View supported editions

USER PERMISSIONS NEEDED

To assign permission set groups from Quick Settings:	Assign Permission Sets
	AND
	Customize Application
	AND
	Manage Users
	AND
	Modify All Data
	AND
	View Setup and Configuration

See Also

    Assign Permission Set Groups to Users
    Turn On Quick Settings

Add a User and Assign Permissions

1. Click ⚙ to open the Quick Settings panel.
2. Click **Users**.
3. Click **New User**.
4. Add user details and click **Next**.
5. Select each permission set group to assign to the user and save.

Edit a User's Permissions

1. Click ⚙ to open the Quick Settings panel.
2. Click **Users**.
3. Click the action menu next to the user's name and click **Edit User**.
4. Click **Next**.
5. Select each permission set group to assign to the user and save.

Sales for Salesforce Foundations

If you have one of the supported editions, you have the foundational Sales features that come with Salesforce Foundations, and there is no setup. Review user interface and navigation settings that can help your sales teams work more efficiently. To incorporate lighter, faster email builder into your Sales experience, enable Email Builder Lite. If you upgraded from Starter or Pro Suite to another edition, you keep foundational Sales features and previous permission set group assignments.

REQUIRED EDITIONS

Available in: View supported editions

Boost your sales productivity with Salesforce Foundations navigation and user interface features.

With Quick Settings, customize sales stages to fit your processes in a few clicks. Click ⚙ to open the Quick Settings panel, and then select `Sales Stages`. Manage customer relationships more efficiently with the vertical navigation bar, Accounts app, and Contacts app. These navigation settings help you quickly find and update information about your customers and their businesses.

Foundations comes with access to Email Builder Lite, which streamlines the process of creating and sending batch emails directly from a List view. To enable Email Builder Lite, go to Setup. In the Quick Find box, enter and select Salesforce Foundations. Under Foundations Apps and Features, enable Email Builder Lite for Sales. Once Email Builder Lite is enabled, select whether you want it exposed to users through the User Interface Setup page.

If you upgraded from Starter or Pro Suite to a supported edition in Sales Cloud, review the additional sales features your users can access. See the Sales Pricing Guide and corresponding Salesforce documentation for each feature. To get started, we've included links to features that other customers

have found helpful to drive more sales.

> 📝 **Note** To retain all existing Sales functionality, including access to Einstein Conversation Insights, orgs
> upgrading to Service Cloud Enterprise Edition or higher must purchase Sales Cloud.

See Also
  Supported Editions for Salesforce Foundations
  Drive Predictable Revenue with Pipeline Inspection
  Focus on the Right Deals with Einstein Opportunity Scoring
  Get Insights and Trends from Calls with Einstein Conversation Insights
  Help Sales Teams Collaborate on Deals with Opportunity Teams
  Visualize Your Contacts Across Company Levels with the Buyer Relationship Map

Set Up Service for Salesforce Foundations

Assign the General User or Service User permission set group. These permission set groups grant users
access to features like the Foundations Service Console.

REQUIRED EDITIONS

Available in: View supported editions

USER PERMISSIONS NEEDED	
To assign user permissions and enable Chatter	Permissions vary by task. Verify the permissions required in related Salesforce documentation.

> 📝 **Note** If you upgraded from Starter or Pro Suite to another edition, permission set group
> assignments remain the same. If you upgraded from Starter to another edition, all users added from
> the Quick Settings panel automatically get access to the service console via the General User
> permission set group.

If you prefer using permission sets instead of permission set groups, assign the Service Starter App,
Lightning Knowledge Manager, and Macros Manager permission sets.

1. Assign the General User or Service User permission set group to users.
   - If Quick Settings is turned on, see Assign Standard Permission Set Groups from Quick Settings.
   - If you want to assign permissions from Setup, see Assign Permission Set Groups to Users.
2. If you upgraded from Starter to another edition, enable Chatter.
   a. In Setup, in the Quick Find Box, enter `Chatter`, and then select **Chatter Settings**.
   b. Enable Chatter Settings and save.

If you have Enterprise or Unlimited Edition in Sales Cloud, or Einstein 1 Sales Edition, see Set Up Service
Cloud Basics to continue configuring features.

If you upgraded from Starter or Pro Suite to a supported edition in Service Cloud, review the additional

service features and enhancements you can access. See the Service Pricing Guide and corresponding Salesforce documentation. To get started, we've included links to features that other customers have found helpful to enhance their customer service.

See Also

    Supported Editions for Salesforce Foundations
    Set Up a Help Center with a Guided Setup Flow
    Suggest Knowledge Articles with Einstein Article Recommendations
    Autofill Case Fields with Einstein Case Classification Apps

Set Up Data Cloud for Salesforce Foundations

After the required products for Salesforce Foundations are added, you're ready to set up Data Cloud for Salesforce Foundations.

REQUIRED EDITIONS

View supported editions

USER PERMISSIONS NEEDED	
To manage permission sets, access Data Cloud Setup, and create an identity resolution ruleset:	Assign Permission Sets AND View Setup and Configuration
To create an identity resolution ruleset and other Data Cloud features:	Appropriate Data Cloud permission set

After you add required Salesforce Foundations products, Data Cloud is automatically provisioned. If auto provisioning isn't available, manually turn on Data Cloud. If you encounter a Data Cloud error on the Salesforce Foundations setup page, go to Data Cloud Setup Home to review error messages and retry.

