Salesforce Release Notes

Salesforce, Winter '24

Future-proof your business with AI + Data + CRM

@salesforcedocs

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CONTENTS

SALESFORCE WINTER '24 RELEASE NOTES

The Winter '24 release helps you work smarter with new product innovations built on AI + Data + CRM.

IN THIS SECTION:

Development

Whether you're using Lightning components, Visualforce, Apex, or Salesforce APIs with your favorite programming language, these enhancements help you develop amazing applications, integrations, and packages for resale to other organizations.

Einstein

Get ready to work smarter with all that Einstein has to offer. Einstein enhancements include new and updated AI-powered features across Search, Commerce, Field Service, Sales, and Service. Plus, view all of our generative AI innovations in one place.

Einstein Generative AI

Supercharge your workforce efficiency with Einstein generative AI.

Enablement and Guidance

Deliver enablement programs focused on improving revenue outcomes for your company. Guide users to curated resources that can help them excel. Bring learning, career growth, skills development, and business-critical job performance to your users where they work in Salesforce.

Experience Cloud

Share CMS content from any workspace with your enhanced LWR site. Now all LWR sites that you create are enhanced. In other refinements to enhanced LWR, you can use Experience Builder to apply custom CSS to any component in the site, and use custom logic to apply flexible expression-based visibility rules to your components. You can also easily access and update the site's global style sheet from a new folder in DigitalExperiencesBundle. Enjoy more efficient, secure authentication into all your Experience Cloud sites, and use your sandbox org to test how disabling your site's content delivery network can affect your production org.

Field Service

AI-generated briefs keep mobile workers informed on work orders. Manage your busy team's hours with work capacity, and use a flow to help you easily move to the Enhanced Scheduling and Optimization engine. Hard-working dispatchers can create work more efficiently with the updated Gantt and user experience. Stay current on maintenance needs with a host of asset attribute functionality. Customize documents to showcase your brand. Learn what's driving Visual Remote Assistant efficiency by analyzing data on the Value dashboard. Mobile enhancements help workers manage error-prone data entry tasks. You can also streamline workflows by creating a customized tab bar suited to how your mobile team works.

Hyperforce

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

Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Outcome Management and Context Service are now generally available. Improve engagement with stores and plan better promotions with Consumer Goods Cloud. Financial Services Cloud can now organize both internal and external data better with Data Cloud. Track grant recipients' budgets with Grantmaking. Health Cloud can now bring its CRM data into Marketing Cloud with Marketing Cloud Engagements. Automate and improve warranty claim adjudication processes with Manufacturing Cloud. Plan your company's social impact with materiality assessments in Net Zero Cloud. Manage the end-to-end lifecycle of contracts with Salesforce Contracts. We also have plenty of changes for Education Cloud, Nonprofit Cloud, Media Cloud, Industries common features, and many more.

Marketing

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer, leveraging data from any source. Plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time. Measure the impact of each interaction on your business so that you can optimize your approach in real time and deliver better results.

Marketing Cloud Account Engagement

Make your Engagement Studio programs more precise with wait times less than a day. Copy assets from sandbox to production business units with API V5 for Flow, and free up system bandwidth by removing old visitor activity records.

Mobile

Salesforce Mobile App Plus now supports searching Briefcase for records, more easily accessible swipe actions on the Landing Page, list filters on the Landing Page, and quicker address configuration. Define your Mobile Publisher for Experience Cloud app's default URL behavior and location-based permissions and push notifications. Use Briefcase Builder to apply custom metadata types to your mobile workforce's offline record experience.

Revenue

Roll out Subscription Management quoting features selectively, without disrupting existing business processes. Give reps a centralized and consolidated view of assets for an account, and control order product conversion to assets. Salesforce CPQ now supports only standard quotes, and the Lightning Web Component rich text editor replaced CKEditor.

Sales

Supercharge your sales teams with fresh insights and enhanced productivity features in Winter '24. Einstein Conversation Insights users can now create call summaries with one click thanks to Einstein. In Pipeline Inspection, see if the right people are involved in deals to help sales reps win. Get a detailed history of changes to opportunity splits, opportunity product splits, and teams to ensure accuracy, and that sales team members are correctly compensated. In Enablement, jump-start your sales teams with all the product and process knowledge needed to quickly open opportunities, close deals, and help achieve your company's revenue outcomes.

Salesforce CMS

Find details for CMS content and translation export and import on the new Export & Import status tab. Publish content from CMS workspaces to enhanced sites and public channels. In enhanced CMS workspaces, prevent users from unpublishing content with dependencies. Assign workflows by content type, and automatically publish or unpublish content.

Salesforce Flow

Compose intelligent workflows with Flow Builder, OmniStudio, and Flow Orchestration. Integrate across any system with Flow Integration.

Salesforce for Slack Integrations

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

Security, Identity, and Privacy

Enhanced domains are enforced. Help your users move to your new URLs and prepare for the end of some redirections. Multi-factor authentication auto-enablement is in effect for the third phase of orgs. Develop local or 2GP packageable external client apps. Expand your Headless Identity implementation with passwordless login, identity for guest users, and improvements to headless registration. Monitor login IP ranges and tenant license usage details with more metrics. View what instance your tenants are running on. Get to know the new Privacy Center app. Configure external credentials for server-to-server integration using OAuth 2.0 client credentials or JWT authentication protocols. Assign the new Manage Named Credentials permission so that users can modify named credentials and external credentials. And manage group membership changes and insufficient access attempts with the new Group Membership Event and Insufficient Access Event types.

Service

Check out new features that enable customer service agents to work faster and more productively across customer service channels.

Work.com

Prepare your business, employees, and facilities. Respond to major events, such as the current COVID-19 crisis, with the apps and services in Work.com.

Other Salesforce Products and Services

Get the latest information on features from Customer Success Group, Heroku, and IdeaExchange.

Release Updates

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

Legal Terms

We made seasonal updates to Salesforce Legal Terms.

What's New for the Salesforce Release Notes?

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

Learn About New and Updated Features Available Between Seasonal Releases

Some Salesforce clouds release features and enhancements more frequently than three times per year. And we want to help you keep up with what's new as soon as it comes out. Starting with Winter '24, we add release notes for newly available features to these seasonal release notes as often as every month, so check back often. To find these release notes, just search for `Monthly Release Notes`.

Get a Quick Video Preview of Top New Features Each Seasonal Release

Get up to speed fast each seasonal release with a video preview of our top features, right here in the release notes. Just search for `Get Ready for the Release`. After checking out the video, read about other helpful resources you can use to prepare.

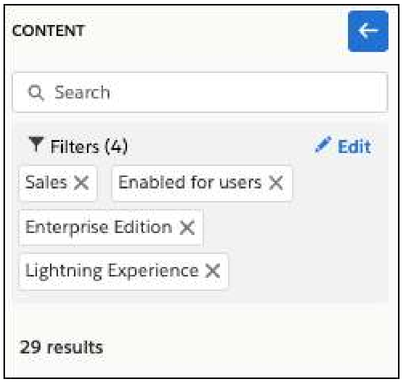
Find Out Which Features Come from IdeaExchange Ideas

Now we make it even easier to find out which features originated from IdeaExchange. If the title of a release note shows this IdeaExchange graphic , you know the idea came from you, our Trailblazers.

How to Use the Release Notes

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

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



- The IdeaExchange graphic in the title of a release note lets you know that we delivered this feature thanks to your ideas. Submit, view, and vote on ideas on IdeaExchange.

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

- **Trailblazer Community**—Post your feedback in the Release Readiness Trailblazers group. To help us track and respond to your feedback, use a hashtag that indicates the release, such as #Winter24Feedback.
- **Feedback forms**—As you're working with our documentation in Salesforce Help, release notes, or developer guides, look for the feedback buttons and vote up or down. Add comments if you have them.
- **Twitter/X**—When you follow @salesforcedocs on X, you receive notices whenever we publish new documentation or make significant updates to existing documentation. Contact us at @salesforcedocs.

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

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

Get Ready for the Release

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

What's New This Release

- Release Milestones. See key dates for the release.
- Release Overview Deck (ROD). Create internal training for your users, review setup screens, and learn how to use features.
- Release Matrix. Quickly see which features immediately affect your users.
- Winter '24 Pre-release Signup. Sign up for a pre-release org to get early access to the new features.
- Release Readiness Live. Register and make the most of the new features.

- Release Demos. Get quick video overviews of what's coming this release.
- Winter '24 Release Website. Check out the new features.
- Winter '24 Release Highlights Module. Get the release Trailhead badge.
- Release in a Box. Use this kit to prepare for the new release and to present it to your users.

Winter '24 Highlights for Admins

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

Watch a video

Release Readiness Essentials

- Release Readiness Trailblazers. Access resources and experts for all things release readiness.
- Trust Status Maintenances. See sandbox and other release dates and times. To see your maintenance dates, click **Instances** and your instance.
- Sandbox Refresh Calculator. Plan if and when to refresh your sandboxes.
- Sandbox Preview Video. Learn how to navigate the sandbox preview process.
- Sandbox Preview Instructions. Get early access to new features in your sandbox.
- Certification Release Maintenance Schedule. Keep your certification updated in Trailhead.
- Prepare for Salesforce Releases. Use Trailhead to create your release strategy.

Release Notes for Features Released Monthly

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

As you explore this content, keep these considerations in mind.

- Monthly release notes aren't the same as release notes for delayed features. Sometimes, a feature released seasonally is subject to a slight delay. When that happens, the timing is explained in the "When" section of that feature's release note.
- Monthly release notes aren't the same as changes to previously published release notes. Sometimes, we need to update previously published release notes for the current seasonal or monthly release. When that happens, we update the "Release Notes Changes" topic.
- Sometimes, monthly releases coincide with seasonal releases. When that happens, we identify related release notes by the first full month of the seasonal release. These features are available when Salesforce rolls out the Winter '24 release to your instance.

  For example, the Winter '24 release begins rolling out to customer instances in mid-August of 2023. Release notes for features released in August or September are linked to from a topic called "September '23 Release." Release notes for features released in October 2023 are linked to from a topic called "October '23 Release."

IN THIS SECTION:

SEE ALSO:

How and When Do Features Become Available?

September ’23 Release

Learn about features released in September ’23. Features included in the September ’23 monthly release become available when Winter ’24 rolls out to your instance.

Einstein Generative AI Features

Release Note Changes

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

October 2, 2023

Allow Only Trusted Cross-Org Redirections (Release Update)

Updated the release note to reflect that the release update was enabled for testing by default in orgs that got Winter ’24 before October 2023.

New and Changed Health Cloud Metadata Types

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

Reduce Costs and Improve Operations with Service Intelligence

Added a release note to announce the My Performance dashboard for agents and added links to new Salesforce help.

Create and Share Your Own Custom Bot Templates (Generally Available)

Added a release note to announce that custom templates for Einstein Bots are generally available.

Build Bots Faster with Bot Blocks (Generally Available)

Added a release note to announce that Bot Blocks is generally available for Einstein Bots.

Grow Your Einstein Bot Portfolio with New Templates and Blocks

Updated the release note to include information about updates to the Intro Bot - Get Pre-Chat Context flow, including renaming to Einstein Bots - Get Customer Context.

Send Secure Forms in Messaging Sessions on page 617

Updated release note to reflect that the Form format is in Beta.

Get Full Snowflake OAuth Parity

Added a release note to announce the implementation of OAuth for Snowflake output connector and Sync Out for Snowflake.

Use Multiple Variables for Forecasting Data

Added a release note for the new SAQL `arimax` statement for multivariate timeseries.

Round Forecast Amounts for More Streamlined Forecasts

Announced the ability to show rounded forecast amounts in the forecasts summary section of the forecasts page.

Improve Sales Forecast Accuracy with Manager Judgments
Updated to include information about opportunity list column requirements.

CSS Scope Tokens Are Generated with Obfuscated Strings
Retitled the release note from "Use Lowercase on CSS Scope Tokens" and clarified that the attributes and classes added automatically to DOM elements are internal implementation details that you shouldn't rely on.

PublicSectrSltn Namespace
Added a release note announcing new Apex class in the PublicSectSltn Namespace for Public Sector Solutions.

Design Engagement Programs with More Precise Wait Times
Clarified that this update only applies to email send steps in an Engagement Studio program.

Streaming API Versions 23.0 Through 36.0 Are Being Retired
Added a release note about the Streaming API version retirement plan.

Removed: Use the Pub/Sub API Global Endpoint to Route Requests to More Regions
This feature isn't quite ready, so we're removing it for now. We'll let you know once it's back up.

September 25, 2023

Changed Connect REST API Request Bodies
Added a release note to announce the decisionResultPolicy enum value updates on the Decision Table Definition Input request body.

Changed Connect REST API Response Bodies
Added a release note to announce the decisionResultPolicy enum value updates on the Decision Table Definition Output response body.

Back Up and Restore More Data
Added a release note about new support for formula field backups and share objects.

Use Improved Transcripts for Voice and Video Calls
Added a topic about the new transcription engine for Einstein Conversation Insights.

Use Filters to Find Record-Triggered Flows Quickly
Experiencing deja vu? This feature was briefly available in Winter '24, but we removed it after it suffered a bad case of stage fright. After some additional preparation, it's now ready for the spotlight!

Verify Email Addresses to Send Email Through Salesforce
Added a clarification about DomainKeys Identified Mail (DKIM) verification.

Follow Up on Companies of Interest with Contextual Insights
Added information about contextual insights, a new feature in the Sales Cloud Everywhere Chrome extension.

Set Up Amazon Real-Time Metrics Dashboard from Omni Supervisor
Added a release note about adding the View Amazon Real-Time Metrics button.

API Distortion Changes in Lightning Web Security
Added a list of web APIs that Lightning Web Security protects to increase security for Lightning web components.

Save the Progress of Your Flow as You Build
Added information clarifying the change to some element properties windows.

Generate an ESRS Report with the Disclosure and Compliance Hub Template
Added a release note announcing the Net Zero Cloud Disclosures for ESRS package.

Removed: Download Package Metadata for a Specific Package Version

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

Legal Terms

We changed the name of the Legal Documents release note to Legal Terms.

Improve AppExchange Listing Discoverability with New Business Needs Categories and Subcategories

Added a release note to announce the expanded and revised business needs that partners can use to categorize their AppExchange listings.

September 18, 2023

Query for All File Shares with ContentDocumentLink

Added a release note to announce the ability to query for all Salesforce File shares with ContentDocumentLink.

Connect to Amazon Athena (Beta)

Added a release note announcing the availability of the Amazon Athena connector for CRM Analytics and Salesforce Data Pipelines (Beta).

Append Data Faster with Incremental Uploads (Beta)

Added a release note announcing the availability of incremental CSV loads for CRM Analytics and Salesforce Data Pipelines (Beta).

Create and List Segments in a Data Space via Connect REST API

Added a release note to announce the ability to create and list segments in a Data Space via Connect REST API.

Fourfold Increase in the Number of Active Decision Tables Per Org

Corrected the default number of active decision tables in a Salesforce org.

Other Improvements to Messaging

Added two items about minor improvements to the agent experience in enhanced Messaging channels and Messaging for In-App and Web.

Initiate Conversations in Enhanced Messaging Channels and Messaging for In-App

Corrected a sentence indicating which layouts can contain the Send Message action.

Sync Agent Presence Statuses Is Turned on by Default

Added a release note to announce that Presence Status Sync is turned on for Service Cloud Voice.

Get Service Insights and Build Bot Intents with Einstein Conversation Mining (Generally Available)

Added SKU information.

Include Email Conversations When You Build Your Conversation Mining Reports (Generally Available)

Added SKU information.

Changed Connect REST API Request Bodies

Announced a new property—templateApiName—on the Document Process Input request body.

Cross-List Your Tableau Accelerator on AppExchange

Added a release note announcing the ability to create AppExchange listings for Tableau Accelerators.

DocumentReader Namespace

Added a release note announcing new Apex classes in the DocumentReader Namespace for Intelligent Document Reader.

Removed: Customize Your Salesforce Content Delivery Network (CDN) Settings

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

Grow Your Einstein Bot Portfolio with New Templates and Blocks

Updated a release note to announce the new system Close Case, Create Case, and CSAT blocks for Einstein Bots.

Metadata API

Added a release note for the `enableQuip` field on the LightningExperienceSettings metadata type.

New and Changed Objects

Added a release note about the new `WorkCapacityLimit`, `WorkCapacityUsage`, and `WorkCapacityAvailability` objects.

Metadata API

Added a release note for the `segment` field on the FlowStart metadata type.

Inbox Mobile is Being Retired

Inbox mobile is being retired in February 2024.

Metadata API

Added a release note for the new fields `description` and `icon`added to the DataSourceBundleDefinition metadata type.

Select All Fields When Configuring Field Permissions

Added a release note about the ability to select all fields when configuring field permissions.

Metadata API

Added a release note for the `successMessages` field on the BotVariableOperationTranslation subtype of the Translations metadata type.

Metadata API

Added a release note for the `permissionSet` fields on the BotBlockVersion subtype of the BotBlock metadata type and on the BotTemplate metadata type.

Metadata API

Added a release note for the new BotBlock metadata type and the related new `isPlaceholderDialog` field on theBotDialog subtype of the BotVersion metadata type.

Create From Lookup Changes

Added a release note announcing changes to the create from lookup modal.

Other Salesforce Products and Services

Marketing Cloud Intelligence and .Org features are not yet ready so we're removing mention of them for now. We'll let you know when they're ready.

Other Changes in Business Rules Engine

Added a release note to announce the changes in Business Rules Engine user interface.

Changed Connect REST API Response Bodies

Announced a new property—apiName—on the Lookup Table Details response body.

Save Agents Time and Improve Accuracy with Grounded Einstein Service Replies (Generally Available)Optimize Agent Productivity and Response Quality with Einstein Service Replies (Generally Available)

Add English (US) only limitation to Service Replies

Close Cases Faster using Einstein Work Summaries with Generative AI(Generally Available)

Add English (US) only limitation to Work Summaries

Explore Tableau Views in CRM Analytics Dashboards With Custom Filters (Generally Available)

Changed Release Type from Beta to Generally Available.

Embed Tableau Views to Lightning Pages (Generally Available)

Added a release note about the ability to add Tableau views to Lightning pages through Lightning Web Components.

Actionable Segmentation Videos

Added a release note announcing the new Actionable Segmentation video.

Track Order Recalls and Returns for a Sales Agreement
Added a release note about the ability to track order products with negative quantities and unit prices in sales agreements.

Visualize Account Hierarchies by Using Actionable Relationship Center in Manufacturing Cloud
Added a release note announcing the enhancements to Actionable Relationship Center in Manufacturing Cloud.

Save Time and Resources by Automatically Extracting Information from Documents in Manufacturing Cloud
Added a release note announcing the availability of Intelligent Document Reader in Manufacturing Cloud.

Visualize Your Data Processing Engine Definitions and Debug Them Easily in Manufacturing Cloud
Added a release note announcing the enhancements to Data Processing Engine in Manufacturing Cloud.

New Connect REST APIs
Added a release note to announce the new gift-related Program Management connect APIs for Nonprofit Cloud.

getSalesforceBaseUrl() Method Is Being Deprecated
Added a release note about the deprecated method.

Easily Set Up Flexible Anchor Nodes in ARC Graphs
Updated the release note to clarify how the feature is used.

Keep Track of the Anchor Node From Any Point in the ARC Graph
Updated the release note to clarify how the feature is used.

Show Upward Account Hierarchy in an ARC Graph
Updated the release note to clarify how the feature is used.

Support Intelligent Sales Operations With Actionable Relationship Center
Updated the release note to clarify how the feature is used.

Get Improved Accessibility in List Views
Updated the third bullet in the release note to clarify the changes for checkboxes on lists in split view.

REST Limits Response Change for Usage-Based Entitlement for Platform Events and Change Events
Added a release note to announce a change in the response of the REST API `limits` resource for Salesforce orgs that haven't purchased the add-on for additional high-volume platform events and change events.

Removed: Use Filters to Find Record-Triggered Flows Quickly
This feature isn't quite ready for showtime, so we're removing it for now while we make improvements. We'll let you know once it's back up.

September 4, 2023

DevOps Center
Read all about the new features included in the latest version of DevOps Center.

Enable New Order Save Behavior (Release Update)
Added a release note for release update about a new custom application logic that runs whenever an order product update causes a change to the parent order.

Identify AppExchange Solution Types at a Glance
Added a release note announcing the availability of solution type badges for AppExchange listings.

Multitask Easily with Field Service Mobile for Android Tablets
Removed a screen shot that showed functionality that is not yet available.

Connect to Databricks (Beta)
Added a release note announcing the availability of the Databricks connector for CRM Analytics and Salesforce Data Pipelines (Beta).

Scan Your Solution with Ease Using Salesforce Code Analyzer Visual Studio Code Extension (Beta)
Added a release note announcing the availability of the Salesforce Code Analyzer Visual Studio Code extension.

Metadata API
Added a release note announcing the availability of two new IndustriesSettings for Net Zero Cloud.

Show Order Details in Checkout
Updated the release note with more detailed setup instructions.

Experience a Sleeker Call Interface in the Omni-Channel Utility
Updated the screen shot to show a live voice call.

Visualize Customers and Prospects on a Map
Added more details about availability.

New and Changed Objects
Added a release note for a behavior change for fields on the AuthConfigProviders object.

Health Cloud Has New and Changed Objects
Added a release note about the new `IsAccepted` field on the ClinicalServiceRequest object in the Home Health data model.

Increase Patient Engagement by Using Marketing Cloud Engagement for Health Cloud
Updated the link to *Salesforce Help*: Marketing Cloud Engagement for Health Cloud.

Metadata API
Added a release note for the `RecommendationStrategy` value in the existing `processType` field on the Flow metadata type.

Save Agents Time and Improve Accuracy with Grounded Einstein Service Replies (Generally Available)
Added replies with grounding release note.

Integrated Onboarding
Added a release note to announce the new Integrated Onboarding feature for Financial Services Cloud.

Discovery Framework Enhancements
Added a release note to announce the enhancements to the Discovery Framework feature.

Get Accurate Site Check-Ins and Check-Outs (Pilot)
Added a screenshot for clarity.

New and Changed Objects
Added a release note about the new `TravelModeId` field for the ServiceTerritory object.

New and Changed Objects
Updated a release note announcing the addition of new objects AdBuyServerAccount, AdOpportunity, AdOrderItemCreativeSizeType, and AdQuoteLineCreativeSizeType to Media Cloud.

Removed: Access a Mobile Device's Biometrics Capabilities with Lightning Web Components
This feature isn't quite ready, so we're removing it for now. We'll let you know once it's back up.

Removed: Interact with NFC Tags using a Mobile Device with Lightning Web Components
This feature isn't quite ready, so we're removing it for now. We'll let you know once it's back up.

Removed: Scan Documents with a Mobile Device using Lightning Web Components
This feature isn't quite ready, so we're removing it for now. We'll let you know once it's back up.

Removed: Scan Documents with a Mobile Device From the Salesforce Field Service App
This feature isn't quite ready, so we're removing it for now. We'll let you know once it's back up.

Removed: Interact with NFC Tags with a Mobile Device From the Salesforce Field Service App
This feature isn't quite ready, so we're removing it for now. We'll let you know once it's back up.

Removed: Scan Documents with a Mobile Device From the Salesforce Mobile App

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

Removed: Interact with NFC Tags with a Mobile Device From Mobile Publisher Apps

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

Removed: Use a Mobile Device's Biometrics From Mobile Publisher Apps

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

Update Your Device to iOS 15 or Later for Experience Cloud Apps

Added a release note about the new device requirement for Mobile Publisher for Experience Cloud iOS apps.

Removed: Slack Invocable Actions Can No Longer Be Invoked from Apex

This information is no longer accurate. It can be possible to invoke Slack actions from Apex.

Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares (Release Update)

Clarified visibility of the release update.

Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares (Release Update)

Clarified visibility of the release update.

Update Email Templates with Invalid Senders

Updated where the feature can be found and when it's available.

Mutual Authentication Is Now Enforced For API Login Requests

Added a release note about a change in behavior for mutual authentication.

Other Improvements in Apex Compiler Messages, Setup, and Processing

Clarified the improvements to Apex language support and error messages.

August 28, 2023

New Connect APIs

Added a release note to announce new Program Management connect APIs in Nonprofit cloud.

New and Changed Business Rules Engine Metadata Types

Updated a release note about new ExpressionSetMessageToken metadata type.

Get More Insight About Opportunities in Sales Forecasts

Updated the edition list to include Performance Edition.

Get Pipeline Inspection Opportunity Detail and Insights in Collaborative Forecasts

Updated the edition list to include Performance Edition.

Social Accounts, Contacts, and Leads Is Being Retired

We're retiring Social Accounts, Contacts, and Leads in Spring '24. Twitter access is being revoked in Winter '24.

Track Disconnect Reasons on Voice Calls

Added a release note to announce the new Disconnect Reason field on Voice calls.

Add Custom Property Editors or Property Types to Custom Lightning Web Components in Aura Sites (Beta)

Added a release note to draw developers' attention to this beta feature available for Aura sites.

Get Your Mobile Workers Up to Speed with Pre-Work Briefing

Added information about when the feature will be available.

Watch Automotive Cloud Videos

Added information about two new videos on Partner Visits.

Save the Progress of Your Flow as You Build
Removed Action elements from the list of elements that have their properties window slide open next to the flow in the canvas.

New and Changed Objects
Added a release note with a new field for the ServiceTerritory object.

New and Changed Objects
Added release notes with new fields for the FieldServiceOrgSettings object.

LWS Protects Static Resources in LWR Sites
Added a release note about changes to LWS and `lightning/platformResourceLoader` that can affect Lightning web components that load static resources in LWR sites in Experience Cloud.

Ensure that Duplicate Queueable Jobs Aren't Enqueued
Updated the code sample to use the static `Builder()` method.

Connect to Third-Party Key Stores with External Key Management
Updated the product availability statement for External Key Management.

Use Third-Party Web Components in LWC (Beta)
Added a release note to announce third-party web component support using `customElements.define()`.

Fix Invalid HTML Usage to Avoid Component Errors
Removed a link that points to an old release note.

Health Cloud Has New and Changed Objects
Added Health Insurance data model changes.

Create a Salesforce Feedback Management Pre-Release Trial Org
Added a release note about the availability of pre-release trial org for Salesforce Feedback Management.

Watch Loyalty Management Videos
Updated the release notes to include the Loyalty Management Mobile SDK video.

Get Ready for the Release
Added Winter '24 resources.

Connect to Third-Party Key Stores with External Key Management
Updated the product availability statement for External Key Management.

Customize an Enhanced Link with Dynamic Input
Added a release note announcing Einstein Bots support for parameters in enhanced link messaging components, so you can dynamically customize enhanced links.

Specify Custom Access Using Permission Sets for User Mode Database Operations (Developer Preview)
Added information about the `System.stripInaccessible()` method overload.

Experience Improved Performance on More Record Home Pages
Added a release note to announce more LWC-enabled objects.

New and Changed Objects
Added a release note about adding the value `ExternalClientApp` to the `Activity` field on the IdentityVerificationEvent and VerificationHistory objects.

August 21, 2023

Receive Change Event Notifications for More Objects
Added a release note with a list of new objects you can get change events for.

Full Apex Auto-Complete in Developer Console is Being Retired

We are retiring Apex full auto-complete in Dev Console because it is no longer sustainable due to its resource intensity.

New and Changed Objects

Added a release note with a list of new fields for the PaymentLink object.

New and Changed Connect REST API Resources

Announced the new Waitlist Check In resource for Salesforce Scheduler.

Create a Salesforce Scheduler Pre-Release Trial Org

Added a release note about the availability of pre-release trial org for Salesforce Scheduler.

New and Changed Aura Components

Added a release note for the `lightning:omniToolkitAPI` component's `getAgentWorkload` method, which has two new responses.

New and Changed Aura Component Events

Added a release note for the `lightning:omniChannelWorkloadChanged` event, which has three new responses.

Health Cloud Has New and Changed Objects

Changed the data model name from Provider Network Management to Provider Relationship Management, and updated information about new fields in the CareProviderSearchableField object: changed ServiceList to Service, changed ServiceCodeList to ServiceCode, and removed Race, Ethnicity, and AffiliationList.

Metadata API

Added a release note for a new enum value in the `sessionTimeout` field on the SessionSettings metadata type.

August 14, 2023

Salesforce Winter '24 Release Notes

Published preview release notes.

How and When Do Features Become Available?

Some features in Winter '24 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

Supported Browsers

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

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Supported Browsers for CRM Analytics	✓			

Salesforce Overall

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
General Enhancements				
Prepare for the New Setup Domain		✓		
MFA Auto-Enablement Continues and MFA Enforcement Begins with Summer '24			✓	
See Improved Color Contrast in UI Elements	✓			
Set a Password or Expiration Date on a Public Link to a Salesforce File	✓			
News, Automated Account Fields, and Account Logos Are Being Retired	✓			
Disable Keyboard Shortcuts	✓			
Experience Improved Performance on More Record Home Pages			✓	
Create From Lookup Changes			✓	
Other Changes to Record Pages	✓			
Salesforce Scheduler				
Manage In-Person Appointments More Efficiently Using Lobby Management			✓	
Share Availability Details with Potential Customers			✓	
Make Customer Engagements Seamless by Reassigning Unavailable Service Resources			✓	
Do More with Recurring Shifts in Salesforce Scheduler			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Send Customers Appointment Details Using an ICS File			✓	
Create a Salesforce Scheduler Pre-Release Trial Org			✓	
Connect REST APIs				
New Connect REST API Resources		✓		
Einstein Search				
Configure Searchable Objects for Profiles More Easily (Beta)		✓		
Resolve Cases Faster with Einstein Search Answers (Pilot)		✓		
Einstein Search for Knowledge Is Enabled by Default		✓		
Salesforce Data Pipelines				
Run Sequential Recipes Faster with Staged Data (Generally Available)	✓			
Connect to Google Analytics 4 (Generally Available)	✓			
Prevent Sync Timeout Issues with Salesforce External Connectors	✓			
Connect to Databricks (Beta)	✓			
Connect to Amazon Athena (Beta)	✓			
Append Data Faster with Incremental Uploads (Beta)	✓			
Get Full Snowflake OAuth Parity	✓			

Analytics

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Unified Analytics Experiences				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Explore Tableau Views in CRM Analytics Dashboards With Custom Filters (Generally Available)	✓			
View Report and Dashboard Asset Details From the Analytics Tab	✓			
IdeaExchange Delivered: Refine Your Search Results with Sort	✓			
Embed Tableau Views to Lightning Pages (Generally Available)			✓	
Experience the Improved Home Tab in CRM Analytics for Slack	✓			
Access Subscriptions and Notifications Anywhere in Slack with Slash Commands (not immediately available)	✓			
View Slack Channel Recipients in Subscription Reports	✓			
Analytics Mobile Apps for iOS				
Transform Static Widgets with Single-Click Interactions	✓			
Update CRM Analytics Dashboard Layouts Automatically	✓			
Analytics Mobile Apps for Android				
Transform Static Widgets with Single-Click Interactions	✓			
Update CRM Analytics Dashboard Layouts Automatically	✓			
Lightning Reports and Dashboards				
Transfer Ownership of Lightning Dashboards (Beta)			✓	
Visualize Lightning Reports with Summary Formulas as You Create Them			✓	
Open Reports and Dashboards in Multiple Tabs from the Analytics Tab	✓			
CRM Analytics				
CRM Analytics Visualization and Dashboard Building				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Experience Improved Table Performance with Pagination	✓			
Reset Dashboard Navigation with the Clear Selections Interaction	✓			
Sort Repeater Widget Cards at Run Time	✓			
Explore Multiple Data Model Objects in Direct Data Using Joins (Generally Available)	✓			
Create Consistent Dashboards with Themes	✓			
Synchronize Modifications Across Layouts Effortlessly	✓			
Use Multiple Variables for Forecasting Data	✓			
Prebuilt and Industry Analytics Apps				
Optimize Quote to Order Process by Using Process Visualizations			✓	
Streamline Business Operations by Using Analytics Dashboard			✓	
Analytics Data Integration				
Run Sequential Recipes Faster with Staged Data (Generally Available)	✓			
Connect to Google Analytics 4 (Generally Available)	✓			
Prevent Sync Timeout Issues with Salesforce External Connectors	✓			
Connect to Databricks (Beta)	✓			
Connect to Amazon Athena (Beta)	✓			
Append Data Faster with Incremental Uploads (Beta)	✓			
Get Full Snowflake OAuth Parity	✓			
Intelligent Analytics Apps				
Revenue Intelligence	✓			
Service Intelligence	✓			
Tableau	✓			
Marketing Cloud Intelligence	✓			

Commerce

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce B2B and D2C Commerce				
Support Larger Purchases	✓			
Commerce Einstein				
Enhance Product Fields in Commerce Stores with Einstein	✓			
Show Frequently Bought Items to Customers	✓			
Easily Prepare Your Org for Commerce with the Enhanced Commerce Setup Center	✓			
Start Selling Fast with Easy Commerce Setup	✓			
Add Branding to Your Commerce Reorder Portal	✓			
Simplify Commerce Reorder Portal Invitations with a Cadence			✓	
Reduce Wait Time When Adding Item to Cart	✓			
Set Up Lowest List Price Compliance	✓			
Provide Guest Users Access to Their Order Details	✓			
View More Consolidated Information on Market and Buyer Group Pages	✓			
Update Promotion Segment and Buyer Group Associations	✓			
Promote Product Variants	✓			
Improve SEO with Custom URL Slugs (Generally Available)			✓	
Create Rich Search Results with Structured Data (Generally Available)			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Access Media in Your Store from All CMS Workspaces	✓			
Place Orders on Behalf Of Customers Using Order Entry	✓			
Commerce Components				
Add Product Pricing Details to Your Commerce Products	✓			
Create Custom Components with the Public Commerce LWR Library	✓			
Fine-Tune the Checkout Experience	✓			
Simplify How Promotions Are Shown in the Cart	✓			
Show Order Details in Checkout	✓			
Customize the Seller Onboarding Component	✓			
Track Customer Behavior in Data Cloud with the Product Set Component				
Omnichannel Inventory				
Control Which SKUs Are Eligible for Shipping from a Particular Location	✓			
Track Inventory Reservations Throughout the Fulfillment Process	✓			
Salesforce Order Management				
Create Inventory Reservations During Order on Behalf Of Checkout				
Search for Product Names and Keywords in Order on Behalf Of				
Salesforce Payments				
Accept PayPal and Venmo with Salesforce Payments		✓		
Offer Direct Debit Payment Methods at Checkout		✓		
Use Pay Now for Salesforce Starter	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Show Itemized Products or Predefined Amounts on the Pay Now Page		✓		
Control Payment Link Usage and Expiration for Pay Now			✓	
Include Express Payments on Your Pay Now Page (Pilot)			✓	
Integrate B2C Payments with Salesforce Payments			✓	
Manage User Access to Salesforce Payments Data			✓	
Get Notified About Salesforce Payments Events			✓	

Customization

Report on custom permission set and permission set group assignments. Use Dynamic Forms on hundreds more LWC-enabled standard objects.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Permissions				
IdeaExchange Delivered: Report on Custom Permission Set and Permission Set Group Assignments		✓		
IdeaExchange Delivered: See What's Enabled in a Permission Set More Easily (Beta)		✓		
IdeaExchange Delivered: Select All Fields When Configuring Field Permissions		✓		
Troubleshoot Permission Set Group Errors		✓		
See API Names for Object and Field Permissions in Permission Sets		✓		
See How Many Permission Set Groups a Permission Set Is Added To		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automate and Migrate User Access with Improved User Access Policy Filters (Beta)			✓	
Lightning App Builder				
IdeaExchange Delivered: Use Dynamic Forms on LWC-Enabled Standard Objects			✓	
IdeaExchange Delivered: Give Your Mobile Users the Dynamic Forms Experience (Generally Available)			✓	
Sharing				
IdeaExchange Delivered: See Who Has Access to Accounts from Manual Shares and Account Teams with Reports		✓		
View Public Group Members with Reports		✓		
Audit Public Group Membership Changes with Event Monitoring				✓
Troubleshoot Insufficient Access Errors with Event Monitoring				✓
Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares (Release Update)			✓	
Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares (Release Update)			✓	
External Services				
Edit POST, PUT, PATCH, and DELETE in HTTP Callout		✓		
Salesforce Connect				
Reuse Cached Query Results with the Amazon Athena Adapter	✓			
OData 4.01 Adapter for Salesforce Connect Enhancements	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Globalization				
Prepare for the Japanese Katakana Style Change (Release Update)				
Enable ICU Locale Formats (Release Update)		✓		
Use Current Locales for Croatia and Sierra Leone		✓		
Accelerate Translation File Exports with Language Filters		✓		
Review Updated Label Translations				
AppExchange				
Identify AppExchange Solution Types at a Glance	✓			
General Setup				
IdeaExchange Delivered: Save Time with Mass Quick Actions on Related Lists (Generally Available)			✓	
Get Improved Accessibility in List Views	✓			

Data Cloud

Manage the availability of a variety of features in your account. Enable Data Cloud objects and insights on your Contact or Lead standard or custom fields. Explore expanded record home page view customizations.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enable and Disable Data Cloud AI and Beta Features with Feature Manager	✓			
Share Data in Near Real-Time Between Data Cloud and Snowflake			✓	
Use Data Model Objects in Batch Data Transforms	✓			
Automate Batch Data Transforms	✓			
Maintain Multiple Data Sources with Multiple Output Nodes	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Connect to Data Cloud from Tableau Server with the Salesforce Data Cloud Connector	✓			
Customize Data Model Object Record Home Pages				
Get a 360-Degree View of Your Accounts				
Use Data Cloud Data to Enrich Your Data				
Use Data Cloud Related Lists to Enrich Your Contacts and Leads				
Copy Fields from Data Cloud to Enrich Your Contacts and Leads				
Choose When to Trigger Data Actions for Updated Records	✓			
Prioritize Campaigns with Waterfall Segments (Pilot)				✓
Query Segment Data via Connect Rest API	✓			
Create and List Segments in a Data Space via Connect REST API	✓			
Add New Object Permissions to Custom Permission Sets in Data Cloud			✓	
Simplify Hierarchical Data with the Flatten Transformation	✓			
Everything New Across Salesforce for Data Cloud		✓		

Development

Whether you're using Lightning components, Visualforce, Apex, or Salesforce APIs with your favorite programming language, these enhancements help you develop amazing applications, integrations, and packages for resale to other organizations.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Lightning Components				
Dynamically Import and Instantiate Lightning Web Components		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get the Latest LWC Features with Component-Level API Versioning		✓		
Use Global Color Styling Hooks to Match Color-Contrast Changes		✓		
Control Workspace Tabs and Subtabs (Beta)		✓		
Use RefreshView API with Lightning Locker		✓		
Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support		✓		
Be Aware of Base Component lightning-input Internal DOM Structure Changes		✓		
Create Custom Elements with Lightning Web Security Enabled (Beta)		✓		
Use Third-Party Web Components in LWC (Beta)		✓		
Monitor Component Events with the Custom Component Instrumentation API (Beta)				
API Distortion Changes in Lightning Web Security			✓	
Create and Manage Toast Notifications (Generally Available)		✓		
CSS Scope Tokens Are Generated with Obfuscated Strings		✓		
Fix Invalid HTML Usage to Avoid Component Errors		✓		
Access Lightning Experience Only with Supported Browsers	✓			
Get Names of Corresponding Invocable Actions in Custom Property Editors		✓		
New Features for the LWC Offline Test Harness		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
LWS Protects Static Resources in LWR Sites in Experience Cloud		✓		
Add Custom Property Editors or Property Types to Custom Lightning Web Components in Aura Sites (Beta)		✓		
Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)			✓	
Visualforce				
Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)		✓		
Apex				
Specify Custom Access Using Permission Sets for User Mode Database Operations (Developer Preview)		✓		
Set the Maximum Depth of Chained Queueable Jobs (Generally Available)		✓		
Ensure that Duplicate Queueable Jobs Aren't Enqueued		✓		
Use DataWeave in Apex to Enable Data Transformation to Different Formats (Generally Available)		✓		
View DataWeave Scripts in Setup UI		✓		
Use the Comparator Interface and Collator Class for Sorting		✓		
Iterate Within For Loops More Easily with Iterable		✓		
Monitor Async Apex Job Limit Usage		✓		
Other Improvements in Apex Compiler Messages, Setup, and Processing		✓		
Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)			✓	
getSalesforceBaseUrl() Method Is Being Deprecated		✓		
API				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use JWT-Based Access Tokens to Authenticate for REST API Calls		✓		
Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)	✓			
Packaging				
Explore the New Developer Guides for Managed Packaging		✓		
DevOps Center				
Deploy Changes Using Salesforce CLI (Beta)	✓			
Promote Confidently When Work Items Share Components		✓		
Development Environments				
Understand Changes to Sandbox License Compliance		✓		
Select Who Has Access To a Sandbox			✓	
Platform Development Tools				
Develop Platform Apps with Ease		✓		
Deploy Scalable Apps and Analyze System Performance with Scale Center			✓	
Conduct Quick, Easy, and Accurate Scale Tests with Scale Testing Service			✓	
Developer Console				
Full Apex Auto-Complete in Developer Console is Being Retired		✓		
Salesforce Functions				
Salesforce Functions Updates				✓
AppExchange Partners				
Self-Enable AppExchange App Analytics on First-Generation (1GP) and Second-Generation (2GP) Packages			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Scan Your Solution with Ease Using Salesforce Code Analyzer Visual Studio Code Extension (Beta)				
Cross-List Your Tableau Accelerator on AppExchange			✓	
Improve AppExchange Listing Discoverability with New Business Needs Categories and Subcategories			✓	
Change Data Capture				
Receive Change Event Notifications for More Objects		✓		
Platform Events				
Process Platform Events at Scale with Parallel Subscriptions for Apex Triggers (Pilot)				✓
REST Limits Response Change for Usage-Based Entitlement for Platform Events and Change Events		✓		
Streaming API Versions 23.0 Through 36.0 Are Being Retired		✓		
Event Bus				
Create Event Relays on Your Hyperforce Instance		✓		
UTAM				
Import Multiple Artifacts for the UTAM Browser Extension (Beta)		✓		
Customize the Element Highlighter for the UTAM Browser Extension (Beta)		✓		
Use the Playground to Generate UTAM Page Objects from HTML		✓		
Override UTAM Generator Output with Custom Rules		✓		

Einstein Generative AI

Supercharge your workforce efficiency with Einstein generative AI.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein Generative AI Features			✓	

Enablement and Guidance

Deliver enablement programs focused on improving revenue outcomes for your company. Guide users to curated resources that can help them excel. Bring learning, career growth, skills development, and business-critical job performance to your users where they work in Salesforce.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enablement				
Keep Your Enablement Admin and Enablement User Permissions Up to Date		✓		
Coach Sales Reps Through the Perfect Pitch			✓	
Get Deeper Insight into Milestone Progress from Enablement Analytics	✓			
Get a Clearer View of Your Progress While Taking a Program	✓			
Assign Enablement Programs to More Users with Fewer Clicks		✓		
Other Changes in Enablement		✓		
Guidance Center and In-App Guidance				
Roll Out In-App Guidance with Enablement More Easily		✓		
Find New Names for Walkthroughs Permissions		✓		
Show Salesblazer Content in the Guidance Center		✓		

Experience Cloud

Share CMS content from any workspace with your enhanced LWR site. Now all LWR sites that you create are enhanced. In other refinements to enhanced LWR, you can use Experience Builder to apply custom CSS to any component in the site, and use custom logic to apply flexible expression-based visibility rules to your components. You can also easily access and update the site's global style sheet from a new folder in DigitalExperiencesBundle. Enjoy more efficient, secure authentication into all your Experience Cloud sites, and use your sandbox org to test how disabling your site's content delivery network can affect your production org.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Aura and LWR Sites				
Share CMS Content from Any Workspace with an Enhanced LWR Site		✓		
New LWR Sites Are Now Enhanced Only		✓		
Find Components on Your LWR Site More Easily in Experience Builder		✓		
Translate Your LWR Site into More Languages		✓		
Use Quick Actions on Related Lists in Aura Sites (Generally Available)		✓		
Engage Pipeline Inspection in Salesforce PRM				
Components in Experience Builder				
Create Component Variations in Enhanced LWR Sites (Beta)		✓		
Use Custom Logic in Your Expression-Based Visibility Rules		✓		
Apply Custom CSS from the New Style Tab on Components in Enhanced LWR Sites		✓		
Display More Fields in Knowledge Search Results		✓		
Do More in LWR Sites with the Actions Bar Component (Generally Available)		✓		
View and Edit More Records Using the Record Detail Component in LWR Sites (Generally Available)		✓		
Developer Productivity				
Create Custom Property Types and Editors for Lightning Web Components in Aura Sites (Beta)		✓		
Add Global Styles More Easily in Enhanced LWR Sites		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Information About the Default Site Language in Lightning Web Components		✓		
Use Dynamic Redirect Rules in LWR Sites (Generally Available)		✓		
LWS Protects Static Resources in LWR Sites		✓		
Site Performance				
Disable Experience Cloud CDN for Enhanced Domains in Sandbox Orgs		✓		
Alert Users During Redirections from Force.com Site URLs		✓		
Respond to Chatter Email Notifications When Using an iOS Device	✓			
Mobile for Experience Cloud				
Configure Your Mobile Publisher for Experience Cloud App's URLs and Location-Based Push Notifications		✓		
Security and Sharing				
Require Sender Name and Email Address to Send Chatter Email Notifications (Release Update)			✓	
Take Advantage of New and Improved Headless Identity Features			✓	
Improve Authorization Flow Performance with JSON Web Token-Based Access Tokens (Generally Available)			✓	
Query for All File Shares with ContentDocumentLink	✓			

Field Service

AI-generated briefs keep mobile workers informed on work orders. Manage your busy team's hours with work capacity, and use a flow to help you easily move to the Enhanced Scheduling and Optimization engine. Hard-working dispatchers can create work more efficiently with the updated Gantt and user experience. Stay current on maintenance needs with a host of asset attribute functionality. Customize documents to showcase your brand. Learn what's driving Visual Remote Assistant efficiency by analyzing data on the Value dashboard.

Mobile enhancements help workers manage error-prone data entry tasks. You can also streamline workflows by creating a customized tab bar suited to how your mobile team works.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein				
Get Your Mobile Workers Up to Speed with Pre-Work Briefing			✓	
Resource Management				
Enhanced Scheduling and Optimization				
Limit Work Capacity According to Your Business Needs			✓	
Reduce System Maintenance by Running Fewer Scheduled Jobs		✓		
Efficiently Optimize Multiday Work When Using Enhanced Scheduling and Optimization			✓	
Utilize Crews Effectively by Limiting the Number of Service Resources in a Crew			✓	
Improve Your Mobile Worker Efficiency by Grouping Same Site Service Appointments			✓	
Transition Smoothly to Enhanced Scheduling and Optimization with Guided Steps			✓	
Evaluate More Candidates for Service Appointment Scheduling by Relaxing Skill Requirements			✓	
Improve Scheduling Quality with Complex Work Sliding for Multiple Resources			✓	
Crew Management				
Create and Maintain Crews More Efficiently by Filtering According to Crew Skills	✓			
Search for Service Crews and Crew Members Easily in the Crew Management Tool	✓			
Dispatcher Console				
Define Resource Absences Easily on the Gantt	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Reassign Resource Absences Effortlessly on the Gantt	✓			
Modify Resource Absences from the Gantt More Efficiently	✓			
View Overlapping Resource Absences Easily on the Gantt	✓			
Identify Candidates on the Gantt More Efficiently	✓			
Find the Best-Qualified Resources with the Skill Filter	✓			
View More Information at a Glance on the Service Appointments List	✓			
Show Week Numbers on the Gantt for Better Orientation	✓			
Reflect Scheduling Changes Quickly on the Gantt			✓	
Regulate Data Sharing with Advanced Security Settings		✓		
Create Dependencies Between Service Appointments with More Flexibility			✓	
Get Better Results from Health Check to Improve Your Field Service Configuration		✓		
Asset Management				
Proactive Services				
Leverage the Power of Field Service in Data Cloud			✓	
Shift to Proactive Maintenance with Asset Attributes			✓	
Monitor Asset Performance with Real-Time Updates	✓			
Get a Heads-Up on Maintenance Performance by Monitoring Asset Attributes			✓	
Create Recordset Filter Criteria Rules for Assets with More Flexibility	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Asset Downtime for Repairs			✓	
Asset Attributes				
Add Default Values for Attribute Definitions Easily	✓			
Secure Asset Attribute Information When Sharing Asset Records			✓	
Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)			✓	
Administration and Processes				
Create Richly Formatted Service Documents with Document Builder (Beta)		✓		
Customer Engagement				
Get Useful Information on Visual Remote Assistant with the Value Dashboard		✓		
Keep Data Safe by Limiting the Days You Retain Visual Remote Assistant Images		✓		
Increase Your Brand Awareness After a Visual Remote Assistant Session	✓			
Reduce Customer Wait Time by Offering a Visual Remote Assistant Self-Service Session	✓			
Mobile				
Save Time and Improve Accuracy by Scanning Barcodes			✓	
Reduce Workflow Friction Between Platforms	✓			
Boost Productivity with a Customized Tab Bar		✓		
Get Accurate Site Check-Ins and Check-Outs (Pilot)		✓		
Multitask Easily with Field Service Mobile for Android Tablets	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Spotlight on Field Service Content				
Simplify Setup Tasks with Landing Pages	✓			
Field Service APIs				
Identify All Matching Service Territories for a Service Appointment			✓	
Manage Repeat Visits with Recurring Appointments API		✓		

Hyperforce

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

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Access Salesforce in More Regions with Hyperforce			✓	
Migrate to Hyperforce with Hyperforce Assistant (Generally Available)			✓	
Salesforce Object ID Is Refined to Use Three Characters for Server IDs (Release Update)			✓	

Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Outcome Management and Context Service are now generally available. Improve engagement with stores and plan better promotions with Consumer Goods Cloud. Financial Services Cloud can now organize both internal and external data better with Data Cloud. Track grant recipients' budgets with Grantmaking. Health Cloud can now bring its CRM data into Marketing Cloud with Marketing Cloud Engagements. Automate and improve warranty claim adjudication processes with Manufacturing Cloud. Plan your company's social impact with materiality assessments in Net Zero Cloud. Manage the end-to-end lifecycle of contracts with Salesforce Contracts. We also have plenty of changes for Education Cloud, Nonprofit Cloud, Media Cloud, Industries common features, and many more.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Automotive Cloud				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Track Fleet Operations with Ease			✓	
Quickly Transfer Your Vehicles to Dealer Locations			✓	
Automatically Adjudicate Warranty Claims for Vehicles and Parts			✓	
Adjudicate Vehicle and Part Warranty Claims Swiftly by Using Predicted Claim Approval Scores			✓	
Automatically Extract Data from Documents to Update and Verify Records in Automotive Cloud	✓			
Get Meaningful Insights Into Dealer Claims			✓	
Enhance Outreach Activities with Actionable List Enhancements in Automotive Cloud	✓			
Show Engagement Events from Data Cloud on Automotive Timelines	✓			
Watch Automotive Cloud Videos	✓			
New and Changed Objects in Automotive Cloud			✓	
Connect REST APIs				
New Connect REST API Resources		✓		
Communications Cloud				
Consumer Goods Cloud				
Retail Execution				
Place Orders Efficiently	✓			
Add Custom Attributes in Penny Perfect Pricing Calculation	✓			
Enhance Promotion Planning and Execution	✓			
Easily Share Attachments in Consumer Goods Cloud Offline Mobile App	✓			
Analyze the Trend and Effectiveness of Promotions	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
IdeaExchange Delivered: Preview Signatures in the Print Layout	✓			
Additional Permissions for Sales Org	✓			
Optimize the Settings of Your Mobile Synchronization		✓		
Allow Bluetooth Permissions for Consumer Goods Cloud Offline Mobile App in Android Devices	✓			
Increase User Satisfaction Through Enhanced Accessibility	✓			
Trade Promotion Management				
Improve Performance of Promotions By Predicting the Sales Uplift Volume				
Easily Identify Custom Periods by Using Custom Labels				
Choose the Best Scenario for Your Customer Business Plan				
Understand the Calculations Behind Your Promotion's Profit and Loss				
Export Key Performance Indicator Grids Using APIs				
Gain Valuable Insights with Better Visibility into Bill of Material Products and Components				
Add Product Attributes in Real-Time Reports				
Use Real-Time Reports More Intuitively				
Get Intelligent Document Reader with Trade Promotion Management			✓	
Updates for Permission Sets				
Increase User Satisfaction Through Enhanced Accessibility				
Model Mobile App with Visual Studio Code Based Modeler for Consumer Goods Cloud	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improve Customer Satisfaction with Sales Excellence	✓			
Achieve Better Performance and Error Handling of Automation	✓			
Consumer Goods Cloud Videos	✓			
New and Changed Objects		✓		
New and Changed Metadata Types		✓		
Energy and Utilities Cloud				
Financial Services Cloud				
Actionable Segmentation				
Actionable List Members				
List Builder for Data Cloud Segments				
Transaction Dispute Management				
Streamline the Dispute Intake Process with Transaction Dispute Management	✓			
Service Process Automation				
Service Process Studio for Financial Services Cloud		✓		
Self-Service Capabilities in Financial Services Client Portal				
Discovery Framework Enhancements				
Financial Goals				
Work with Financial Goals			✓	
New Connect REST API Resources		✓		
Integrated Onboarding				
Get Started with Customer Onboarding Faster			✓	
Streamline the End-to-End Document Approval Lifecycle	✓			
Other Enhancements in the Financial Services Cloud				
Organize Interaction Records With Topics			✓	
Find Changed Financial Deals at a Glance	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Financial Services Cloud Documentation Changes				
Financial Services Cloud Admin, Installation, Quick Start, and Upgrade Guides				
Actionable Relationship Center and Compliant Data Sharing Documentation Moved to Industries Common Features Guide	✓			
New and Changed Financial Services Cloud Object Fields				
Grantmaking				
Enter Actual Budget Used in Experience Cloud			✓	
Add Budget Component to a Custom Experience Cloud Site			✓	
Share Grantmaking Records with Compliant Data Sharing			✓	
New Objects and Fields in Grantmaking			✓	
Health Cloud				
Actionable Relationship Center Enhancements				
Show Upward Account Hierarchy in an ARC Graph		✓		
Easily Set Up Flexible Anchor Nodes in ARC Graphs	✓			
Render Flexible ARC Relationship Graphs			✓	
Keep Track of the Anchor Node From Any Point in the ARC Graph		✓		
Advanced Therapy Management Enhancements				
Provide a Transparent Tracking Process Using Custody Management			✓	
Easily Customize Custody Records by Using Decision Tables			✓	
Track History of the Changes to Custody Records		✓		
Create Customized Field Lists By Using Decision Tables			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Configure Realistic Lead Times By Using Steps Within a Work Type			✓	
Optimize Site Utilization with Territory Prioritization Rules			✓	
Create User Groups in Care Teams			✓	
Access Advanced Therapy Management From Experience Cloud			✓	
Represent Steps Within a Therapy Stage with Work Type Steps		✓		
Configure Lead Time In Hours		✓		
Assessments Enhancements				
Save Time and Effort with Sample Healthcare Assessments			✓	
Behavioral Health				
Manage Care More Easily by Using the Behavioral Health App			✓	
Crisis Support Center Management Enhancements				
Add Social Determinants of Health to Cases			✓	
Expose Crisis Support Center Management to Experience Cloud Sites			✓	
Communicate with Clients by Using SMS and Web Chat			✓	
Help Patients Receive Timely Care with the Create Referral Flow			✓	
Request Facility Admins to Update Bed Availability and Confirm Beds for Referrals			✓	
Create Follow-Up Lists by Using Actionable Segmentation			✓	
Quickly Configure Crisis Support Center Management with the Updated Guided Setup		✓		
Healthcare Provider Enhancements				
Track More Information About Healthcare Providers			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Upload Photos of Healthcare Providers			✓	
Home Health Enhancements				
Improve Patient Health Outcomes With Effective Medication Management Services			✓	
Streamline Patient Care With Enhanced Care Plans			✓	
Get Accurate Tracking and Recent Visit Information With Electronic Visit Verification Capabilities			✓	
Enhance Operational Efficiency with Automatic Verification of Patient Eligibility			✓	
Visualize Scheduled Visits With a Single Click			✓	
Get the Latest Visit Count With a New Flow			✓	
Reduce Scheduling Time by Using Care Professional Recommendations			✓	
Get More Information with the Updated Guided Setup for Home Health			✓	
Enhance Home Healthcare Service Efficiency			✓	
Integrated Care Management Enhancements				
Access Integrated Care Management from App Launcher	✓			
Identify Gaps in Patient Care by Using Care Gaps			✓	
Create Care Gaps by Evaluating Clinical Measures			✓	
Create Care Plans from Care Gaps by Using an OmniScript Flow			✓	
View Care Gaps by Using the Enhanced Care Plan Interface			✓	
Enhance Assessment Question and Response Mapping with Updated Decision Tables			✓	
Expose Care Gaps to Experience Cloud Sites			✓	
Intelligent Document Automation Enhancements				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Set Up Intelligent Document Workspace More Easily			✓	
Intelligent Sales Enhancements				
Track the Status of Sales Agreements with Path		✓		
Search for Product Inventory in a Larger Radius	✓			
Support Intelligent Sales Operations With Actionable Relationship Center			✓	
Marketing Cloud Engagement for Health Cloud				
Increase Patient Engagement by Using Marketing Cloud Engagement for Health Cloud			✓	
New Shield Platform Encryption for Health Cloud				
Encrypt Consent and Healthcare Provider Data			✓	
Referral Management				
Automate Referrals with the Create Referral Flow			✓	
Create a Referral in the Provider Portal			✓	
Track Accepted Referrals			✓	
Transform Inbound Documents into Referrals			✓	
Health Cloud Has New and Changed Objects		✓		
New and Changed Invocable Actions in Health Cloud		✓		
New and Changed Health Cloud Metadata Types		✓		
Connect REST APIs				
New Connect REST API Resources		✓		
Industries Order Management				
Insurance				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Manufacturing Cloud				
Automation of Warranty Claims Adjudication				
Validate Claims Quickly and Accurately by Using Complex, Extensible Business Rules			✓	
Create Warranty Claims Adjudication Rules with Greater Flexibility and Ease			✓	
CRM Analytics for Warranty Lifecycle Management				
Set Up CRM Analytics for Warranty Lifecycle Management Easily			✓	
Manage Your Warranty Claims More Efficiently			✓	
Adjudicate Product Warranty Claims Swiftly by Using Predicted Claim Approval Scores			✓	
Track Order Recalls and Returns for a Sales Agreement			✓	
Track the Stakeholders in an Asset's Lifecycle			✓	
Get Visibility Into Your Manufacturing Fleet Operations			✓	
Visualize Account Hierarchies by Using Actionable Relationship Center in Manufacturing Cloud			✓	
Save Time and Resources by Automatically Extracting Information from Documents in Manufacturing Cloud			✓	
Build Trusted Relationships with Prospects by Using Actionable List Member Enhancements in Manufacturing Cloud	✓			
Improve Information Visibility by Showing Engagement Events on Timelines in Manufacturing Cloud	✓			
Drive Targeted, Personalized Engagement with Prospects Using List Builder for Data Cloud			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Visualize Your Data Processing Engine Definitions and Debug Them Easily in Manufacturing Cloud			✓	
New and Changed Objects in Manufacturing Cloud			✓	
Media Cloud				
Loyalty Management				
Perform Loyalty Actions from POS System with Loyalty Management POS API			✓	
Generate Targeted Members Lists with Minimal Fuss			✓	
View Vouchers of a Contact		✓		
Watch Loyalty Management Videos	✓			
Net Zero Cloud				
Allocate Energy Attribute Credits to Manage Renewable Energy	✓			
Conduct Materiality Assessments	✓			
Copy Disclosure Responses from Previous Years	✓			
Include More Data in Social and Governance Reports	✓			
Enhance Carbon Accounting with Custom Fuel Types	✓			
Manage Emissions Factors from Net Zero Marketplace	✓			
Load Document Data to Net Zero Cloud Objects with Intelligent Document Reader	✓			
Improve Decarbonization Strategy with Programs and Outcome Management	✓			
Generate an ESRS Report with the Disclosure and Compliance Hub Template			✓	
CRM Analytics for Net Zero Cloud				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Set Up Net Zero Analytics Easily			✓	
Take Educated Sustainability Actions Based on Impact Analysis of Specific Forecasted Emissions			✓	
Plan More Impactful DEI Initiatives with Pay Gap and Representation Insights			✓	
New and Changed Objects for Net Zero Cloud	✓			
Metadata API		✓		
OmniStudio Document Generation				
Outcome Management				
Track Desired Outcomes and Efforts That Move the Needle			✓	
Get a Holistic View of How Outcomes Contribute to Success			✓	
Measure the Work You Do to Affect Change			✓	
Track Interim and Final Results			✓	
Get a Comprehensive View of Your Impact Strategy			✓	
Watch Outcome Management Videos			✓	
New Objects and Fields for Outcome Management			✓	
Program Management				
New Connect REST APIs		✓		
Public Sector Solutions				
Quickly View Contextual Data in Actionable Relationship Center Graphs			✓	
Refer Constituents to Appropriate Service Providers and Track Service Delivery			✓	
Use Dynamic Assessments with More Objects, Including Custom Objects		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Process Benefit Applications Efficiently by Using a Guided Flow			✓	
Easily Manage Evidence in Cases and Case Proceedings			✓	
Capture Service Requests for More Scenarios by Using Service Process Studio			✓	
Give Caseworkers a Complete Provider Search Experience			✓	
Easily Split Party Relationship Groups by Using a Guided Workflow			✓	
Simplify Access to Information by Aggregating and Associating Records from Unrelated Objects			✓	
Set Up the Complaint Intake Guided Flow Quickly with Out-of-the-Box Components			✓	
Track Actual Budget Spent in an Experience Cloud Grantmaking Site and Share Records Using Compliant Data Sharing			✓	
Consolidate Financial Data with Your Accounting System by Using Accounting Subledger			✓	
Enhance Your Constituent Impact Strategy by Using Outcome Management			✓	
New and Changed Objects in Public Sector Solutions			✓	
PublicSectrSltn Namespace				
Rebate Management				
CRM Analytics for Rebate Management				
Set Up Rebate Analytics Easily			✓	
Optimize Partner Value by Analyzing Your Ship and Debit Programs			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Increase Scalability of Your DPE Definitions with a Custom Node (Generally Available)			✓	
Salesforce Contracts				
Salesforce for Education			✓	
Salesforce for Nonprofits			✓	
		Industries Common Features		
Actionable List Members				
Narrow Down on Prospects Easily and Save Time by Using Filters	✓			
Get Valuable Insights on Prospects and Make Smarter Business Decisions Using KPI Bar	✓			
Optimize the Workload of Agents by Assigning Prospects to Service Cloud Queues	✓			
Boost Your Efficiency by Automating the Assignment of New Prospects in an Actionable List to Agents	✓			
Changed Objects in Actionable List Members		✓		
Connect REST APIs		✓		
Actionable Relationship Center				
Quickly View Contextual Data in Actionable Relationship Center Graphs			✓	
Actionable Segmentation				
Personalize the List Creation Experience by Customizing Display Columns	✓			
Add Latest Matching Records to Get Updated Actionable Lists	✓			
Add Members to Actionable Lists Efficiently with a Quick Action	✓			
Get an Enhanced View of Data in List Builder by Using Aggregated Fields		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Get Up and Running with Actionable Segmentation by Using Guided Setup			✓	
Actionable Segmentation Videos		✓		
New Objects		✓		
Metadata API		✓		
Batch Management				
Filter Batch Job Records with In and Not In Operators		✓		
Filter Batch Job Records with Date Literals		✓		
Business Rules Engine				
Use Attributes from Context Definitions as List Variables in Expression Sets	✓			
Work with List Variables Easily Using List Groups and Filters	✓			
Easily Configure Complex Calculations with List Functions	✓			
Provide Inputs to Lookup Tables in Bulk	✓			
Decision Explainer Enhancements for Expression Sets				
Fourfold Increase in the Number of Active Decision Tables Per Org	✓			
Use Multiple Objects as Data Sources for Decision Table Creation	✓			
Create Decision Tables with 10 Times More Rows	✓			
Easily Maintain Decision Tables by Categorizing Them	✓			
Easily Filter Decision Table Results by Choosing Your Filter Preference	✓			
Create Expression Sets by Using Additional Data Type and Functions	✓			
Use Decision Tables with More Data Types in Expression Set Versions	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Create Decision Tables with More Input Columns	✓			
Export Decision Matrix Versions to DMN Files from Decision Matrix Builder	✓			
Effortlessly Map Lookup Table Variables to Expression Set Resources	✓			
Other Changes in Business Rules Engine	✓			
New and Changed Business Rules Engine Objects		✓		
New and Changed Business Rules Engine Tooling API Objects		✓		
New and Changed Business Rules Engine Metadata Types		✓		
Connect REST APIs		✓		
Context Service (Generally Available)				
Access Data by Using Context Service			✓	
Create Context Definitions			✓	
Map Context Definitions to Data Sources			✓	
Retrieve and Deploy Context Data to Applications and Database			✓	
Invoke Build Context from Flows			✓	
Invoke Persist Context Data from Flows			✓	
Cross Org Migrations			✓	
New Objects in Context Service			✓	
Data Processing Engine				
Build Definitions Faster with the New Node Canvas		✓		
See Which Nodes Reference Each Other in a Definition		✓		
Transform Data with Data Cloud		✓		
View Failed Writeback Records for Troubleshooting		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Changed Data Processing Definition Objects		✓		
Changed Data Processing Engine Tooling API Objects		✓		
Metadata API		✓		
Discovery Framework Enhancements				
Quickly and Easily Identify the Documents to Upload for an Assessment			✓	
New Connect REST API Resources		✓		
Engagement				
Changed Objects		✓		
Industry Integration Solutions				
Easily Access Multiple Industry Cloud Integrations			✓	
Connect an Integration to Multiple External Systems			✓	
Reenable Failed Integration Instances			✓	
Remove Unwanted Integration Instances			✓	
View Integrations in MuleSoft Automation Services			✓	
Use Third-Party Connectors to Connect to External Systems			✓	
Intelligent Document Reader				
Get Intelligent Document Reader with More Industries Clouds			✓	
Watch the Set Up Intelligent Document Reader Video			✓	
Connect REST APIs			✓	
DocumentReader Namespace				
List Builder for Data Cloud Segment				
Improve Customer Satisfaction by Personalizing Engagement with Your Prospects Using List Builder for Data Cloud Segment	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Service Process Studio				
Define Service Processes with More Relevant Data		✓		
Get Started Quickly with the Transaction Dispute Template		✓		
New Connect REST API Resources		✓		
Timeline				
Show Engagement Events on Timeline to Improve Visibility and Facilitate Personalized Engagement	✓			

Marketing Cloud Account Engagement

Make your Engagement Studio programs more precise with wait times less than a day. Copy assets from sandbox to production business units with API V5 for Flow, and free up system bandwidth by removing old visitor activity records.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
General Enhancements				
Restrict Which Domains Can Display Account Engagement Assets			✓	
Chart Historical Prospect Changes by Feature	✓			
Restore a Paused Prospect by Deleting Their Visitor Records		✓		
Design Engagement Programs with More Precise Wait Times	✓			
Update Email Templates with Invalid Senders	✓			
Remove Unconverted Visitor Activity Records		✓		
APIs and Integrations				
Account Engagement API: New and Changed Items		✓		

Mobile

Salesforce Mobile App Plus now supports searching Briefcase for records, more easily accessible swipe actions on the Landing Page, list filters on the Landing Page, and quicker address configuration. Define your Mobile Publisher for Experience Cloud app's default URL behavior and location-based permissions and push notifications. Use Briefcase Builder to apply custom metadata types to your mobile workforce's offline record experience.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Mobile App				
Everything That's New in the Salesforce Mobile App				
Get Better Widget Navigation with Single-Click Interactions	✓			
Update CRM Analytics Dashboards Automatically	✓			
Share Reports Anytime, Anywhere	✓			
Do More with Enhanced Offline Landing Page Features			✓	
Search Your Briefcase for Offline Records				
Offline App Onboarding Wizard Is Generally Available				
Attach Images to Records While Offline				
Enable Dynamic Forms on Mobile (Generally Available)			✓	
Mobile Publisher				
Set the Default Method for How Your Mobile Publisher for Experience Cloud App Opens URLs		✓		
Define Your Experience Cloud App's Location-Based Permissions and Push Notifications		✓		
Update Your Device to iOS 15 or Later for Experience Cloud Apps		✓		
Briefcase Builder				
Customize the Offline Record Experience with Custom Metadata Types			✓	

Revenue

Roll out Subscription Management quoting features selectively, without disrupting existing business processes. Give reps a centralized and consolidated view of assets for an account, and control order product conversion to assets. Salesforce CPQ now supports only standard quotes, and the Lightning Web Component rich text editor replaced CKEditor.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Subscription Management				
Use Your Existing Quotes Alongside Subscription Management Quotes			✓	
Visualize Data for Both Standalone and Bundled Assets			✓	
Control When Order Products Are Converted to Assets			✓	
Price Adjustment Tier Object Tier Type Values Were Changed	✓			
Annual Label Is Now Years	✓			
Increase Partner Engagement With Partner Discounting	✓			
Accessibility of the Collections User Interface Was Enhanced	✓			
Salesforce CPQ				
The Edit Web Quote and Generate Web Document Functionality Was Retired	✓			
Minimize Security Vulnerabilities in Quote Term Editor with LWC Rich Text Editor	✓			
Use OmniStudio Features with Salesforce CPQ+	✓			

Sales

Supercharge your sales teams with fresh insights and enhanced productivity features in Winter '24. Einstein Conversation Insights users can now create call summaries with one click thanks to Einstein. In Pipeline Inspection, see if the right people are involved in deals to help sales reps win. Get a detailed history of changes to opportunity splits, opportunity product splits, and teams to ensure accuracy, and that sales team members are correctly compensated. In Enablement, jump-start your sales teams with all the product and process knowledge needed to quickly open opportunities, close deals, and help achieve your company's revenue outcomes.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Sales Basics				
Visualize Customers and Prospects on a Map			✓	
Opportunities				
IdeaExchange Delivered: Ensure Accurate Sales Compensation with Audit History for Splits and Opportunity Teams			✓	
Optimize Your Users' Opportunity Product Splits View with Custom Fields			✓	
Contacts				
See Which Contacts Need Attention and Take Action Directly from Contact Home	✓			
Leads				
See Which Leads Need Attention and Take Action Directly from Lead Home	✓			
Activities				
Do More in To Do Lists	✓			
Sales Engagement				
Manage Cadence Targets When Einstein Insights Occur	✓			
Set Up Sales Engagement Features More Easily	✓			
Discover Quick Cadences and Email Productivity Features in More Editions			✓	
Accelerate Sales Cycles with a Buyer Assistant (Generally Available)			✓	
Save Time by Creating Call Scripts and Email Templates with Quick Cadences	✓			
Save Time by Working with More Cadence Targets Simultaneously	✓			
Cadence Wait Steps Are Being Retired	✓			
Einstein Conversation Insights				
Create Call Summaries Powered by Einstein	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Review Calls with Ease	✓			
Match More Related Records Automatically	✓			
Share Conversation Data with Users with Call Access	✓			
Use Improved Transcripts for Voice and Video Calls	✓			
Other Changes to Einstein Conversation Insights	✓			
Revenue Intelligence				
Monitor the Health of your Sales Engine	✓			
Explore Sales Scenarios with the Commit Calculator	✓			
Understand How your Products Sell in Different Segments	✓			
Upload Quota Data to Revenue Intelligence	✓			
Find Data More Quickly with the Updated Einstein Account Management App	✓			
Track Historical Changes in Formula Fields	✓			
Pipeline Inspection				
Keep Deals Moving by Involving the Right People	✓			
Speed Through Your Opportunities with a Revamped Pipeline Inspection Page	✓			
Edit More Fields Inline in Pipeline Inspection	✓			
Get Pipeline Inspection Opportunity Detail and Insights in Collaborative Forecasts	✓			
Track Performance with Pipeline Inspection in Salesforce Partner Relationship Management		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Collaborative Forecasts				
IdeaExchange Delivered: Improve Sales Forecast Accuracy with Manager Judgments			✓	
Get More Insight About Opportunities in Sales Forecasts	✓			
Discover a Refreshed Forecasts Page	✓			
Round Forecast Amounts for More Streamlined Forecasts	✓			
Enablement for Sales Teams				
Find Out What's New for Enablement			✓	
Partner Relationship Management				
Get Up and Running Fast with PRM for Slack Unified Setup		✓		
Unite Salesforce and Slack with Expanded Object Support		✓		
Focus on Key Sales Metrics, AI Insights, and Opportunities to Close More Deals		✓		
Sales Performance Management				
Territory Planning				
Plan Territories by Country	✓			
Import Assignments Regardless of Boundary Versions	✓			
Match Attribute Fields Automatically	✓			
Update Territory Names and Centers in Bulk	✓			
Salesforce Maps				
Plan Visits Using Addresses Formatted for Your Locale	✓			
Enhanced Domains and Salesforce Maps Products			✓	
Sales Cloud Einstein				
Personalize Sales Emails with Einstein Generative AI for Sales			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Include Product Info in Sales Emails with Einstein Generative AI			✓	
Spot Forecasting Trends Faster	✓			
Einstein Account Insights and Opportunity Insights Are Being Retired	✓			
Sales Cloud Everywhere				
Follow Up on Companies of Interest with Contextual Insights			✓	
See Your Data Your Way in Workspace	✓			
Integration with Other Products				
Salesforce for Outlook				
Salesforce for Outlook Is Retiring in June 2024		✓		
Lightning Sync for Google			✓	
Einstein Activity Capture				
IdeaExchange Delivered: See Activities Captured by Einstein in Standard Reports			✓	
Address Connection Issues Quickly with Notifications		✓		
IdeaExchange Delivered: Sync Recurring Events from Google to Salesforce		✓		
Find Users' Onboarding Status and Connection Metrics in One Place		✓		
Hide Integrated Calendars From the Calendars Tab		✓		
Salesforce Meetings				
Meeting Studio Is Being Retired	✓			
Email Experience				
Discover Email Productivity Features in More Editions			✓	
Retrieve Inbound or Outbound Email Logs		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Retrieve Email Logs Based on the Mail Event		✓		
Capture More Details of Email Deliverability		✓		
Salesforce Inbox				
Inbox Mobile App	✓			
Inbox Mobile is Being Retired				
Other Changes in the Sales Cloud				
Enable New Order Save Behavior (Release Update)			✓	
Social Accounts, Contacts, and Leads Is Being Retired			✓	

Salesforce CMS

Find details for CMS content and translation export and import on the new Export & Import status tab. Publish content from CMS workspaces to enhanced sites and public channels. In enhanced CMS workspaces, prevent users from unpublishing content with dependencies. Assign workflows by content type, and automatically publish or unpublish content.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Find Export and Import Content and Translation Details on the New Status Tab	✓			
Publish Content from CMS Workspaces to Enhanced LWR Sites	✓			
Prevent Users from Unpublishing Content with Dependencies in Enhanced CMS Workspaces	✓			
Assign Workflows by Content Type and Automatically Publish or Unpublish Content		✓		
View File Type and Size in CMS Content Details Summary	✓			
Change Permission Sets for a Restricted CMS Channel	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Navigate to Enhanced CMS Content Folders from the Content Detail Page	✓			
Find Enhanced CMS Content Seamlessly with Search Suggestions		✓		

Salesforce Flow

Compose intelligent workflows with Flow Builder, OmniStudio, and Flow Orchestration. Integrate across any system with Flow Integration.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Flow Integration			✓	
Flow Builder				
Flow Builder Updates				
Build Screen Flows with Reactive Components (Generally Available)		✓		
IdeaExchange Delivered: Create Custom Error Messages in Record-Triggered Flows		✓		
Send Salesforce Data to an External Server Without Code via HTTP Callout (Generally Available)		✓		
Transform Your Data in Flows (Beta)		✓		
Create Autolaunched Flows Based on Data Changes in Data Cloud		✓		
Save the Progress of Your Flow as You Build		✓		
Screen Flow Components Retain Values After State Changes	✓			
Refresh Values Between Screens for More Components		✓		
Get Data Cloud Records More Easily in Flow Builder		✓		
Find Flow Resources More Easily in Create Records Elements		✓		
Use Wait Elements in More Types of Flows		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Advanced Pause Element Is Now Named Wait for Conditions		✓		
Flow Trigger Explorer				
Use Filters to Find Record-Triggered Flows Quickly		✓		
Flow Runtime				
Flow and Process Run-Time Changes in API Version 59.0		✓		
Flow Management				
Migrate Workflow Rules with Pending Time-Based Actions to Flow		✓		
Migrate Process Builder Processes with Custom Metadata in Formulas to Flows		✓		
Migrate More Workflow Rules to Flow with Increased Flow Limits		✓		
Some Graphs Are No Longer Available in Automation Home		✓		
Flow Extensions				
Flow and Process Release Updates				
Prevent Guest User from Editing or Deleting Approval Requests (Release Update)			✓	
Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)			✓	
Disable Access to Session IDs in Flows (Release Update)			✓	
Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)			✓	
Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)			✓	
Make Paused Flow Interviews Resume in the Same Context (Release Update)			✓	
Restrict User Access to Run Flows (Release Update)			✓	
Flow Orchestration				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Control Execution of Orchestration Stages and Steps with Requirements		✓		
Extend Flow Orchestration Objects		✓		
Other Improvements		✓		
OmniStudio and OmniStudio for Vlocity				
OmniStudio		✓		
OmniStudio Minor Release Updates		✓		
OmniStudio for Vlocity		✓		

Security, Identity, and Privacy

Enhanced domains are enforced. Help your users move to your new URLs and prepare for the end of some redirections. Multi-factor authentication auto-enablement is in effect for the third phase of orgs. Develop local or 2GP packageable external client apps. Expand your Headless Identity implementation with passwordless login, identity for guest users, and improvements to headless registration. Monitor login IP ranges and tenant license usage details with more metrics. View what instance your tenants are running on. Get to know the new Privacy Center app. Configure external credentials for server-to-server integration using OAuth 2.0 client credentials or JWT authentication protocols. Assign the new Manage Named Credentials permission so that users can modify named credentials and external credentials. And manage group membership changes and insufficient access attempts with the new Group Membership Event and Insufficient Access Event types.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Salesforce Backup				
Backup and Restore Is Now Salesforce Backup			✓	
Back Up and Restore More Data			✓	
Export Data from a Backup			✓	
Domains				
Deploy Enhanced Domains (Release Update)			✓	
Notify Users During My Domain Redirections		✓		
Prepare for the End of Some My Domain Redirections		✓		
Manage My Domain Redirections		✓		

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Use Partitioned Domains in More Orgs		✓		
Verify Custom Domain Configuration During Setup		✓		
Determine Your Recommended Custom Domain Configuration Option		✓		
Other Domain Changes		✓		
Identity and Access Management				
MFA Auto-Enablement Continues: Find Out When and How Your Org Is Affected (Release Update)		✓		
Update U2F Security Keys to Support WebAuthn Authentication	✓			
SMS Identity Verification Is No Longer Available in Free Salesforce Orgs		✓		
Verify Email Addresses to Send Email Through Salesforce		✓		
Create and Distribute External Client Apps			✓	
Identity Connect 3.0.1.2 Security Patch Is Being Removed			✓	
Streamline the Login Experience in Headless Apps			✓	
Understand What Makes Your Users Tick with Guest User Identity			✓	
Simplify Your Setup with a Headless Registration Handler Template			✓	
Secure Your Headless Identity Implementation with reCAPTCHA Enterprise			✓	
Customize the Email Template for Headless Registration			✓	
JSON Web Token (JWT)-Based Access Tokens Are Now Generally Available				
Improve Authorization Security with the Proof Key for Code Exchange (PKCE) Extension			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enjoy Improved Guidance for Headless Identity and OAuth Settings		✓		
Session Timeout Popup Is Updated	✓			
Updated Hover Text Label for Client Credentials Flow Is Available in Japanese				
Mutual Authentication Is Now Enforced For API Login Requests		✓		
Named Credentials				
Authenticate Named Credential Callouts with Client Credentials Flow	✓			
Use JWT Authentication Protocol with Named Credentials	✓			
Grant Permission to Manage Named Credentials and External Credentials			✓	
Grant Guest Users Access to Make Callouts Using Named Credentials			✓	
Access Public Information with No Authentication Protocol	✓			
Security Health Check				
Evaluate Your Experience Cloud Site Security		✓		
Privacy Center				
Privacy Policies on Core		✓		
Privacy Center App		✓		
Privacy Holds for Sensitive Data		✓		
Encrypt Sensitive Data			✓	
Salesforce Shield				
Event Monitoring				
Get Information About Public Group and Queue Membership Changes				✓
IdeaExchange Delivered: Get Information About Insufficient Access Errors				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
See More Informative Column Header Log Data			✓	
Spot Event Monitoring Analytics App Datasets with User Ids			✓	
Enjoy Efficient Dataset Updates in the Event Monitoring Analytics App (Generally Available)			✓	
View Knowledge Article Event Data in Event Monitoring Analytics Apps			✓	
Shield Platform Encryption				
Connect to Third-Party Key Stores with External Key Management			✓	
Encrypt Consent Data			✓	
Encrypt Healthcare Provider Data			✓	
Manage Keys More Easily with an Improved UI			✓	
Encrypt Inputs for Flow Orchestration Work Items			✓	
Security Center				
Customize Security Center Tenant Name		✓		
View Tenant Instance Names in Security Center		✓		
Get Insight Into License Usage Information for Tenants		✓		
Monitor Login IP Ranges		✓		
Other Changes				
Allow Only Trusted Cross-Org Redirections (Release Update)			✓	
Secure Access to Your Users' Camera and Microphone		✓		
Protect More Users from Clickjacking		✓		
Secure Cross-Cloud Integrations with Private Connect Across the Globe	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Enjoy a Modernized CA-Signed Certificate Page			✓	

Service

Check out new features that enable customer service agents to work faster and more productively across customer service channels.

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Einstein for Service				
Einstein Article Recommendations				
Get AI-Drafted Email Responses Based on a Knowledge Article (Pilot)				✓
Einstein Bots				
Answer FAQs with Article Answers AI (Generally Available)		✓		
Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model (Beta)		✓		
Route Conversations to an Enhanced Bot with Fewer Clicks			✓	
Get Your Bot Ready for Launch with the Enhanced Bot Audit			✓	
Ask Questions with Static Options with an Enhanced Bot			✓	
Customize an Enhanced Link with Dynamic Input			✓	
Create and Share Your Own Custom Bot Templates (Generally Available)		✓		
Build Bots Faster with Bot Blocks (Generally Available)		✓		
Add Permission Sets to Your Custom Templates and Blocks			✓	
Reach More Customers with Multi-Language Support for Custom Templates and Blocks			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Grow Your Einstein Bot Portfolio with New Templates and Blocks			✓	
Read in Right-to-Left Languages in the Bot Builder		✓		
View Standard Bot Reports in the Winter '24 Folder		✓		
AnalyticsBotSession Object Was Removed		✓		
Run Flows in Bot User Context (Release Update)			✓	
Einstein Classification				
Close Cases Faster using Einstein Work Summaries with Generative AI(Generally Available)			✓	
Bring Agents and Supervisors Up to Speed with Mid-Conversation Summaries			✓	
Einstein Conversation Mining				
Get Service Insights and Build Bot Intents with Einstein Conversation Mining (Generally Available)		✓		
Include Email Conversations When You Build Your Conversation Mining Reports (Generally Available)		✓		
Einstein Reply Recommendations				
Optimize Agent Productivity and Response Quality with Einstein Service Replies (Generally Available)			✓	
Save Agents Time and Improve Accuracy with Grounded Einstein Service Replies (Generally Available)			✓	
Einstein for Service Grounding				
Ground Einstein for Service in Your Company's Data (Generally Available)			✓	
Service Intelligence				
Reduce Costs and Improve Operations with Service Intelligence				

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Monitor Your Service Operations with Case Dashboards			✓	
Improve Agent Performance with Omni-Channel Dashboards			✓	
See Top Customer Requests with Einstein Conversation Mining Dashboards			✓	
Let Agents See Their Caseloads with My Performance Dashboards			✓	
Feedback Management				
Capture Feedback as Records with Survey Invitation Field Data	✓			
Stay on Top of Survey Responses by Receiving Custom Notifications	✓			
Enhance Rating Surveys with New Icons	✓			
Increase Engagement with More Detailed Survey Invitation Emails	✓			
Create a Salesforce Feedback Management Pre-Release Trial Org	✓			
Service Catalog				
Set Your Catalog Settings Effortlessly			✓	
View and Manage Your Catalog Easily in a Central Hub			✓	
Learn How to Manage Your Catalog			✓	
Learn How to Use Catalog Fulfillments			✓	
Open Your Service Catalog to Partners and Customers			✓	
Provide Customers Quick Access to Your Featured Catalog Items (Beta)			✓	
Show Your Customers the Details of a Catalog Item			✓	
Add Data Categories to Your Service Catalog Site			✓	
Enhance Your Customers' Service Catalog Experience with Item Search			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Incident Management				
Share Incident Updates Based on a Product		✓		
Keep Broadcast Slack Messages Data Up to Date	✓			
Get the Improved Incident Management Experience	✓			
Swarming				
Catch Up on Service Cloud for Slack App Features			✓	
Channels				
Email				
Transition to the Lightning Editor for Email Composers in Email-to-Case (Beta) (Release Update)		✓		
Use Enhanced Quick Text with Service Email		✓		
The Ref ID Format for Email-to-Case Changed			✓	
The Message-ID Format for Email Alerts Changed		✓		
Multiple Links to a Single Email Attachment Are No Longer Shown		✓		
Messaging				
Send Automated Notifications with the Send Conversation Messages Action			✓	
Initiate Conversations in Enhanced Messaging Channels and Messaging for In-App			✓	
Set Multi-Language Keywords and Responses in Messaging for In-App and Web			✓	
Send Messaging Components More Easily	✓			
Transfer Messaging Sessions Faster	✓			
Navigate a High Volume of Quick Texts	✓			

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Message with Customers in Right-to-Left Languages			✓	
Send Secure Forms in Messaging Sessions			✓	
Build Trust with Customers by Presenting Terms and Conditions in Pre-Chat			✓	
Customize Your Pre-Chat Form with Lightning Web Components			✓	
Clone Your Messaging for In-App Deployment				
Launch the Web Chat Client Using an API				
Other Improvements to Messaging				
Voice				
Improve Customer Service and Agent Training with Conversation Sentiment Analysis	✓			
Listen In to an Amazon Connect Voice Call through Salesforce			✓	
Keep Your Amazon Contact Center Running 24/7 with Disaster Recovery			✓	
Check Voice Channel Performance with More Metrics (Generally Available)			✓	
Resolve Setup Issues Quickly with Self-Service Checks (Generally Available)		✓		
Enable Record Types on Voice Calls to Support Different Business Processes			✓	
Track Disconnect Reasons on Voice Calls			✓	
Send Calls to the Most Qualified Agents with Skills-Routing (Pilot)			✓	
Migrate an Existing Salesforce Contact Center Created from an XML Import		✓		
Automate Actions Based on Intelligence Signals from Partner Systems			✓	
Get Agents Online Faster with More Voice Status Utility Capabilities			✓	

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Improve Agent Login Experiences on Virtual Desktops	✓			
Respect Agent Capacity for Voice Calls Is Turned on by Default for New Salesforce Orgs (Beta)			✓	
Sync Agent Presence Statuses Is Turned on by Default	✓			
Experience a Sleeker Call Interface in the Omni-Channel Utility	✓			
Add More AWS Services to Service Cloud Voice with Amazon Connect				✓
Preview Estimated Wait Times for All Queues Before Transferring Calls	✓			
Set Up Amazon Real-Time Metrics Dashboard from Omni Supervisor	✓			
Chat				
Build Trust with Customers by Presenting Terms and Conditions in Pre-Chat			✓	
Other Improvements			✓	
Channel Tools				
Individual-Object Linking (Generally Available)			✓	
Export Conversation Transcripts Multiple Times and from an Active Salesforce Org				
Knowledge				
Turn On Lightning Article Editor and Article Personalization for Knowledge			✓	
Improve the Readability of Lengthy Knowledge Articles with Accordions			✓	
Routing				
Upgrade to Enhanced Omni-Channel				✓
Speed Through Work with the Omni-Channel Enhanced Agent Experience				✓

Feature	Enabled for users	Enabled for administrators/ developers	Requires administrator setup	Contact Salesforce to enable
Follow Your Agents' Work Easily with the Enhanced Omni Supervisor Experience (Generally Available)				✓
Improve Multi-Channel Agent Efficiency with Interruptible Capacity				✓
Audit Queue Membership Changes with Event Monitoring				✓
IdeaExchange Delivered: View Queue Members with Reports		✓		
Self-Service				
Show Knowledge Articles on Your Enhanced LWR Site				
Structure Your Help Site with Data Categories (Beta)		✓		

Supported Browsers

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

IN THIS SECTION:

Supported Browsers and Devices for Lightning Experience

See the supported browsers and devices for Lightning Experience.

Lightning Experience is available in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions. When accessing Lightning Experience on a mobile device, we recommend that you use the Salesforce mobile app. You can also access Lightning Experience on iPad Safari. For more information, see Lightning Experience on iPad Safari Considerations.

Consider these browser restrictions when working with Lightning Experience.

- Salesforce doesn't support nonbrowser applications that embed WebView or similar controls to render content for Lightning Experience. Examples of approaches that embed this type of control include Salesforce Mobile SDK, Microsoft's WebBrowser Control, Electron's embedded Chromium browser, iOS's UIWebView and WKWebView, and Android's WebView.
- Lightning Experience doesn't support incognito or other private browsing modes.

Desktop and Laptop Browsers

Salesforce supports these browsers. Make sure that your browsers are up to date. Other browsers or older versions of supported browsers aren't guaranteed to support all features.

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

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

Tablet Browsers

Use Apple Safari on iPadOS (iOS 13.x) or later. Portrait orientation and orientation switching aren't supported on Lightning Experience on iPad Safari. Use landscape orientation and maximize your Safari browser to full width. To avoid orientation switching, turn on the iPad rotation lock.

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

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

	Apple® Safari®	Google Chrome™	Other Browsers	Salesforce Mobile App
Android	N/A	Not supported	Not supported	Supported

Salesforce treats touch-enabled laptops, including Microsoft Surface and Surface Pro devices, as laptops instead of tablets. You can't access the Salesforce mobile app on these devices. Users are redirected to the full site experience that's enabled for them—Lightning Experience or Salesforce Classic. Only standard keyboard and mouse inputs are supported on these types of devices.

Phones

For the best experience, use the Salesforce mobile app.

Third-Party Browser Extensions and JavaScript Libraries

Before you use a third-party browser extension or JavaScript library, we recommend that you check AppExchange for browser extensions and apps from Salesforce partners, or the Component Reference for base components that match your requirements.

Although some third-party browser extensions can personalize and enhance your Salesforce experience, we don't recommend the use of browser extensions that manipulate the DOM. Using third-party browser extensions is at your own risk. Salesforce can't prevent these extensions from accessing your Salesforce data, nor can we detect that there's any attempt to access your data. Additionally:

- Browser extensions that insert or remove elements in the DOM can interfere with the stability of Lightning Experience and lead to unexpected behavior.
- Browser extensions that don't follow Salesforce security standards can fail to work properly in Lightning Experience.
- The internal DOM structure of Lightning Experience can change in a future release, and compatibility with a third-party browser extension isn't guaranteed.

To use a third-party JavaScript library with custom Lightning components, upload it first as a static resource. Use the JavaScript library by loading it in the component like this.

- Lightning Web Components: Load a third-party JavaScript library via `lightning/platformResourceLoader`
- Aura Components: Load a third-party JavaScript library via `ltng/require`

Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic. Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce mobile app when you're working on a mobile device.

Where

Salesforce Classic is available in all editions.

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

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

Supported Browsers for CRM Analytics

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

Salesforce Overall

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

IN THIS SECTION:

General Enhancements

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

IN THIS SECTION:

Prepare for the New Setup Domain

Salesforce plans to host Setup pages on a new domain in a future release. To prepare for this change, add *.salesforce-setup.com to your allowlists.

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

SEE ALSO:

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

MFA Auto-Enablement Continues and MFA Enforcement Begins with Summer '24

As of February 1, 2022, users are contractually required to use multi-factor authentication (MFA) when they access Salesforce orgs, either through direct logins with a username and password or single sign-on (SSO) logins. To help customers satisfy this requirement, Salesforce is automatically enabling MFA for direct logins to production orgs in several phases. The process started with Spring '23 and concludes with Spring '24. Enforcement, which is when MFA becomes a permanent part of the direct login process, is scheduled to begin with Summer '24. To avoid disruptions to your users when these milestones occur, enable MFA yourself as soon as possible.