See Also

    Data Cloud Considerations for Salesforce Foundations
    Video: Data Cloud Basics Series
    Default and Custom Match Rules
    About Salesforce Data Cloud

Configure Settings and Assign Permission Sets

1. Assign yourself the Data Cloud Marketing Admin permission set.
   See Create Data Cloud Users and Assign Permissions.
2. Associate the default data space to the Marketing Manager permission set.

   a. In Setup, search for Permission Sets and select **Permission Sets**.
   b. Select the Marketing Manager permission set.
   c. Under Apps, select **Data Cloud Data Space Management**.
   d. On Data Space Scopes, click **Edit**.
   e. Select the **default** data space to associate it to the permission set.
   f. Save your changes.
3. Assign yourself the General User permission set group.
   - If Quick Settings is turned on, see Assign Standard Permission Set Groups from Quick Settings.
   - If you want to assign permissions from Setup, see Assign Permission Set Groups to Users.

   📝 **Note** After you complete these steps, it can take a few days for the Marketing app to show up in your org. After the Marketing app is visible in your org, you can continue with identity resolution ruleset setup.

Create an Identity Resolution Ruleset

This ruleset organizes and unifies your data for marketing sends and reporting.

See the Identity Resolution video from the Data Cloud video series.

1. In the Marketing app, on the Identity Resolutions tab, click **New**.
2. Select the default data space and select **Individual** for the Primary Data Model Object.
3. Name the ruleset and save.
4. On the identity resolution record, in the Match Rules section, click **Configure**.
5. Select a default or custom match rule.
6. Edit or add criteria for your match rule and save.
   Include Contact Point Email Address (Exact Normalized) in the match criteria. This is a critical step to help make sure your customer consent preferences are respected.

You can do more with identity resolution, such as creating rules to specify which objects and fields to reconcile. See Identity Resolution Reconciliation Rules. After you set up Data Cloud, see Set Up Marketing for Salesforce Foundations and Set Up Commerce for Salesforce Foundations

Set Up Marketing for Salesforce Foundations

Configure the required email settings and give users access to the Marketing app.

REQUIRED EDITIONS

Available in: View supported editions

USER PERMISSIONS NEEDED	
To set up Data Cloud, set up Marketing, and add workspace contributors:	Permissions vary by task. Verify the permissions required in related Salesforce documentation.

Before you send marketing emails, make sure your leads and contact records include an opt-in, opt-out status in the Privacy Consent Status field. If you prefer using permission sets instead of permission set groups, assign the Marketing Starter App and Marketing Manager permission sets.

> **Note** To turn on marketing settings on the Salesforce Foundations setup page, first make sure your email is verified. In most cases, you verify your email address in the Salesforce sign-up process. To check your email verification status, go to the Advanced User Details page and find the Email field.

1. Verify Data Cloud is set up.
   Data Cloud powers tools for managing consent data and creating targeted audiences for campaigns. See Set Up Data Cloud.
2. Configure required email settings and grant users access to the Marketing app.
   See Set Up Marketing.
3. To visualize data through Tableau in the Marketing app, install and configure the Marketing Performance app after provisioning is complete for Marketing Settings.
   a. From Advanced Setup, in the Quick Find box, enter and select **Marketing Performance**.
   b. To install Marketing Performance, click **Install**.
   c. Assign the Tableau Next Limited Consumer permission set to all users who need to access the Marketing Performance app. See User Permissions for more detailed instructions.
4. Assign users a workspace contributor role so they can create content.
   See Add Workspace Contributors.
5. Set up integrations and give users access to manage landing pages and forms.
   See Set Up Landing Pages and Forms.

After you set up Marketing for Salesforce Foundations, review Included Features in Salesforce Foundations and corresponding Salesforce documentation.

See Also
   Marketing Considerations

Set Up Commerce for Salesforce Foundations

Assign users access to the Commerce app and features.

REQUIRED EDITIONS

Available in: View supported editions

USER PERMISSIONS NEEDED	
To assign user permissions and set up Pay Now	Permissions vary by task. Verify the permissions required in related Salesforce documentation.

If you prefer using permission sets instead of permission set groups, assign the Commerce Starter App and Payments Administrator permission sets.

🗹 **Note** Commerce Store is available only in the U.S. Pay Now isn't available to Salesforce customers in India, Brazil, and Japan.

Configure Commerce Store and Pay Now

Auto-configure your org for Commerce and set up your online store and Pay Now.

1. Verify Data Cloud is set up.
   See Set Up Data Cloud.
2. Verify the Marketing app and required email settings are set up in your org.
   See Set Up Marketing
   Data Cloud and Marketing tools enable order confirmation in Commerce.
3. Assign the Commerce User or General User permission set group to users.
   - If Quick Settings is turned on, see Assign Standard Permission Set Groups from Quick Settings.
   - If you want to assign permissions from Setup, see Assign Permission Set Groups to Users.
4. Configure your online store.
   a. Use Commerce Setup Assistant to auto-configure your org for Commerce.
      See Commerce Setup Assistant.
   b. Follow the guided setup provided by the Store Setup Assistant to set up your direct-to-consumer (D2C) online store.
      See Set Up an Online Store
5. Configure Pay Now.
   Follow the guided setup to complete your Stripe merchant account, define payment methods, and brand your Pay Now page with your logo. See Set Up Pay Now.

Add Payment Links Component to the Opportunities Page

With Pay Now, when an opportunity closes you can generate secure payment links for customers from the Opportunity page. Add the Payment Links component to the Opportunities page.

1. From Setup, in the Quick Find box, enter App Builder, then select **Lightning App Builder**.
2. Select **Edit** for the Opportunity Record Page - Three Column page.
3. Drag the **Dynamic Related List–Single** component onto the page.
4. Select the **Dynamic Related List–Single** component on the record page.
   a. In the properties pane, select **Use This Opportunity** for the Parent Record.
   b. Select **Payment Links** for the Related List.
      The remaining property values populate automatically.
5. Save your changes.