Where: This change applies to Lightning Experience, Salesforce Classic, and all Salesforce mobile apps in all editions.

When: Salesforce is auto-enabling MFA over several releases via the MFA Auto-Enablement Release Update. To know when your Salesforce org is affected, see MFA Auto-Enablement Continues: Find Out When and How Your Org Is Affected (Release Update). MFA enforcement begins with Summer '24. To monitor the schedule for these events, see the MFA Enforcement Roadmap.

How: To get extra protection against cyberattacks sooner, implement and roll out MFA on your own instead of waiting for Salesforce to do it. Controlling your rollout schedule means that you can avoid conflicts with other initiatives at your company and unexpected disruptions to your users.

To roll out MFA:

- Watch the Launch Multi-Factor Authentication video for the steps to turn on MFA.
- Get customizable change management templates by downloading the MFA Rollout Pack.

Note: If you use SSO to access Salesforce, Salesforce isn't enabling or enforcing MFA for your SSO identity provider. But you are contractually required to implement MFA for all users who access Salesforce via SSO. To satisfy this requirement, you can use your SSO provider's MFA service.

SEE ALSO:

Knowledge Article: Everything You Need to Know About MFA Auto-Enablement and Enforcement

Salesforce Help: Enable MFA for Direct User Logins (can be outdated or unavailable during release preview)

Knowledge Article: Salesforce Multi-Factor Authentication FAQ

External Link: MFA for Salesforce Customers Site

See Improved Color Contrast in UI Elements

Non-text UI elements, such as buttons and checkboxes, and some text UI elements, such as links, now display with improved color contrast to align with accessibility standards. We started the color-contrast improvements in Summer '23. In Winter '24, the changes apply to all pages in Lightning Experience and Lightning base components in custom Lightning components.

Where: This change applies to all pages in Lightning Experience in all editions. The changes to Lightning base components apply in Lightning Experience and if you use a Lightning base component in a custom component.

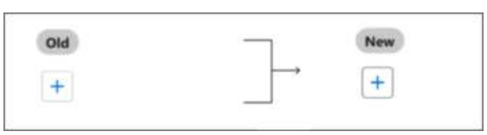
Why: Web Content Accessibility Guidelines (WCAG) are a series of web accessibility guidelines published by the Web Accessibility Initiative (WAI) of the World Wide Web Consortium (W3C). The guidelines include criteria for non-text contrast. Good color contrast means that all users can more easily see the content on any device or in any lighting conditions.

This image shows the difference between standard object and document type icons in Summer '23 and Winter '24. The Winter '24 icons use a greater range of colors to make it easier to distinguish different objects.

Standard Object and Document Type Icons

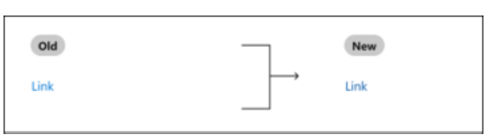
This image shows the difference between neutral borders in Spring '23 (old) and Winter '24 (new). The increased contrast for borders also affects radio buttons, checkboxes, buttons, and input fields.

Neutral Borders



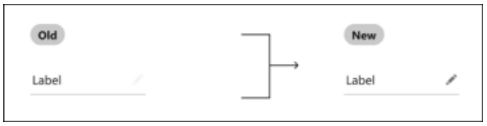
This image shows the difference between links in Spring '23 (old) and Winter '24 (new).

Links



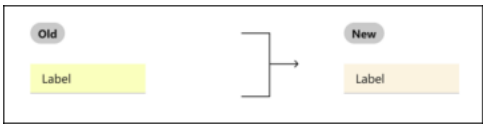
This image shows the difference between edit icons in Spring '23 (old) and Winter '24 (new).

Edit Icons



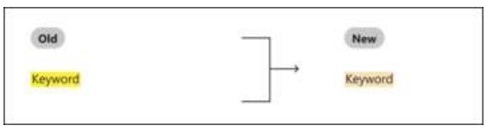
This image shows the difference between the edit state in Spring '23 (old) and Winter '24 (new).

Edit State



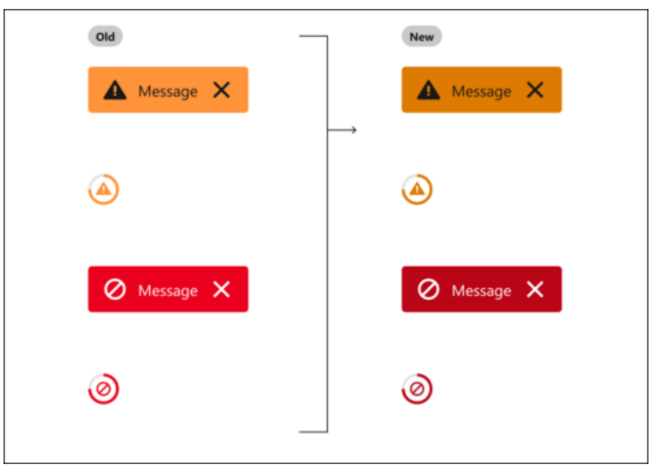
This image shows the difference between search highlights in Spring '23 (old) and Winter '24 (new).

Search Highlights



This image shows the difference between messaging elements in Spring '23 (old) and Winter '24 (new).

Messaging Elements



SEE ALSO:

- *Summer '23 Release Notes:* See Improved Color Contrast in UI Elements
- Use Global Color Styling Hooks to Match Color-Contrast Changes
- Salesforce Lightning Design System
- *Salesforce Admins Blog:* Updates to the Salesforce UI That Will Improve Accessibility for Low-Vision Users

Set a Password or Expiration Date on a Public Link to a Salesforce File

In Lightning Experience, when you create a public link to share a file, you can choose to set a date when the link expires. You can also protect access to the file with a password. By default, link expiration is enabled and set for 30 days. Use the password default settings to determine if protection is on or off by default. When password protection is toggled on, an auto-generated password shows in the dialog. Public links to folders don't have password protection or link expiration.

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

How:

To set password defaults for Salesforce Files, edit the content deliveries settings. From Setup, in the Quick Find box, enter `Salesforce Files`, and then select **Content Deliveries and Public Links**. Select a password default. Choose from:

- **Password protection is optional and defaults to OFF**
- **Password protection is optional and defaults to ON**
- **Password protection is required** (This setting doesn't mean password protection is required in Lightning Experience, but it defaults to ON.)

News, Automated Account Fields, and Account Logos Are Being Retired

The News, automated account fields, and automated account logo features are being retired in all Salesforce orgs in Winter '24 on October 13, 2023. After these account features are retired, Salesforce doesn't prompt users with suggestions for account names and doesn't fill out fields or add company logos automatically. The News component is removed from page layouts.

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

Disable Keyboard Shortcuts

By default, keyboard shortcuts are enabled so that you can work faster. But sometimes these keyboard shortcuts interfere with assistive tools such as screen readers. Now you can disable keyboard shortcuts across all Lightning Experience apps.

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

How: From the global header, select the **Help Menu**. Then click **View Keyboard Shortcuts** and switch off keyboard shortcuts.

SEE ALSO:

Salesforce Help: Keyboard Shortcuts for Lightning Experience

Experience Improved Performance on More Record Home Pages

More objects are Lightning Web Components (LWC)-enabled in Winter '24. With LWC-enabled objects, you can create, view, or edit the record home pages with improved performance, stronger accessibility support, and better service availability.

Where: This change applies to Lightning Experience and all Salesforce mobile apps in all editions.

Why: As part of LWC enablement at Salesforce, most record home pages now render using LWC.

A record home page has this URL pattern.

```
https://MyDomainName.my.salesforce.com/lightning/r/ObjectApiName/RecordId/ViewOrEdit
```

For example, view an account's record home page:

```
https://my-dev-org.my.salesforce.com/lightning/r/Account/0012L00001OCuehQAD/view
```

Over 300 objects are LWC-enabled in Winter '24, including `Applicant`, `ApplicationForm`, `CareGap`, `EmissionsAllocation`, `GiftCommitment`, `Obligation`, `Outcome`, `Team`, `Waitlist`, and many more. For the full list, see the Lightning Web Components Developer Guide.

Create From Lookup Changes

Observe several changes to the record create modal that displays when you create a record via a lookup field.

Where: This change applies to Lightning Experience and all Salesforce mobile apps in all editions.

Why: As part of LWC enablement at Salesforce, most record home pages now render using LWC. Salesforce continues to introduce enhancements to record pages and modals, including these changes for the record create modal.

For all record pages, including LWC-enabled ones and those that aren't LWC-enabled, when you create a record via a lookup field, the **Save & New** button no longer appears. The button continues to appear on Create and Edit modals that are not opened via a lookup field.

For LWC-enabled record pages:

- The create from lookup modal now also displays using LWC.
- The create from lookup modal is now URL addressable.
- The create from lookup modal now supports Dynamic Forms.

SEE ALSO:

Experience Improved Performance on More Record Home Pages

IdeaExchange Delivered: Use Dynamic Forms on LWC-Enabled Standard Objects

Other Changes to Record Pages

Learn about enhancements to record pages.

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

How:

- The Change Owner, Change Record Type, and Inline Edit icons got a small makeover. We changed their colors slightly, to make them easier to see.
- Screen readers now communicate whether an error message in the page footer is in an expanded or collapsed state.

Salesforce Scheduler

Manage customers who visit your business locations for in-person appointments. Use an actionable list to send out appointment invitations to potential customers. Assign a different service resource for a scheduled appointment when the assigned resource is unavailable. Explore the various enhancements made to Shifts in Salesforce Scheduler. Send your users email notifications along with an Internet Calendar Scheduling (ICS) file.

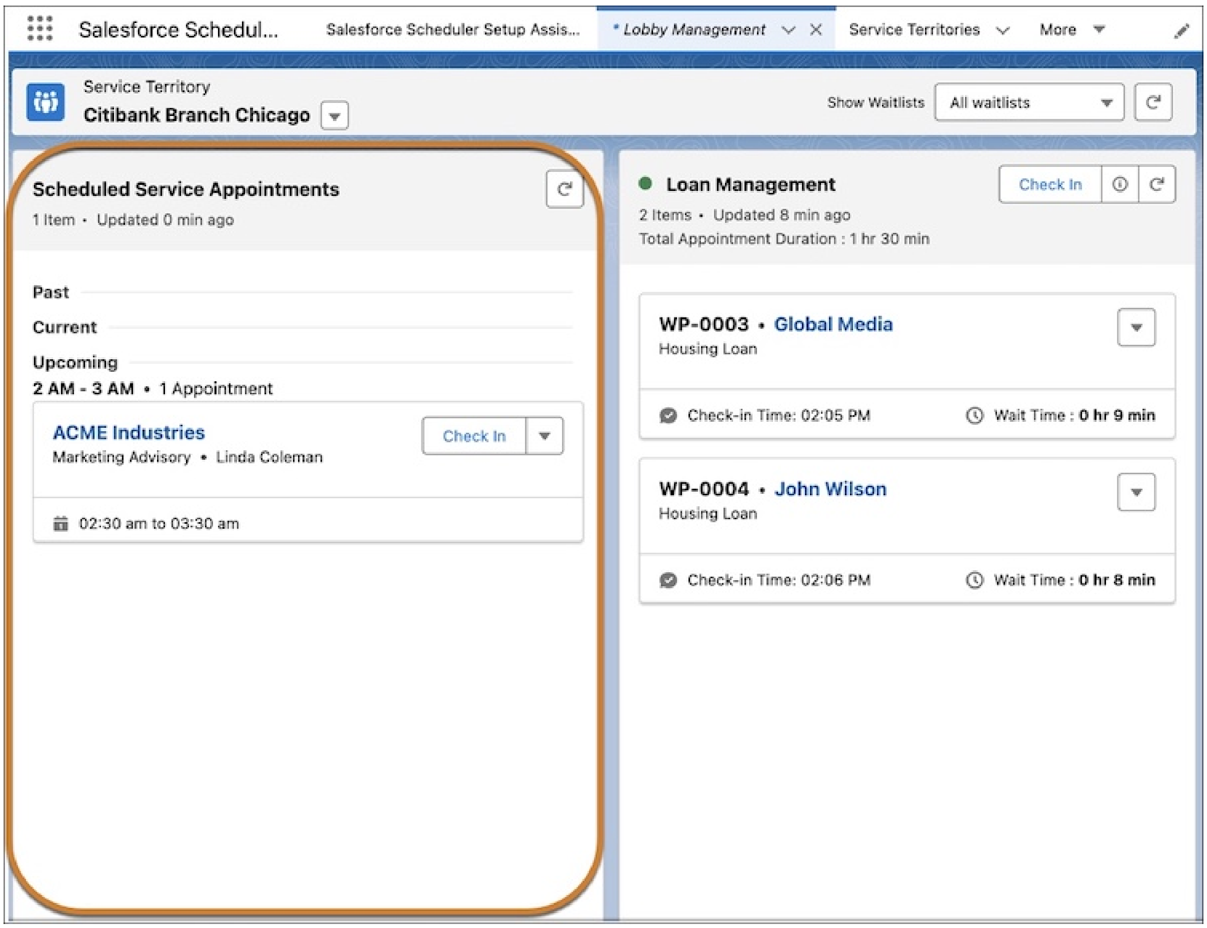
IN THIS SECTION:

Manage In-Person Appointments More Efficiently Using Lobby Management

Use the enhanced lobby management dashboard to manage customers who prefer to visit the branch location—with or without a scheduled appointment. Greeters can use lobby management to check in customers, monitor their wait time, or mark them as a no show. Greeters can also reschedule or reassign an appointment if the assigned service resource is unavailable. Service resources are also notified when customers are waiting to be attended. For waitlists, appointment information, such as participants per day and average wait time, is captured to help improve branch performance.

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

How: View and manage in-location appointments on the Lobby Management tab.



SEE ALSO:

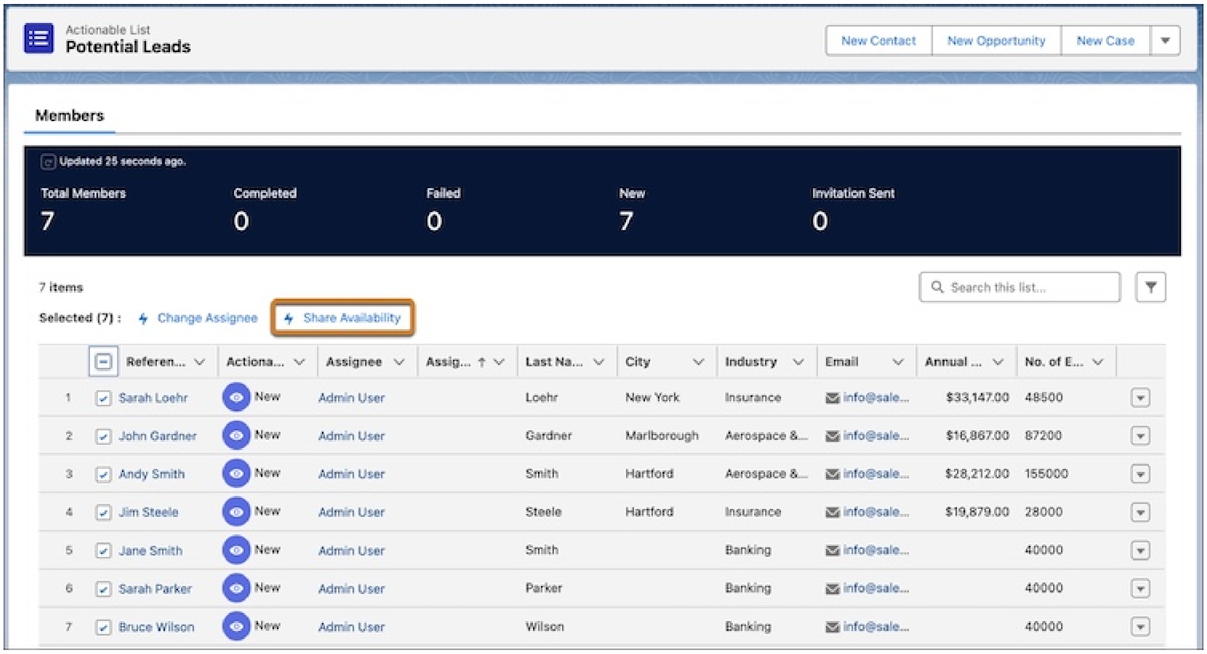
Salesforce Scheduler Help: Lobby Management (can be outdated or unavailable during release preview)

Share Availability Details with Potential Customers

Make it easy and convenient for potential customers to book appointments with service resources by emailing them an appointment invitation URL with the availability options. Use an actionable list to create and share the appointment invitation URL and track the appointments booked using that invitation URL.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Salesforce Scheduler is enabled with the Industry Sales Excellence Add On license.

How: On the Actionable List page, click **Share Availability**.



SEE ALSO:

Salesforce Scheduler Help: Share Service Resource Availability by Using an Actionable List (can be outdated or unavailable during release preview)

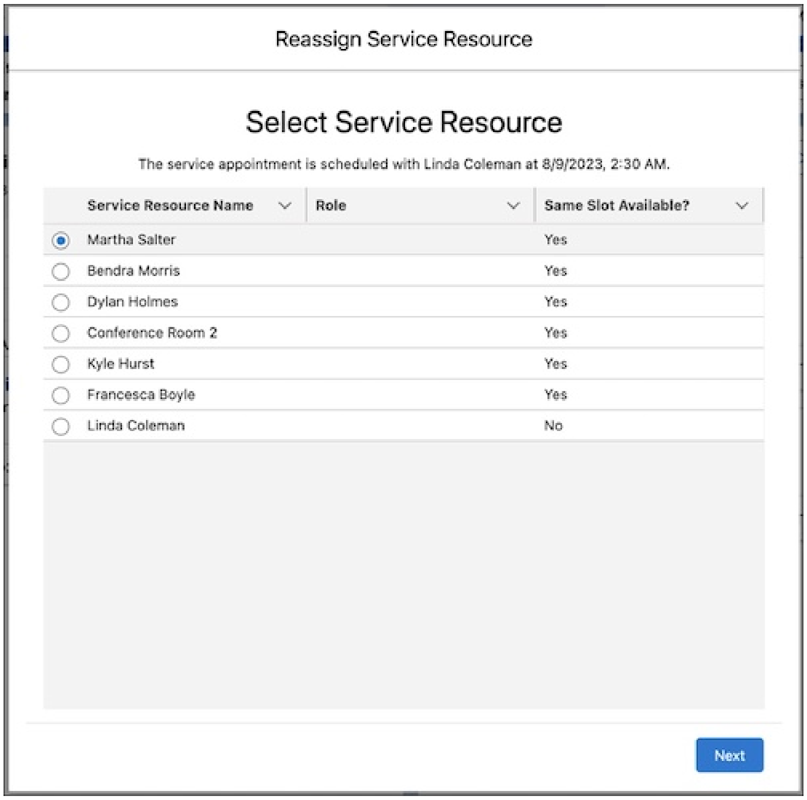
Make Customer Engagements Seamless by Reassigning Unavailable Service Resources

When a service resource assigned for a service appointment becomes unavailable, a territory manager or a greeter can easily assign the customer another service resource. You can see the service resources available on the Reassign Service Resource screen.

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

How: To enable reassigning service resources, clone the Outbound Modify Appointment flow or the Inbound Modify Appointment flow and set the `changeServiceResource` variable to `true`. Then, save and activate the flow.

To invoke the flow and change a service resource, create an action button.



SEE ALSO:

Salesforce Scheduler Help: Reassign an Outbound Appointment in Salesforce Scheduler (can be outdated or unavailable during release preview)

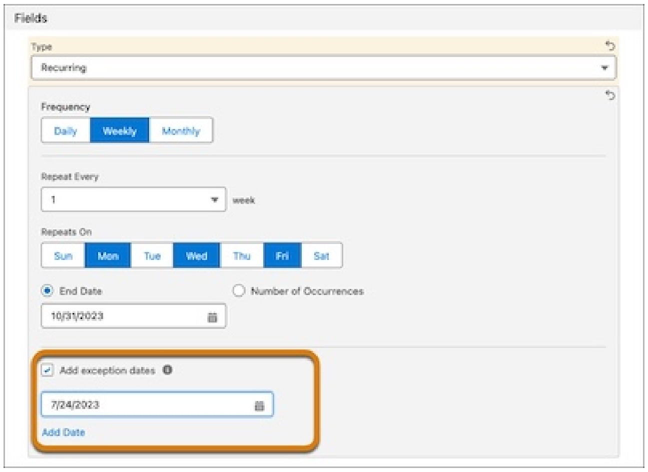
Do More with Recurring Shifts in Salesforce Scheduler

Territory managers and services resources can now set up recurring shifts for longer periods, specify exception dates, view the recurrence pattern in a readable format, and create similar recurring shifts.

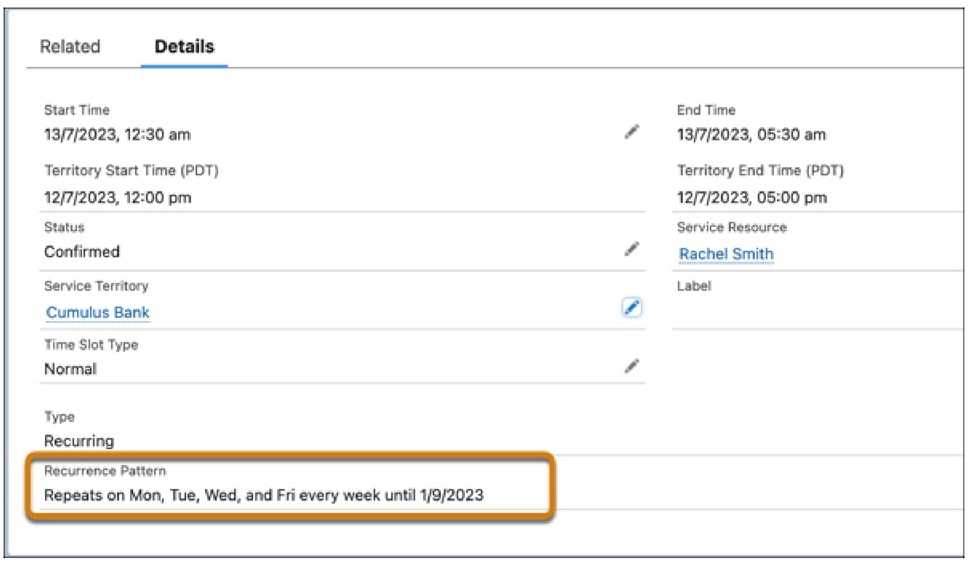
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Salesforce Scheduler enabled.

Why: Territory managers and service resources can now:

- Set up recurring shifts for up to 180 days.
- Specify dates that they aren't available on. They can add up to ten exception dates within the recurrence pattern duration.



- Quickly create another recurring shift schedule by cloning an existing shift.
- View the recurrence pattern in a readable format.



SEE ALSO:

Salesforce Scheduler Help: Create Shifts in Salesforce Scheduler (can be outdated or unavailable during release preview)

Send Customers Appointment Details Using an ICS File

Create a record-triggered flow to send email notifications to your internal or external users about their upcoming appointment. The email includes an Internet Calendar Scheduling (ICS) file with time and duration that users can add to their calendar.

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

SEE ALSO:

Salesforce Scheduler Help: Configure Appointment Email Notifications with the ICS File (can be outdated or unavailable during release preview)

Create a Salesforce Scheduler Pre-Release Trial Org

Sign up for a Salesforce Scheduler pre-release trial org to get hands-on experience and take a sneak peek at the features in this release.

Who: This pre-release trial org is great for admins, architects, and developers.

How: To sign up for a pre-release trial org, go to https://www.salesforce.com/form/signup/scheduler-prerelease-trial/. After your org is created, you'll receive an email with login details.

Note:

- Winter '24 pre-release trial orgs are available now until October 15, 2024.
- Trial orgs are intended for proof of concept and guided self-exploration. Trial orgs expire in 30 days.

Connect REST APIs

Connect REST APIs for Salesforce Scheduler help customers, partners, and ISVs integrate with Salesforce software and UIs.

IN THIS SECTION:

New Connect REST API Resources

These are the new Salesforce Scheduler resources.

Get waitlist details with the list of participants

Make a GET request to the new `/connect/scheduling/waitlists` resource.

New response body: Waitlist Output

Check in a participant to a waitlist for a drop-in appointment

Make a POST request to the new `/connect/scheduling/waitlist-checkin` resource.

New request body: Waitlist Check In Input

New response body: Waitlist Check In

Einstein Search

Improve how you receive your search results. In Search Manager, configure searchable standard and custom objects, and capture search storage insights. You can also receive specific answers from a knowledge article with Einstein Search Answers.

IN THIS SECTION:

Einstein Search for Knowledge Is Enabled by Default

Your service agents can find relevant articles faster using the new filtering experience and respond to customers more accurately for expedited case resolution. Einstein Search for Knowledge also supports multi-language search and provides AI-based algorithms to increase search accuracy. Einstein Search for Knowledge is now enabled for everyone by default and you can disable it in Settings.

SEE ALSO:

Einstein Release Notes

Configure Searchable Objects for Profiles More Easily (Beta)

The Search Manager configuration window now guides you through configuring searchable objects for a user profile. Get information when you need it directly in the application.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

SEE ALSO:

Salesforce Help: Configure Which Objects and Fields Are Searchable for a User Profile (can be outdated or unavailable during release preview)

Resolve Cases Faster with Einstein Search Answers (Pilot)

Get extracted relevant text from a knowledge article to speed up case resolution. Ask a question or enter a phrase in the global search bar and get the most relevant information from English-language knowledge articles.

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

Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

How: This feature activates 24 hours after it's turned on. If you have feedback or issues, email tryeinsteinsearch@salesforce.com.

SEE ALSO:

Salesforce Help: Enable Search Answers for Knowledge (can be outdated or unavailable during release preview)

Einstein Search for Knowledge Is Enabled by Default

Your service agents can find relevant articles faster using the new filtering experience and respond to customers more accurately for expedited case resolution. Einstein Search for Knowledge also supports multi-language search and provides AI-based algorithms to increase search accuracy. Einstein Search for Knowledge is now enabled for everyone by default and you can disable it in Settings.

Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, and Unlimited editions. You must have Lightning Knowledge and Einstein Search.

SEE ALSO:

Salesforce Help: Dive into Einstein Search for Knowledge (can be outdated or unavailable during release preview)

Salesforce Data Pipelines

Decrease data processing time by using staged data instead of datasets. Take advantage of Google's new event-based GA4 property framework with the Google Analytics 4 connector. Load larger data objects with the Salesforce Bulk API 2.0.

IN THIS SECTION:

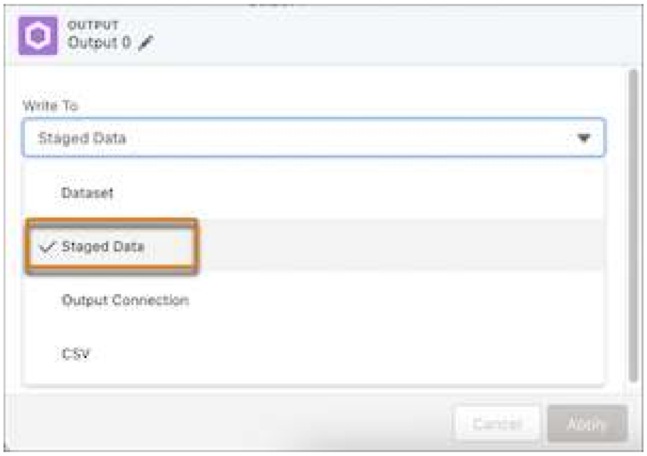
Run Sequential Recipes Faster with Staged Data (Generally Available)

Reduce processing time when your data strategy involves multiple recipes by using staged data instead of datasets. An initial recipe outputs results as staged data, and subsequent recipes can use the staged data in input nodes. For example, rather than merge account and opportunity data in each region-specific forecasting recipe, merge just one time, output the results as staged data, and use this data in the other recipes.

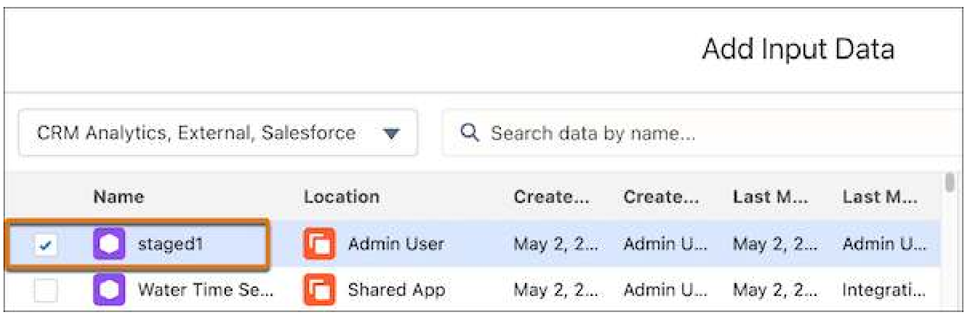
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited Editions. This feature isn't available with Shield Platform.

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

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



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



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

SEE ALSO:

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

Connect to Google Analytics 4 (Generally Available)

Migrate to Google Analytics 4 to continue loading your Google Analytics data and take advantage of Google's new event-based GA4 property framework. Google Analytics 4 uses first-party and Google data to understand and analyze multiple sites and apps together. Google Analytics 4 has replaced Universal Analytics. On July 1, 2023, all standard Universal Analytics properties stopped processing data.

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

How: Create a Google Analytics 4 connection using the Data Manager. Add your Google Analytics property ID to the advanced properties for each connected object.

SEE ALSO:

Salesforce Help: Google Analytics 4 Connection (can be outdated or unavailable during release preview)

External Link: Universal Analytics is going away

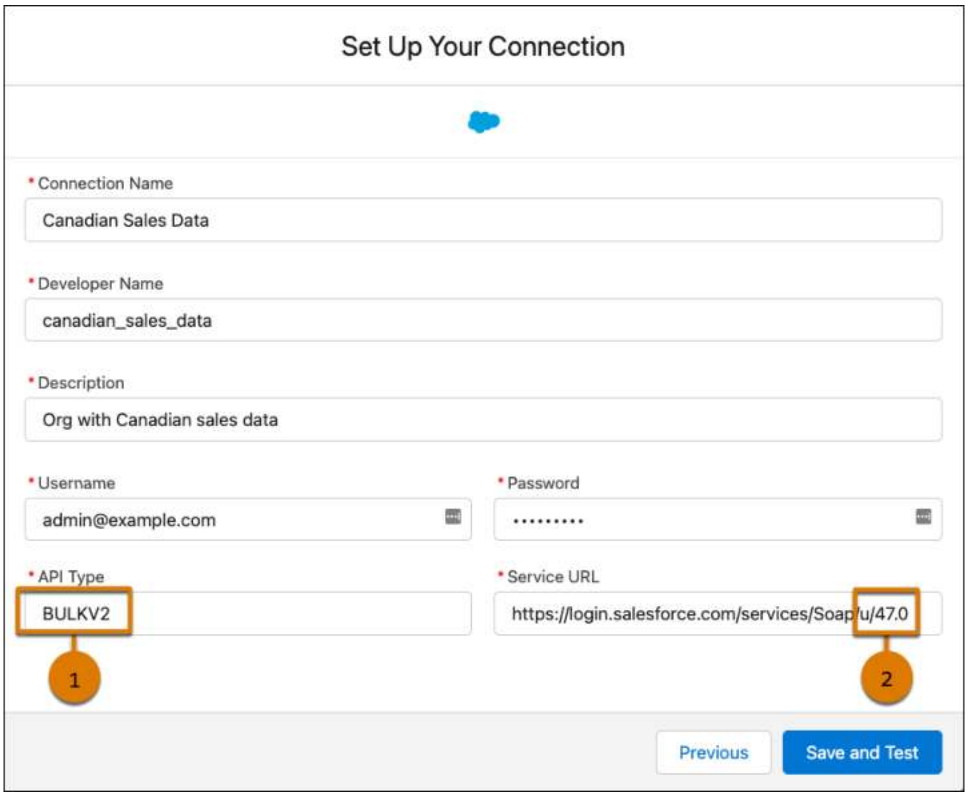
External Link: [UA GA4] Universal Analytics versus Google Analytics 4 data

Prevent Sync Timeout Issues with Salesforce External Connectors

If you encounter issues with larger data objects timing out when using a Salesforce External connector, use Salesforce Bulk API 2.0 with the new BULKV2 API type.

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

How: When creating an Salesforce External connector, use `BULKV2` for the API type (1). For the Service URL, the version number is 47.0 or later (2).



SEE ALSO:

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

Connect to Databricks (Beta)

Create a remote connection using the Databricks connector to sync data from Databricks to Data Manager.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Use Data Manager to create a Databricks connection. Add the Databricks personal access token, server, HTTPPath, and database values to the advanced properties for each connected object.

SEE ALSO:

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

Connect to Amazon Athena (Beta)

Sync Amazon Athena data to Data Manager by creating a remote connection. Add your AWS security credentials to the advanced properties for each connected object.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

SEE ALSO:

Salesforce Help: Amazon Athena Connection (Beta) (can be outdated or unavailable during release preview)

Append Data Faster with Incremental Uploads (Beta)

Improve your data upload time when using the external data API by loading CSVs incrementally. By registering data faster, you can bring in more data to your existing datasets without causing the overall run time to grow exponentially.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: From Setup, in the Quick Find box, enter `Analytics`, and select **Settings**. Then select **Incremental Append in External Data API** and save. When using the Analytics External Data API to load data, set the mode to incremental.

SEE ALSO:

Analytics External Data API Developer Guide: Append the Data

Get Full Snowflake OAuth Parity

Take advantage of OAuth across all Snowflake connectors. The Snowflake Output connector and Sync Out for Snowflake now have full OAuth functionality to match the Snowflake input connector, providing a consistent and secure connection experience.

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

SEE ALSO:

Snowflake Output Connection

Sync Out for Snowflake

Analytics

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

IN THIS SECTION:

Unified Analytics Experiences

Add custom filters to explore Tableau views within CRM Analytics dashboard components. Experience the improved Home tab and new slash commands in Slack. In custom subscription reports, see the Slack channels that receive subscriptions and notifications. Get single-click widget interactions, and share reports on mobile.

IN THIS SECTION:

Explore Tableau Views in CRM Analytics Dashboards With Custom Filters (Generally Available)

You can now add custom filters to explore Tableau views within dashboard components and unlock additional insights. Instead of generating multiple component views to support different data scenarios, add a filter parameter to interact with static values or a filter in a CRM Analytics dashboard. Maintain a single Tableau view without creating and switching between different views.

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

How: Click the Tableau view in the dashboard component widget. Click **Add Parameter** (1).

Select a Tableau dimension field to be the filter (2). Give the parameter a name (3). Select how to retrieve values for the filter (4). For example, to get values based on CRM Analytics dashboard filter selections, select **Dynamic**, then choose the filter query, value field, and query interaction.

SEE ALSO:

Salesforce Help: Tableau Views in CRM Analytics (Beta) (can be outdated or unavailable during release preview)

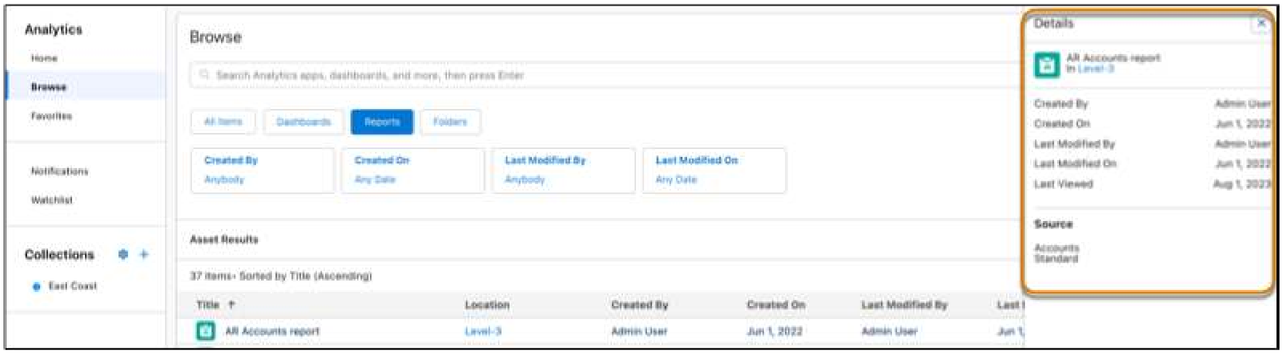
View Report and Dashboard Asset Details From the Analytics Tab

Use Asset Details to view metadata for your reports and dashboards, such as create date and owner. Asset Details also include data sources to help you differentiate between reports created with Salesforce and Data Cloud.

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

How: From the App Launcher, find and select **Analytics**, then browse or search for a report or dashboard. Click the row action menu button for the asset and click **Details**.

Asset details, including data source, appear for the asset in the Details panel.



SEE ALSO:

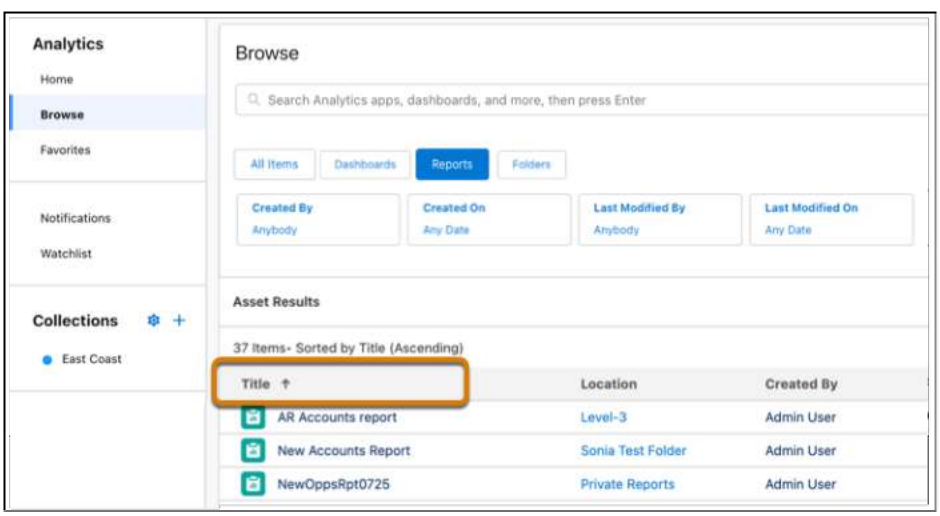
Salesforce Help: Manage Your Reports and Dashboards in Analytics Home (can be outdated or unavailable during release preview)

Refine Your Search Results with Sort

Find what you need faster by sorting the column headers in your search results. You no longer have to scroll through pages of reports, dashboards, and CRM Analytics assets to find what you want. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: From the App Launcher, select **Analytics** and browse or search for an asset. Click the column headers to toggle search results in ascending or descending order.



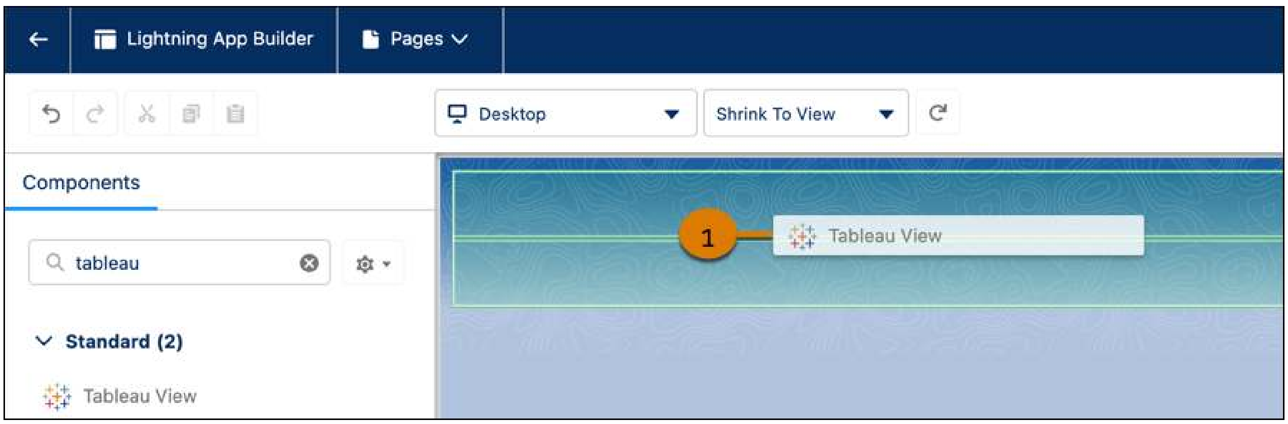
Embed Tableau Views to Lightning Pages (Generally Available)

Deliver Tableau data insights right where Salesforce users work by adding them to Lightning web components. Users can avoid repeated sign-ins or managing separate apps that can interrupt their workflow. Also, there's no complex configuration or extra add-ons to install, simply add a Tableau component to the Lightning page with link details to natively connect to the Tableau View. You can choose to display the view with workbook tabs and a Tableau toolbar.

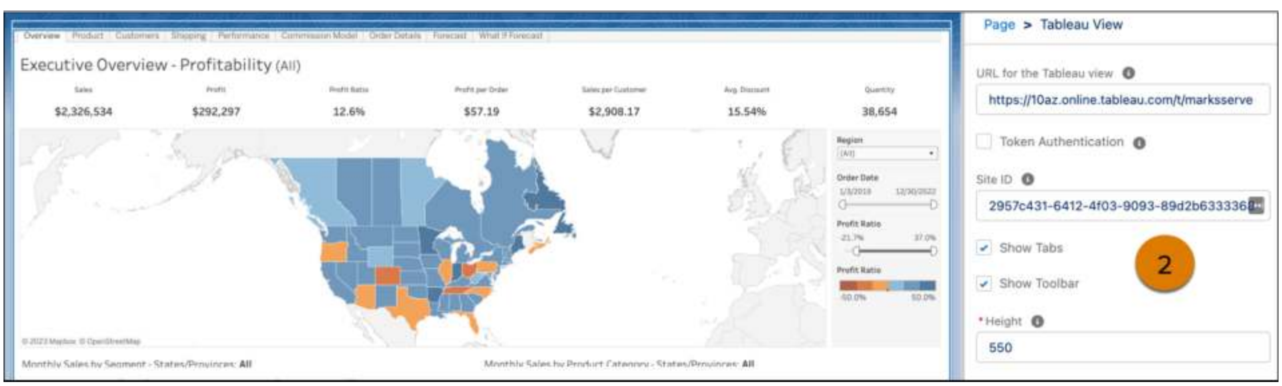
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. Connections to Tableau views require Tableau with Connected Apps (v2021.4 or greater) for Server or Cloud.

How: Complete this one-time configuration to embed Tableau content. From Setup, in the Quick Find box, enter `Tableau`, and then select **Tableau Embedding**. Select **Turn on Tableau View Lightning Web Component** and **Turn on token-based single sign-on authentication**. Select **Tableau User Identity field** and select the org's login format.

Add the Tableau View component (1) to a Lightning page.



Add the Tableau View URL and Site ID in the configuration pane (2).



SEE ALSO:

Tableau Help: Tableau Lightning Web Component Seamless Authentication (Limited Preview)(can be outdated or unavailable during release preview)

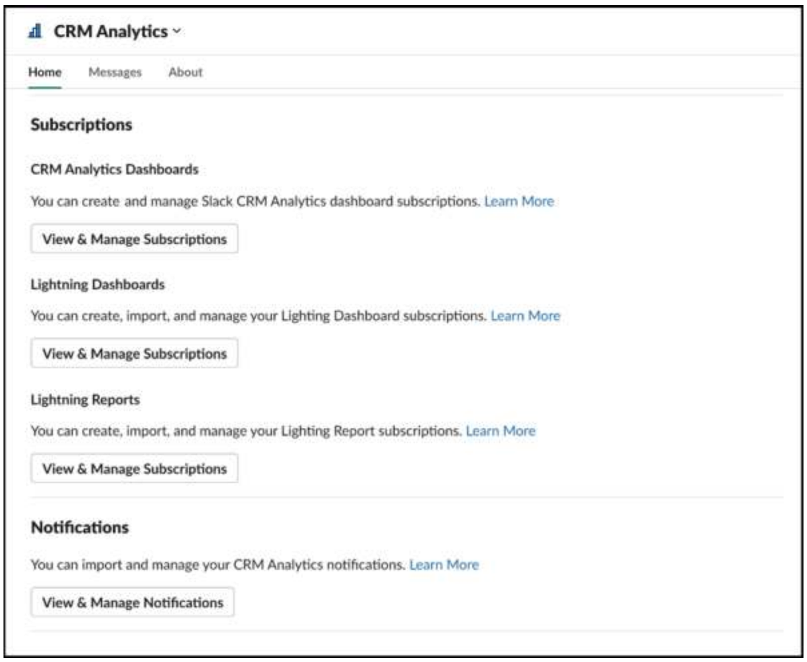
Tableau Help: Troubleshoot Connected Apps(can be outdated or unavailable during release preview)

Experience the Improved Home Tab in CRM Analytics for Slack

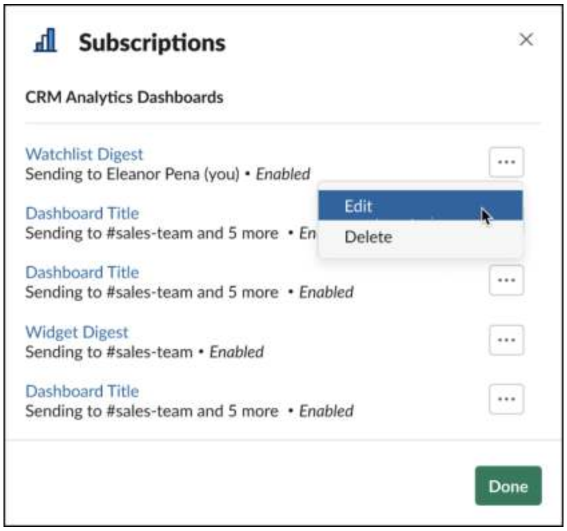
Get reduced clutter and boosted Home tab performance with the new way to access subscriptions and notifications in Slack. In the reorganized Home tab, your lists of subscriptions and notifications are now available in separate windows. Previously, these lists filled the app's Home tab.

Where: The CRM Analytics for Slack app works with CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. CRM Analytics for Slack is available for use where approved by a workspace admin and installed in Slack.

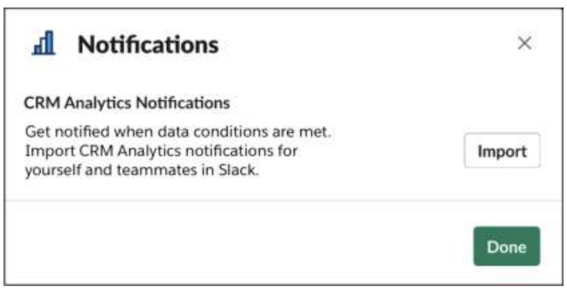
How: To open a subscriptions or notifications window, click **View & Manage Subscriptions** or **View & Manage Notifications** on the Home tab in CRM Analytics for Slack. The buttons are available when you have the applicable permissions, even if you haven't created subscriptions or notifications.



If you have items, the window lists each with a menu of available actions.



If you don't have items, the window helps you to get started.



SEE ALSO:

Salesforce Help: Subscribe to CRM Analytics Dashboards

Salesforce Help: Import and Add Recipients to CRM Analytics Notifications

Salesforce Help: Subscribe to Lightning Reports and Dashboards

Salesforce Help: Import and Add Recipients to Lightning Report and Dashboard Subscriptions

Access Subscriptions and Notifications Anywhere in Slack with Slash Commands

Reduce context switching and increase productivity with the new way to view and configure CRM Analytics subscriptions and notifications. Without changing your context in Slack, use a slash command to open a window where you can manage subscriptions and notifications, including adding and removing recipients. Previously, you could only manage these items within the CRM Analytics for Slack app.

Where: The CRM Analytics for Slack app works with CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. CRM Analytics for Slack is available for use where approved by a workspace admin and installed in Slack.

When: The feature is available in mid-October after the Winter '24 release rollout.

How: To access subscriptions, enter `/analytics-crma-subscriptions` in the Slack message field.

To access notifications, enter `/analytics-crma-notifications` in the Slack message field.

SEE ALSO:

Salesforce Help: Subscribe to CRM Analytics Dashboards

Salesforce Help: Import and Add Recipients to CRM Analytics Notifications

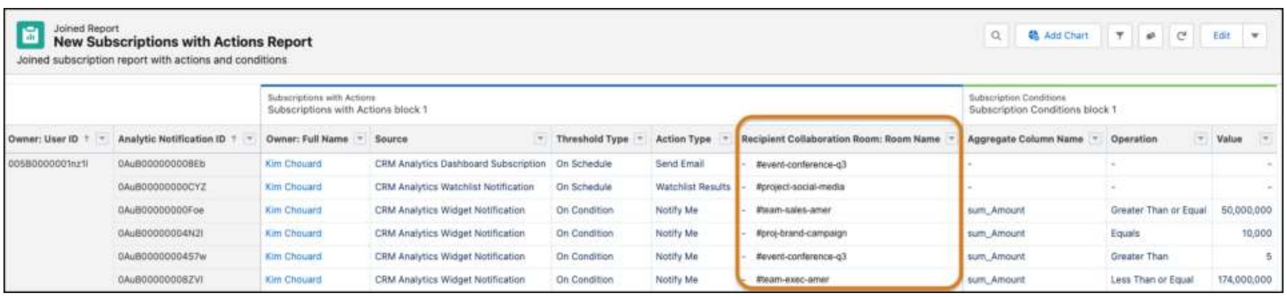
View Slack Channel Recipients in Subscription Reports

Quickly see the Slack channels where subscriptions and notifications are sent. In addition to monitoring schedules, conditions, recipients, and actions, a custom subscription report can now include a recipient column containing Slack channel names. Previously, this column showed ID numbers.

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

Who: To create and manage subscription reports, users need the Manage Custom Report Types permission.

How: Add the Recipient Collaboration Room column to the Action block in your custom subscription report. For channels created in Winter '24 and later, the column is populated with the Slack channel names where subscriptions and notifications are sent. For channels created before Winter '24, the channel ID appears in the column.


Joined Report
New Subscriptions with Actions Report
Joined subscription report with actions and conditions

		Subscriptions with Actions Subscriptions with Actions block 1					Subscription Conditions Subscription Conditions block 1		
Owner: User ID	Analytic Notification ID	Owner: Full Name	Source	Threshold Type	Action Type	Recipient Collaboration Room: Room Name	Aggregate Column Name	Operation	Value
005B0000001nz1l	0AuB00000008Eb	Kim Chouard	CRM Analytics Dashboard Subscription	On Schedule	Send Email	- #event-conference-q3	-	-	-
	0AuB0000000CYZ	Kim Chouard	CRM Analytics Watchlist Notification	On Schedule	Watchlist Results	- #project-social-media	-	-	-
	0AuB0000000Foe	Kim Chouard	CRM Analytics Widget Notification	On Condition	Notify Me	- #team-sales-amer	sum_Amount	Greater Than or Equal	50,000,000
	0AuB00000004N2l	Kim Chouard	CRM Analytics Widget Notification	On Condition	Notify Me	- #proj-brand-campaign	sum_Amount	Equals	10,000
	0AuB0000000457w	Kim Chouard	CRM Analytics Widget Notification	On Condition	Notify Me	- #event-conference-q3	sum_Amount	Greater Than	5
	0AuB00000008ZVl	Kim Chouard	CRM Analytics Widget Notification	On Condition	Notify Me	- #team-exec-amer	sum_Amount	Less Than or Equal	174,000,000

Channel names are saved when added to a subscription or notification. If the name of a channel is changed, the name isn't automatically updated in the report.

SEE ALSO:

Salesforce Help: Combine Subscriptions, Actions, and Conditions in One Report

Analytics Mobile Apps for iOS

Sharing items and widget interactions, previously available only on desktops, are now accessible to mobile users. Changes across all layouts are automatically synchronized to maintain consistency with the user experience.

IN THIS SECTION:

Update CRM Analytics Dashboard Layouts Automatically

Widget additions and changes now sync automatically across a dashboard's layouts. For example, when you add a widget to a mobile layout, it's also added to a desktop layout without editing.

Transform Static Widgets with Single-Click Interactions

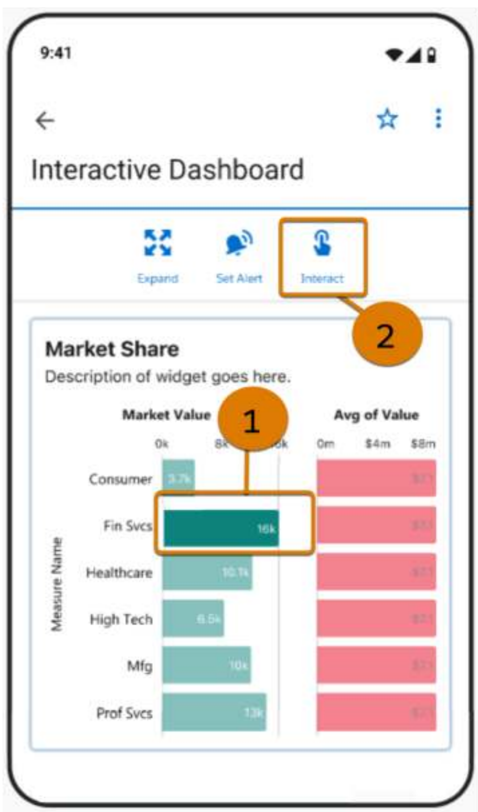
Widgets with single-click interactions, such as opening a lens, are now available on your iOS devices. Previously, single-click interactions could only be done on desktops.

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

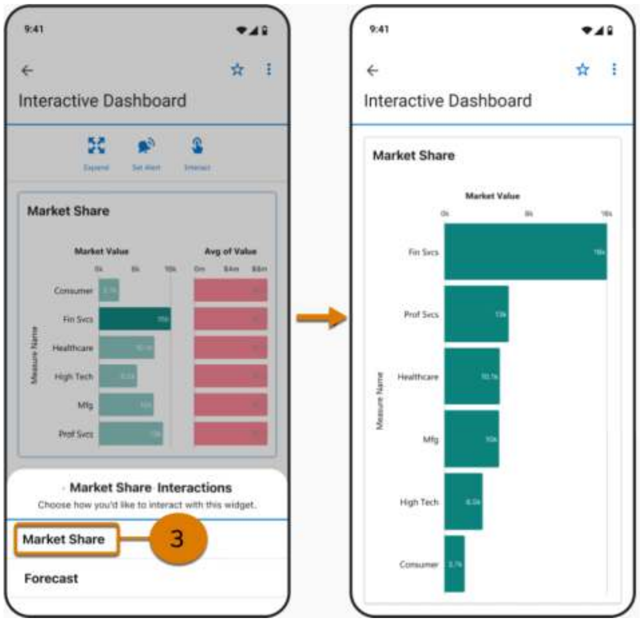
When: Single-click interactions is available the week of October 16, 2023.

How: CRM Analytics is available for devices running iOS 12.2 and later. For the latest enhancements, download CRM Analytics from the App Store.

Open a CRM Analytics dashboard and tap a metric in a chart (1). Tap **Interact** (2) in the menu bar.



Tap the view (3) you want to open.



SEE ALSO:

Salesforce Help: Configure a Widget Interaction (can be outdated or unavailable during release preview)

Update CRM Analytics Dashboard Layouts Automatically

Widget additions and changes now sync automatically across a dashboard's layouts. For example, when you add a widget to a mobile layout, it's also added to a desktop layout without editing.

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

When: Layout synchronization is available the week of October 16, 2023.

How: CRM Analytics is available for devices running iOS 12.2 and later. For the latest enhancements, download CRM Analytics from the App Store. Edits to CRM Analytics dashboard layouts must be done on the desktop.

SEE ALSO:

Synchronize Modifications Across Layouts Effortlessly

Salesforce Help: Generate Unique CRM Analytics Dashboard Layouts for Different Devices (can be outdated or unavailable during release preview)

Analytics Mobile Apps for Android

Sharing items and widget interactions, previously available only on desktops, are now accessible to mobile users. Changes across all layouts are automatically synchronized to maintain consistency with the user experience.

IN THIS SECTION:

Transform Static Widgets with Single-Click Interactions

Widgets with single-click interactions, such as opening a lens, are now available on your Android devices. Previously, single-click interactions could only be done on desktops.

Update CRM Analytics Dashboard Layouts Automatically

Widget additions and changes now sync automatically across a dashboard's layouts. For example, when you add a widget to a mobile layout, it's also added to a desktop layout without editing.

Transform Static Widgets with Single-Click Interactions

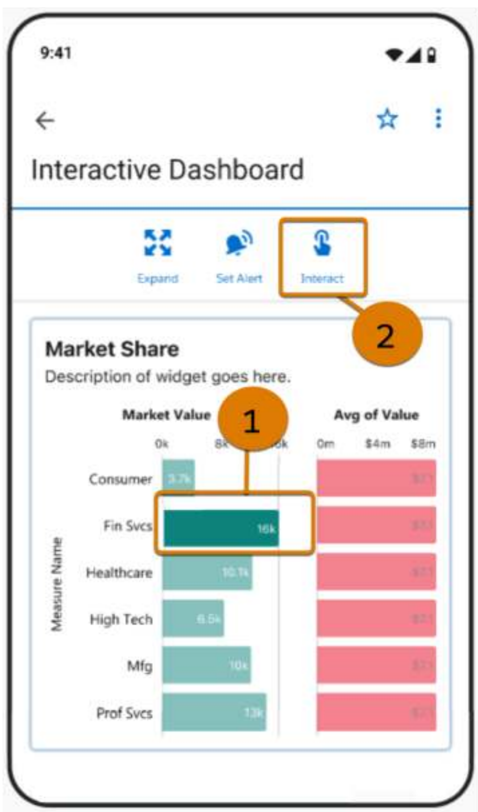
Widgets with single-click interactions, such as opening a lens, are now available on your Android devices. Previously, single-click interactions could only be done on desktops.

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

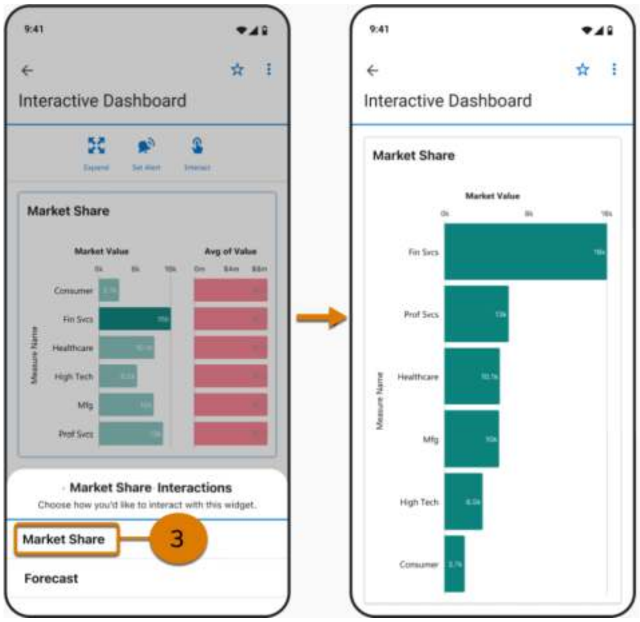
When: Single-click interactions is available the week of October 16, 2023.

How: CRM Analytics is available for devices running Android 5 or later. For the latest enhancements, download CRM Analytics from Google Play™.

Open a CRM Analytics dashboard and tap a metric in a chart (1). Tap **Interact** (2) in the menu bar.



Tap the view (3) you want to open.



SEE ALSO:

Salesforce Help: Configure a Widget Interaction (can be outdated or unavailable during release preview)

Update CRM Analytics Dashboard Layouts Automatically

Widget additions and changes now sync automatically across a dashboard's layouts. For example, when you add a widget to a mobile layout, it's also added to a desktop layout without editing.

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

When: Layout synchronization is available the week of October 16, 2023.

How: CRM Analytics is available for devices running Android 5 or later. For the latest enhancements, download CRM Analytics from Google Play™. Edits to CRM Analytics dashboard layouts must be done on the desktop.

SEE ALSO:

Synchronize Modifications Across Layouts Effortlessly

Salesforce Help: Generate Unique CRM Analytics Dashboard Layouts for Different Devices (can be outdated or unavailable during release preview)

Lightning Reports and Dashboards

Keep your Lightning dashboards current even when responsibilities change by assigning the dashboard to a new owner who can update the content. Don't lose context when creating reports with summary formulas that compare values relative to parent or peer groupings. More easily organize and interact with reports, dashboards, and CRM Analytics items on the Analytics tab.

IN THIS SECTION:

Transfer Ownership of Lightning Dashboards (Beta)

Enable ongoing updates to Lightning dashboards by transferring dashboard ownership when responsibilities change or the dashboard creator leaves your organization. The new owner has full control over the dashboard contents. Previously you had to clone or recreate the dashboard when the creator moved on to other responsibilities.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Who: To use this feature, you must have the View All Data or the View My Team's Dashboard permission. View All Data allows you to change the owner to anyone in your org. View My Team's Dashboards allows you to change the owner from and to anyone who rolls up to you in your team's Role Hierarchy. You must also have edit or manage access to the folder that contains the dashboard. The new owner is granted edit access to the dashboard folder.

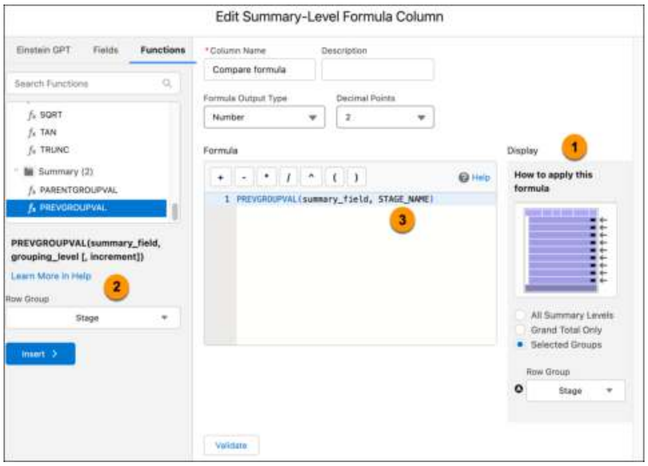
How: From Setup, in the Quick Find box, enter **Reports and Dashboards Settings**, then select **Reports and Dashboards Settings**. On the Reports and Dashboards Settings page, select **Allow users to change dashboard owner (Lightning Experience Only)**. Then from the Dashboards tab or the open dashboard, select **Change Owner**.

Visualize Lightning Reports with Summary Formulas as You Create Them

See at a glance how a summary formula that includes the PARENTGROUPVAL or PREVGROUPVAL function will be used in your Lightning report. When you select grouping options in the enhanced summary formula builder, the preview image updates instantly to show how the formula applies to the report. This feature was previously available only in Salesforce Classic and is now available in Lightning Experience.

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

How: Edit a report that has the groupings that you want to compare. In the summary formula builder, select the **PARENTGROUPVAL** or **PREVGROUPVAL** function. In the Display area (1), configure how to apply the formula, using the preview image as a reference. Then in the Function panel (2), select the group parameter values to include. When you insert the function into the formula (3), the selected parameters are included.

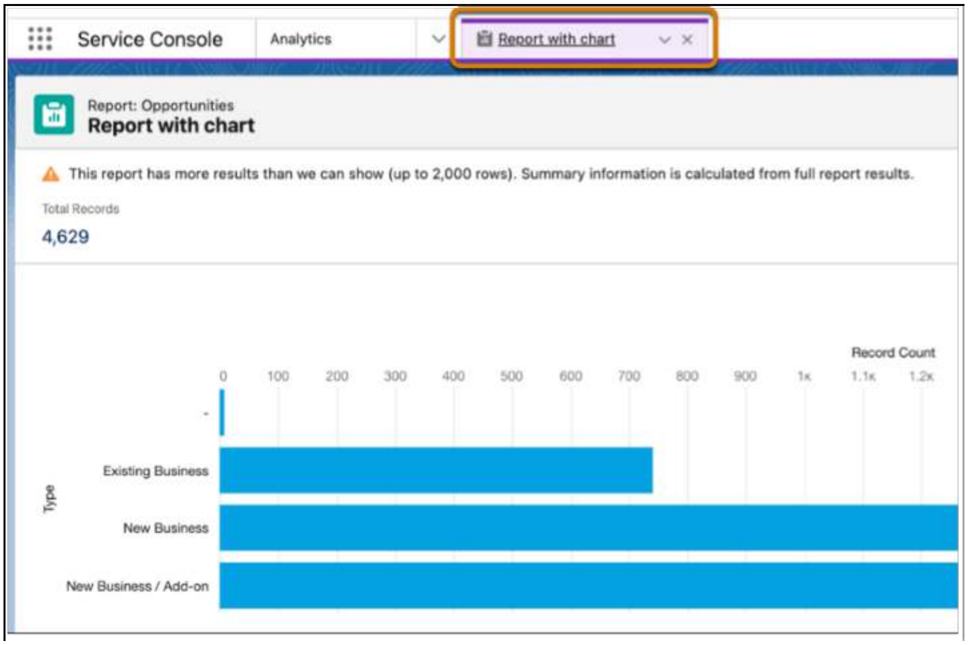


Open Reports and Dashboards in Multiple Tabs from the Analytics Tab

You can now open multiple reports and dashboards in individual tabs. Previously, you could open only one report at a time in the Analytics tab. You get better organization of your work and the ability to work on different analytics at the same time.

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

How: From the App Launcher, find and select **Analytics**, then click multiple reports and dashboards to view them in separate tabs.



SEE ALSO:

Salesforce Help: Manage Your Reports and Dashboards in Analytics Home (can be outdated or unavailable during release preview)

CRM Analytics

Join multiple data model objects in a single dashboard query. Unify branding and layouts across devices with custom themes and layout sync. Improve process and operational efficiency with the Analytics For Communications app. Reduce the run time for multiple recipes with staged data.

IN THIS SECTION:

CRM Analytics Visualization and Dashboard Building

Explore data faster with table pagination. Unify and update branding and layouts with custom themes and layout sync. Streamline your experience with user-sortable repeater widgets and resettable navigation.

Prebuilt and Industry Analytics Apps

Gain complete visibility and insights into your business operations by using the new dashboards in the Analytics for Communications - Business app.

Analytics Data Integration

Decrease data processing time by using staged data instead of datasets. Take advantage of Google's new event-based GA4 property framework with the Google Analytics 4 connector. Load larger data objects with the Salesforce Bulk API 2.0.

CRM Analytics Visualization and Dashboard Building

Explore data faster with table pagination. Unify and update branding and layouts with custom themes and layout sync. Streamline your experience with user-sortable repeater widgets and resettable navigation.

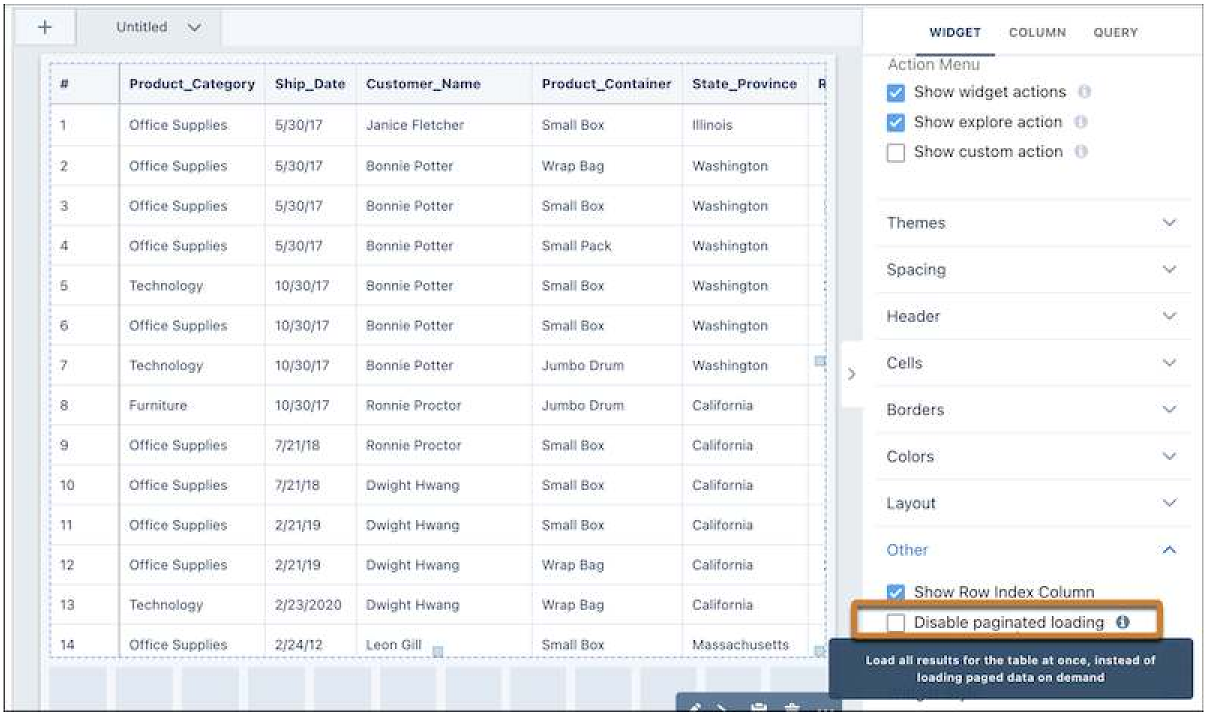
IN THIS SECTION:

Experience Improved Table Performance with Pagination

Your dashboard tables are now more responsive and load faster. Pagination of table results limits the amount of data loaded up front. As users page through the table results, more data loads as needed.

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

How: Table pagination is on by default. To disable table pagination, edit your dashboard and update the widget properties.

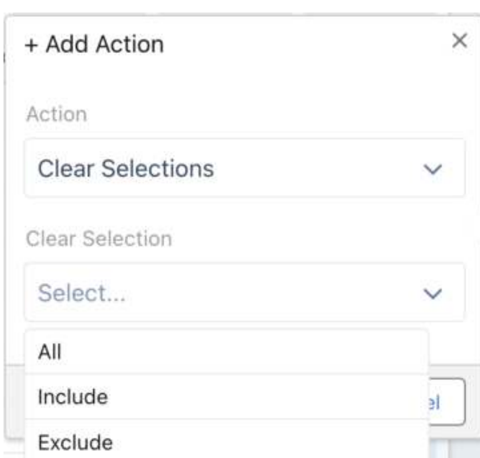


Reset Dashboard Navigation with the Clear Selections Interaction

Let dashboard users quickly return to the start of a curated journey with a single click. When you build a navigation flow, you can now add the Clear Selections action. After drilling deep into a navigation flow, users can easily return to the initial state. Clear Selections is only available for text widgets.

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

How: To build your navigation flow, select the widget in the dashboard editor. On the Interactions tab on the Widget Properties panel, add a **Clear Selection** action.



Sort Repeater Widget Cards at Run Time

View metrics in the order that you want by sorting repeater cards at run time. Use dimension fields as sort options so that viewers can choose how to arrange the cards. Previously, if one viewer wanted to see the cards ordered by region and another viewer by amount, the underlying query needed to be modified for each request.

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

How: Click **Sort By** (1) in repeater widget properties. To add all dimension fields as sort options, select **All Fields**.

To limit the sort fields that a viewer can choose, select **Pick Fields**.

Viewers can then click **Sort by** in the repeater widget to sort the cards.

SEE ALSO:

Salesforce Help: Transform Tabular Data with Repeater Widgets (can be outdated or unavailable during release preview)

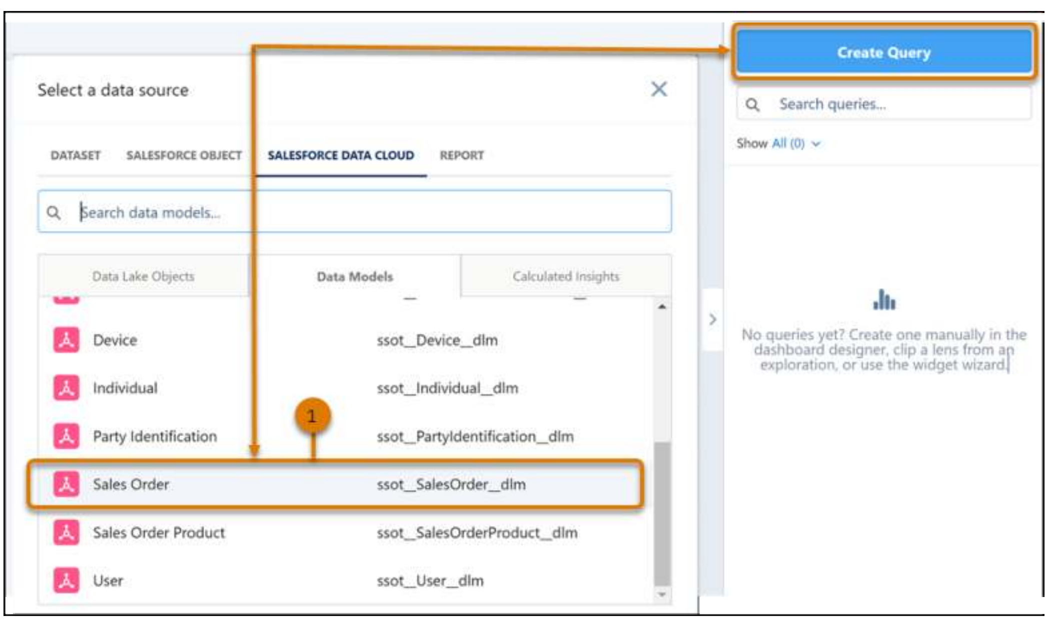
Explore Multiple Data Model Objects in Direct Data Using Joins (Generally Available)

It's now easier to analyze data model object (DMO) records where the data is normalized and related information resides in separate DMOs. To explore and draw insights from multiple DMOs simultaneously, join these objects in a single dashboard query. You can also filter the joined data and highlight the records that matter with conditional formatting. Previously, you wrote custom SQL queries to analyze data in multiple DMOs.

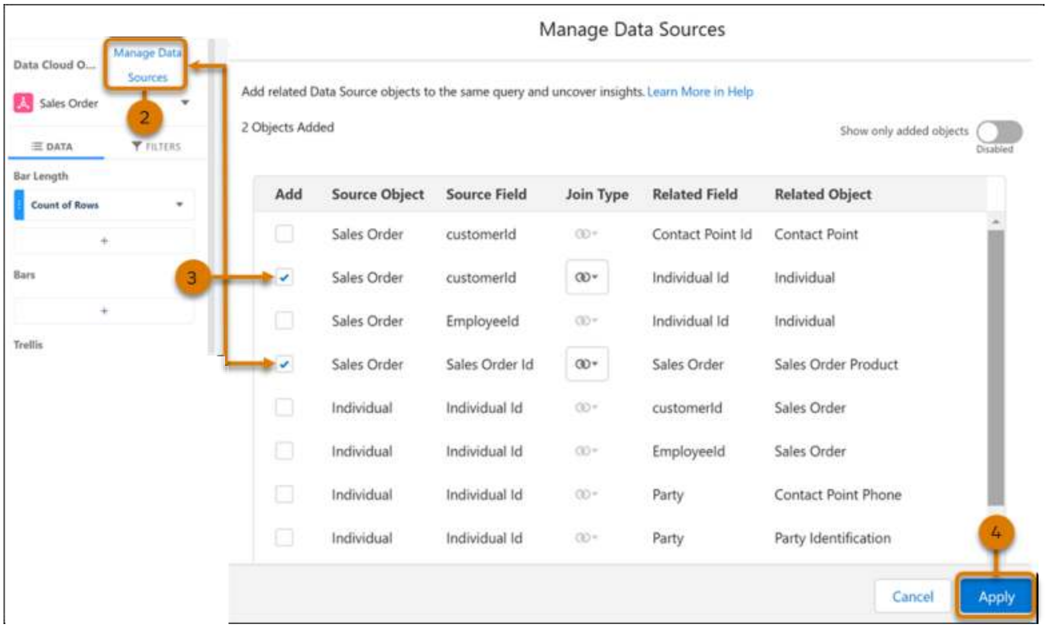
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

Who: CRM Analytics Direct Data for Data Cloud is available to users with a Data Cloud license.

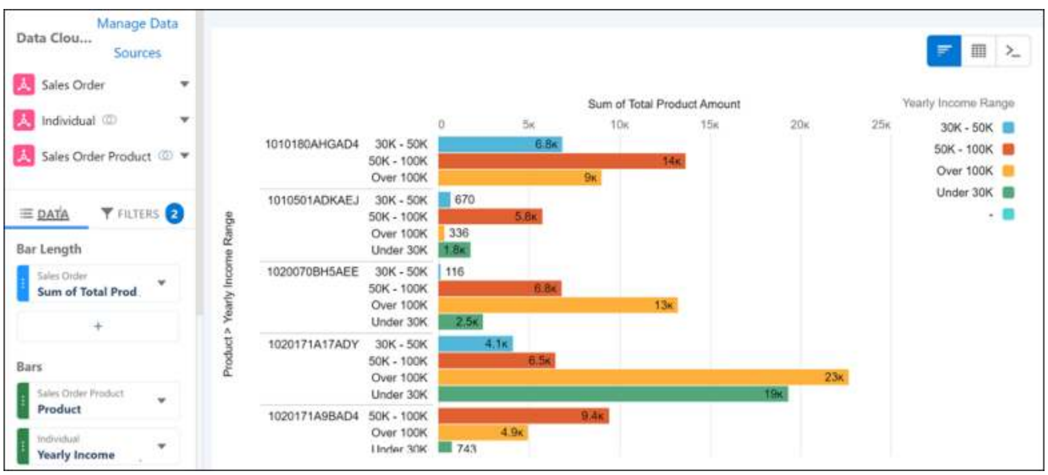
How: For example, to compare sales order data with product and customer's annual income, in the dashboard designer, create a query on the Sales Order DMO (1).



Then, in the lens mode, click **Manage Data Sources** (2). Add the related Individual and Product DMOs that you want to use (3), and apply your changes (4).



Build your query on the joined DMOs.



Create Consistent Dashboards with Themes

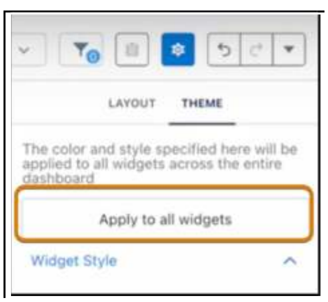
Creating widgets with selected formats, such as brand colors or a border style, is now easier with themes. Create a style and then save it as a theme for other widgets in the dashboard to inherit. You can now focus on dashboard content and functionality instead of creating aesthetic properties from scratch for each widget.

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

How: Click the Dashboard Properties (1) button in the dashboard.

On the **Theme** tab (2), create the style (3).

The theme is applied to all existing and new widgets. Click **Apply to all widgets** to apply a theme to widgets that have a different theme.



SEE ALSO:

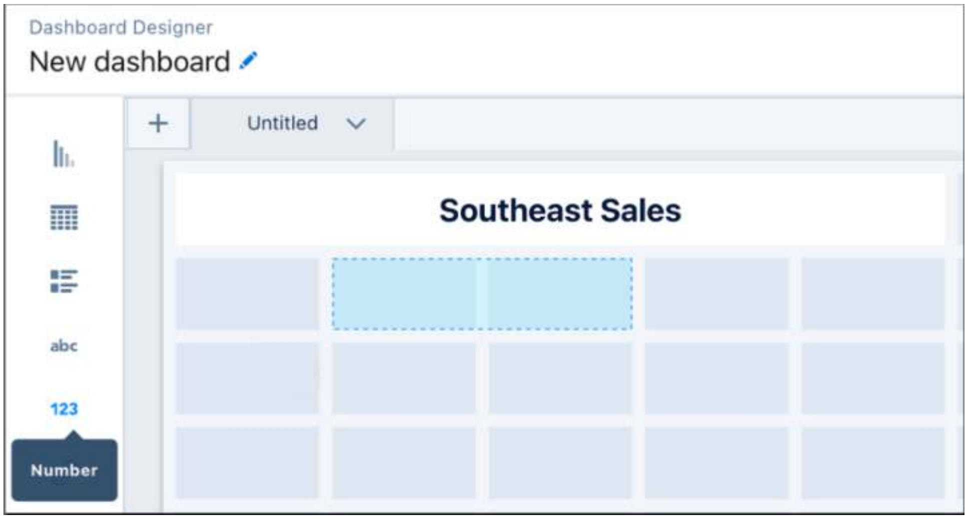
Salesforce Help: Dashboard Properties (can be outdated or unavailable during release preview)

Synchronize Modifications Across Layouts Effortlessly

Whether you're adding or updating widgets on a dashboard layout, use layout sync to maintain uniformity across other layouts in the dashboard. For example, a widget that's added to a mobile layout is also added to the desktop layout automatically.

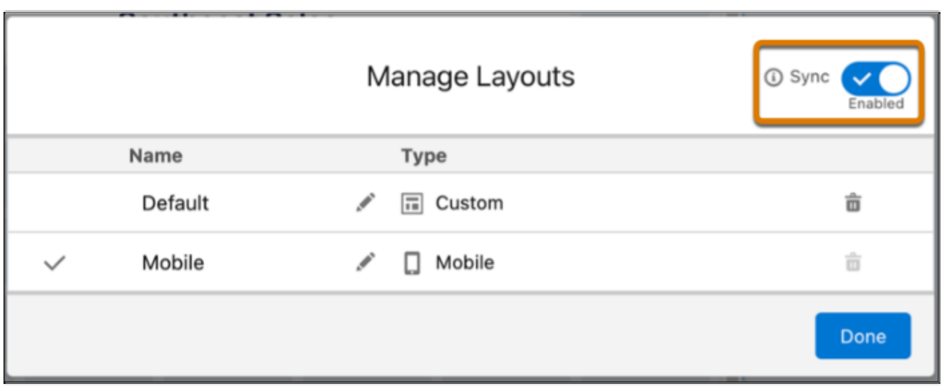
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

How: Add a widget to the dashboard layout or edit widget properties.



When you open another dashboard layout or create one, it's automatically in sync with the changes made in the original layout.

Use Manage Layouts to disable synchronization between dashboard layouts.



Use Multiple Variables for Forecasting Data

Predict future data points using a multivariate time series SAQL query. The new `arimax` statement enables you to use multiple variables to predict future data points.

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

SEE ALSO:

Analytics SAQL Developer Guide: arimax (can be outdated or unavailable during release preview)

Prebuilt and Industry Analytics Apps

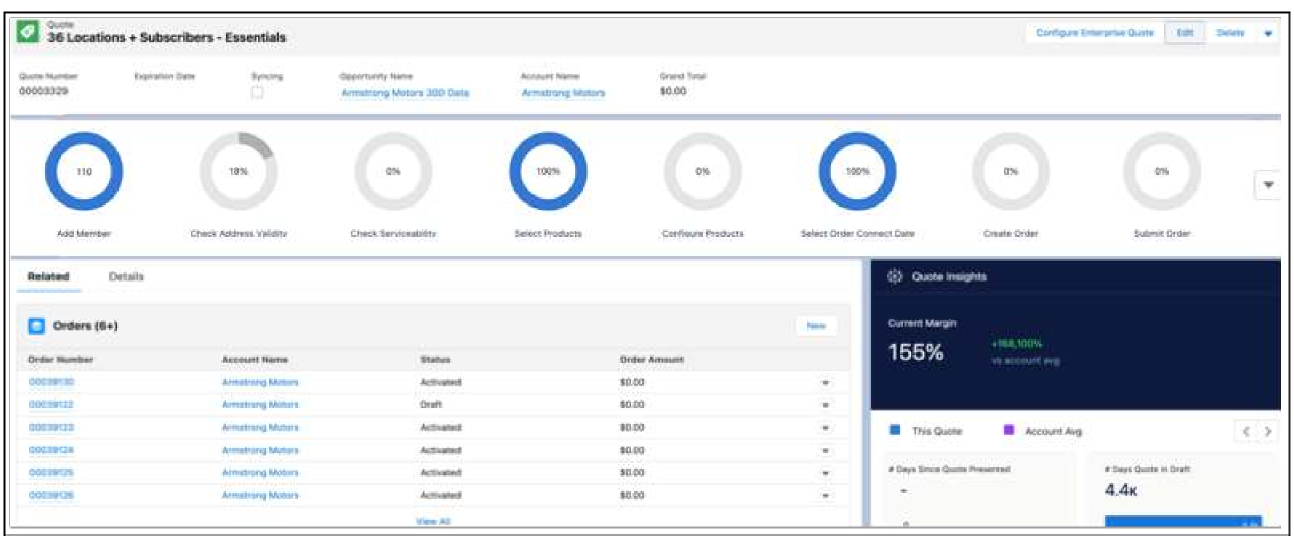
Gain complete visibility and insights into your business operations by using the new dashboards in the Analytics for Communications - Business app.

IN THIS SECTION:

Optimize Quote to Order Process by Using Process Visualizations

Get a comprehensive view of your quote process and analyze each step to identify missing data and streamline task completion. The process visualization dashboard is seamlessly integrated into the Quote to Order guided setup and helps you identify areas that need attention.

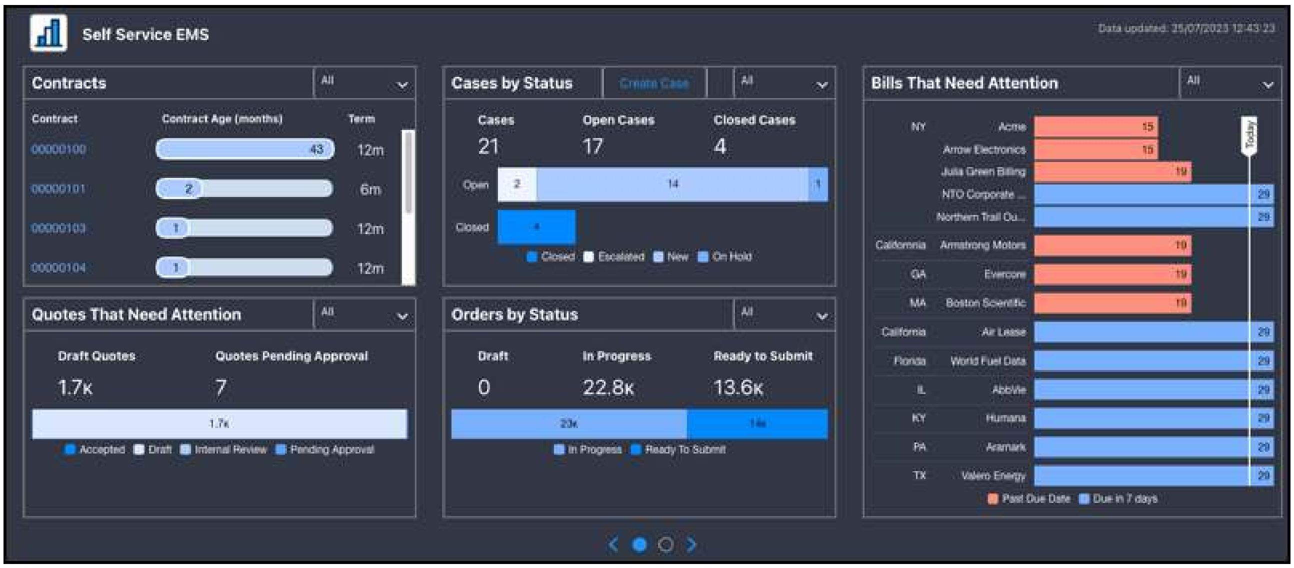
Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Communications Cloud and CRM Analytics are enabled.



Streamline Business Operations by Using Analytics Dashboard

Get detailed insights into your business operations by using the self-service dashboard for enterprises and Small and Medium Businesses (SMBs). Procurement managers and customer service representatives can easily access the dashboard from the self-service portal to get instant visibility into customer order details, case information, and asset distribution. SMBs can access the dashboard within the SMB Console for all account-specific information.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Communications Cloud and CRM Analytics are enabled.



Analytics Data Integration

Decrease data processing time by using staged data instead of datasets. Take advantage of Google's new event-based GA4 property framework with the Google Analytics 4 connector. Load larger data objects with the Salesforce Bulk API 2.0.

IN THIS SECTION:

Run Sequential Recipes Faster with Staged Data (Generally Available)

Reduce processing time when your data strategy involves multiple recipes by using staged data instead of datasets. An initial recipe outputs results as staged data, and subsequent recipes can use the staged data in input nodes. For example, rather than merge account and opportunity data in each region-specific forecasting recipe, merge just one time, output the results as staged data, and use this data in the other recipes.

Connect to Google Analytics 4 (Generally Available)

Migrate to Google Analytics 4 to continue loading your Google Analytics data and take advantage of Google's new event-based GA4 property framework. Google Analytics 4 uses first-party and Google data to understand and analyze multiple sites and apps together. Google Analytics 4 has replaced Universal Analytics. On July 1, 2023, all standard Universal Analytics properties stopped processing data.

Prevent Sync Timeout Issues with Salesforce External Connectors

If you encounter issues with larger data objects timing out when using a Salesforce External connector, use Salesforce Bulk API 2.0 with the new BULKV2 API type.

Connect to Databricks (Beta)

Create a remote connection using the Databricks connector to sync data from Databricks to Data Manager.

Connect to Amazon Athena (Beta)

Sync Amazon Athena data to Data Manager by creating a remote connection. Add your AWS security credentials to the advanced properties for each connected object.

Append Data Faster with Incremental Uploads (Beta)

Improve your data upload time when using the external data API by loading CSVs incrementally. By registering data faster, you can bring in more data to your existing datasets without causing the overall run time to grow exponentially.

Get Full Snowflake OAuth Parity

Take advantage of OAuth across all Snowflake connectors. The Snowflake Output connector and Sync Out for Snowflake now have full OAuth functionality to match the Snowflake input connector, providing a consistent and secure connection experience.

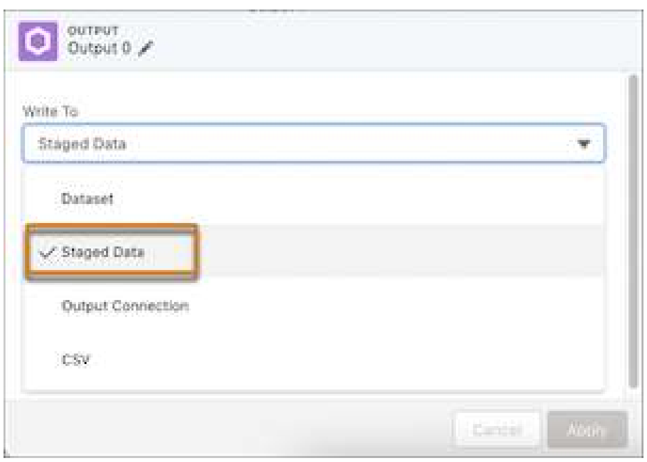
Run Sequential Recipes Faster with Staged Data (Generally Available)

Reduce processing time when your data strategy involves multiple recipes by using staged data instead of datasets. An initial recipe outputs results as staged data, and subsequent recipes can use the staged data in input nodes. For example, rather than merge account and opportunity data in each region-specific forecasting recipe, merge just one time, output the results as staged data, and use this data in the other recipes.

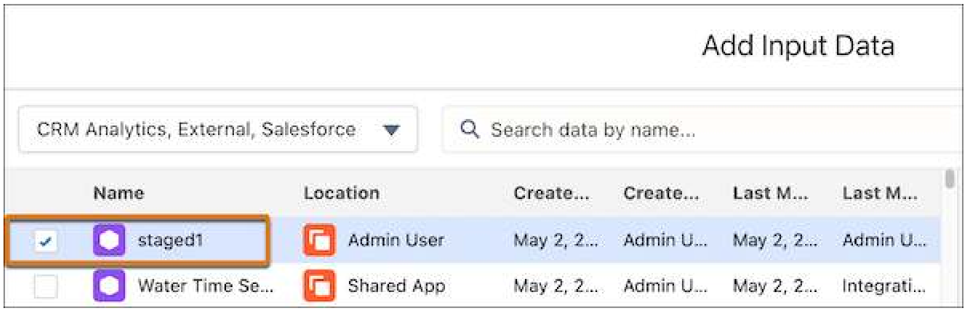
Where: This change applies to CRM Analytics in Lightning Experience and Salesforce Classic. CRM Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions. This change also applies to Salesforce Data Pipelines in Lightning Experience. Salesforce Data Pipelines is available for an extra cost in Enterprise, Performance, and Unlimited Editions. This feature isn't available with Shield Platform.

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

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



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



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

SEE ALSO:

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

Connect to Google Analytics 4 (Generally Available)

Migrate to Google Analytics 4 to continue loading your Google Analytics data and take advantage of Google's new event-based GA4 property framework. Google Analytics 4 uses first-party and Google data to understand and analyze multiple sites and apps together. Google Analytics 4 has replaced Universal Analytics. On July 1, 2023, all standard Universal Analytics properties stopped processing data.

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

How: Create a Google Analytics 4 connection using the Data Manager. Add your Google Analytics property ID to the advanced properties for each connected object.

SEE ALSO:

Salesforce Help: Google Analytics 4 Connection (can be outdated or unavailable during release preview)

External Link: Universal Analytics is going away

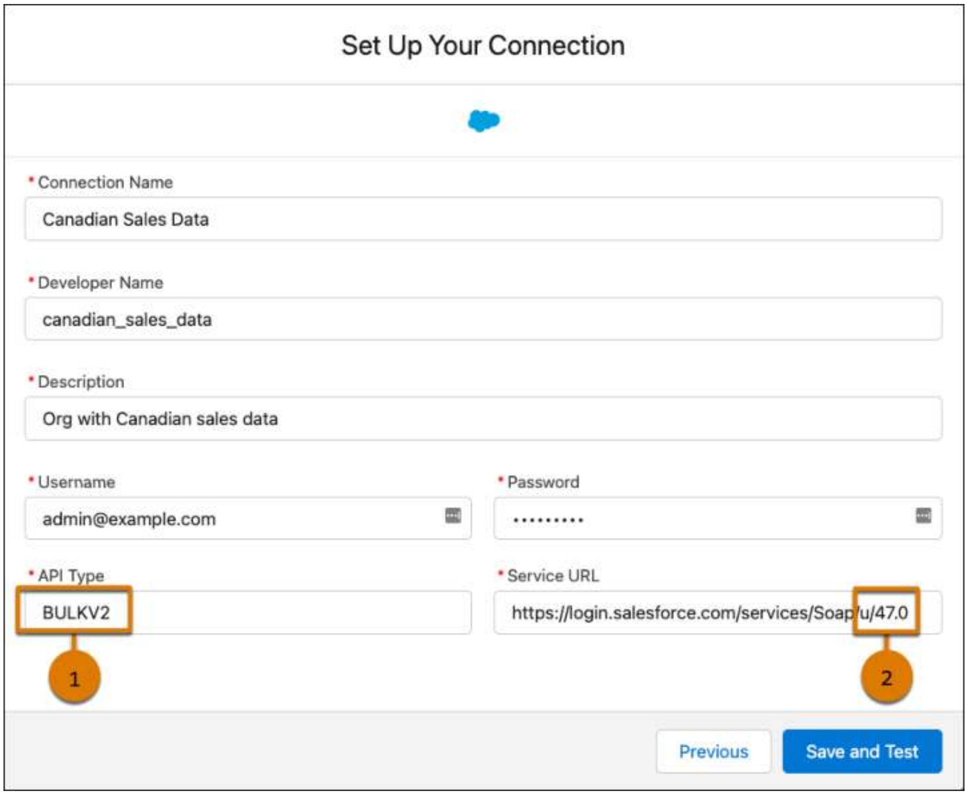
External Link: [UA GA4] Universal Analytics versus Google Analytics 4 data

Prevent Sync Timeout Issues with Salesforce External Connectors

If you encounter issues with larger data objects timing out when using a Salesforce External connector, use Salesforce Bulk API 2.0 with the new BULKV2 API type.

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

How: When creating an Salesforce External connector, use `BULKV2` for the API type (1). For the Service URL, the version number is 47.0 or later (2).



SEE ALSO:

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

Connect to Databricks (Beta)

Create a remote connection using the Databricks connector to sync data from Databricks to Data Manager.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Use Data Manager to create a Databricks connection. Add the Databricks personal access token, server, HTTPPath, and database values to the advanced properties for each connected object.

SEE ALSO:

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

Connect to Amazon Athena (Beta)

Sync Amazon Athena data to Data Manager by creating a remote connection. Add your AWS security credentials to the advanced properties for each connected object.

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

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SEE ALSO:

Salesforce Help: Amazon Athena Connection (Beta) (can be outdated or unavailable during release preview)

Append Data Faster with Incremental Uploads (Beta)

Improve your data upload time when using the external data API by loading CSVs incrementally. By registering data faster, you can bring in more data to your existing datasets without causing the overall run time to grow exponentially.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: From Setup, in the Quick Find box, enter `Analytics`, and select **Settings**. Then select **Incremental Append in External Data API** and save. When using the Analytics External Data API to load data, set the mode to incremental.

SEE ALSO:

Analytics External Data API Developer Guide: Append the Data

Get Full Snowflake OAuth Parity

Take advantage of OAuth across all Snowflake connectors. The Snowflake Output connector and Sync Out for Snowflake now have full OAuth functionality to match the Snowflake input connector, providing a consistent and secure connection experience.

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

SEE ALSO:

Snowflake Output Connection

Sync Out for Snowflake

Intelligent Analytics Apps

Optimize your sales strategy and track changes in your pipeline with Revenue Intelligence. Improve performance, monitor operations, and quickly discover top customer requests with Service Intelligence.

IN THIS SECTION:

Revenue Intelligence

Revenue Intelligence is a data-driven sales solution that unites CRM Analytics dashboards and analytics with an easy-to-visualize pipeline progress flow chart in Pipeline Inspection, and more.

SEE ALSO:

Revenue Intelligence

Service Intelligence

Service Intelligence is a data-driven solution that displays key contact center performance metrics.

SEE ALSO:

Service Intelligence

Tableau

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

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

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

Marketing Cloud Intelligence

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

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

Commerce

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

IN THIS SECTION:

Salesforce B2B and D2C Commerce

Let customers add up to 2,000 line items to a cart. Enhance product fields and show frequently bought items to customers in Commerce stores with Einstein Generative AI. Start selling fast with automated org setup and streamlined store creation. Improve your customer experience with reduced wait times on product pages, guest user access to order details, and enhancements for viewing and configuring markets. Access media from all CMS workspaces, and improve SEO with custom URL slugs. Place orders on behalf of customers, and optimize the self-registration experience.

IN THIS SECTION:

Start Selling Fast with Easy Commerce Setup

Answer a few simple questions to effortlessly create your selling channel. No more waiting for site creation work to happen behind the scenes. Choose whether you want to create a B2B or B2C store or a reorder portal to integrate with your sales or service processes. For a reorder portal, use the new Store Setup Assistant to complete tasks like adding products and setting up shipping. When you're done, go directly to a landing page optimized for your channel.

Add Branding to Your Commerce Reorder Portal

Quickly make your reorder portal match your brand. Upload your logo, and choose your colors and fonts. Everything is then applied to your reorder page.

Simplify Commerce Reorder Portal Invitations with a Cadence

Use a cadence to guide your reps through inviting a contact to a Commerce reorder portal. The included cadence provides an email template so that reps can quickly engage repeat customers. The process also includes a step for reviewing which products and prices are available for the contact in the reorder portal.

Reduce Wait Time When Adding Item to Cart

Speed up the shopping experience in your LWR store by enabling the Faster-Add-to-Cart setting, which splits processing time across Product and Cart pages. Previously, when customers put items in their cart, they experienced longer processing times on Product pages. In new stores created with an LWR template, this setting is enabled by default.

Set Up Lowest List Price Compliance

When you announce a promotion or price reduction, satisfy a European Union (EU) mandate that requires you to show the lowest price for a product over the past 30 days. If the original price is displayed and is greater than the list price, the lowest list price also displays. B2C stores must show the lowest price and any price adjustments. B2B stores must show the lowest price and any price adjustments for guest users but don't need to show it for logged-in users. Manually updating the lowest list price isn't recommended because it can cause an incorrect value for lowest unit price and the store won't be in compliance with the mandate.

Provide Guest Users Access to Their Order Details

After completing a purchase, guest shoppers can navigate to an order lookup page and enter their order number, last name, and email to access their order details. Provide the URL to this page in the store footer, your order confirmation emails, or any custom experience pages. Use Experience Builder to add this page to your store.

View More Consolidated Information on Market and Buyer Group Pages

Locales and supported ship-to countries are now in separate columns on the All Markets page, making it easier to scan the information. Quickly see the buyer group details on the Related tab on the Buyer Group page. From the Related tab, assign and delete items, such as locales, price books, and promotion segments.

Update Promotion Segment and Buyer Group Associations

Easily modify your promotion segment targeting as needed. To change the buyer group assigned to a promotion segment, delete the current association and then assign the new buyer group to that promotion segment.

Promote Product Variants

Promotions assigned to product categories automatically apply to variant products. To run a promotion on a variant, create a promotion targeting the parent product and then assign the variant that you want the promotion to apply to. For example, if you want to give 10% off for only red t-shirts, create a promotion and assign it to the red variants.

Improve SEO with Custom URL Slugs (Generally Available)

To boost organic traffic on your store, improve search engine optimization (SEO) with new URL configuration solutions. Create URL slugs for each Product and Category page to replace record IDs with relevant and human-readable information in URLs. You can also bulk-import URL slugs for products with a CSV file. When you use URL slugs, the SEO-friendly URLs generated are now set to canonical, and record ID URLs continue to resolve.

Create Rich Search Results with Structured Data (Generally Available)

Use structured data from your store to dynamically update a page's meta tags, which are processed and surfaced by search engines. For example, you can inform search engines about category names, breadcrumbs, and product attributes like color, size, and pricing. This information creates richer, more accurate search results and improves your site ranking with search engines.

Access Media in Your Store from All CMS Workspaces

New stores based on Lightning Web Runtime (LWR) that use an enhanced CMS workspace can now also access media from non-enhanced CMS workspaces. You no longer have to move all your media to a different workspace so that your store can access product images and attachments.

Place Orders on Behalf Of Customers Using Order Entry

Customer service representatives using Salesforce B2B Commerce, D2C Commerce, or B2C Commerce can now directly place orders for customers without having an Order Management license.

Commerce Components

Customize components fast by starting with our reference component library. Simplify how promotions are shown in a customer cart. Add product pricing details, and show order details at checkout.

Support Larger Purchases

Customers can now complete checkout with up to 2,000 line items in a cart. To increase the line item limit for your Salesforce org, contact your Salesforce Administrator.

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

Commerce Einstein

Let Einstein generate multiple product fields in a single step. Add the new Einstein Frequently Bought Together component to show customers additional products that are related to the one they're viewing in their cart.

IN THIS SECTION:

Enhance Product Fields in Commerce Stores with Einstein

Generate product text fields for multiple products in one step with Einstein Generative AI. Einstein uses your instructions and any linked reference fields to generate revised product text for the selected products. Product fields generated by Einstein support instructions in English only. You can generate product fields in languages in your B2B or B2C store Then, review the generated text and accept or discard the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

Show Frequently Bought Items to Customers

Increase average order value by recommending frequently bought items to customers. Add the Einstein Frequently Bought component to the product detail page to market similar items. Recommendations are generated based on shopper interactions with the storefront.

SEE ALSO:

Einstein Release Notes

Enhance Product Fields in Commerce Stores with Einstein

Generate product text fields for multiple products in one step with Einstein Generative AI. Einstein uses your instructions and any linked reference fields to generate revised product text for the selected products. Product fields generated by Einstein support instructions in English only. You can generate product fields in languages in your B2B or B2C store Then, review the generated text and accept or discard the changes. You need the Einstein Generative AI license to use Einstein Generative AI. Contact your account executive for more information.

Where: This change applies to B2B Commerce and D2C Commerce in the Unlimited Edition.

This change applies to Lightning Experience in Unlimited editions with Commerce Einstein and the Einstein Generative AI for Commerce add-on. Einstein is available in Lightning Experience.

Einstein for Commerce charges only for the activity you use. Learn how Commerce Cloud tracks your usage against your subscription allowance. For each Einstein feature, credit usage depends on the size of the request and the response from Einstein.

To learn more or get updates on your Commerce credit usage, contact your Salesforce account executive.

Why: You need assurances that AI output is trustworthy and accurate. You can rely on Salesforce to uphold our #1 value, trust, and treat your data with care and security at the forefront.

How: From Setup, enable Einstein to use generative AI features. Then from the Product Workspace, select one or more products. Click **Create and Review Field Text** to give instructions to Einstein to generate text.

SEE ALSO:

Einstein Generative AI Features

Salesforce Help: Einstein Generative AI (can be outdated or unavailable during release preview)

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

Show Frequently Bought Items to Customers

Increase average order value by recommending frequently bought items to customers. Add the Einstein Frequently Bought component to the product detail page to market similar items. Recommendations are generated based on shopper interactions with the storefront.

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

SEE ALSO:

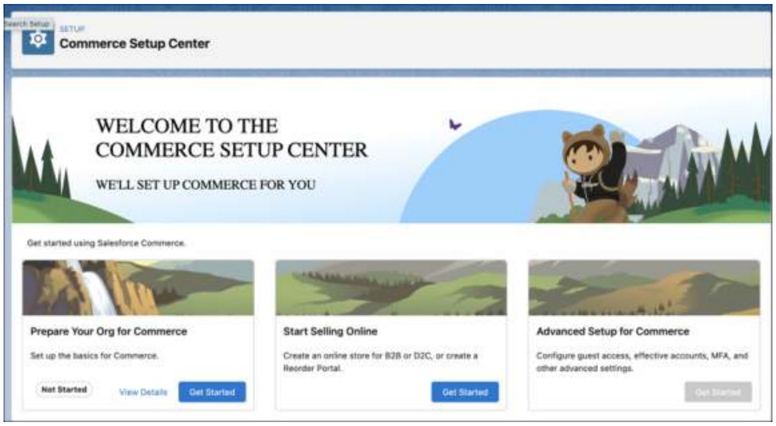
Salesforce Help: LWR Store Components (can be outdated or unavailable during release preview)

Easily Prepare Your Org for Commerce with the Enhanced Commerce Setup Center

The enhanced Setup Center enables Commerce features, sets org preferences, adjusts layouts for Commerce objects, and installs Commerce reports. After using the automated setup, you're ready to start selling.

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

How: To access the Commerce Setup Center, from Setup, in the Quick Find box, enter `Commerce Setup Center`.



SEE ALSO:

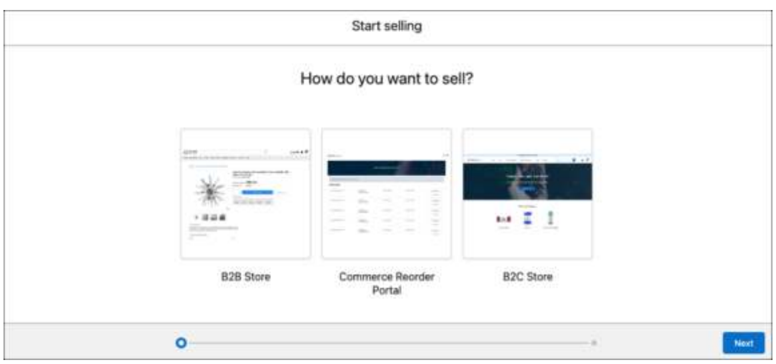
Salesforce Help: Prepare Your Org for Commerce (can be outdated or unavailable during release preview)

Start Selling Fast with Easy Commerce Setup

Answer a few simple questions to effortlessly create your selling channel. No more waiting for site creation work to happen behind the scenes. Choose whether you want to create a B2B or B2C store or a reorder portal to integrate with your sales or service processes. For a reorder portal, use the new Store Setup Assistant to complete tasks like adding products and setting up shipping. When you're done, go directly to a landing page optimized for your channel.

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

How: From the Commerce App navigation menu, select **Stores**. Click **Create a Store**.



SEE ALSO:

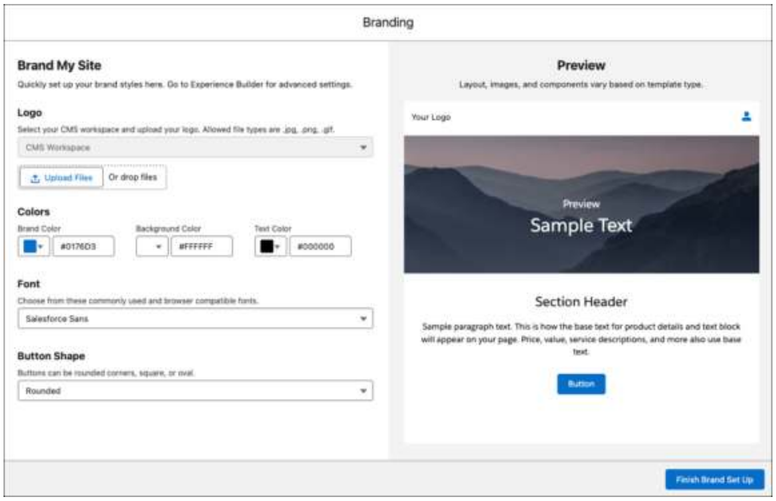
Salesforce Help: Create a Store or Reorder Portal (can be outdated or unavailable during release preview)

Add Branding to Your Commerce Reorder Portal

Quickly make your reorder portal match your brand. Upload your logo, and choose your colors and fonts. Everything is then applied to your reorder page.

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

How: From the Setup Assistant, click **Brand My Site**.



SEE ALSO:

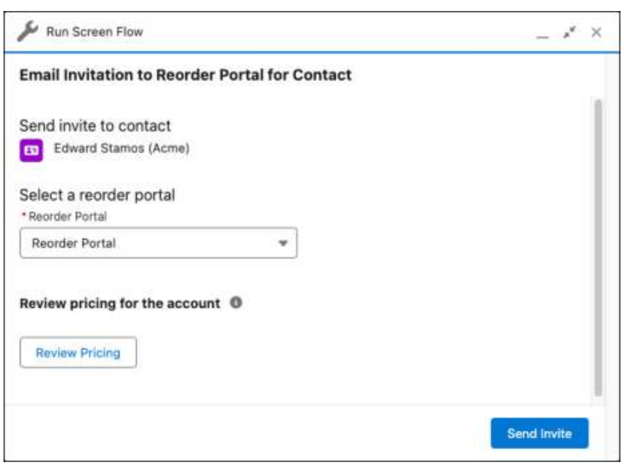
Salesforce Help: Create a Commerce Reorder Portal (can be outdated or unavailable during release preview)

Simplify Commerce Reorder Portal Invitations with a Cadence

Use a cadence to guide your reps through inviting a contact to a Commerce reorder portal. The included cadence provides an email template so that reps can quickly engage repeat customers. The process also includes a step for reviewing which products and prices are available for the contact in the reorder portal.

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

How: After you create a Commerce reorder portal and enable Sales Engagement, activate the Invite Contact to a Reorder Portal cadence and begin adding targets in Sales Cloud.



SEE ALSO:

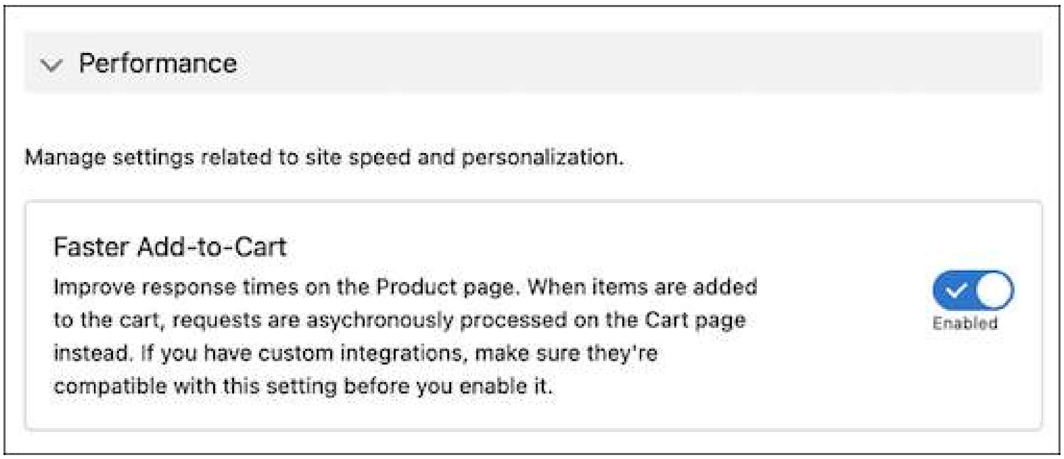
Salesforce Help: Use Cadences for a Commerce Reorder Portal (can be outdated or unavailable during release preview)

Reduce Wait Time When Adding Item to Cart

Speed up the shopping experience in your LWR store by enabling the Faster-Add-to-Cart setting, which splits processing time across Product and Cart pages. Previously, when customers put items in their cart, they experienced longer processing times on Product pages. In new stores created with an LWR template, this setting is enabled by default.

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

How: On the Administration page for your store, go to General Settings. In the Performance section, enable Faster Add-to-Cart. If you have custom components that rely on cart APIs, make sure they work as expected. Finally, republish the store.



SEE ALSO:

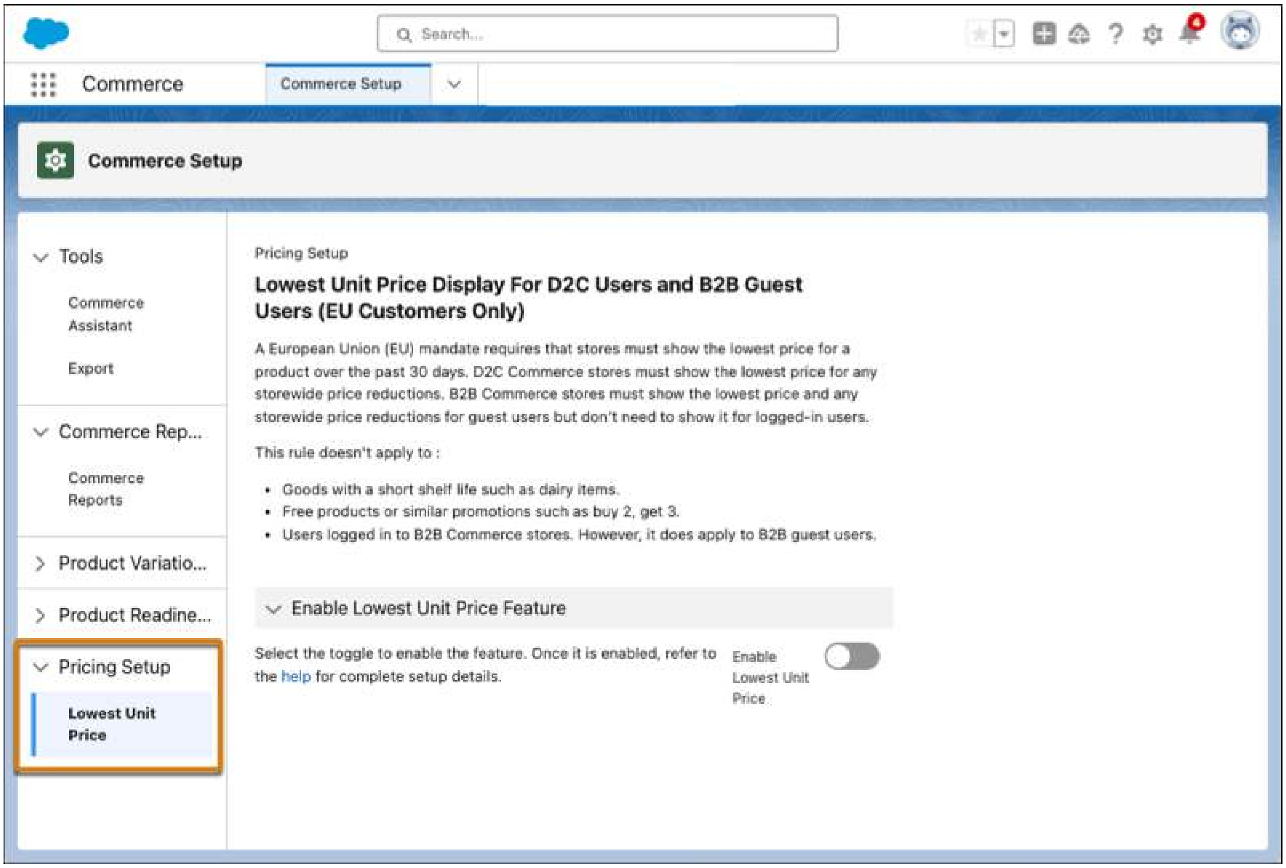
Salesforce Help: Salesforce B2B Commerce and D2C Commerce (can be outdated or unavailable during release preview)

Set Up Lowest List Price Compliance

When you announce a promotion or price reduction, satisfy a European Union (EU) mandate that requires you to show the lowest price for a product over the past 30 days. If the original price is displayed and is greater than the list price, the lowest list price also displays. B2C stores must show the lowest price and any price adjustments. B2B stores must show the lowest price and any price adjustments for guest users but don't need to show it for logged-in users. Manually updating the lowest list price isn't recommended because it can cause an incorrect value for lowest unit price and the store won't be in compliance with the mandate.

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

How: Select **Product Workspace > Commerce Setup**. In the left panel, under Pricing Setup, select **Lowest Unit Price** and enable it. Then set up layout visibility in Salesforce Setup.



SEE ALSO:

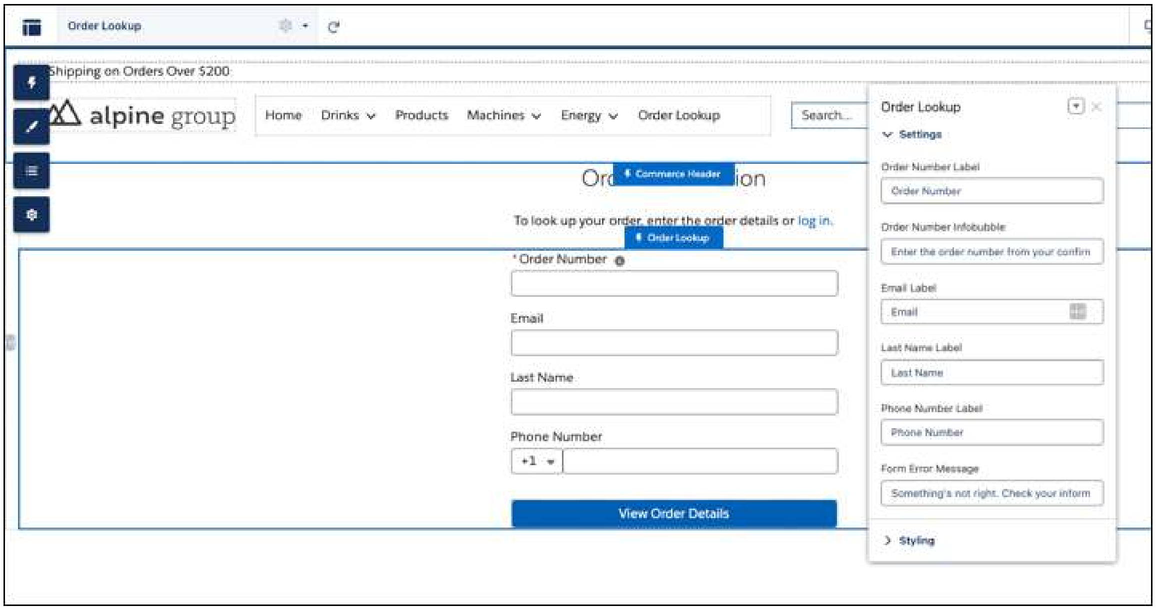
Salesforce Help: Price Books (can be outdated or unavailable during release preview)

Provide Guest Users Access to Their Order Details

After completing a purchase, guest shoppers can navigate to an order lookup page and enter their order number, last name, and email to access their order details. Provide the URL to this page in the store footer, your order confirmation emails, or any custom experience pages. Use Experience Builder to add this page to your store.

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

How: In Experience Builder, configure the Order Lookup page and add a link to it on the navigation menu.



SEE ALSO:

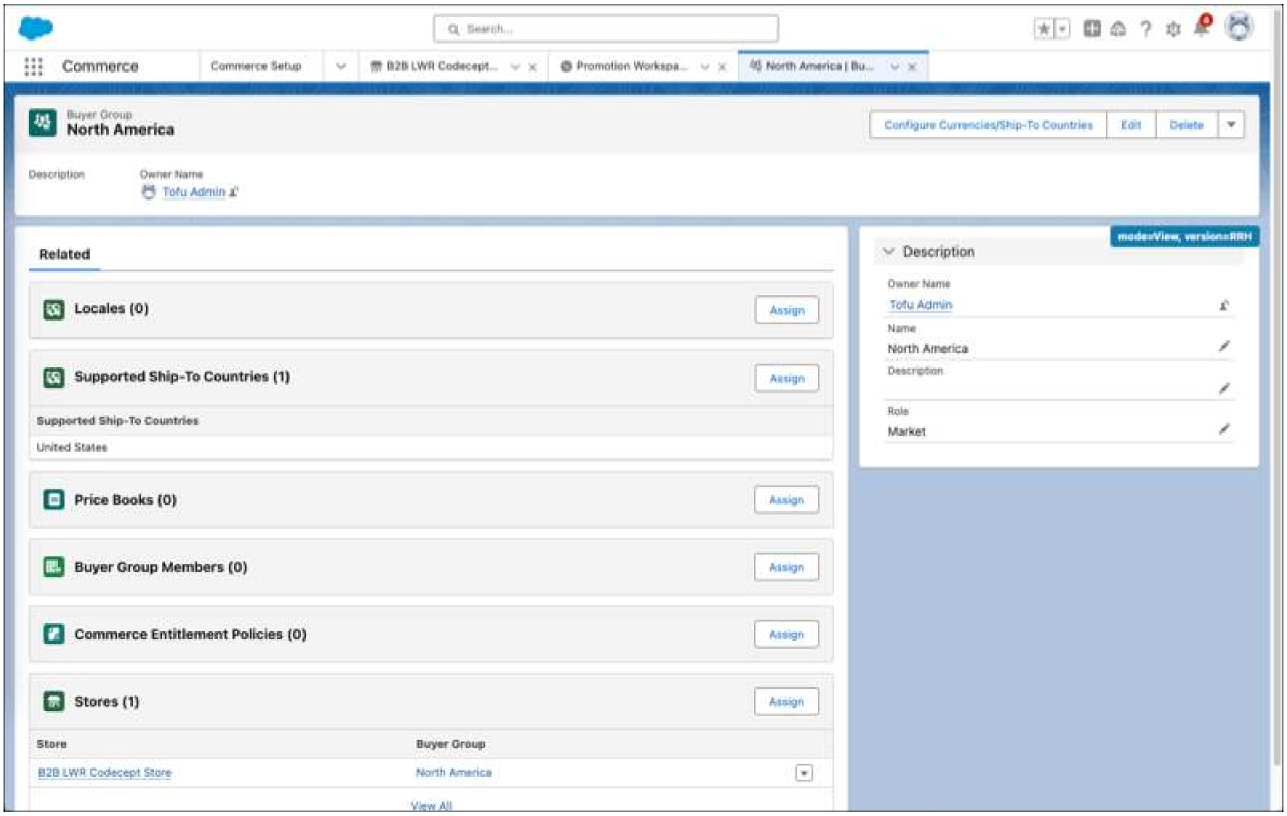
Salesforce Help: LWR Store Components (can be outdated or unavailable during release preview)

View More Consolidated Information on Market and Buyer Group Pages

Locales and supported ship-to countries are now in separate columns on the All Markets page, making it easier to scan the information. Quickly see the buyer group details on the Related tab on the Buyer Group page. From the Related tab, assign and delete items, such as locales, price books, and promotion segments.

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

How: From your store's home page, click the **Administration** tile, click **Markets**, and then select the market that you want to view.



SEE ALSO:

Salesforce Help: Segment a Store into Markets Based on Locale (can be outdated or unavailable during release preview)

Update Promotion Segment and Buyer Group Associations

Easily modify your promotion segment targeting as needed. To change the buyer group assigned to a promotion segment, delete the current association and then assign the new buyer group to that promotion segment.

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

SEE ALSO:

Salesforce Help: Add a Promotion Segment (can be outdated or unavailable during release preview)

Promote Product Variants

Promotions assigned to product categories automatically apply to variant products. To run a promotion on a variant, create a promotion targeting the parent product and then assign the variant that you want the promotion to apply to. For example, if you want to give 10% off for only red t-shirts, create a promotion and assign it to the red variants.

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

SEE ALSO:

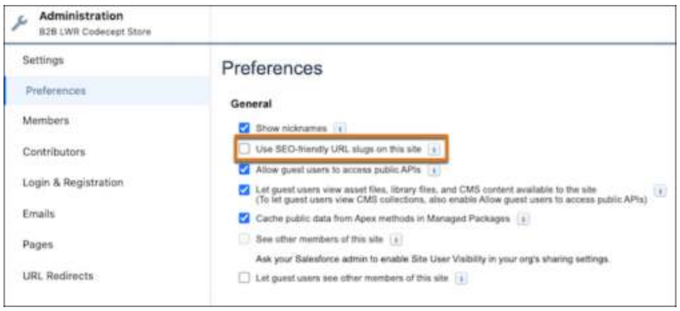
Salesforce Help: Configure a Promotion (can be outdated or unavailable during release preview)

Improve SEO with Custom URL Slugs (Generally Available)

To boost organic traffic on your store, improve search engine optimization (SEO) with new URL configuration solutions. Create URL slugs for each Product and Category page to replace record IDs with relevant and human-readable information in URLs. You can also bulk-import URL slugs for products with a CSV file. When you use URL slugs, the SEO-friendly URLs generated are now set to canonical, and record ID URLs continue to resolve.

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

How: From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**. For an active LWR site, click **Workspaces**. From the Experience Workspace, go to **Administration** > **Preferences** and select **Use SEO-friendly URL slugs on this site**. Publish your site to apply changes.



SEE ALSO:

Salesforce Help: SEO Considerations for Store URLs (can be outdated or unavailable during release preview)

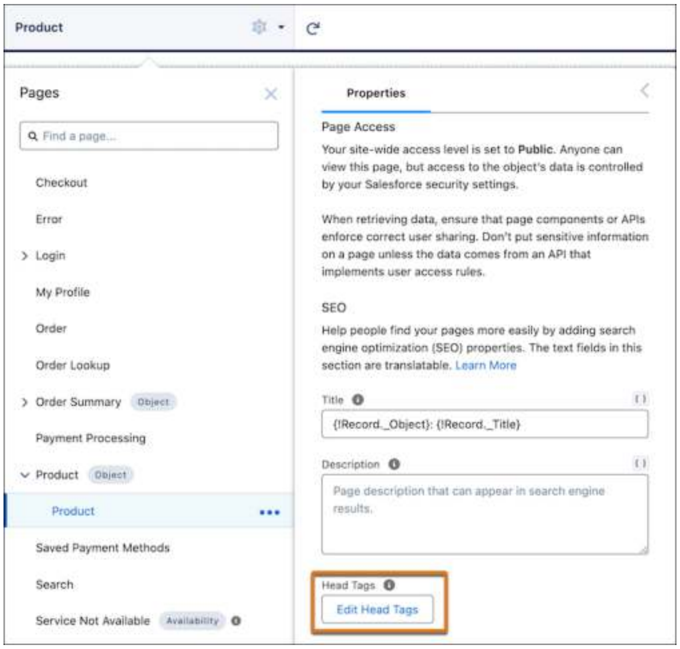
Salesforce Help: Add URL Slugs to Store Pages(can be outdated or unavailable during release preview)

Create Rich Search Results with Structured Data (Generally Available)

Use structured data from your store to dynamically update a page's meta tags, which are processed and surfaced by search engines. For example, you can inform search engines about category names, breadcrumbs, and product attributes like color, size, and pricing. This information creates richer, more accurate search results and improves your site ranking with search engines.

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

How: From Experience Builder, edit the head tags on a Product Detail Page. Add an expression that maps to category, breadcrumb, or product data.



SEE ALSO:

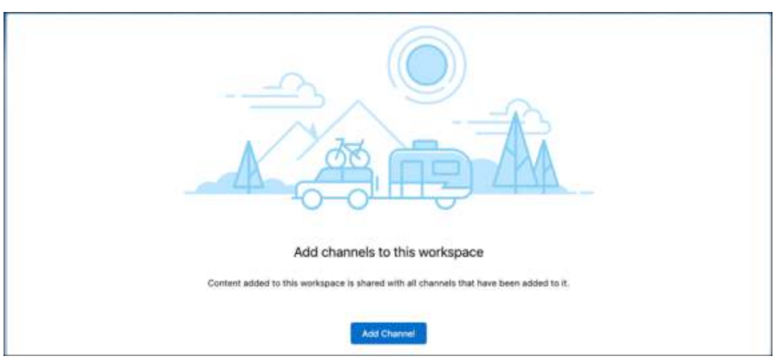
Salesforce Help: Structured Data for Meta Tags (can be outdated or unavailable during release preview)

Access Media in Your Store from All CMS Workspaces

New stores based on Lightning Web Runtime (LWR) that use an enhanced CMS workspace can now also access media from non-enhanced CMS workspaces. You no longer have to move all your media to a different workspace so that your store can access product images and attachments.

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

How: Go to the non-enhanced CMS workspace and add your store's public channel.



SEE ALSO:

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

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

Salesforce Help: Add a Channel to a CMS Workspace (can be outdated or unavailable during release preview)

Place Orders on Behalf Of Customers Using Order Entry

Customer service representatives using Salesforce B2B Commerce, D2C Commerce, or B2C Commerce can now directly place orders for customers without having an Order Management license.

Where: This change applies to B2B Commerce and D2C Commerce in Enterprise, Unlimited, and Developer editions. Order Entry requires Connected Commerece.

How: Configure Order Entry for your org by following the setup steps for the Order on Behalf Of flow.

SEE ALSO:

Salesforce Help: Order on Behalf Of Overview (can be outdated or unavailable during release preview)

Commerce Components

Customize components fast by starting with our reference component library. Simplify how promotions are shown in a customer cart. Add product pricing details, and show order details at checkout.

IN THIS SECTION:

Add Product Pricing Details to Your Commerce Products

Highlight discounted and promotional prices to shoppers by including the original price along with the savings. Add the Product Pricing Details component to show pricing details on the Product Detail page in your B2B or B2C store. You can display up to three prices and specify the order in which they appear. For example, include the current product price, the original (MSRP) price, and the discounted or promotional price.

Create Custom Components with the Public Commerce LWR Library

Accelerate the development process with ready-to-use Lightning web components that help you customize your Commerce storefronts. The Public Commerce LWR Library in GitHub is an open repository of components that look and function like the Commerce product components available in Experience Builder. Use these public components to streamline your workflow and quickly build outstanding Commerce storefronts.

Fine-Tune the Checkout Experience

Customize your Checkout page in Experience Builder with new and enhanced Checkout components. The components now incorporate building blocks and binding expressions for added flexibility. Use the new Layout and Section components to organize your page structure, and take advantage of added customization to tailor your Checkout experience.

Simplify How Promotions Are Shown in the Cart

Present a more compact and complete view of promotions with the new Promotions component for LWR stores. You can now show a single list of all manual and automatic promotions applied to the cart. If you have an existing LWR store, we recommend replacing your legacy Coupons and Promotions components with the latest options. The legacy components continue to work but no longer receive enhancements.

Show Order Details in Checkout

Use the updated Cart Items component to show LWR store customers their cart contents during checkout. Let customers review their order or return to individual product pages. You can add a Cart Items component anywhere on the Checkout Page, but we recommend putting it in an expandable section so that customers can choose whether to view it. In new stores, the Checkout Page includes the Cart Items component by default.

Customize the Seller Onboarding Component

Tailor the steps for the seller's onboarding process to match your business type. Download the onboarding component from the Git repository, and implement it in the home page of the seller portal.

Track Customer Behavior in Data Cloud with the Product Set Component

The Product Set component can now track customer data and behavrior in Data Cloud.

Add Product Pricing Details to Your Commerce Products

Highlight discounted and promotional prices to shoppers by including the original price along with the savings. Add the Product Pricing Details component to show pricing details on the Product Detail page in your B2B or B2C store. You can display up to three prices and specify the order in which they appear. For example, include the current product price, the original (MSRP) price, and the discounted or promotional price.

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

How: In Experience Builder, drag the Product Pricing Detail component onto the Product Detail page in your store.

SEE ALSO:

Salesforce Help: Products and Pricing (can be outdated or unavailable during release preview)

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

Create Custom Components with the Public Commerce LWR Library

Accelerate the development process with ready-to-use Lightning web components that help you customize your Commerce storefronts. The Public Commerce LWR Library in GitHub is an open repository of components that look and function like the Commerce product components available in Experience Builder. Use these public components to streamline your workflow and quickly build outstanding Commerce storefronts.

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

SEE ALSO:

B2B Commerce and D2C Commerce Developer Guide: Public Commerce LWR Library (can be outdated or unavailable during release preview)

Fine-Tune the Checkout Experience

Customize your Checkout page in Experience Builder with new and enhanced Checkout components. The components now incorporate building blocks and binding expressions for added flexibility. Use the new Layout and Section components to organize your page structure, and take advantage of added customization to tailor your Checkout experience.

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

How: For existing stores, remove components marked as "Legacy" and replace them with the updated components. Upgraded components don't work inside the Checkout (Legacy) container. We recommend starting with the Layout and Checkout Section components first. For new stores, the Checkout page includes the latest components.

The new and upgraded components are:

- Action Button-New
- Billing Address-New
- Checkout Notification-New
- Checkout Section-New
- Contact Information-Replaces Guest Contact Information (Legacy)
- Dual Payment-Replaces Dual Payment (Legacy)

- Layout: Accordion-Replaces Checkout (Legacy)
- Layout: One-Page-Replaces Checkout (Legacy)
- Payment-Replaces Payment (Legacy)
- Place Order Button-New
- Purchase Order-Replaces Purchase Order (Legacy)
- Salesforce Payments-Replaces Salesforce Payments (Legacy)
- Shipping Address-Replaces Shipping Address (Legacy)
- Shipping Instructions-Replaces Shipping Instructions (Legacy)
- Shipping Method-Replaces Shipping Method (Legacy)

SEE ALSO:

Salesforce Help: Set Up the Checkout Page (can be outdated or unavailable during release preview)

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

Simplify How Promotions Are Shown in the Cart

Present a more compact and complete view of promotions with the new Promotions component for LWR stores. You can now show a single list of all manual and automatic promotions applied to the cart. If you have an existing LWR store, we recommend replacing your legacy Coupons and Promotions components with the latest options. The legacy components continue to work but no longer receive enhancements.

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

How: On your store Cart page in Experience Builder, remove the Coupons and Promotions components marked as Legacy. Then, add the new Promotions component, which contains the new Coupons and Applied Promotions subcomponents.

SEE ALSO:

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

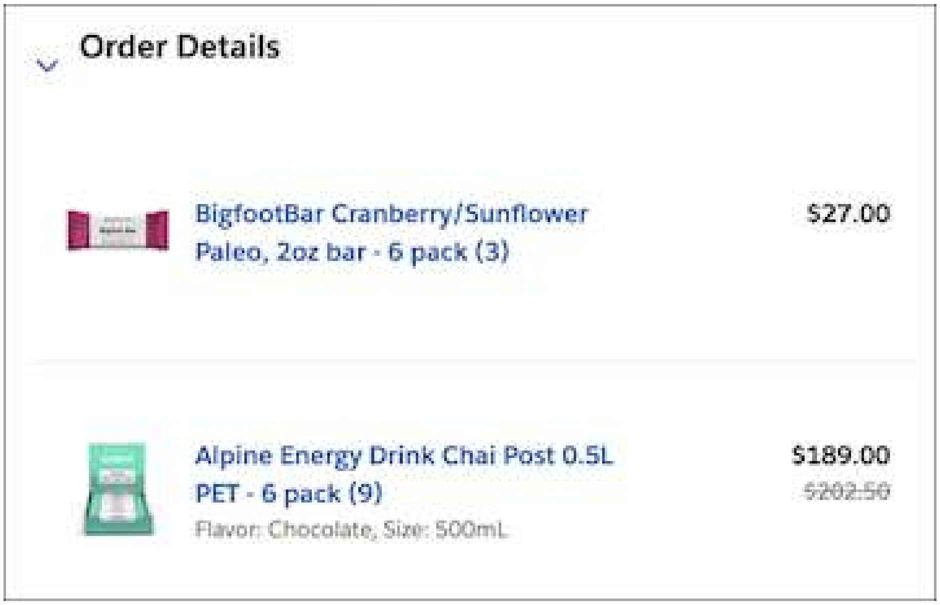
Show Order Details in Checkout

Use the updated Cart Items component to show LWR store customers their cart contents during checkout. Let customers review their order or return to individual product pages. You can add a Cart Items component anywhere on the Checkout Page, but we recommend putting it in an expandable section so that customers can choose whether to view it. In new stores, the Checkout Page includes the Cart Items component by default.

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

How: To match the default setup in new stores, on your store's Checkout page, add an Expandable Section component above the Cart Summary component. In the content area of the Expandable Section component, add a Cart Items component.

Edit the Cart Items component to hide promotions, the quantity selector, the original price, the SKU, the line item total, and the option to remove items. Show the product image, the quantity next to the product name, variants, the show more option, and the actual price or price per unit.



SEE ALSO:

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

Customize the Seller Onboarding Component

Tailor the steps for the seller's onboarding process to match your business type. Download the onboarding component from the Git repository, and implement it in the home page of the seller portal.

Where: This change applies to Salesforce Digital Experience.

Track Customer Behavior in Data Cloud with the Product Set Component

The Product Set component can now track customer data and behavrior in Data Cloud.

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

How: To enable tracking, replace your current component with the updated component. Drag the new one from the palette onto your existing component.

SEE ALSO:

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

Omnichannel Inventory

You can make an item ineligible to ship from a specific location but still available for in-store pickup. Use the reservationId field on the Transfer, Fulfill, and Unreserve Inventory Reservation APIs to track a reservation through the entire fulfillment lifecycle across Omnichannel Inventory, Order Management, and storefronts.

Control Which SKUs Are Eligible for Shipping from a Particular Location

You can make an item ineligible to ship from a specific location but still available for in-store pickup. For example, if a product is too heavy or costly to ship from a store, you can limit fulfillment to a warehouse. Use the Omnichannel Inventory Impex API endpoint to control which SKUs are eligible for shipping from a particular location. The inventory counts at that location aren't displayed in the associated location groups. Shipping eligibility is set using the new groupEligibilityExclusion attribute in the Omnichannel Inventory Impex API.

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

SEE ALSO:

Omnichannel Inventory Impex API Endpoints

Track Inventory Reservations Throughout the Fulfillment Process

Get increased visibility into Omnichannel Inventory reservations with the new reservationId field on the Transfer, Fulfill, and Unreserve Inventory Reservation APIs. Use this field to track a reservation through the entire fulfillment lifecycle across Omnichannel Inventory, Order Management, and storefronts. You can also export the reservation status for reserve, transfer, fulfill, and unreserved, along with their reservation IDs for tracking and troubleshooting.

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

SEE ALSO:

Inventory Reservation API Overview

Salesforce Order Management

Enhance your Order on Behalf Of experience. Search for products using the product name or key search terms instead of just SKUs or IDs. Reserve products during the ordering process to reduce the chance of receiving out-of-stock errors.

Create Inventory Reservations During Order on Behalf Of Checkout

Reduce out-of-stock errors by creating reservations during the Order on Behalf Of checkout process. This update applies to both OOBO, which requires an Order Management license, and Order Entry, which doesn't require an Order Management license. To enable reservations, configure a webstore inventory source.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. OOBO for D2C Commerce requires an OMS Growth License. Order Entry requires the Connected Commerce Bundle.

SEE ALSO:

Salesforce Help: Add a Webstore Inventory Source (can be outdated or unavailable during release preview)

Search for Product Names and Keywords in Order on Behalf Of

When placing orders on behalf of customers, agents can now search using product names and keywords, such as "t-shirts" or "skirts." Previously, search criteria were limited to SKUs or Product IDs. This update applies to both OOBO, which requires an Order Management license, and Order Entry, which doesn't require an Order Management license. If you've already cloned the Order on Behalf Of flow, update the flag on the product selection screen to enable product search. If you're cloning the flow in this release or later automatically have keyword search enabled.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. OOBO for D2C Commerece requires an OMS Growth License. Order Entry requires the Connected Commerce bundle.

SEE ALSO:

Salesforce Help: Order on Behalf Of Overview (can be outdated or unavailable during release preview)

Salesforce Payments

Accept payments with PayPal, Venmo, and direct debit methods such as ACH, BECS, and BACS. Get started with payments using Pay Now for Starter, and improve the customer payment experience with a more configurable Pay Now page. Manage user access to different payment records with record sharing. Generate B2C payment data that's visible in the Payments Workspace.

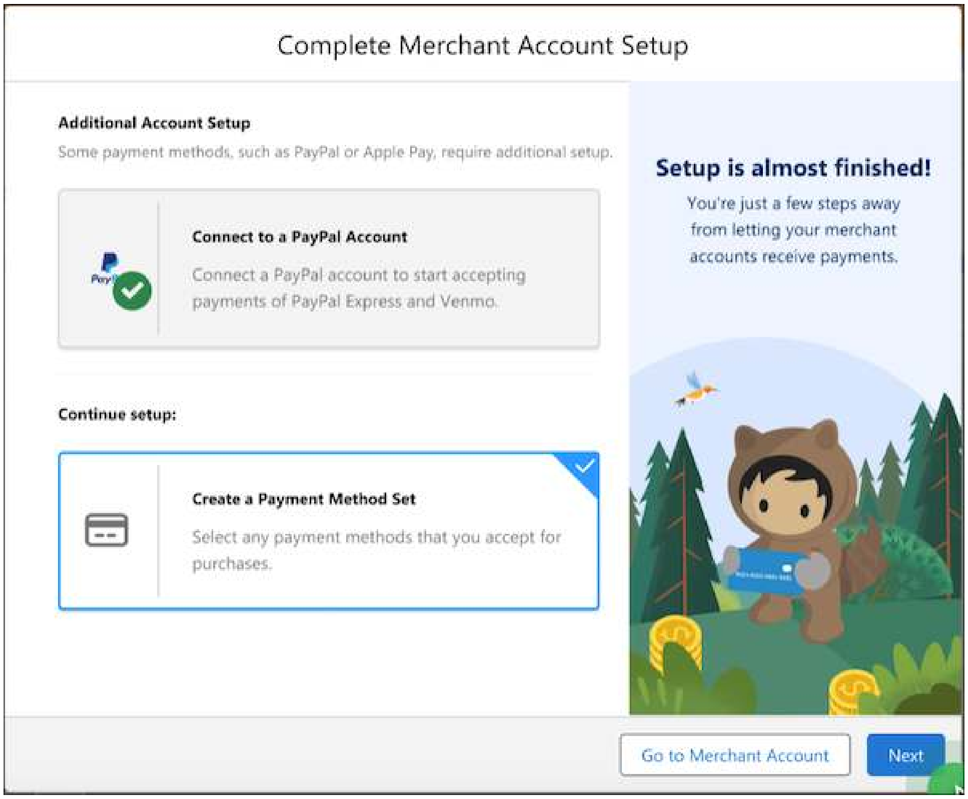
IN THIS SECTION:

Accept PayPal and Venmo with Salesforce Payments

PayPal and Venmo are now available natively with Salesforce Payments. Account setup guides you through creating a merchant account and a payment method set. To offer PayPal, each merchant account requires a separate PayPal business account with a unique email address. You can't use the PayPal account with any other accounts in your org.

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

How: Complete the required merchant account setup with Stripe, and then set up your PayPal account.



SEE ALSO:

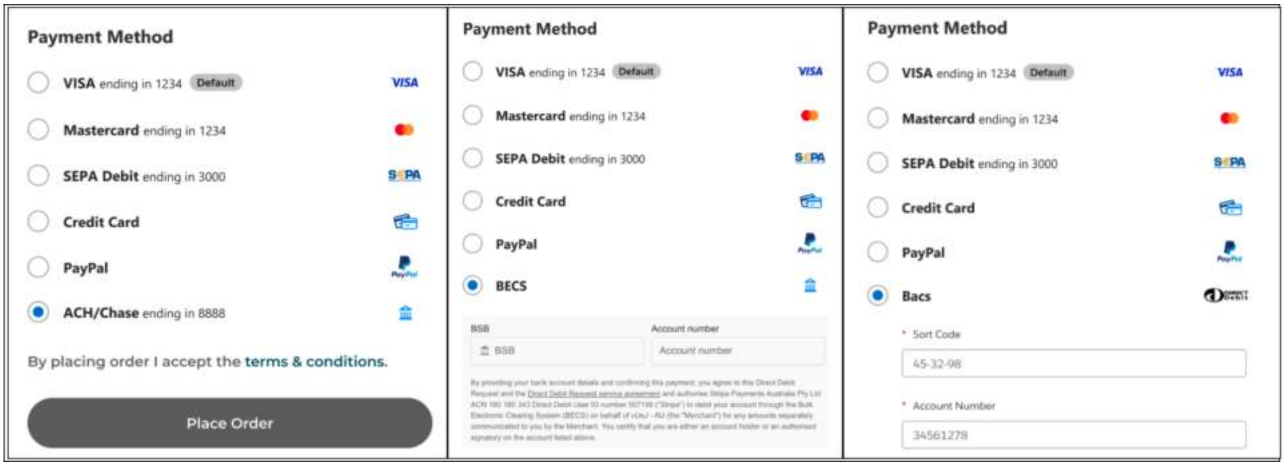
Salesforce Help: Set Up a Merchant Account and Payment Method Set (can be outdated or unavailable during release preview)

Offer Direct Debit Payment Methods at Checkout

Lower transaction costs and reduce failed payments by accepting direct debit payment methods. You can offer customers ACH direct debit, BECS for transactions in Australia and New Zealand, and Bacs for transactions in the United Kingdom.

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

How: Include the direct debit payment methods in a payment method set.



SEE ALSO:

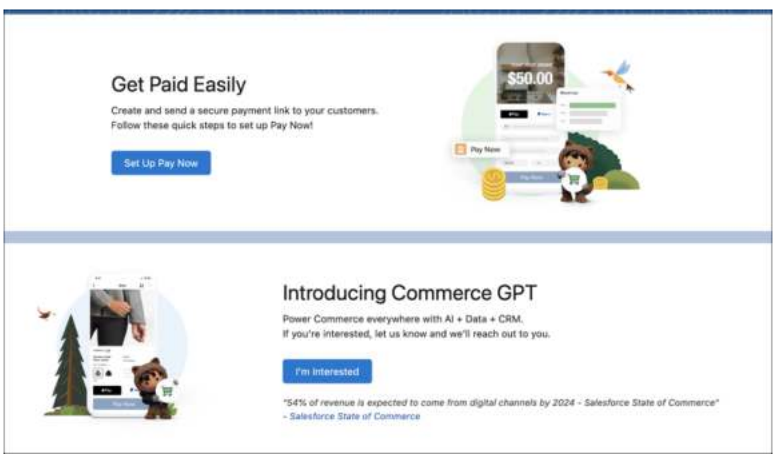
Salesforce Help: Set Up a Merchant Account and Payment Method Set (can be outdated or unavailable during release preview)

Use Pay Now for Salesforce Starter

Take advantage of the Salesforce Starter quick onboarding and streamlined user interface. When an opportunity closes, make it easy for your customer to pay you. Create payment links that direct the customer to a Pay Now page where they can choose which payment method to use.

Where: This change applies to Salesforce Starter.

How: Select the Commerce tab in Starter, and click **Get Paid Easily**.



SEE ALSO:

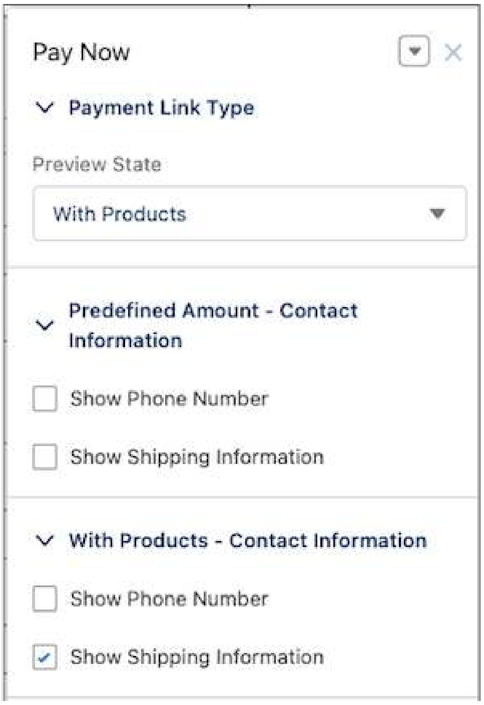
Salesforce Help: Salesforce Starter (can be outdated or unavailable during release preview)

Show Itemized Products or Predefined Amounts on the Pay Now Page

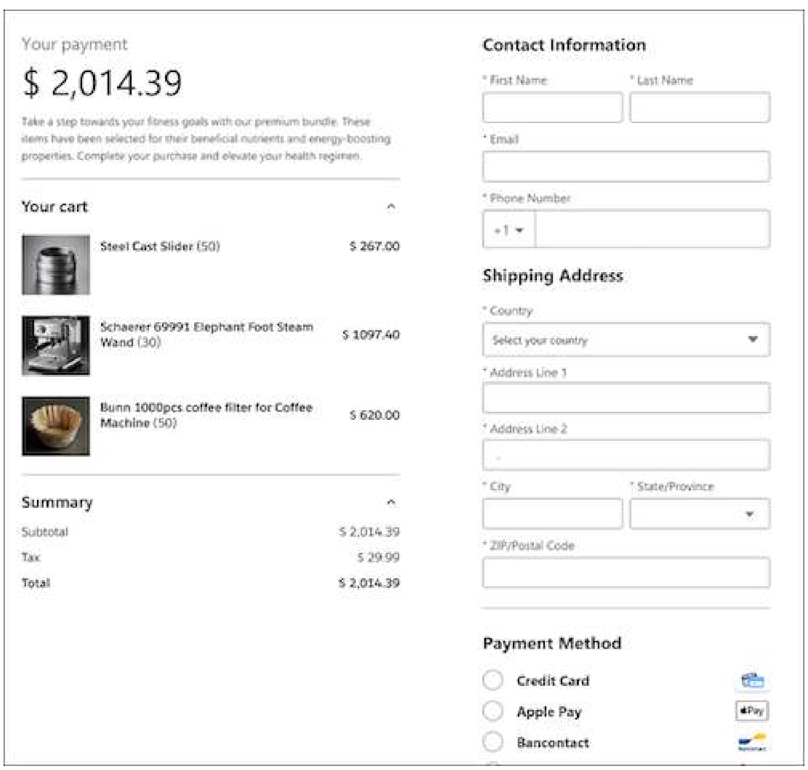
Let customers see what they're paying for on the Pay Now page by including a line item for each product, including a product image. To make these customizations, use the Pay Now Experience Builder component.

Where: This change applies to Pay Now in Enterprise, Unlimited, and Developer editions.

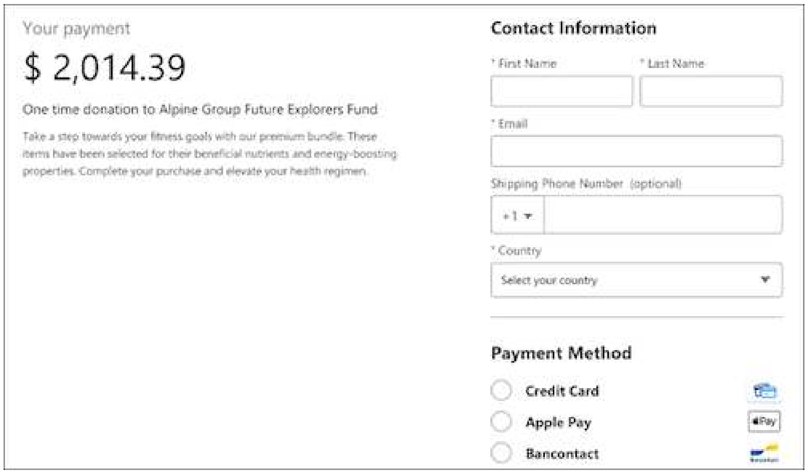
How: In the Pay Now Experience Builder component, select what you want to show.



If you choose to show products, customers see an itemized product list.



If you choose to show a predefined amount, customers see only the amount.



SEE ALSO:

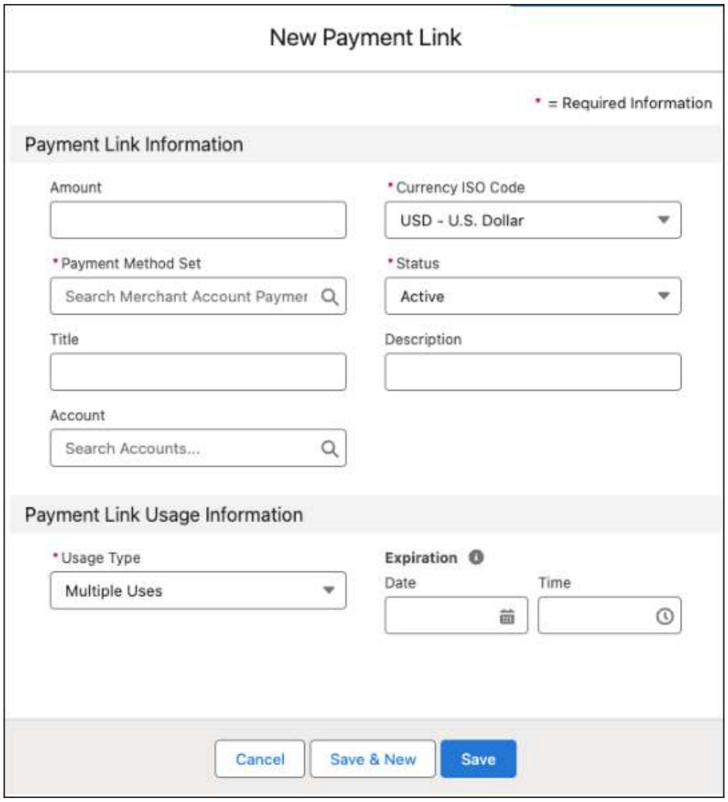
Salesforce Help: Set Up a Pay Now Site (can be outdated or unavailable during release preview)

Control Payment Link Usage and Expiration for Pay Now

Configure whether a payment link is for one-time use or multiple times for distribution to multiple people. You can specify an expiration date and time for each link. For example, send an invoice that includes a payment link. Because the invoice expires 24 hours after it's sent, you want the link to expire as well. You can set the link usage for each Payment Link record.

Where: This change applies to Pay Now in Enterprise, Unlimited, and Developer editions.

How: Set the link usage in each Payment Link record.



SEE ALSO:

Salesforce Help: Create Payment Links to Your Pay Now Site (can be outdated or unavailable during release preview)

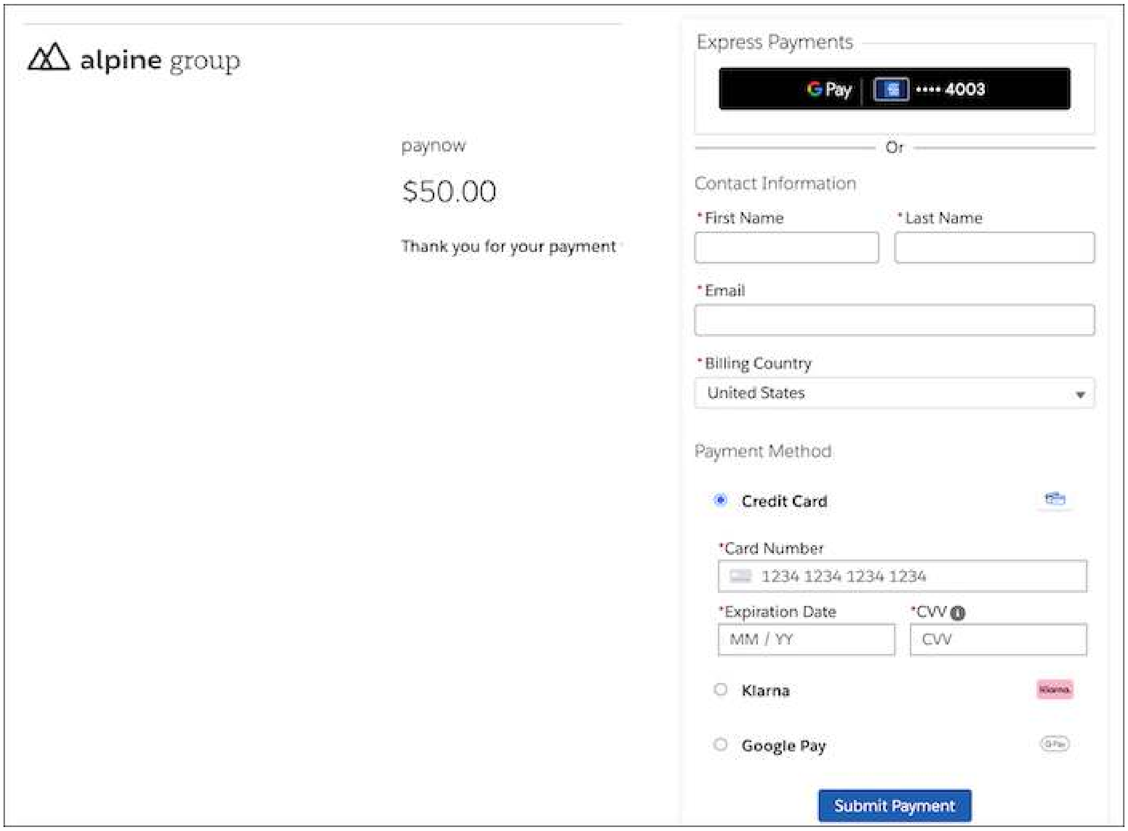
Include Express Payments on Your Pay Now Page (Pilot)

Your Pay Now page can provide customers a quick and easy way to make purchases without reentering contact information and payment details. You can also add Google Pay and Apple Pay buttons to your Pay Now page to accelerate the checkout experience.

Where: This change applies to Pay Now in Enterprise, Unlimited, and Developer editions.

Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

How: In the Pay Now Experience Builder component, select **Enable express payments**. Customers see a Pay Now page with an Express Payments button.

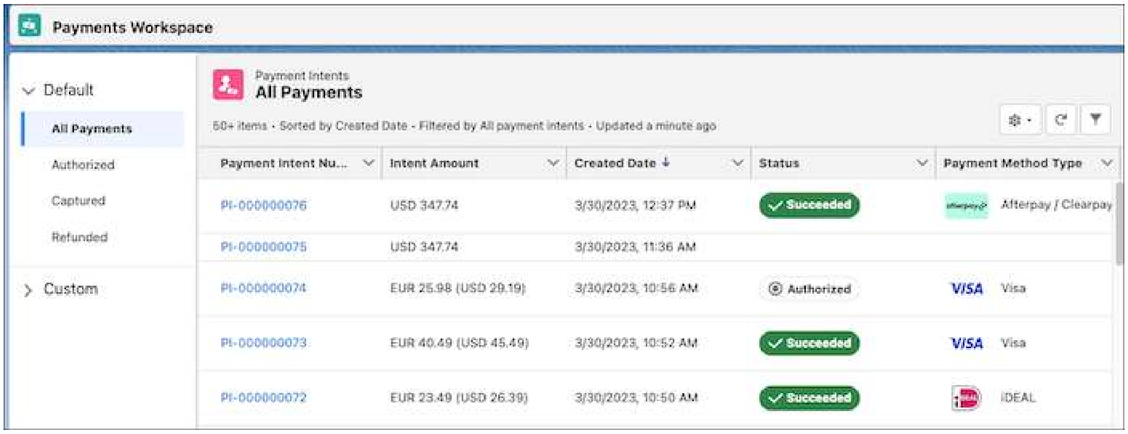


Integrate B2C Payments with Salesforce Payments

Gain a complete view of payment activity for your business by centralizing payment activity in the Payments Workspace. In the Payments app, create a merchant account that is linked to an existing B2C merchant account with Stripe. This account consumes payment data from Stripe and generates payment intents that are listed in the Payments Workspace.

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

How: To confirm that B2C payment intents are created, look at the payment intent and see whether it's attached to a merchant account for the B2C site.



SEE ALSO:

Salesforce Help: Generate B2C Payment Records in the Payments Workspace (can be outdated or unavailable during release preview)

Manage User Access to Salesforce Payments Data

You can control access to payment data by assigning different owners to your merchant accounts. Whoever owns a merchant account automatically gets access to the account's payment intent records. By giving merchant account access to only relevant users, you can segment payment data for reasons such as security, efficient payment processing, and regulatory compliance. The owner of a merchant account object can share access with other users, who can manage transactions if needed.

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

How: Configure manual sharing at the individual merchant account object, or configure sharing rules in Setup.

SEE ALSO:

Salesforce Help: Manage Payment Record Access and Sharing (can be outdated or unavailable during release preview)

Salesforce Help: Sharing Rules (can be outdated or unavailable during release preview)

Salesforce Help: Manual Sharing (can be outdated or unavailable during release preview)

Get Notified About Salesforce Payments Events

Stay informed of payment activities using Salesforce Payments platform events, generated automatically for the PaymentIntent, MerchantAccount, PaymentLink, and SavedPaymentMethods objects. Events can include payment authorizations, captures, and refunds. As a transaction goes through its lifecycle, get notified of events by incorporating notifications into flows or Apex triggers. Use any notification mechanism that flows or triggers support, such as Slack, SMS, or email, or a Lightning notification app.

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

SEE ALSO:

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

Customization

Report on custom permission set and permission set group assignments. Use Dynamic Forms on hundreds more LWC-enabled standard objects.

IN THIS SECTION:

Permissions

Create reports to see custom permission set and permission set group assignments. See object and field API names in permission sets and recalculate permission set groups.

IN THIS SECTION:

IdeaExchange Delivered: Select All Fields When Configuring Field Permissions

In permission sets, you can now enable or disable Read or Edit access for all your fields with a single click instead of manually selecting the permission for each field. This update can save you dozens or even hundreds of clicks, speeding up tasks like setting up API-only integration users or migrating profiles to permission sets. As a security best practice, enable only the field permissions that your users require for their business needs.

Troubleshoot Permission Set Group Errors

To help you fix issues faster, the most recent actionable error message related to a permission set group is displayed on its detail page. You can also now recalculate permission set groups manually if they're in a failed status. You can use this manual recalculation operation if your permission set group has a failed status after deployments or package updates. Previously, you initiated recalculation by making an update to the permission set group.

See API Names for Object and Field Permissions in Permission Sets

When you configure object and field permissions in permission sets, the Object API Name and Field API Name are now displayed in addition to the object and field label. This change makes it easier for you to distinguish your objects and fields if you have multiple components with the same name.

See How Many Permission Set Groups a Permission Set Is Added To

You can now see a count of how many permission set groups a specific permission set is included in. Use this count to estimate the potential impact on your users before making a change to a permission set.

Automate and Migrate User Access with Improved User Access Policy Filters (Beta)

You can reference a total of three permission sets, permission set groups, or managed package licenses in your user access policy filters, making it easier to target your intended users. Previously, you were able to reference only one permission set, permission set group, or managed package license each. With user access policies, you can automate your users' assignments to managed package licenses, permission sets, and other access mechanisms based on criteria that you set. Create policies that run automatically when users are created or updated, or policies for migrating users to new access setups in a single operation. This feature continues to be available in beta in Winter '24.

Report on Custom Permission Set and Permission Set Group Assignments

To help you manage your users, create a custom report type and build reports on custom permission set and permission set group assignments. See all users assigned to a specific custom permission set or permission set group. Or, use the report to review an individual user's assignments. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: From Setup, in the Quick Find box, enter *Report Types*, and then select **Report Types**. Select **Permission Set Assignment** as the primary object. After you deploy the custom report type, users can select it when building reports.

SEE ALSO:

Salesforce Help: Report on Custom Permission Set and Permission Set Group Assignments (can be outdated or unavailable during release preview)

IdeaExchange: Ability to Report on Users' Permission Set Assignments

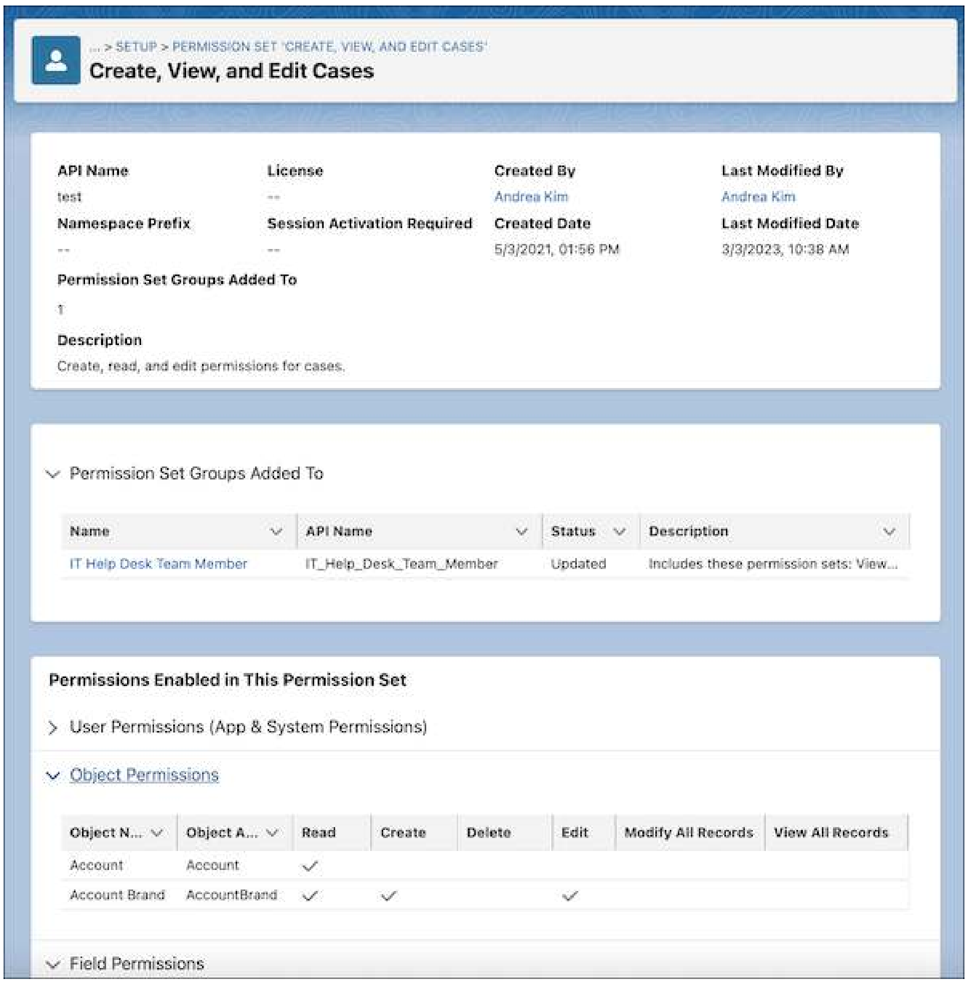
See What's Enabled in a Permission Set More Easily (Beta)

It can be tricky to keep track of all the permissions included in a permission set. To make managing your users' access and permissions easier, you can now see all enabled object, user, and field permissions on one page, saving you dozens of clicks. You can also see which permission set groups the permission set is included in. We delivered this feature thanks to your ideas on IdeaExchange.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**. Select a permission set, and then click **View Summary (Beta)**.



SEE ALSO:

Salesforce Help: View Permissions Enabled in a Permission Set (Beta) (can be outdated or unavailable during release preview)

IdeaExchange: Permissions View Associated to a Permission Set

Select All Fields When Configuring Field Permissions

In permission sets, you can now enable or disable Read or Edit access for all your fields with a single click instead of manually selecting the permission for each field. This update can save you dozens or even hundreds of clicks, speeding up tasks like setting up API-only integration users or migrating profiles to permission sets. As a security best practice, enable only the field permissions that your users require for their business needs.

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

How: Select a permission set, and then search for and select an object. Click **Edit**, and in the Field Permissions section, you can select or deselect the checkbox next to Read Access or Edit Access.

This feature is also available in the enhanced profile user interface.

SEE ALSO:

Salesforce Help: Set Field Permissions in Permission Sets and Profiles (can be outdated or unavailable during release preview)

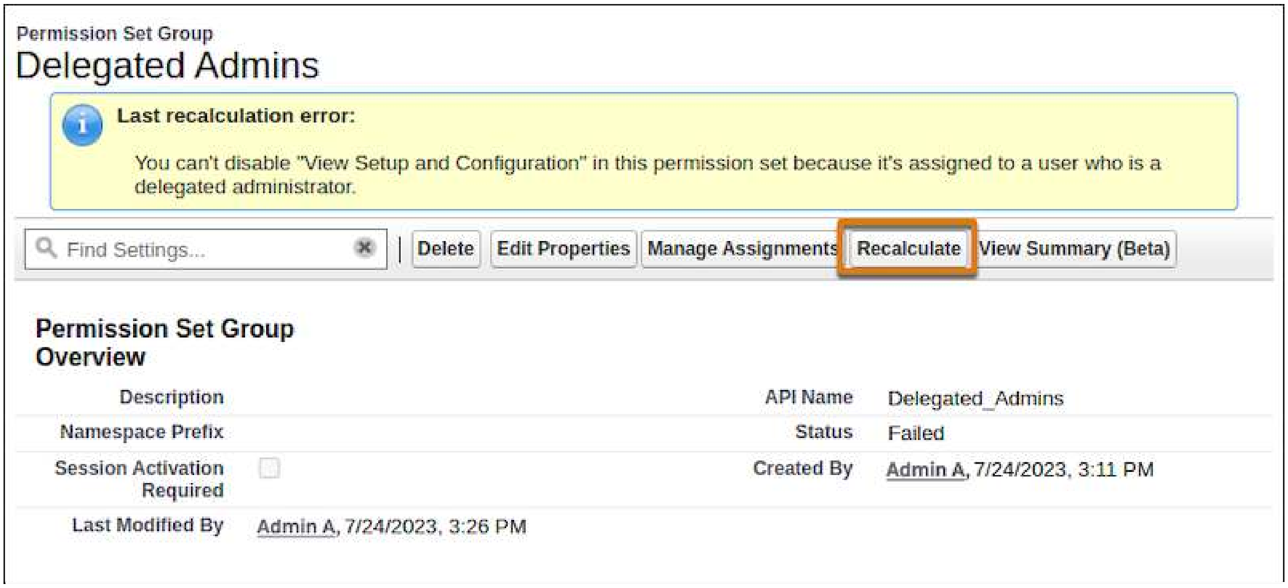
IdeaExchange: Select All Button for Read/Create Field Permissions in Permission Set UI

Troubleshoot Permission Set Group Errors

To help you fix issues faster, the most recent actionable error message related to a permission set group is displayed on its detail page. You can also now recalculate permission set groups manually if they're in a failed status. You can use this manual recalculation operation if your permission set group has a failed status after deployments or package updates. Previously, you initiated recalculation by making an update to the permission set group.

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

How: From Setup, in the Quick Find box, enter `Permission Set Groups`, and then select **Permission Set Groups**. To review a permission set group's most recent error, select the permission set group. To recalculate a permission set group, select the permission set group, and then click **Recalculate**.



SEE ALSO:

Salesforce Help: Permission Set Group Status and Recalculation (can be outdated or unavailable during release preview)

See API Names for Object and Field Permissions in Permission Sets

When you configure object and field permissions in permission sets, the Object API Name and Field API Name are now displayed in addition to the object and field label. This change makes it easier for you to distinguish your objects and fields if you have multiple components with the same name.

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

SEE ALSO:

Salesforce Help: Permission Sets (can be outdated or unavailable during release preview)

See How Many Permission Set Groups a Permission Set Is Added To

You can now see a count of how many permission set groups a specific permission set is included in. Use this count to estimate the potential impact on your users before making a change to a permission set.

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

How: From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**. Select a permission set, and view the Permission Set Groups Added To field.

To see a list of the permission set groups, click **View Summary (Beta)**.

SEE ALSO:

Salesforce Help: See the Count of Permission Set Groups a Permission Set Is Added To (can be outdated or unavailable during release preview)

IdeaExchange Delivered: See What's Enabled in a Permission Set More Easily (Beta)

Automate and Migrate User Access with Improved User Access Policy Filters (Beta)

You can reference a total of three permission sets, permission set groups, or managed package licenses in your user access policy filters, making it easier to target your intended users. Previously, you were able to reference only one permission set, permission set group, or managed package license each. With user access policies, you can automate your users' assignments to managed package licenses, permission sets, and other access mechanisms based on criteria that you set. Create policies that run automatically when users are created or updated, or policies for migrating users to new access setups in a single operation. This feature continues to be available in beta in Winter '24.

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

Note: This feature is a Beta Service. Customers may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: To enable user access policies, from Setup, in the Quick Find box, enter `User Management Settings`, and then select **User Management Settings**. Enable **User Access Policies (Beta)**. To create or manage your user access policies, from Setup, in the Quick Find box, enter `User Access Policies`, and then select **User Access Policies**.

When you reference multiple permission sets, permission set groups, or managed package licenses in your criteria filters, the policy is only applied to users who meet all of the filters.

If Salesforce enabled user access policies for you before Summer '23, you must enable this feature again on the User Management Settings page.

SEE ALSO:

Salesforce Help: User Access Policies (Beta) (can be outdated or unavailable during release preview)

Lightning App Builder

Use Dynamic Forms on hundreds of LWC-enabled standard objects. Give your mobile users the same customized experience that your desktop users have with Dynamic Forms on Mobile, now generally available.

IN THIS SECTION:

IdeaExchange Delivered: Use Dynamic Forms on LWC-Enabled Standard Objects

Dynamic Forms is now supported on hundreds of LWC-enabled standard objects. Dynamic Forms gives you a streamlined admin experience, enhanced page performance, and the option of visibility rules so your users see only what they need when they need it. But until now, you could use Dynamic Forms only on custom objects and a limited number of standard objects. We delivered this feature thanks to your ideas on IdeaExchange.

IdeaExchange Delivered: Give Your Mobile Users the Dynamic Forms Experience (Generally Available)

With Dynamic Forms, you can add and remove fields individually from a Lightning record page, break up record details into multiple sections, and set conditional visibility rules for fields and field sections, all in Lightning App Builder. Previously, Dynamic Forms were available only on desktop. Now, with Dynamic Forms on Mobile, your mobile users can have the same customized experience that your desktop users have. Dynamic Forms on Mobile was offered as a beta feature for use with limited objects in Summer '23. It's now generally available on all Dynamic Forms-supported objects. We delivered this feature thanks to your ideas on IdeaExchange.

Use Dynamic Forms on LWC-Enabled Standard Objects

Dynamic Forms is now supported on hundreds of LWC-enabled standard objects. Dynamic Forms gives you a streamlined admin experience, enhanced page performance, and the option of visibility rules so your users see only what they need when they need it. But until now, you could use Dynamic Forms only on custom objects and a limited number of standard objects. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: Dynamic Forms is supported for most but not all standard LWC-enabled objects. If you open a record page for an object in the Lightning App Builder and don't see a Fields tab in the component panel, then Dynamic Forms isn't supported for that object. As an example, the Note object doesn't support Dynamic Forms because it has a fixed layout.

Dynamic Forms isn't supported on objects that aren't LWC-enabled. For example, Campaigns, Products, and Tasks still use information from page layout.

SEE ALSO:

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

Salesforce Help: LWC Migration for Record Home Pages (can be outdated or unavailable during release preview)

Give Your Mobile Users the Dynamic Forms Experience (Generally Available)

With Dynamic Forms, you can add and remove fields individually from a Lightning record page, break up record details into multiple sections, and set conditional visibility rules for fields and field sections, all in Lightning App Builder. Previously, Dynamic Forms were available only on desktop. Now, with Dynamic Forms on Mobile, your mobile users can have the same customized experience that your desktop users have. Dynamic Forms on Mobile was offered as a beta feature for use with limited objects in Summer '23. It's now generally available on all Dynamic Forms-supported objects. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: From Salesforce Mobile App Setup, enable Dynamic Forms on Mobile.

If you add the dynamic form component to a Lightning record page and that page includes a Record Detail - Mobile component, your users see only the Record Detail - Mobile component from their mobile device, even after you enable Dynamic Forms on Mobile. So that your users can view Dynamic Forms on Mobile content on pages that you upgrade to Dynamic Forms, remove the Record Detail - Mobile component from the pages.

After you enable Dynamic Forms on Mobile, Lightning record pages that you upgrade to Dynamic Forms show dynamic forms on their mobile devices without additional configuration.

SEE ALSO:

Salesforce Help: Dynamic Forms on Mobile (can be outdated or unavailable during release preview)
Salesforce Help: Dynamic Forms on Mobile Considerations (can be outdated or unavailable during release preview)

Sharing

Troubleshoot record access errors and audit group membership changes using Event Monitoring. Create reports on account access and group membership. Enable faster account sharing recalculation using two release updates.

IN THIS SECTION:

IdeaExchange Delivered: See Who Has Access to Accounts from Manual Shares and Account Teams with Reports

Get a snapshot of the account records that are shared manually or through account teams and which users or groups have access to them. Create a custom report type on the Account Share object, and then build reports. We delivered this feature thanks to your ideas on IdeaExchange.

View Public Group Members with Reports

Manage public group membership more easily. Now you can see which users, roles, and other groups have been added to public groups by creating a custom report type. Previously, you clicked in each public group or ran queries to see its members.

Audit Public Group Membership Changes with Event Monitoring

Monitor when members are added to or removed from public groups using the new Group Membership event type. Public groups can contain individual users, other groups, or users in a specified role or territory.

Troubleshoot Insufficient Access Errors with Event Monitoring

To help you troubleshoot and resolve account, case, contact, and opportunity record access errors, use the new Insufficient Access event type in the EventLogFile object. See when users weren't able to access or transfer records and the related error messages.

Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares (Release Update)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Case and Contact objects. Implicit child share records are no longer stored between accounts and their child case and contact records. Instead, the system determines whether users can access child case and contact records when they try to access them. This release update was first available starting in Summer '23 and is enforced in Winter '24.

Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares (Release Update)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Opportunity object. Implicit child share records are no longer stored between accounts and their child opportunity records. Instead, the system determines whether users can access child opportunity records when they try to access them. You can now enable this feature for opportunities yourself. Previously, Salesforce Customer Support enabled this functionality. This release update is available starting in Winter '24.

See Who Has Access to Accounts from Manual Shares and Account Teams with Reports

Get a snapshot of the account records that are shared manually or through account teams and which users or groups have access to them. Create a custom report type on the Account Share object, and then build reports. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: From Setup, in the Quick Find box, enter `Report Types`, and then select **Report Types**. Select **Account Share** as the primary object. After you deploy the custom report type, users can select it when building reports.

SEE ALSO:

Salesforce Help: See Account Access from Manual Shares or Account Teams with Reports (can be outdated or unavailable during release preview)

Object Reference for Salesforce Platform: AccountShare

IdeaExchange: Ability to Report on Sharing: Manual, Sharing Rules or Teaming (Account or Sales)

View Public Group Members with Reports

Manage public group membership more easily. Now you can see which users, roles, and other groups have been added to public groups by creating a custom report type. Previously, you clicked in each public group or ran queries to see its members.

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

How: From Setup, in the Quick Find box, enter `Report Types`, and then select **Report Types**. Select **Group Member** as the primary object. After you deploy the custom report type, users can select it when building reports.

SEE ALSO:

Salesforce Help: Monitor Public Group Members with Reports (can be outdated or unavailable during release preview)

Audit Public Group Membership Changes with Event Monitoring

Monitor when members are added to or removed from public groups using the new Group Membership event type. Public groups can contain individual users, other groups, or users in a specified role or territory.

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

SEE ALSO:

Get Information About Public Group and Queue Membership Changes

Troubleshoot Insufficient Access Errors with Event Monitoring

To help you troubleshoot and resolve account, case, contact, and opportunity record access errors, use the new Insufficient Access event type in the EventLogFile object. See when users weren't able to access or transfer records and the related error messages.

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

SEE ALSO:

IdeaExchange Delivered: Get Information About Insufficient Access Errors

Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares (Release Update)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Case and Contact objects. Implicit child share records are no longer stored between accounts and their child case and contact records. Instead, the system determines whether users can access child case and contact records when they try to access them. This release update was first available starting in Summer '23 and is enforced in Winter '24.

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

When: This update was first available in Summer '23. For production orgs created before Summer '23, this behavior is enabled on a rolling basis beginning in Winter '24. For production orgs and scratch orgs created in Summer '23 or later, this behavior is enabled by default. For sandboxes, this behavior was enabled on a rolling basis in Summer '23. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: Not storing these implicit child share records speeds up ownership and sharing rule recalculation for accounts. Org-wide defaults, group membership, role hierarchy, and manual sharing operations can all improve.

How: To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares, follow the testing steps, and click **Apply Update** when your org is ready. This release update isn't visible in sandboxes and production orgs where Salesforce already enabled this behavior. The update also isn't visible in new production orgs or scratch orgs created in Summer '23 or later.

After this update is enforced, account owners can gain access to cases and contacts owned by high-volume Experience Cloud site users, depending on the org's role hierarchy configuration. SOQL queries or Apex tests that query implicit child case and contact share records no longer return results because Salesforce no longer stores these records. For more information, see the knowledge article.

SEE ALSO:

Knowledge Article: Faster Account Sharing Recalculation

Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares (Release Update)

Release Updates

Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares (Release Update)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Opportunity object. Implicit child share records are no longer stored between accounts and their child opportunity records. Instead, the system determines whether users can access child opportunity records when they try to access them. You can now enable this feature for opportunities yourself. Previously, Salesforce Customer Support enabled this functionality. This release update is available starting in Winter '24.

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

When: Salesforce enforces this release update in existing production orgs on a rolling basis beginning in Spring '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

For production orgs and scratch orgs created in Winter '24 or later, this behavior is enabled by default. For sandboxes, this behavior is enabled on a rolling basis beginning in Winter '24.

Why: Not storing these implicit child share records speeds up ownership and sharing rule recalculation for accounts. Org-wide defaults, group membership, role hierarchy, and manual sharing operations can all improve.

How: To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares, follow the testing steps, and click **Apply Update** when your org is ready. This release update isn't visible in sandboxes and production orgs where Salesforce already enabled this behavior. The update also isn't visible in new production orgs or scratch orgs created in Winter '24 or later.

SOQL queries or Apex tests that query implicit child opportunity share records no longer return results because Salesforce no longer stores these records. For more information, see the knowledge article.

SEE ALSO:

Knowledge Article: Faster Account Sharing Recalculation

Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares (Release Update)

Release Updates

External Services

Edit additional HTTP Callout methods using declarative tools within External Services.

IN THIS SECTION:

Edit POST, PUT, PATCH, and DELETE in HTTP Callout

Use declarative tools to edit the parameters, sample request, and sample response body for HTTP Callout methods POST, PUT, PATCH, and DELETE. Previously, you could only edit the GET method, and you manually edited the API specification for the other HTTP methods.

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

How: Create an HTTP Callout in Flow. In External Services, to edit an operation, go to the external service's Details page, and select **Edit HTTP Callout**.

SEE ALSO:

Send Salesforce Data to an External Server Without Code via HTTP Callout (Generally Available)

Salesforce Help: HTTP Callout (can be outdated or unavailable during release preview)

Salesforce Connect

Reuse cached query results with Amazon Athena external data sources. Get to know the enhancements to the OData 4.01 adapter for Salesforce Connect.

IN THIS SECTION:

Reuse Cached Query Results with the Amazon Athena Adapter

Improve performance for repeat queries by reusing the stored query results retrieved from an external data source mapped to Amazon Athena. If you submit a query to an external data source within a configured maximum time, it fetches the cached query results and accelerates your queries.

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

How: From Setup, in the Quick Find box, enter `External Data Source`, and then select **External Data Source**. Select an external data source mapped to Amazon Athena, and then select **Use Cached Results** and enter the maximum age for cached results.

SEE ALSO:

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

OData 4.01 Adapter for Salesforce Connect Enhancements

You can now configure an OData 4.01 adapter to track changes made to external data with External Data Change Capture. The external objects that map to OData 4.01 external data sources are now searchable objects. Use the search box at the top of the page to search by a specific external object mapped to an OData 4.01 data source or for a global search across Salesforce.

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

How: From Setup, in the Quick Find box, enter `External Data Source`, and then select **External Data Source**. Select your external data source, and then select **Eligible for Data Change Capture**.

SEE ALSO:

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

Globalization

Stay up to date with ICU and JDK locale formats. Prepare for a new style for Japanese katakana. Use current locales for Croatia and Sierra Leone. Prepare for enforcement of ICU Locale formats.

IN THIS SECTION:

Prepare for the Japanese Katakana Style Change (Release Update)

To improve the Japanese katakana translation for foreign language words, the current Japanese Industrial Standards (JIS) style is replaced with the 1991 Cabinet Notification Directive style.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions. Product documentation also uses the new style.

Note: The feature described here doesn't become generally available until the latest general availability date that Salesforce announces. Before then, we can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features.

SEE ALSO:

Knowledge Article: 日本語(カタカナ)の表示ラベル変更 (Japanese Only)

Enable ICU Locale Formats (Release Update)

To provide a consistent experience across the platform and improve integration with International Components for Unicode (ICU)-compliant applications across the globe, enable the ICU locale formats. When you enable this update, the ICU locale formats replace Oracle's JDK locale formats in Salesforce. This update was first made available in Winter '20 and is enforced in Spring '24. Effective Spring '24, you can no longer use Oracle's JDK locale formats in Salesforce.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions, except Database.com.

When: Salesforce enforces this update in Spring '24. Salesforce orgs created in Winter '20 or later have ICU locale formats enabled by default. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: To enable this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Enable ICU Locale Formats, follow the testing and activation steps.

The English (Canada) locale (en_CA) requires separate activation. From Setup, in the Quick Find box, enter `User Interface`, and select **User Interface**. Then select **Enable ICU formats for en_CA**, and save your changes.

SEE ALSO:

Salesforce Help: Go Global with New International Locale Formats (can be outdated or unavailable during release preview)

Trailblazer Community Group: ICU Locale Formats Adoption

Release Updates

Use Current Locales for Croatia and Sierra Leone

In 2023, Croatia joined the European Union and uses the euro (EUR), and Sierra Leone's currency changed from the old leone (SLL) to the new leone (SLE). In Summer '23, there were locales for the new currencies. In Winter '23, the outdated currency is removed.

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

How: For Croatia, if you use hr_HR in JDK, the currency formats are updated.

For Sierra Leone, if you use en_SL_SLE in either JDK or ICU, replace it with the updated locale en_SL.

SEE ALSO:

Salesforce Help: Locales Overview (can be outdated or unavailable during release preview)

Accelerate Translation File Exports with Language Filters

To quickly export Translation Workbench files, use the filter to limit which of your available languages to include in the text file. Smaller text files export faster.

Where: This change applies to unlocked and first- and second-generation managed packages with translations.

SEE ALSO:

Salesforce Help: Export Data Translation Files (can be outdated or unavailable during release preview)

Review Updated Label Translations

To improve accuracy and your users' experience, the translations for some standard object, tab, and field names for these languages are updated: Chinese (Simplified), Chinese (Traditional), Czech, Danish, Dutch, Finnish, French, Greek, Hebrew, Hungarian, Japanese, Korean, Polish, Portuguese (Brazil), Slovak, Slovenian, Spanish, and Spanish (Mexico).

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

How: To review the changes, see Review Winter '24 Updated Label Translations and download the attached list of changes. If you want to use a different translation for tab and field labels, you can change the name.

SEE ALSO:

Salesforce Help: Rename Object, Tab, and Field Labels (can be outdated or unavailable during release preview)

AppExchange

See whether an AppExchange solution meets your requirements using the new solution type badge.

IN THIS SECTION:

Identify AppExchange Solution Types at a Glance

Check the solution type badge on AppExchange listings to quickly determine which technology the solution extends and whether it meets your technical requirements. For example, identify accelerators that extend Tableau or cartridges that extend Salesforce B2C Commerce.

Identify AppExchange Solution Types at a Glance

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Where: This change applies to solution listings on the AppExchange website.

How: To view a badge, go to AppExchange, open a solution listing, and go to the listing summary.

The solution type, such as Salesforce App (1), appears below the provider name and description.

General Setup

Help your users create and update related records easily by adding quick actions right where they're needed, on related lists. Navigate list views more easily with accessibility enhancements.

IN THIS SECTION:

IdeaExchange Delivered: Save Time with Mass Quick Actions on Related Lists (Generally Available)

Use the power of quick actions on related lists, now generally available, to help your users create and update related records with ease. Streamline data entry by configuring quick actions with predefined field values and action layouts that include only the most important fields. And add quick actions directly on the related lists, right where users need them. Your users can create related records for items in the list without leaving the page. Or they can perform mass updates on up to 100 related records at once. We delivered this feature thanks to your ideas on IdeaExchange.

Get Improved Accessibility in List Views

Learn about small but important changes that make list views more accessible.

Save Time with Mass Quick Actions on Related Lists (Generally Available)

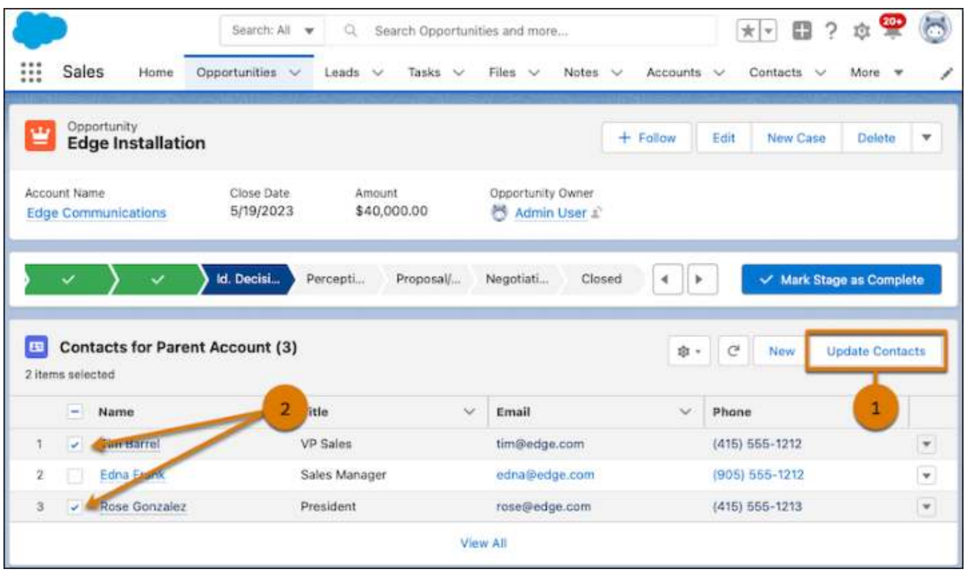
Use the power of quick actions on related lists, now generally available, to help your users create and update related records with ease. Streamline data entry by configuring quick actions with predefined field values and action layouts that include only the most important fields. And add quick actions directly on the related lists, right where users need them. Your users can create related records for items in the list without leaving the page. Or they can perform mass updates on up to 100 related records at once. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: You can add quick actions on a related list in one of two ways. In this release, only Create a Record and Update a Record quick actions are supported.

- To add quick actions from the Lightning App Builder, add or select the Dynamic Related List - Single component on the record page. In the properties pane, select **Show list view action bar**, and then click **Add Action**.
- To add quick actions using the page layout editor, from the object management settings for the parent object, open the page layout. Double-click to open the related list properties, expand the Buttons section, and select the quick actions that you want to add. Then, from the parent record page in the Lightning App Builder, set the related list type to **Enhanced List**.

Now the related list includes the quick actions that you added (1), and users can apply the actions to the records that they select (2).



SEE ALSO:

Salesforce Help: Set Up a Mass Quick Action for Related Lists (can be outdated or unavailable during release preview)

Get Improved Accessibility in List Views

Learn about small but important changes that make list views more accessible.

Where: These changes apply to Lightning Experience in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Why: Check out details about these changes.

- The list view Display as Table button is now labeled Select List Display, and the button and dropdown menu options have clearer, more informative tooltips.

- In the list view Charts panel, the field to select an existing chart is labeled Select Chart to clarify the field's purpose.
- Keyboard users can always tab to checkboxes on lists in split view when the list supports mass actions. Previously, some lists showed checkboxes even when mass actions weren't supported, and keyboard users couldn't tab to the checkboxes.
- Checkboxes on lists in split view include more information about the current record for screen readers.
- The inline edit pencil icon in list view cells includes information about the contents of the cell for screen readers.
- The Edit List button on list views is now compliant with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1. This change improves accessibility for users who find it difficult to differentiate between some color combinations.
- In Browse mode on a list view page, screen readers read the object name above the Select a List View dropdown menu only one time.

Data Cloud

Manage the availability of a variety of features in your account. Enable Data Cloud objects and insights on your Contact or Lead standard or custom fields. Explore expanded record home page view customizations.

IN THIS SECTION:

Customize Data Model Object Record Home Pages

Get more out of your data by customizing the record home page view for any data model object (DMO). Use the Lightning App Builder to add related lists from other DMOs, change which fields are displayed in the header or other areas of the page, and more. For example, put contact information at your users' fingertips by including a unified contact point related list on the unified individual DMO record home.

Get a 360-Degree View of Your Accounts

Power up your B2B marketing and analytics by unifying account data from multiple sources into unified account profiles. Use your unified account data to accelerate sales and service productivity and run calculated insights, activations, Tableau, and more. The identity resolution process for accounts supports matching on exact business name or normalized address, email, phone, or party identifier. Create an identity resolution ruleset using Account as the primary data model object. You can create up to two rulesets per primary data model object per data space.

Use Data Cloud Data to Enrich Your Data

Data Cloud enrichments copy or query data from Data Cloud into standard Salesforce components that you can add to specific record pages. You can add related lists and fields with data from Data Cloud to your Contact and Leads record pages.

Use Data Cloud Related Lists to Enrich Your Contacts and Leads

Data Cloud related lists query for data harmonized in Data Cloud so that you can see information across your enterprise in a single component. You can add related lists with data from Data Cloud to your Contact and Leads record pages. For example, see all email engagements with a customer across multiple orgs.

Copy Fields from Data Cloud to Enrich Your Contacts and Leads

Copy data from a Data Cloud DMO or CIO field into your Contact or Lead standard or custom fields. You can enhance your contacts and leads with insights, such as lifetime value, and data aggregated or captured by Data Cloud from other orgs and systems.

Choose When to Trigger Data Actions for Updated Records

Specify the frequency to trigger data actions for the record updated event rule. You can trigger data actions every time when a record update meets the action rule conditions that you've specified or only the first time when it meets these conditions. This feature is enabled only if the Record Updated event rule is selected.

Prioritize Campaigns with Waterfall Segments (Pilot)

When running a campaign with multiple offers, use a waterfall segment to create a hierarchical structure and prioritize your campaigns. For example, you have four different discounted offers, but you don't want a customer to receive more than one offer. To target your campaign, create a prioritized list of mutually exclusive segments so that an audience member exists in only one segment of your waterfall and receives only one promotional offer. You can also rearrange segments in your waterfall to adjust the priority.

Query Segment Data via Connect Rest API

Query segment members' latest and historical data with a GET request to the new `/ssot/segments/`***`segmentApiName`***`/members` resource. Flexibly refine results using filters, limits, and sort order.

Create and List Segments in a Data Space via Connect REST API

Organize your segmentation data via Connect REST API. Create a segment or list segments in a default data space with a POST or GET request to the new `/ssot/segments?dataspace=<dataspacename>` resource. For example, to create a segment in a default data space, use a POST request with `/ssot/segments?dataspace=default` endpoint.

Add New Object Permissions to Custom Permission Sets in Data Cloud

So you can manage data access for future product developments, six new object permissions were introduced in Data Cloud. These permissions were added to standard Data Cloud permission sets, but custom permission sets can't be updated automatically. You must directly add the new object permissions to any custom permission sets that grant users access to data model objects. Users without these object permissions can encounter errors when accessing or working with data model objects.

Simplify Hierarchical Data with the Flatten Transformation

Denormalize hierarchical data with the flatten transformation. By flattening your data and tracking a record's ancestor chain, you can calculate rollups or extract pieces of the hierarchy and filter them based on role.

Everything New Across Salesforce for Data Cloud

Our latest round of Salesforce features for Data Cloud.

SEE ALSO:

Salesforce Help: Data Cloud Release Notes Changes

Enable and Disable Data Cloud AI and Beta Features with Feature Manager

Easily enable, disable, and monitor Data Cloud AI and beta features using the new Feature Manager. The Feature Manager is in the navigation pane under Features.

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

SEE ALSO:

Salesforce Help: Enable and Disable Data Cloud AI and Beta Features with Feature Manager (can be outdated or unavailable during release preview)

Share Data in Near Real-Time Between Data Cloud and Snowflake

Securely share Data Cloud data with Snowflake using datashares. A datashare offers Zero ETL (Extract Transform Load) data sharing capability and allows the users to access Salesforce objects as if data is stored natively in Snowflake.

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

Who: This feature is available to Data Cloud customers with a Data Cloud license. It isn't available to orgs with Customer Data Platform licenses.

How: Create a datashare and add data lake objects, data model objects, or calculated insights objects to it. Next, create a datashare target to set up connectivity with a Snowflake account. Link the datashare with the datashare target and make the objects in the datashare available in Snowflake as secure views.

Use Data Model Objects in Batch Data Transforms

Get the most out of batch data transforms by using data model objects as both data input and output data objects. Previously, you could only run batch data transforms on data lake objects that entered Data Cloud through data streams or other data lake objects. Data model object support allows for greater flexibility in using batch data transforms. Apply them to downstream processes that also use data model objects such as segmentation and identity resolution.

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

How: On the New Data Transform: Choose a Data Source screen, select **Data Model Objects**.

Automate Batch Data Transforms

Save time and keep data fresh by scheduling batch data transforms to repeatedly run at timed intervals. Choose an hourly or daily frequency, the time at which the data transform runs, and on which days. You can schedule a data transform on the Recently Viewed page that lists data transforms or on the Details page for an individual data transform.

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

Maintain Multiple Data Sources with Multiple Output Nodes

Preserve multiple data sources by writing a batch data transform to multiple output nodes. For example, a single transform can simultaneously update Case, Order, and Status data lake or data model objects. You can write a batch data transform to up to five output nodes.

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

How: In the canvas, click **Branch** on a node and select **Output** from the Add Branch menu. Select an available object to write the node's results to.

Connect to Data Cloud from Tableau Server with the Salesforce Data Cloud Connector

You no longer have to manually install the Salesforce connector for Data Cloud and Tableau Server—the connector is automatically included when you install Tableau. The built-in connector is data spaces aware, is easier to use, and shows the object label instead of the object API name. The table names in Tableau are also now more user-friendly. Previously, the connector was available only for Tableau Cloud, Tableau Desktop, and Tableau Prep.

Where: This change applies to Tableau Server version 2023.3.

Customize Data Model Object Record Home Pages

Get more out of your data by customizing the record home page view for any data model object (DMO). Use the Lightning App Builder to add related lists from other DMOs, change which fields are displayed in the header or other areas of the page, and more. For example, put contact information at your users' fingertips by including a unified contact point related list on the unified individual DMO record home.

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

Get a 360-Degree View of Your Accounts

Power up your B2B marketing and analytics by unifying account data from multiple sources into unified account profiles. Use your unified account data to accelerate sales and service productivity and run calculated insights, activations, Tableau, and more. The identity resolution process for accounts supports matching on exact business name or normalized address, email, phone, or party identifier. Create an identity resolution ruleset using Account as the primary data model object. You can create up to two rulesets per primary data model object per data space.

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

When: Account unification is available as of September 2023.

Use Data Cloud Data to Enrich Your Data

Data Cloud enrichments copy or query data from Data Cloud into standard Salesforce components that you can add to specific record pages. You can add related lists and fields with data from Data Cloud to your Contact and Leads record pages.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions.

Who: Data Cloud admins or Data Cloud for Marketing admins who are also a Salesforce admin with View All (Enrichment) and Modify All (Enrichment) permissions.

How: From the **Contact** or **Lead** object management settings, select **Data Cloud Copy Fields** or **Data Cloud Related Lists**.

Use Data Cloud Related Lists to Enrich Your Contacts and Leads

Data Cloud related lists query for data harmonized in Data Cloud so that you can see information across your enterprise in a single component. You can add related lists with data from Data Cloud to your Contact and Leads record pages. For example, see all email engagements with a customer across multiple orgs.

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Who: Data Cloud admins or Data Cloud for Marketing admins who are also a Salesforce admin with View All (Enrichment) and Modify All (Enrichment) permissions.

How: From the **Contact** or **Lead** object management settings, select **Data Cloud Related Lists**.

Copy Fields from Data Cloud to Enrich Your Contacts and Leads

Copy data from a Data Cloud DMO or CIO field into your Contact or Lead standard or custom fields. You can enhance your contacts and leads with insights, such as lifetime value, and data aggregated or captured by Data Cloud from other orgs and systems.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions.

Who: Data Cloud admins or Data Cloud for Marketing admins who are also a Salesforce admin with View All (Enrichment) and Modify All (Enrichment) permissions.

How: From the **Contact** or **Lead** object management settings, select **Data Cloud Copy Fields**.

Choose When to Trigger Data Actions for Updated Records

Specify the frequency to trigger data actions for the record updated event rule. You can trigger data actions every time when a record update meets the action rule conditions that you've specified or only the first time when it meets these conditions. This feature is enabled only if the Record Updated event rule is selected.

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

How: In Data Cloud, on the Data Actions tab, click **New**, and select the data action target. Select a data space, object type, primary object, and then select **Record Updated**.

SEE ALSO:

Salesforce Help: Create a Data Action in Data Cloud (can be outdated or unavailable during release preview)

Prioritize Campaigns with Waterfall Segments (Pilot)

When running a campaign with multiple offers, use a waterfall segment to create a hierarchical structure and prioritize your campaigns. For example, you have four different discounted offers, but you don't want a customer to receive more than one offer. To target your campaign, create a prioritized list of mutually exclusive segments so that an audience member exists in only one segment of your waterfall and receives only one promotional offer. You can also rearrange segments in your waterfall to adjust the priority.

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

Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

Who: To participate in the pilot program, contact your account executive.

How: From Segments, create a waterfall segment, and drag in segments to define the priority. Run segment counts, and save your waterfall segment. Then activate the individual segments to target specific customers.

Query Segment Data via Connect Rest API

Query segment members' latest and historical data with a GET request to the new `/ssot/segments/`***`segmentApiName`***`/members` resource. Flexibly refine results using filters, limits, and sort order.

Where: This change applies to API version 58.0 and later for Lightning Experience in Developer, Enterprise, and Unlimited editions

SEE ALSO:

Salesforce Developer: Data Cloud Segment Members (can be outdated or unavailable during release preview)

Salesforce Developer: MarketSegmentDefinition (can be outdated or unavailable during release preview)

Create and List Segments in a Data Space via Connect REST API

Organize your segmentation data via Connect REST API. Create a segment or list segments in a default data space with a POST or GET request to the new `/ssot/segments?dataspace=<dataspacename>` resource. For example, to create a segment in a default data space, use a POST request with `/ssot/segments?dataspace=default` endpoint.

Where: This change applies to API version 58.0 and later for Lightning Experience in Developer, Enterprise, and Unlimited editions

SEE ALSO:

Salesforce Developer: Data Cloud Segments (can be outdated or unavailable during release preview)

Add New Object Permissions to Custom Permission Sets in Data Cloud

So you can manage data access for future product developments, six new object permissions were introduced in Data Cloud. These permissions were added to standard Data Cloud permission sets, but custom permission sets can't be updated automatically. You must directly add the new object permissions to any custom permission sets that grant users access to data model objects. Users without these object permissions can encounter errors when accessing or working with data model objects.

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

When: These object permissions were added to the standard permission sets for Salesforce orgs with Data Cloud or Customer Data Platform licenses on March 29, 2023.

How: Add the new object permissions to each custom permission set that controls user access to in Data Cloud. See Salesforce Help: Add Object Permissions to Custom Permission Sets for Data Cloud for details.

Simplify Hierarchical Data with the Flatten Transformation

Denormalize hierarchical data with the flatten transformation. By flattening your data and tracking a record's ancestor chain, you can calculate rollups or extract pieces of the hierarchy and filter them based on role.

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

How: In the canvas, click a transform node, and select Flatten from the transformation toolbar.

Everything New Across Salesforce for Data Cloud

Our latest round of Salesforce features for Data Cloud.

New and Changed Features

- Data Cloud for Service Cloud: Reduce Costs and Improve Operations with Service Intelligence
- Data Cloud for Salesforce Flow: Create Autolaunched Flows Based on Data Changes in Data Cloud
- Data Cloud for Salesforce Flow: Get Data Cloud Records More Easily in Flow Builder

Development

Whether you're using Lightning components, Visualforce, Apex, or Salesforce APIs with your favorite programming language, these enhancements help you develop amazing applications, integrations, and packages for resale to other organizations.

IN THIS SECTION:

Lightning Components

Dynamically import and instantiate a Lightning web component when the underlying component constructor isn't known until run time. Version a custom component to tie behavior to the Salesforce release corresponding to the API version. Use global color styling hooks in custom components to match color-contrast changes. Salesforce is enforcing the release update that generates a different cross-site request forgery (CSRF) token for each Lightning app.

Visualforce

Increase the security of your Visualforce pages by reviewing and enabling the release update.

Apex

As a developer preview feature, run user-mode database and search operations with permissions specified in a permission set. Configuring stack depth of chained Queueable jobs is now generally available. Reduce resource contention and race conditions by enqueuing only a single instance of your async Queueable job. DataWeave in Apex is now generally available. View deployed DataWeave script resources via the Setup UI. Implement different sort orders and perform locale-sensitive comparisons and sorting using the Comparator interface and the Collator class. Easily iterate through lists or sets using an Iterable variable in a `for` loop. Monitor your org's async Apex usage on the Apex Jobs Setup page.

API

Improve compatibility with external systems by using JWT-based access tokens to authenticate REST calls. And the previously announced retirement of API versions 21.0 through 30.0 of the Salesforce Platform API is delayed until Summer '25.

Packaging

Packaging facilitates the development and distribution of business apps. Use second-generation managed packages to create apps to sell and distribute on AppExchange. Use unlocked packages to develop internal business apps.

DevOps Center

Salesforce DevOps Center provides an improved experience around change and release management that brings DevOps best practices to your development team, regardless of where team members fall on the low-code to pro-code spectrum. All developers and builders can work together to deliver value to customers in a repeatable and scalable way.

Development Environments

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

Lightning Components

Dynamically import and instantiate a Lightning web component when the underlying component constructor isn't known until run time. Version a custom component to tie behavior to the Salesforce release corresponding to the API version. Use global color styling hooks in custom components to match color-contrast changes. Salesforce is enforcing the release update that generates a different cross-site request forgery (CSRF) token for each Lightning app.

Note: Looking for new and changed Lightning web components, Aura components, and Aura component interfaces? See the lists of new and changed items at the end of the Development section.

IN THIS SECTION:

Get the Latest LWC Features with Component-Level API Versioning

Add an API version on a custom component to inform the LWC framework to behave as it did for the Salesforce release corresponding to the API version for that component. Versioning your custom components allows us to ship new features, bug fixes, or performance improvements and to deprecate legacy features.

Use Global Color Styling Hooks to Match Color-Contrast Changes

Non-text UI elements, such as buttons and checkboxes, and some text UI elements, such as links, now display with improved color contrast to align with accessibility standards. Improved color contrast makes it easier for people with low-vision to see and use critical parts of the UI. Base Lightning components automatically include the color-contrast changes. If necessary, update your custom components to avoid visual inconsistencies by using global color styling hooks.

Control Workspace Tabs and Subtabs (Beta)

The LWC Workspace API provides methods to manage your workspace tabs and subtabs in a Lightning console app.

Use RefreshView API with Lightning Locker

The `lightning/refresh` module and RefreshView API provide a standard way to refresh component data in Lightning web components (LWC). Now the RefreshView API also works with Lightning Locker, the security architecture in effect when Lightning Web Service (LWS) isn't enabled. Previously, the RefreshView API required LWS to be enabled in the Salesforce org.

Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support

Salesforce is preparing the base Lightning components to adopt native shadow DOM to enhance performance and comply with Web Components standards. These updates change the internal DOM structure. Ensure that your tests don't rely on the previous internal structure of these components.

Be Aware of Base Component lightning-input Internal DOM Structure Changes

Salesforce is preparing the base Lightning components to adopt native shadow DOM to enhance performance and comply with Web Components standards. These updates include changes to the internal DOM structure for the `lightning-input` component. Ensure that your tests and styling don't rely on the previous internal structure of this component.

Create Custom Elements with Lightning Web Security Enabled (Beta)

With Lightning Web Security (LWS) enabled, you can create custom elements in your Lightning web components. Custom elements are a key feature of the Web Components standard and another advantage of LWS over Lightning Locker.

Use Third-Party Web Components in LWC (Beta)

Take advantage of the growing number of web components and use them without rewriting the web components for use with LWC.

Monitor Component Events with the Custom Component Instrumentation API (Beta)

Add observability to your Lightning web components with the Custom Component Instrumentation API (beta). Now you can directly monitor and track events or interactions with custom Lightning web components in your org's Event Monitoring. Previously, Event Monitoring tools only tracked insights about your application as a whole, like records loaded and page performance. The Custom Component Instrumentation API is designed for Lightning web components and isn't supported for Aura components.

API Distortion Changes in Lightning Web Security

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

Create and Manage Toast Notifications (Generally Available)

Create a list of toast notifications with `lightning/toast`, and manage them using `lightning/toastContainer` on LWR sites.

CSS Scope Tokens Are Generated with Obfuscated Strings

CSS scope tokens have changed from the `cmpName_cmpName` format to `lwc-hashstring` in LWC API version 59.0 and later, where `hashstring` is a unique alphanumerical string. This change was made as part of a performance improvement on the framework.

Fix Invalid HTML Usage to Avoid Component Errors

HTML validation is stricter with LWC API version 59.0 and later. Loading a Lightning web component results in an error if your component includes a trailing double closing `</template>` tag, along with other HTML syntax errors.

Access Lightning Experience Only with Supported Browsers

For improved security and performance, Lightning Experience is now available only in the latest version of supported browsers. Salesforce ended support for Internet Explorer 11 in Lightning Experience and Salesforce Classic in January 2023. After Winter '24, you can no longer use Internet Explorer 11 and other legacy browsers to view or access Lightning Experience. If you have code that gives users access to Lightning Experience in one of the unsupported browsers, you can delete it.

Get Names of Corresponding Invocable Actions in Custom Property Editors

Use the new `actionName` property on the existing `elementInfo` interface for custom property editors in flows. Previously, you couldn't get the invocable action name directly through a property in the custom property editor, which is a custom Lightning web component.

New Features for the LWC Offline Test Harness

Testing your offline-enabled Lightning web components gets even easier! Test Harness now has even more features intended to simplify and streamline your development and debugging experience, including Global Quick Actions, Offline Briefcase, and a customizable home tab experience. Discerning users will also notice a facelift–the UX has been redesigned to better align with the look of Salesforce App+.

LWS Protects Static Resources in LWR Sites in Experience Cloud

Code that's loaded from static resources now runs with Lightning Web Security (LWS) in LWR sites in Experience Cloud.

Add Custom Property Editors or Property Types to Custom Lightning Web Components in Aura Sites (Beta)

Make custom Lightning web components for your Aura sites highly configurable in Experience Builder—add custom property editors or property types to the components.

Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)

This update enforces the generation of a different cross-site request forgery (CSRF) token for each Lightning app, which ensures that a token is used only in its intended context. The update also improves the handling for invalid and expired tokens. This update was first available in Spring '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

SEE ALSO:

Lightning Web Components Developer Guide

Lightning Aura Components Developer Guide

Dynamically Import and Instantiate Lightning Web Components

Dynamic component creation can help you avoid loading large modules that you don't need for all use cases. Also, you can create a component instance when the underlying component constructor isn't known until run time. Dynamic import is a convenient solution to make a component more customizable. However, it isn't always the best solution because of the run-time performance overhead it introduces, so don't overuse it.

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

How: To dynamically import and instantiate Lightning web components, enable Lightning Web Security.

For details on how to instantiate a component dynamically, see the *Lightning Web Components Developer Guide*.

LWR Sites for Experience Cloud supports only statically analyzable dynamic imports. For this use case, `import("c/analyzable")` works, but `import("c/" + "analyzable")` doesn't work because it isn't statically analyzable.

SEE ALSO:

Lightning Web Components Developer Guide: Dynamically Instantiate Components

Lightning Web Components Developer Guide: Enable Lightning Web Security in an Org

LWR Sites for Experience Cloud

Get the Latest LWC Features with Component-Level API Versioning

Add an API version on a custom component to inform the LWC framework to behave as it did for the Salesforce release corresponding to the API version for that component. Versioning your custom components allows us to ship new features, bug fixes, or performance improvements and to deprecate legacy features.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app.

How: Every HTML, CSS, and JS file of a component corresponds to one API version. To specify an API version, use the `apiVersion` configuration element in the `.js-meta.xml` file for the component.

```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
    <apiVersion>58.0</apiVersion>
</LightningComponentBundle>
```

For example, setting the `apiVersion` key to 58.0 informs LWC that the custom component continues to behave as it did in Summer '23.

As of Winter '24, all API versions of 58.0 and earlier correspond to version 58.0 (Summer '23). If you set the API version to a value lower than 58.0, LWC uses version 58.0 by default and your components continue to work based on LWC framework behavior in Summer '23. To implement these new functionalities, upgrade your component API version to 59.0.

- Use lowercase on CSS scope tokens on page 182
- Throw an error instead of a warning for parse5 HTML errors on page 183

Note: If you provide an `apiVersion` value that's later than the available LWC API version, the latest-known version is used. For instance, if the latest LWC API versions are 58.0, 59.0, and 60.0, and you specify 61.0, then the framework uses 60.0. Similarly, if you specify a version earlier than 58.0, the framework uses 58.0.

SEE ALSO:

Lightning Web Components Developer Guide: API Versioning

Use Global Color Styling Hooks to Match Color-Contrast Changes

Non-text UI elements, such as buttons and checkboxes, and some text UI elements, such as links, now display with improved color contrast to align with accessibility standards. Improved color contrast makes it easier for people with low-vision to see and use critical parts of the UI. Base Lightning components automatically include the color-contrast changes. If necessary, update your custom components to avoid visual inconsistencies by using global color styling hooks.

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

Why: Web Content Accessibility Guidelines (WCAG) are a series of web accessibility guidelines published by the Web Accessibility Initiative (WAI) of the World Wide Web Consortium (W3C). The guidelines include criteria for non-text contrast.

How: Some custom components automatically align with the color-contrast updates. The custom component migration guide on the Lightning Design System website lists different classifications of custom components with details on how to handle each migration scenario to align with the color-contrast changes.

Look through the classifications of custom components in the migration guide to identify if any of them apply to your custom Aura or Lightning web components. Use the recommended approach to update your custom components, if necessary.

Find a list of your custom components from Setup. In the Quick Find box, enter *`Lightning Components`*, and then select **Lightning Components**.

Styling hooks are CSS custom properties that Salesforce Lightning Design System (SLDS) uses to make styling customizable in predictable ways. Global color styling hooks (`--slds-g-*`) are predefined values for global usage in an app. You can use these global values to align with the color-contrast changes.

Lightning components in iframes might display the old non-accessible colors. This known issue with iframes isn't specific to a particular page or cloud.

SEE ALSO:

See Improved Color Contrast in UI Elements

Lightning Design System: Migration Guide

Lightning Design System: Global Color Styling Hooks

Lightning Design System: Known Issue with iframes

Control Workspace Tabs and Subtabs (Beta)

The LWC Workspace API provides methods to manage your workspace tabs and subtabs in a Lightning console app.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Import the `lightning/platformWorkspaceApi` module to access the LWC Workspace API methods, wire adapters, and event-based APIs via Lightning Message Service.

Note: Lightning Web Security must be enabled in the Salesforce org because Lightning Locker doesn't support the LWC Workspace API.

These API methods for LWC are available for Lightning console apps.

- `closeTab()`—Closes a workspace tab or subtab.
- `disableTabClose()`—Prevents a workspace tab or subtab from closing.
- `focusTab()`—Focuses a workspace tab or subtab.
- `getAllTabInfo()`—Returns information about all open tabs.
- `getFocusedTabInfo()`—Returns information about the focused workspace tab or subtab.
- `getTabInfo()`—Returns information about the specified tab.
- `openSubtab()`—Opens a subtab within a workspace tab. If the subtab is already open, the subtab is focused.
- `openTab()`—Opens a new workspace tab. If the tab is already open, the tab is focused.
- `refreshTab()`—Refreshes a workspace tab or a subtab specified by the tab ID.
- `setTabHighlighted()`—Highlights the specified tab with a different background color and a badge. Tab highlights don't persist after reloading a Lightning console app.

- `setTabIcon()`—Sets the icon and alternative text of the specified tab.
- `setTabLabel()`—Sets the label of the specified tab.

These wire adapters are available for Lightning console apps.

- `EnclosingTabId()`—Returns the ID of the enclosing tab.
- `IsConsoleNavigation()`—Determines whether the app it's used within uses console navigation.

These Lightning message channels correspond to the Aura application events that are available for Lightning console apps. Their payloads are the same as the payloads for the Aura application events. Subscribe to these channels for the events that you want to listen for.

- `lightning__tabClosed`—Indicates that a tab was closed.
- `lightning__tabCreated`—Indicates that a tab was created successfully.
- `lightning__tabFocused`—Indicates that a tab was focused.
- `lightning__tabRefreshed`—Indicates that a tab was refreshed.
- `lightning__tabReplaced`—Indicates that a tab was replaced successfully.
- `lightning__tabUpdated`—Indicates that a tab was updated successfully.

SEE ALSO:

Salesforce Console Developer Guide

Use RefreshView API with Lightning Locker

The `lightning/refresh` module and RefreshView API provide a standard way to refresh component data in Lightning web components (LWC). Now the RefreshView API also works with Lightning Locker, the security architecture in effect when Lightning Web Service (LWS) isn't enabled. Previously, the RefreshView API required LWS to be enabled in the Salesforce org.

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

How: Use the API the same as you would to refresh component data in LWS–enabled orgs, except when registering handlers and containers. The `registerRefreshHandler()` and `registerRefreshContainer()` methods for registering components require different formats for their parameters when the components run in a Salesforce org that uses Lightning Locker.

When Lightning Locker is enabled, use this format to register components as handlers or containers.

```
registerRefreshHandler(this.template.host, this.refreshHandler.bind(this));
registerRefreshContainer(this.template.host, this.refreshContainer.bind(this));
```

Note: If the org's security architecture changes between LWS and Lightning Locker, component code must change to use the appropriate protocol for registering handlers and containers.

SEE ALSO:

Lightning Web Components Developer Guide: Refresh Component Data with RefreshView API

Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support

Salesforce is preparing the base Lightning components to adopt native shadow DOM to enhance performance and comply with Web Components standards. These updates change the internal DOM structure. Ensure that your tests don't rely on the previous internal structure of these components.

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

Why: Salesforce works continuously to align the base Lightning components with web standards. This newest effort is part of our process for Lightning Web Components to support native shadow DOM in a future release (safe harbor). In Spring '23 and Summer '23, 12 components were adapted to prepare for native shadow DOM, as we announced in Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support

Additionally, in Winter '24, these components have been adapted to prepare for native shadow DOM.

- `lightning-accordion`
- `lightning-accordion-section`
- `lightning-avatar`
- `lightning-button-icon`
- `lightning-button-icon-stateful`
- `lightning-button-menu`
- `lightning-button-stateful`
- `lightning-card`
- `lightning-combobox`
- `lightning-helptext`
- `lightning-icon`
- `lightning-input`
- `lightning-menu-divider`
- `lightning-menu-subdivider`
- `lightning-menu-item`
- `lightning-pill`
- `lightning-pill-container`
- `lightning-radio-group`
- `lightning-spinner`
- `lightning-tab`
- `lightning-tabset`

Salesforce documented that the internal component structure is protected. Salesforce may at any time redesign the internals of our components to improve performance, enhance functionality, and support accessibility. For more information, see Anti-Patterns for Styling Components.

Important: If your tests rely on this protected internal DOM structure, rewrite your tests as soon as possible.

How: For supported integration tests, use the UI Test Automation Model (UTAM) and UTAM Page Objects, which stay up to date with changes in component structure. For supported Selenium-based tests, see Working With Shadow DOM Elements Using Webdriver. For supported CSS styling, see CSS in the *Lightning Web Components Developer Guide*.

Be Aware of Base Component `lightning-input` Internal DOM Structure Changes

Salesforce is preparing the base Lightning components to adopt native shadow DOM to enhance performance and comply with Web Components standards. These updates include changes to the internal DOM structure for the `lightning-input` component. Ensure that your tests and styling don't rely on the previous internal structure of this component.

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

Why: Salesforce works continuously to align the base Lightning components with web standards. This effort is part of our process for Lightning Web Components to support native shadow DOM in a future release (safe harbor). In Spring '23 and Summer '23, 12 components were adapted to prepare for native shadow DOM, as we announced in Be Aware of Base Lightning Component Internal DOM Structure Changes for Future Native Shadow Support.

In Winter '24, in addition to other components, the internal structure of the `lightning-input` component changed to prepare for native shadow DOM.

Salesforce documented that the internal component structure is protected. Salesforce can at any time redesign the internals of our components to improve performance, enhance functionality, and support accessibility. For more information, see Anti-Patterns for Styling Components.

Important: If your tests rely on this protected internal DOM structure, rewrite your tests as soon as possible.

How: For supported integration tests, use the UI Test Automation Model (UTAM) and UTAM Page Objects, which stay up to date with changes in component structure. For supported Selenium-based tests, see Working With Shadow DOM Elements Using Webdriver. For supported CSS styling, see CSS in the *Lightning Web Components Developer Guide*.

Note: Base components are currently not supported in Mixed Shadow Mode (Developer Preview).

Create Custom Elements with Lightning Web Security Enabled (Beta)

With Lightning Web Security (LWS) enabled, you can create custom elements in your Lightning web components. Custom elements are a key feature of the Web Components standard and another advantage of LWS over Lightning Locker.

Where: This change applies to Lightning Experience in all editions, LWR-based Experience Cloud sites, and Lightning web components in Aura sites when LWS is enabled in the Salesforce org.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Why: LWS now virtualizes the browser API `CustomElementRegistry`, isolating access to your custom elements to your own namespace sandbox. This virtual registry enables you to create your own custom elements without interference from other code that runs on the page outside your sandbox. And now you can use third-party web components on page 178 on the Salesforce platform. `CustomElementRegistry` is in the global scope, so previously LWS blocked its use to protect your components from unauthorized cross-sandbox access and potentially malicious code.

How: Create custom elements in the standard way using `customElements.define()` when LWS is enabled. LWS handles the virtual isolation for you.

SEE ALSO:

Using custom elements on MDN

Use Third-Party Web Components in LWC (Beta)

Use Third-Party Web Components in LWC (Beta)

Take advantage of the growing number of web components and use them without rewriting the web components for use with LWC.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components in Open Source.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Custom elements are the building blocks of reusable web components, which you can create using `customElements.define()`. A basic custom element looks like this.

```
customElements.define('my-custom-element', class extends HTMLElement {
    constructor() {
        super();
        this.attachShadow({ mode: 'closed' }).innerHTML = '<div>Custom Element
Constructor</div>';
    }});
```

To use a third-party web component in a Lightning web component, add it to your template using the `lwc:external` directive. The third-party web component renders as a native web component in your LWC template.

Note: Lightning Web Security (LWS) must be enabled in the Salesforce org because Lightning Locker doesn't support third-party web components.

```
<template>
    <my-custom-element lwc:external></my-custom-element>
</template>
```

You can use a third-party web component using one of these solutions.

- Upload a third-party web component as a static resource. Load the component using the `loadScript` method from the `lightning/platformResourceLoader` module. Then, add the custom element to your template using `lwc:external`. You can upload up to 5 MB per static resource. An org can have up to 250 MB of static resources.
- Add a third-party web component as an LWC module with a `.js-meta.xml` configuration file. A component's JavaScript file can have a maximum file size of 128 KB.

This beta release includes the following known issues.

- Only a closed shadow mode is supported for third-party web components using shadow DOM. If the third-party web component uses an open mode, update the source to use closed mode to make the component LWS compliant. Alternatively, work with a third-party web component that doesn't use shadow DOM.
- `loadScript` doesn't support ECMAScript modules. Only pre-bundled JavaScript files with custom elements in a legacy format such as IIFE (Immediately-Invoked Function Expression) or UMD (Universal Module Definition) are supported.
- Third-party web components with npm and other dependencies or those that require compilation and bundling aren't supported. Importing from npm isn't currently supported.
- Third-party web components that reference an element by ID aren't supported in shadow DOM. For example, if the component uses `document.getElementById('some-id')`, LWC can't access the global HTML document. Use template refs where possible.
- Experience Builder sites don't currently support third-party web components when LWS is enabled.

SEE ALSO:

Create Custom Elements with Lightning Web Security Enabled (Beta)

Component Library: lightning/platformResourceLoader

Lightning Web Components Developer Guide: Third-Party Web Components (Beta) (can be outdated or unavailable during release preview)

Monitor Component Events with the Custom Component Instrumentation API (Beta)

Add observability to your Lightning web components with the Custom Component Instrumentation API (beta). Now you can directly monitor and track events or interactions with custom Lightning web components in your org's Event Monitoring. Previously, Event Monitoring tools only tracked insights about your application as a whole, like records loaded and page performance. The Custom Component Instrumentation API is designed for Lightning web components and isn't supported for Aura components.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: Import `log` from the `lightning/logger` module in your component and log data messages to Event Monitoring. The `log()` function publishes data to a new EventLogFile event type called Lightning Logger Event that structures the event data for use in Event Monitoring.

```
<!-- myComponent.html -->
<template>
  <lightning-button label="Approve"
                    onclick={handleClick}>
  </lightning-button>
</template>
```

```
// myComponent.js
import { LightningElement } from 'lwc';
import { log } from 'lightning/logger';

export default class HelloWorld extends LightningElement {
  constructor() {
  super();
  }

  let msg = {
      type: "click",
      action: "Approve"
  }

  handleClick() {
    log(msg);
  }
}
```

API Distortion Changes in Lightning Web Security

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

Where: This change applies to Lightning Experience in all editions, LWR-based Experience Cloud sites, and Lightning web components in Aura sites when LWS is enabled in the Salesforce org.

How: These APIs have new distortions documented in the LWS Distortion Viewer. Corresponding ESLint rules are included in the ESLint package.

- `Element.prototype.getInnerHTML`
- `Element.prototype.setHTML`
- `Event.prototype.explicitOriginalTarget`
- `Event.prototype.originalTarget`
- `HTMLBodyElement rejectionhandled` event
- `HTMLBodyElement storage` event
- `HTMLBodyElement unhandledrejection` event
- `HTMLFrameSetElement rejectionhandled` event
- `HTMLFrameSetElement storage` event
- `HTMLFrameSetElement unhandledrejection` event
- `HTMLScriptElement.prototype.text` setter
- `UIEvent.prototype.rangeParent` (Firefox only)
- `window.find`
- `Window rejectionhandled` event
- `Window storage` event
- `Window unhandledrejection` event

This distortion and associated ESLint rule was removed.

- `WindowEventHandler.onstorage`

Create and Manage Toast Notifications (Generally Available)

Create a list of toast notifications with `lightning/toast`, and manage them using `lightning/toastContainer` on LWR sites.

Where: This change applies to LWR sites for Experience Cloud in Enterprise, Performance, Unlimited, and Developer editions.

How: The `lightning/toast` module displays a toast notification with an icon, label, message, and optional links.

```
// c/myToastComponent.js
import { LightningElement } from 'lwc';
import ToastContainer from 'lightning/toastContainer';
import Toast from 'lightning/toast';

export default class MyToastComponent extends LightningElement {
    connectedCallback() {
        const toastContainer = ToastContainer.instance();
        toastContainer.maxToasts = 5;
        toastContainer.toastPosition = 'top-right';
    }

    Toast.show({
           label: 'This is a toast title with a {0} placeholder link that gets replaced
by labelLinks',
           labelLinks : [{
                'url': 'https://www.lightningdesignsystem.com/components/toast/',
                'label': 'Toast link'
           }],
           message: 'This message has a {0} placeholder link that gets replaced by from
```

```
messageLinks',
            messageLinks: [{
                url: 'http://www.salesforce.com',
                label: 'Salesforce link'
            }],
            mode: 'sticky'
            variant: 'info',
            onclose: () => {
               // Do something after the toast is closed
            }
         }, this);
     }
}
```

The `lightning/toastContainer` module creates a container that handles and displays your page-level toast notifications. With `lightning/toastContainer`, you can:

- Set the maximum number of toasts in the container using the `maxToasts` attribute.
- Position the container using `containerPosition`.
- Position the toast components within the container using `toastPosition`.

Note: `lightning/platformShowToastEvent` isn't supported on LWR sites.

SEE ALSO:

Component Library

CSS Scope Tokens Are Generated with Obfuscated Strings

CSS scope tokens have changed from the `cmpName_cmpName` format to `lwc-hashstring` in LWC API version 59.0 and later, where `hashstring` is a unique alphanumerical string. This change was made as part of a performance improvement on the framework.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components in open source.

How: LWC now uses lowercase on CSS scope tokens with LWC API version 59.0. To scope CSS within a component, LWC automatically adds attributes and classes to DOM elements. These attributes and classes are internal implementation details of the framework and can change at any time. For example, a custom component renders like this in the DOM with LWC API Version 59.0.

```
<c-cmp lwc-2s44vctlls4-host>
    <span lwc-2s44vctlls4></span>
</c-cmp>
```

Previously, CSS scoped tokens resembled the component names.

```
<c-cmp c-cmp_cmp-host>
    <span c-cmp_cmp></span>
</c-cmp>
```

We don't recommend querying for the scope token value using `this.template.querySelector()` because the internals of a component can change.

Note: The change to generate obfuscated strings for CSS scope tokens affects your custom components only when you upgrade to LWC API version 59.0. However, this change immediately affects Salesforce-authored components in Lightning Experience and

Experience Builder sites, such as the components that are rendered on record pages or list views. and base Lightning components. Your code can break if you rely on the internals of components that you don’t own.

SEE ALSO:

Lightning Web Components Developer Guide: Access Elements the Component Owns

Lightning Web Components Developer Guide: Anti-Patterns for Styling Components

Fix Invalid HTML Usage to Avoid Component Errors

HTML validation is stricter with LWC API version 59.0 and later. Loading a Lightning web component results in an error if your component includes a trailing double closing `</template>` tag, along with other HTML syntax errors.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app. This change also applies to Lightning web components in Open Source.

How: In LWC API version 59.0 and later, invalid HTML syntax that used to return warnings now return errors. In VS Code, an error in your template code displays with red squiggly lines with a popover that explains the problem. The component can be saved locally but it can't be pushed or deployed to your org. You must fix the template errors before you can push or deploy your code.

SEE ALSO:

Lightning Web Components Developer Guide: HTML Template Errors (can be outdated or unavailable during release preview)

Access Lightning Experience Only with Supported Browsers

For improved security and performance, Lightning Experience is now available only in the latest version of supported browsers. Salesforce ended support for Internet Explorer 11 in Lightning Experience and Salesforce Classic in January 2023. After Winter ’24, you can no longer use Internet Explorer 11 and other legacy browsers to view or access Lightning Experience. If you have code that gives users access to Lightning Experience in one of the unsupported browsers, you can delete it.

Where: This change applies to custom Lightning web components in Lightning Experience and Experience Builder sites. This change also applies to Lightning web components in Open Source.

SEE ALSO:

Lightning Web Components Developer Guide: Supported Browsers

Developers’ Blog: Ending Support for IE11 on the Lightning Platform

Get Names of Corresponding Invocable Actions in Custom Property Editors

Use the new `actionName` property on the existing `elementInfo` interface for custom property editors in flows. Previously, you couldn't get the invocable action name directly through a property in the custom property editor, which is a custom Lightning web component.

Where: This change applies to custom Lightning web components in Lightning Experience.

SEE ALSO:

Lightning Web Components Developer Guide: Custom Property Editor JavaScript Interface

Lightning Web Components Developer Guide: Customize Action and Screen Component UI in Flow Builder

New Features for the LWC Offline Test Harness

Testing your offline-enabled Lightning web components gets even easier! Test Harness now has even more features intended to simplify and streamline your development and debugging experience, including Global Quick Actions, Offline Briefcase, and a customizable home tab experience. Discerning users will also notice a facelift–the UX has been redesigned to better align with the look of Salesforce App+.

Where: This tool is publicly available for download as both an app file (iOS) and an APK file (Android).

How: For details on how to use the Test Harness during offline component development, see Develop Offline-Ready LWCs with the LWC Offline Test Harness in the Mobile Offline Developer Guide.

LWS Protects Static Resources in LWR Sites in Experience Cloud

Code that's loaded from static resources now runs with Lightning Web Security (LWS) in LWR sites in Experience Cloud.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

LWS Protects Static Resources in LWR Sites

Add Custom Property Editors or Property Types to Custom Lightning Web Components in Aura Sites (Beta)

Make custom Lightning web components for your Aura sites highly configurable in Experience Builder—add custom property editors or property types to the components.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

SEE ALSO:

Create Custom Property Types and Editors for Lightning Web Components in Aura Sites (Beta)

Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)

This update enforces the generation of a different cross-site request forgery (CSRF) token for each Lightning app, which ensures that a token is used only in its intended context. The update also improves the handling for invalid and expired tokens. This update was first available in Spring '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

Where: This change applies to Lightning apps, including Lightning Experience, and all versions of the Salesforce mobile app. This change doesn't apply to Lightning Out apps.

When: Salesforce enforces this update for all orgs in Winter '24. The update was enforced for sandboxes in Summer '23. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: CSRF is a web application vulnerability where a malicious application causes a user's client to perform an unwanted action on a trusted site that the user is authenticated for.

A CSRF token is a random and unique value generated by the server. A CSRF token is the most common prevention technique because it requires an attacker to know the value of the CSRF token used.

How: To test this update, we recommend working in a sandbox, where this release update is enforced in Summer '23.

In a production org, you can activate the release update from Setup. In the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Security Enhancements for CSRF Tokens for Lightning Apps, follow the testing and activation steps.

SEE ALSO:

Trailhead: Mitigate Cross-Site Request Forgery

Release Updates

Visualforce

Increase the security of your Visualforce pages by reviewing and enabling the release update.

For more information on features affected by these enhancements, refer to the Visualforce Developer Guide.

IN THIS SECTION:

Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To prevent unauthorized serialization and deserialization across packaging namespaces, this update validates the JsonAccess annotation of your Apex classes. This update was first made available in Winter '23 and was scheduled to be enforced in Winter '24. The enforcement date has been postponed to Spring '24.

Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To prevent unauthorized serialization and deserialization across packaging namespaces, this update validates the JsonAccess annotation of your Apex classes. This update was first made available in Winter '23 and was scheduled to be enforced in Winter '24. The enforcement date has been postponed to Spring '24.

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

When: Salesforce enforces this update in Spring '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and then click the maintenance tab.

How: To activate this release update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For **Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API**, follow the testing and activation steps.

SEE ALSO:

Apex Developer Guide: JsonAccess Annotation

Release Updates

Apex

As a developer preview feature, run user-mode database and search operations with permissions specified in a permission set. Configuring stack depth of chained Queueable jobs is now generally available. Reduce resource contention and race conditions by enqueuing only a single instance of your async Queueable job. DataWeave in Apex is now generally available. View deployed DataWeave script resources via the Setup UI. Implement different sort orders and perform locale-sensitive comparisons and sorting using the Comparator interface and the Collator class. Easily iterate through lists or sets using an Iterable variable in a `for` loop. Monitor your org's async Apex usage on the Apex Jobs Setup page.

For more information on these enhancements, see the Apex Developer Guide and the Apex Reference Guide.

IN THIS SECTION:

Specify Custom Access Using Permission Sets for User Mode Database Operations (Developer Preview)

The new `AccessLevel.withPermissionSetId()` method supports database and search operations that are run with permissions specified in a permission set. You can also specify a permission set ID as a parameter to the new `Security.stripInaccessible()` overloaded method. Apex enforces field-level security (FLS) and object permissions as per the specified permission set, in addition to the running user's permissions.

Set the Maximum Depth of Chained Queueable Jobs (Generally Available)

The Configure Stack Depth of Chained Queueable Jobs feature is now generally available. You can set a maximum stack depth of Queueable jobs, overriding the default limit of five in Developer and Trial Edition orgs. This feature provides a larger safety mechanism to prevent runaway recursive jobs from consuming the daily async Apex limit.

Ensure that Duplicate Queueable Jobs Aren't Enqueued

Reduce resource contention and race conditions by enqueuing only a single instance of your async Queueable job based on the signature. Attempting to add more than one Queueable job to the processing queue with the same signature results in an exception on enqueue for the subsequent jobs.

Use DataWeave in Apex to Enable Data Transformation to Different Formats (Generally Available)

DataWeave in Apex is now generally available. DataWeave in Apex enhances native Apex data transformation support by integrating the Mulesoft DataWeave library into the Apex runtime. It makes data transformation easier to code, more scalable, and efficient. With this feature, Apex developers can focus more on solving business problems and less on addressing the specifics of file formats. You can create DataWeave scripts as metadata and invoke them directly from Apex. Similar to Apex, DataWeave scripts are run within Salesforce application servers, enforcing the same heap and CPU limits on the executing code.

View DataWeave Scripts in Setup UI

You can now create a listview for DataWeave resources in your org and view deployed DataWeave scripts within your namespace. Select the fields that you want to monitor, such as the DataWeave Resource ID, Name, Namespace Prefix, and API Version.

Use the Comparator Interface and Collator Class for Sorting

The List class now supports the new Comparator interface, so you can implement different sort orders in your code by using `List.sort()` with a Comparator parameter. To perform locale-sensitive comparisons and sorting, use the `getInstance` method in the new Collator class. Because locale-sensitive sorting can produce different results depending on the user running the code, avoid using it in triggers or in code that expects a particular sort order.

Iterate Within For Loops More Easily with Iterable

You can now easily iterate through lists or sets using an Iterable variable in a `for` loop.

Monitor Async Apex Job Limit Usage

Monitor your org's async Apex usage on the Apex Jobs Setup page to mitigate potential limit problems before they happen. You see the percentage of async Apex used and how many Apex operations have been used out of the allowed 24-hour org limit.

Other Improvements in Apex Compiler Messages, Setup, and Processing

Winter '24 includes many improvements to Apex compiler messages, jobs setup page, and serialization support. Error messages are enhanced to include in-progress scheduled job CronTrigger IDs when updating dependent class metadata. To avoid pagination errors, a limit of 10,000 records is enforced for Apex Jobs listviews. Deserialization now uses the same Apex class API version that was used for serialization.

Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)

When this update is enabled, regardless of API version, REST response headers defined in Apex via the `RestResponse.addHeader(name, value)` method have the header names validated based on RFC 7230. The update is available starting in Spring '23.

getSalesforceBaseUrl() Method Is Being Deprecated

In API version 59.0 and later, the getSalesforceBaseUrl() method is deprecated and no longer available. Instead use getOrgDomainUrl() to get your org URL or getCurrentRequestUrl() to get the URL of an entire request on a Salesforce instance. Attempting to use the deprecated method in API version 59.0 and later results in a compilation error.

SEE ALSO:

Apex: New and Changed Items

Specify Custom Access Using Permission Sets for User Mode Database Operations (Developer Preview)

The new `AccessLevel.withPermissionSetId()` method supports database and search operations that are run with permissions specified in a permission set. You can also specify a permission set ID as a parameter to the new `Security.stripInaccessible()` overloaded method. Apex enforces field-level security (FLS) and object permissions as per the specified permission set, in addition to the running user's permissions.

Note: Feature is available as a developer preview. Feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools in a production environment. You can provide feedback and suggestions for the "Permission Sets with User Mode" feature in the Trailblazer Community.

Where: This feature is available in scratch orgs where the `ApexUserModeWithPermset` feature is enabled. If the feature isn't enabled, Apex code with this feature can be compiled but not executed.

How: For the Developer Preview, you can run the `AccessLevel.withPermissionSetId()` method with a specified permission set ID. Specific user mode DML operations that are performed with that `AccessLevel`, respect the permissions in the specified permission set. Previously, you could choose to run DML operations in user mode, enforcing the FLS and object permissions of the running user.

This example runs the `AccessLevel.withPermissionSetId()` method with the specified permission set and inserts a custom object.

```
@isTest
public with sharing class ElevateUserModeOperations_Test {
    @isTest
    static void objectCreatePermViaPermissionSet() {
        Profile p = [SELECT Id FROM Profile WHERE Name='Minimum Access - Salesforce'];
        User u = new User(Alias = 'standt', Email='standarduser@testorg.com',
            EmailEncodingKey='UTF-8', LastName='Testing', LanguageLocaleKey='en_US',
            LocaleSidKey='en_US', ProfileId = p.Id,
```

```
            TimeZoneSidKey='America/Los_Angeles',
            UserName='standarduser' + DateTime.now().getTime() + '@testorg.com');

        System.runAs(u) {
            try {
                Database.insert(new Account(name='foo'), AccessLevel.User_mode);
                Assert.fail();
            } catch (SecurityException ex) {
                Assert.isTrue(ex.getMessage().contains('Account'));
            }
            //Get ID of previously created permission set named 'AllowCreateToAccount'
            Id permissionSetId = [Select Id from PermissionSet
                where Name = 'AllowCreateToAccount' limit 1].Id;

            Database.insert(new Account(name='foo'),
AccessLevel.User_mode.withPermissionSetId(permissionSetId));

            // The elevated access level in not persisted to subsequent operations
            try {
                Database.insert(new Account(name='foo2'), AccessLevel.User_mode);
                Assert.fail();
            } catch (SecurityException ex) {
                Assert.isTrue(ex.getMessage().contains('Account'));
            }

        }
    }
}
```

Note: Checkmarx, the AppExchange Security Review source code scanner, hasn't been updated with this new Apex feature. Until it's updated, Checkmarx can generate false positives for field or object level security violations that require exception documentation.

Set the Maximum Depth of Chained Queueable Jobs (Generally Available)

The Configure Stack Depth of Chained Queueable Jobs feature is now generally available. You can set a maximum stack depth of Queueable jobs, overriding the default limit of five in Developer and Trial Edition orgs. This feature provides a larger safety mechanism to prevent runaway recursive jobs from consuming the daily async Apex limit.

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

How: Enqueue jobs by using the new `System.enqueueJob()` overload. The method overload has an optional `AsyncOptions` parameter to specify the maximum stack depth and the minimum queue delay.

You can test chained queueables using appropriate stack depths, but be aware of applicable Apex governor limits.

Use these methods in the new `System.AsyncInfo` class to determine the current and maximum stack depths and to get the minimum queueable delay.

- `getCurrentQueueableStackDepth()`
- `getMaximumQueueableStackDepth()`
- `getMinimumQueueableDelayInMinutes()`
- `hasMaxStackDepth()`

This example uses stack depth to terminate a chained job and prevent it from reaching the daily maximum number of asynchronous Apex method executions.

```
// Fibonacci
public class FibonacciDepthQueueable implements Queueable {

    private long nMinus1, nMinus2;

    public static void calculateFibonacciTo(integer depth) {
        AsyncOptions asyncOptions = new AsyncOptions();
        asyncOptions.MaximumQueueableStackDepth = depth;
        System.enqueueJob(new FibonacciDepthQueueable(null, null), asyncOptions);
    }

    private FibonacciDepthQueueable(long nMinus1param, long nMinus2param) {
        nMinus1 = nMinus1param;
        nMinus2 = nMinus2param;
    }

    public void execute(QueueableContext context) {

        integer depth = AsyncInfo.getCurrentQueueableStackDepth();

        // Calculate step
        long fibonacciSequenceStep;
        switch on (depth) {
            when 1, 2 {
                fibonacciSequenceStep = 1;
            }
            when else {
                fibonacciSequenceStep = nMinus1 + nMinus2;
            }
        }

       System.debug('depth: ' + depth + ' fibonacciSequenceStep: ' + fibonacciSequenceStep);


        if(System.AsyncInfo.hasMaxStackDepth() &&
           AsyncInfo.getCurrentQueueableStackDepth() >=
           AsyncInfo.getMaximumQueueableStackDepth()) {
            // Reached maximum stack depth
            Fibonacci__c result = new Fibonacci__c(
                Depth__c = depth,
                Result = fibonacciSequenceStep
                );
            insert result;
        } else {
          System.enqueueJob(new FibonacciDepthQueueable(fibonacciSequenceStep, nMinus1));

        }
    }
}
```

Ensure that Duplicate Queueable Jobs Aren't Enqueued

Reduce resource contention and race conditions by enqueuing only a single instance of your async Queueable job based on the signature. Attempting to add more than one Queueable job to the processing queue with the same signature results in an exception on enqueue for the subsequent jobs.

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

How: Use the `QueueableDuplicateSignature` class methods `addId()`, `addInteger()`, and `addString()` to build a unique signature for your queueable job. Use the `DuplicateSignature` property in the `AsyncOptions` class to store the queueable job signature. Enqueue your job by using the `System.enqueueJob()` with the `AsyncOptions` parameter.

This example builds the async job signature with UserId and the string `MyQueueable`.

```
AsyncOptions options = new AsyncOptions();
options.DuplicateSignature = QueueableDuplicateSignature.Builder()
                                .addId(UserInfo.getUserId())
                                .addString('MyQueueable')
                                .build();
try {
    System.enqueueJob(new MyQueueable(), options);
} catch (DuplicateMessageException ex) {
    //Exception is thrown if there is already an enqueued job with the same signature
    Assert.areEqual('Attempt to enqueue job with duplicate queueable signature',
        ex.getMessage());
}
```

This example builds the async job signature using ApexClass Id and the hash value of an sObject.

```
AsyncOptions options = new AsyncOptions();
options.DuplicateSignature = QueueableDuplicateSignature.Builder()
                                .addInteger(System.hashCode(someAccount))
                                .addId([SELECT Id FROM ApexClass
                                     WHERE Name='MyQueueable'].Id)
                                .build();
System.enqueueJob(new MyQueueable(), options);
```

Use DataWeave in Apex to Enable Data Transformation to Different Formats (Generally Available)

DataWeave in Apex is now generally available. DataWeave in Apex enhances native Apex data transformation support by integrating the Mulesoft DataWeave library into the Apex runtime. It makes data transformation easier to code, more scalable, and efficient. With this feature, Apex developers can focus more on solving business problems and less on addressing the specifics of file formats. You can create DataWeave scripts as metadata and invoke them directly from Apex. Similar to Apex, DataWeave scripts are run within Salesforce application servers, enforcing the same heap and CPU limits on the executing code.

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

How: You can share DataWeave scripts across namespaces. Specify a namespace name in the new `DataWeave.createScript(namespace, scriptName)` method overload. Performance is improved with first-time DataWeave script creation and execution. Checks for feature support are done at script creation time instead of at runtime. You must specify encoding for binary input (Apex Blobs) to be coerced to strings: `binaryVariable as String {encoding: 'utf8' }`".

For every DataWeave script, an inner class of type `DataWeaveScriptResource.ScriptName`, which extends the `DataWeave.Script` class, is generated. You can use the generated `DataWeaveScriptResource.ScriptName` class in lieu of the actual script name. DataWeave scripts that are currently being referenced via this inner class can't be deleted. Set the `isGlobal` field in the `DataWeaveResource` metadata object for the generated DataWeaveScriptResource class to be global.

This example shows the transformation of an input CSV file into Contact sObjects.

```
// CSV data for Contacts

String inputCsv = 'first_name,last_name,email\nCodey,"The Bear",codey@salesforce.com';
DataWeave.Script dwscript = new DataWeaveScriptResource.csvToContacts();
DataWeave.Result dwresult = dwscript.execute(new Map<String, Object>{'records' => inputCsv});
List<Contact> results = (List<Contact>)dwresult.getValue();

Assert.areEqual(1, results.size());
Contact codeyContact = results[0];
Assert.areEqual('Codey', codeyContact.FirstName);
Assert.areEqual('The Bear', codeyContact.LastName);
```

The CSV data is transformed to objects using the DataWeave script csvToContacts.dwl.

```
%dw 2.0
input records application/csv
output application/apex
---
records map(record) -> {
 FirstName: record.first_name,
 LastName: record.last_name,
 Email: record.email
} as Object {class: "Contact"}
```

View DataWeave Scripts in Setup UI

You can now create a listview for DataWeave resources in your org and view deployed DataWeave scripts within your namespace. Select the fields that you want to monitor, such as the DataWeave Resource ID, Name, Namespace Prefix, and API Version.

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

How: From Setup, in the Quick Find box, enter *DataWeave*, and then select **DataWeave Resources**.

Use the Comparator Interface and Collator Class for Sorting

The List class now supports the new Comparator interface, so you can implement different sort orders in your code by using `List.sort()` with a Comparator parameter. To perform locale-sensitive comparisons and sorting, use the `getInstance` method in the new Collator class. Because locale-sensitive sorting can produce different results depending on the user running the code, avoid using it in triggers or in code that expects a particular sort order.

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

How: Implement the `compare()` method of the `System.Comparator` interface, and specify the Comparator as a parameter to `List.sort()`. Your implementation must explicitly handle null inputs in the `compare()` method to avoid a null pointer exception. This example implements two different ways of sorting employees.

```
public class Employee {

    private Long id;
    private String name;
    private Integer yearJoined;
```

```
    // Constructor
    public Employee(Long i, String n, Integer y) {
        id = i;
        name = n;
        yearJoined = y;
    }

    public String getName() { return name; }
    public Integer getYear() { return yearJoined; }
}
```

```
// Class to compare Employees by name
    public class NameCompare implements Comparator<Employee> {
        public Integer compare(Employee e1, Employee e2) {
            if(e1?.getName() == null && e2?.getName() == null) {
                return 0;
            } else if(e1?.getName() == null) {
                return -1;
            } else if(e2?.getName() == null) {
                return 1;
            }
            return e1.getName().compareTo(e2.getName());
            }
        }

    // Class to compare Employees by year joined
    public class YearCompare implements Comparator<Employee> {
        public Integer compare(Employee e1, Employee e2) {
            // Guard against null operands for '<' or '>' operators because
            // they will always return false and produce inconsistent sorting
            Integer result;
            if(e1?.getYear() == null && e2?.getYear() == null) {
                result = 0;
            } else if(e1?.getYear() == null) {
                  result = -1;
            } else if(e2?.getYear() == null) {
                  result = 1;
            } else if (e1.getYear() < e2.getYear()) {
                  result = -1;
            } else if (e1.getYear() > e2.getYear()) {
                  result = 1;
            } else {
                  result = 0;
            }
        return result;
        }
    }
```

```
@isTest
private class EmployeeSortingTest {
    @isTest
    static void sortWithComparators() {
        List<Employee> empList = new List<Employee>();
```

```
        empList.add(new Employee(101,'Joe Smith', 2020));
        empList.add(new Employee(102,'J. Smith', 2020));
        empList.add(new Employee(25,'Caragh Smith', 2021));
        empList.add(new Employee(105,'Mario Ruiz', 2019));
        // Sort by name
        NameCompare nameCompare = new NameCompare();
        empList.sort(nameCompare);
        // Expected order: Caragh Smith, J. Smith, Joe Smith, Mario Ruiz
        Assert.areEqual('Caragh Smith', empList.get(0).getName());

        // Sort by year joined
        YearCompare yearCompare = new YearCompare();
        empList.sort(yearCompare);
        // Expected order: Mario Ruiz, J. Smith, Joe Smith, Caragh Smith
        Assert.areEqual('Mario Ruiz', empList.get(0).getName());
    }
}
```

This example performs a default list sort and then uses Collator to sort based on the user locale.

```
@IsTest
    static void userLocaleSort() {

        string userLocale = 'fr_FR';

        User u = new User(Alias = 'standt', Email='standarduser@testorg.com',
        EmailEncodingKey='UTF-8', LastName='Testing', LanguageLocaleKey='en_US',
        LocaleSidKey=userLocale, TimeZoneSidKey='America/Los_Angeles',
        ProfileId = [SELECT Id FROM Profile WHERE Name='Standard User'].Id,
        UserName='standarduser' + DateTime.now().getTime() + '@testorg.com');

        System.runAs(u) {

            List<String> shoppingList = new List<String> {
                'épaule désosé Agneau',
                'Juice',
                'à la mélasse Galette 5 kg',
                'Bread',
                'Grocery'
            };

            // Default sort
            shoppingList.sort();
            Assert.areEqual('Bread', shoppingList[0]);

            // Sort based on user Locale
            Collator myCollator = Collator.getInstance();
            shoppingList.sort(myCollator);
            Assert.areEqual('à la mélasse Galette 5 kg', shoppingList[0]);
            Assert.areEqual('Bread', shoppingList[1]);
            Assert.areEqual('épaule désosé Agneau', shoppingList[2]);
            Assert.areEqual('Grocery', shoppingList[3]);
            Assert.areEqual('Juice', shoppingList[4]);
```

```
        }
    }
```

SEE ALSO:

IdeaExchange: Support Apex List Sorting Using a Comparator

Iterate Within For Loops More Easily with Iterable

You can now easily iterate through lists or sets using an Iterable variable in a `for` loop.

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

How: This example iterates through a list of strings.

```
Iterable<String> stringIterator = new List<String>{'Hello', 'World!'};
   for (String str : stringIterator) {
      System.debug(str);
}
```

This example implements an Iterable interface and then iterates through the strings in the returned set of strings.

```
public class MyIterable implements Iterable<String> {
   public Iterator<String> iterator() {
      return new Set<String>{'Hello', 'World!'}.iterator();
   }
}
```

```
for (String str : new MyIterable()) {
   System.debug(str);
}
```

SEE ALSO:

IdeaExchange: Allow Iterable for Loops in Apex Code

Monitor Async Apex Job Limit Usage

Monitor your org's async Apex usage on the Apex Jobs Setup page to mitigate potential limit problems before they happen. You see the percentage of async Apex used and how many Apex operations have been used out of the allowed 24-hour org limit.

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

How: From Setup, in the Quick Find box, enter *Apex*, and then select **Apex Jobs**.

SEE ALSO:

Apex Developer Guide: Lightning Platform Apex Limits

Other Improvements in Apex Compiler Messages, Setup, and Processing

Winter '24 includes many improvements to Apex compiler messages, jobs setup page, and serialization support. Error messages are enhanced to include in-progress scheduled job CronTrigger IDs when updating dependent class metadata. To avoid pagination errors, a limit of 10,000 records is enforced for Apex Jobs listviews. Deserialization now uses the same Apex class API version that was used for serialization.

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

Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)

When this update is enabled, regardless of API version, REST response headers defined in Apex via the `RestResponse.addHeader(name, value)` method have the header names validated based on RFC 7230. The update is available starting in Spring '23.

Where: This change applies to Salesforce orgs in all editions.

When: Salesforce enforces this update in Spring '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: This update improves legacy behavior where Apex REST Response headers weren't validated and enables RFC 7230 validation. After the update, invalid characters such as `/` (slash) are no longer accepted.

How: Apex that invokes the `RestResource.addHeader(name, value)` method with a header name that isn't RFC 7230–compliant results in a run-time exception of type `InvalidHeaderException`. Before activating this update in production, check with your package providers to make sure that all your installed packages are compatible. Evaluate the impact to your Salesforce org with these checks.

- Run Apex test cases and check for failures caused by `InvalidHeaderException`.
- Invoke your Apex REST API classes and check responses for failures caused by `InvalidHeaderException`.
- Inspect Apex code that calls the `RestResource.addHeader(name, value)` method for a *`name`* parameter with a value that isn't RFC 7230–compliant.

getSalesforceBaseUrl() Method Is Being Deprecated

In API version 59.0 and later, the getSalesforceBaseUrl() method is deprecated and no longer available. Instead use getOrgDomainUrl() to get your org URL or getCurrentRequestUrl() to get the URL of an entire request on a Salesforce instance. Attempting to use the deprecated method in API version 59.0 and later results in a compilation error.

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

SEE ALSO:

Apex Reference Guide: URL Class

API

Improve compatibility with external systems by using JWT-based access tokens to authenticate REST calls. And the previously announced retirement of API versions 21.0 through 30.0 of the Salesforce Platform API is delayed until Summer '25.

IN THIS SECTION:

Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)

The retirement of versions 21.0 through 30.0 of the Salesforce Platform API was first scheduled for Summer '23. The retirement is now postponed to Summer '25. You can continue to use these API versions but they're not supported and won't be available starting in Summer '25. Applications consuming them are then disrupted. Requests fail with an error message indicating that the endpoint is deactivated. Upgrade all applications that use a legacy API version to a current version before this breaking change occurs.

SEE ALSO:

REST Limits Response Change for Usage-Based Entitlement for Platform Events and Change Events

Use JWT-Based Access Tokens to Authenticate for REST API Calls

You can now use JSON Web Token (JWT)-based access tokens for granting access to REST APIs. Enable connected apps to issue JWT-based access tokens and use these tokens to authenticate REST calls. Make sure you understand the functionality and limitations before you implement JWT tokens.

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

SEE ALSO:

JSON Web Token (JWT)-Based Access Tokens Are Now Generally Available

Salesforce Help: JWT-Based Access Tokens (can be outdated or unavailable during release preview)

Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)

The retirement of versions 21.0 through 30.0 of the Salesforce Platform API was first scheduled for Summer '23. The retirement is now postponed to Summer '25. You can continue to use these API versions but they're not supported and won't be available starting in Summer '25. Applications consuming them are then disrupted. Requests fail with an error message indicating that the endpoint is deactivated. Upgrade all applications that use a legacy API version to a current version before this breaking change occurs.

Where: This change affects these API versions.

Bulk API

21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0

SOAP API

21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0

REST API

v21.0, v22.0, v23.0, v24.0, v25.0, v26.0, v27.0, v28.0, v29.0, v30.0

Note: This change affects all REST APIs that use URIs beneath `/services/data/vXX.X/`, including:

- Bulk API
- Connect REST API
- IoT REST API
- Lightning Platform REST API
- Metadata API
- Place Order REST API
- Reports and Dashboards REST API
- Tableau CRM REST API

- Tooling API

This change applies to Professional (with API access enabled), Enterprise, Performance, Unlimited, and Developer editions. It affects all API-enabled orgs, including Sandboxes and Scratch orgs.

How: Modify or upgrade all applications to function with current API versions before the Summer '25 release. Newer API versions offer more capabilities and improved security and performance.

Identify requests made from old or unsupported API versions of SOAP API, REST API, and Bulk API using the API Total Usage event.

Packaging

Packaging facilitates the development and distribution of business apps. Use second-generation managed packages to create apps to sell and distribute on AppExchange. Use unlocked packages to develop internal business apps.

IN THIS SECTION:

Explore the New Developer Guides for Managed Packaging

To improve the readability of our packaging documentation for ISVs and developers that concentrate on a single package type, we reorganized our developer-focused packaging topics into two new developer guides. You can find all the developer-focused topics in either the Second-Generation Managed Packaging Developer Guide or the First-Generation Managed Packaging Developer Guide. The ISVforce Guide is now focused on business and marketplace content and no longer includes details on building packages. The developer-focused topics for unlocked packages remain in the Salesforce DX Developer Guide.

Where: This change applies to second- and first-generation managed packaging.

SEE ALSO:

Second-Generation Managed Packaging Developer Guide

First-Generation Managed Packaging Developer Guide

Salesforce DX Developer Guide: Unlocked Packages

DevOps Center

Salesforce DevOps Center provides an improved experience around change and release management that brings DevOps best practices to your development team, regardless of where team members fall on the low-code to pro-code spectrum. All developers and builders can work together to deliver value to customers in a repeatable and scalable way.

Are you looking for an alternative to change sets based on modern development best practices? We thought so.

IN THIS SECTION:

SEE ALSO:

DevOps Center Roadmap: v6.0 Bug Fixes (August 2023)

Salesforce Help: Install and Configure DevOps Center

Salesforce Help: Manage and Release Changes Easily and Collaboratively with DevOps Center

Deploy Changes Using Salesforce CLI (Beta)

Use Salesforce CLI to deploy externally merged changes to a pipeline stage's environment or perform a validate-only deployment using the `sf project deploy pipeline` commands. The CLI allows you to perform DevOps Center actions on the command line for developers who plan to work outside of DevOps Center or want to automate tasks.

Where: This change applies to Lightning Experience in:

- Developer, Professional, Enterprise, Performance, and Unlimited Editions.
- Government Cloud Plus. Turning on DevOps Center in Government Cloud Plus orgs can send data outside the authorization boundary. Contact your Salesforce account executive for more details.

When: The DevOps Center CLI plugin is compatible with DevOps Center package version 6.0 or later. Salesforce CLI releases on a weekly basis. See the Salesforce CLI Release Notes for information on the timing for the official release of the DevOps Center plugin.

Who: Users who are assigned the DevOps Center Release Manager permission set.

How: Install Salesforce CLI. See Salesforce CLI Setup Guide for details.

SEE ALSO:

Salesforce Help: Install Salesforce CLI DevOps Center Plugin (Beta)

Salesforce Help: Deploy Changes Using Salesforce CLI (Beta)

Promote Confidently When Work Items Share Components

Prevent potential conflicts during the promotion process by combining work items that share metadata components. In some cases, the source control repository doesn't know how to reconcile the changes to the same metadata component. Sometimes the promotion is blocked based on a dependency with a shared component. But have no fear, DevOps Center detects the shared components and provides you with a way to promote your changes through the release pipeline with confidence.

Where: This change applies to Lightning Experience in:

- Developer, Professional, Enterprise, Performance, and Unlimited Editions.

- Government Cloud Plus. Turning on DevOps Center in Government Cloud Plus orgs can send data outside the authorization boundary. Contact your Salesforce account executive for more details.

Who: Users who are assigned the required DevOps Center permission sets, including DevOps Center Release Manager.

Why: In DevOps Center, you can move work items only forward through the pipeline. Currently, you can’t revert a work item after it’s been promoted. Because you can’t abandon a work item in a pipeline stage, all work items must eventually move through the pipeline to ensure all pipeline stage branches and their corresponding environments are in sync. Although it seems counterintuitive to move changes you don’t want through the release pipeline, combining work items merges all the changes together to achieve the desired results.

How: When DevOps Center detects a potential conflict due to work items that share components or contain dependencies, it provides you with the option to combine the work items so you can continue with the promotion.

SEE ALSO:

Salesforce Help: Prevent Potential Conflicts By Combining Work Items

Development Environments

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

IN THIS SECTION:

Understand Changes to Sandbox License Compliance

To ensure sandbox license compliance, we inform you when you have more sandboxes than provisioned licenses. When you exceed your sandbox allocations, we lock the appropriate number of sandboxes to restore your license compliance, starting with the least recently used sandboxes. After you meet compliance, locked sandboxes are unlocked. If you do nothing, sandboxes locked for more than 60 days are deleted and can’t be recovered.

Select Who Has Access To a Sandbox

Selective Sandbox Access helps you limit access to a sandbox to only required users when refreshing or creating a sandbox. By default, all active users in the source org have access to the sandbox, but only the user who creates the sandbox has their email address in the original format (without `.invalid` appended to it). With selective access, a Salesforce admin grants access to specific users through a public group. The email addresses for the users included in the group remain in their original format and don’t need to be modified. Users who aren’t part of the public group have to be unfrozen in the sandbox in order to access it.

Understand Changes to Sandbox License Compliance

To ensure sandbox license compliance, we inform you when you have more sandboxes than provisioned licenses. When you exceed your sandbox allocations, we lock the appropriate number of sandboxes to restore your license compliance, starting with the least recently used sandboxes. After you meet compliance, locked sandboxes are unlocked. If you do nothing, sandboxes locked for more than 60 days are deleted and can’t be recovered.

Where: This change applies to expired sandbox licenses of Professional, Enterprise, Performance, Unlimited, and Database.com editions.

When: This feature is available in production orgs when they’re upgraded to the Winter ’24 release starting in mid-October 2023.

Who: Email notifications are sent to all users with the Manage Sandbox user permission regarding non-compliant sandboxes.

How: How can I get back into sandbox license compliance?

- Free up sandbox licenses by deleting any unused or locked sandboxes.

- Purchase additional sandbox licenses to cover your required number of sandboxes by contacting your Salesforce Account Executive. Be sure to allow provisioning time when purchasing licenses!

SEE ALSO:

Salesforce Help: Sandbox License Compliance

Salesforce Help: Unlock a Sandbox

Select Who Has Access To a Sandbox

Selective Sandbox Access helps you limit access to a sandbox to only required users when refreshing or creating a sandbox. By default, all active users in the source org have access to the sandbox, but only the user who creates the sandbox has their email address in the original format (without `.invalid` appended to it). With selective access, a Salesforce admin grants access to specific users through a public group. The email addresses for the users included in the group remain in their original format and don't need to be modified. Users who aren't part of the public group have to be unfrozen in the sandbox in order to access it.

Where: This change applies to sandboxes of Professional, Enterprise, Performance, Unlimited, and Database.com editions.

When: This feature is available in production orgs when they're upgraded to the Winter '24 release starting in mid-October 2023.

Who: All users in the production org with the Manage Sandbox user permission.

SEE ALSO:

Salesforce Help: Determine Who Has Access to a Sandbox

Salesforce Help: Create and Edit Groups

Salesforce Help: Create a Sandbox

Salesforce Help: Clone a Sandbox

Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience that makes development on the Customer 360 Platform easy.

IN THIS SECTION:

Develop Platform Apps with Ease

The Salesforce DX toolset includes Salesforce Extensions for Visual Studio Code and Salesforce CLI. Pick the tool that works best for your team and meets your business needs. We release new versions of both tools weekly.

Deploy Scalable Apps and Analyze System Performance with Scale Center

Scale Center provides self-service and near-real-time access to performance metrics. Diagnose root causes and act on scale issues earlier in your development cycle. Create analysis reports to troubleshoot errors. Retrieve customized insights and recommendations.

Conduct Quick, Easy, and Accurate Scale Tests with Scale Testing Service

Scale Testing Service gives you a suite of features that includes Test Environment Setup, Test Execution, and Test Plan Creation. Access insights into scale hotspots, trial runs, test trends, and more. Be confident that your implementation scales and adheres to your performance SLAs.

Develop Platform Apps with Ease

The Salesforce DX toolset includes Salesforce Extensions for Visual Studio Code and Salesforce CLI. Pick the tool that works best for your team and meets your business needs. We release new versions of both tools weekly.

Salesforce Extensions for Visual Studio Code

This extension pack includes tools for developing on the Customer 360 Platform in the lightweight, extensible VS Code editor. Read the weekly release notes to learn about recent updates.

Salesforce CLI

Use Salesforce CLI to create environments for development and testing, synchronize source code, run tests, and control your application lifecycle. Read the weekly release notes to learn about recent updates.

SEE ALSO:

Salesforce Extensions for Visual Studio Code

Salesforce CLI Setup Guide

Salesforce CLI Command Reference

Salesforce DX Developer Guide

Deploy Scalable Apps and Analyze System Performance with Scale Center

Scale Center provides self-service and near-real-time access to performance metrics. Diagnose root causes and act on scale issues earlier in your development cycle. Create analysis reports to troubleshoot errors. Retrieve customized insights and recommendations.

Where: This change applies to Lightning Experience in the Unlimited Edition and Signature Success customers. Scale Center isn't supported in Government Cloud Plus.

Who: This service is automatically available to all Unlimited Edition production orgs. Users are subject to the applicable terms provided at Agreements and Terms.

How: From Setup, in the Quick Find box, enter `Scale Center`, and then click **Scale Center**.

Conduct Quick, Easy, and Accurate Scale Tests with Scale Testing Service

Scale Testing Service gives you a suite of features that includes Test Environment Setup, Test Execution, and Test Plan Creation. Access insights into scale hotspots, trial runs, test trends, and more. Be confident that your implementation scales and adheres to your performance SLAs.

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

Who: This service is in pilot.

How: To get access, contact your customer success representative or account executive. Enable Scale Testing Service features in test environments on first-party infrastructure (1P) and Hyperforce.

From Setup, in the Quick Find box, enter `Performance`, and then click **Performance Testing**.

Developer Console

Use Developer Console to create, debug, and test applications in your Salesforce org.

IN THIS SECTION:

Full Apex Auto-Complete in Developer Console is Being Retired

We are retiring Apex full auto-complete in Dev Console because it is no longer sustainable due to its resource intensity. Auto-complete is still available for custom Apex classes and SObjects.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Enterprise, Performance, Unlimited and Developer editions.

When: This feature will retire in production orgs when they're upgraded to the Winter '24 release starting in mid-October 2023.

How: Use robust code-completion in our latest developer tooling available in Salesforce Extensions for VS Code and Code Builder (beta) as an alternative.

Salesforce Functions

Salesforce Functions extends the power of Salesforce with elastic compute and language flexibility.

IN THIS SECTION:

Salesforce Functions Updates

With Salesforce Functions, build digital experiences with common abstractions in a single environment for code and low code on the Salesforce platform. With support for code written in Java, JavaScript, and Typescript, Salesforce Functions provides a platform to employ custom, elastically scalable business logic using your preferred language and tools.

Stay up to date with the Salesforce Functions Release Notes in the Developer Guide.

SEE ALSO:

Welcome to Salesforce Functions

Trailhead : Discover Salesforce Functions

AppExchange Partners

Self-enable AppExchange App Analytics on your managed packages. Scan your code easily with the Salesforce Code Analyzer Visual Studio Code extension. List your Tableau Accelerator on AppExchange. Make it easier for customers to find your AppExchange listing with expanded and revised business needs.

IN THIS SECTION:

Self-Enable AppExchange App Analytics on First-Generation (1GP) and Second-Generation (2GP) Packages

You can enable AppExchange App Analytics on your 1GP and 2GP managed packages to access AppExchange App Analytics package usage logs and subscriber snapshots. Package usage summaries are available by default. Previously, for access to App Analytics, you logged a case in the Partner Community.

Where: This change applies to Lightning Experience and Salesforce Classic in Developer Edition. AppExchange App Analytics is available only for managed packages that passed security review.

Who: To use this feature, you must be an ISV partner with a security-reviewed managed package.

How: To activate App Analytics on your 1GP package, log in to your packaging org. Then follow the instructions in Enable App Analytics on Your First-Generation Managed Package. To activate App Analytics on your 2GP package, follow the instructions in Enable App Analytics on Your Second-Generation Managed Package.

SEE ALSO:

Developer Documentation: Get Started with AppExchange App Analytics

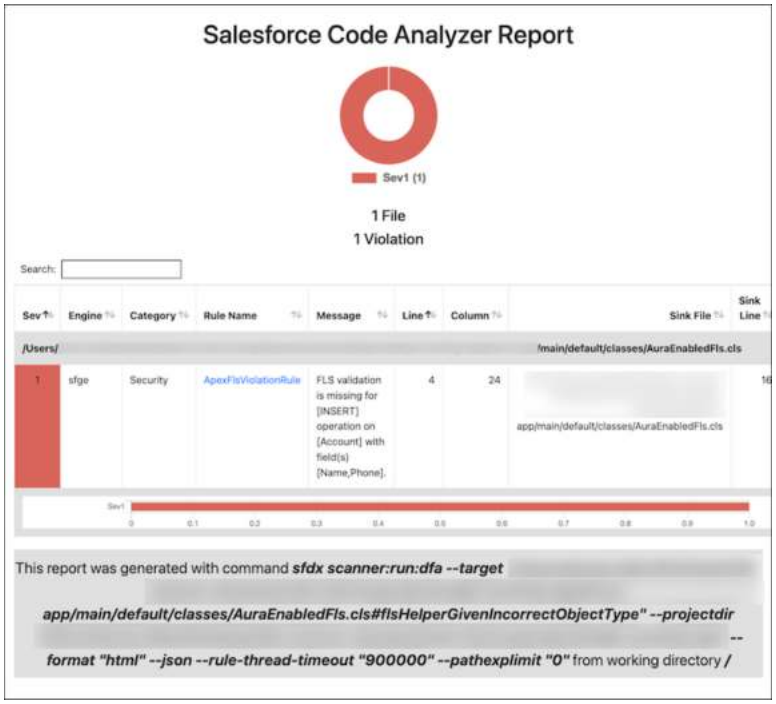
Scan Your Solution with Ease Using Salesforce Code Analyzer Visual Studio Code Extension (Beta)

This extension enables VS Code to use Code Analyzer to interact with your code. Run scans using PMD and RetireJS engines plus Salesforce Graph Engine to produce lists of violations and improve your code.

Where: This change applies to developers with Apex, VisualForce, and JavaScript code. Also, developers can enable the Code Analyzer extension (beta) for Java and XML code.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: To install Salesforce Code Analyzer VS Code Extension (beta), first install Salesforce CLI. Then in your terminal, run `sfdx plugins:install @salesforce/sfdx-scanner`. Next, install the Salesforce Code Analyzer VS Code extension (beta), and open your project in VS Code. Run a Code Analyzer scan with options in VS Code explorer, code editor, and command palette.



SEE ALSO:

Developer Documentation: Salesforce Code Analyzer

Developer Documentation: Salesforce Code Analyzer Visual Studio Code Extension

Developer Documentation: Salesforce Extensions for Visual Studio Code: Other Recommended Extensions

Cross-List Your Tableau Accelerator on AppExchange

Reach more customers by creating an AppExchange listing for your Tableau Accelerator. First, create your listing on the Tableau Exchange website. Then create an AppExchange listing and link it to your Tableau Exchange listing.

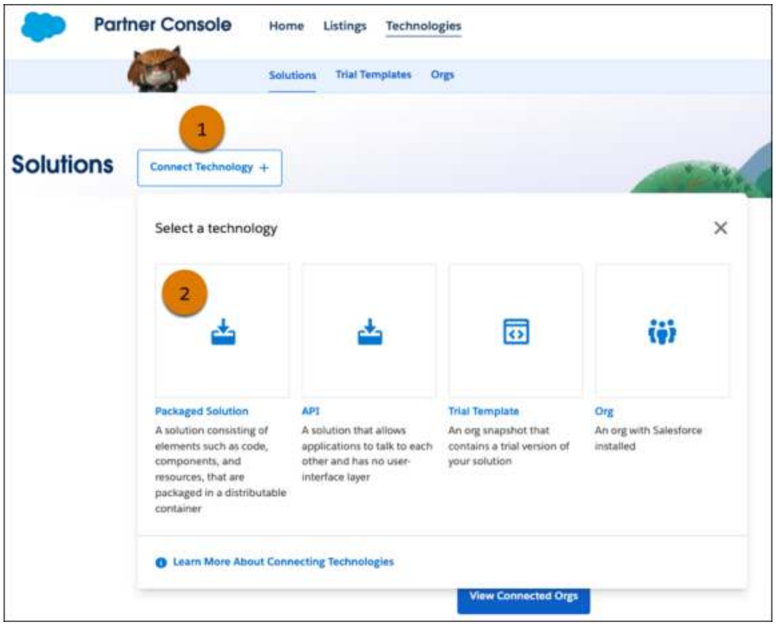
When: You can create AppExchange listings for Tableau Accelerators starting on August 23, 2023.

Who: To use the AppExchange Partner Console, you must have the Manage Listing permission in the Salesforce Partner Community.

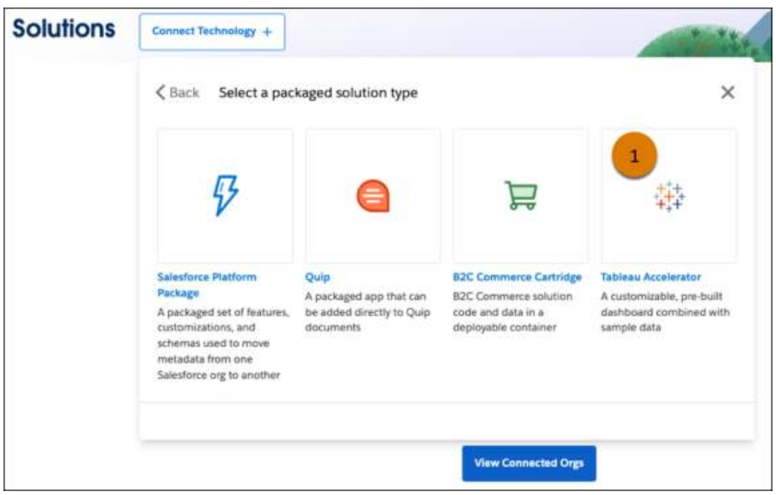
Why: List your Accelerator on AppExchange to reach more than 18 million Salesforce Trailblazers, most of whom aren't currently Tableau users.

How: When your Tableau Exchange listing goes live, you're ready to create your AppExchange listing. Launch the Partner Console, connect your Accelerator, and publish your AppExchange listing.

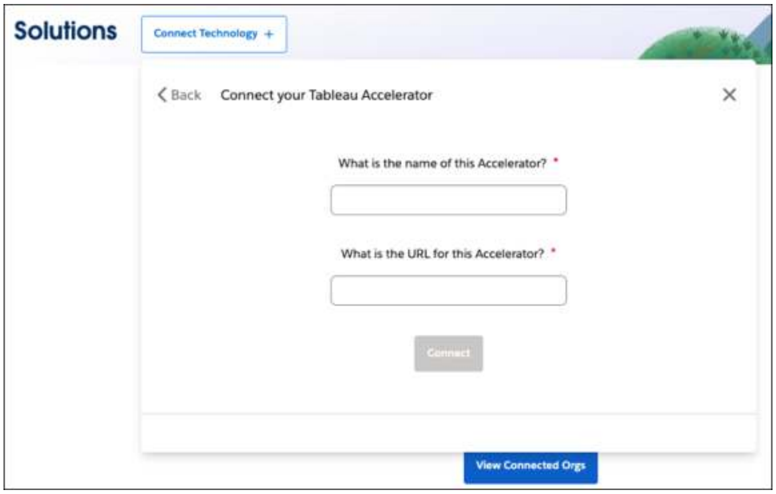
To access the Partner Console, log in to the Salesforce Partner Community. Then click **Publishing**. Next, connect your Accelerator to the Partner Console. Go to **Technologies** > **Solutions**. Click **Connect Technology** (1). Then select **Packaged Solution** (2).



When prompted to select a packaged solution type, select **Tableau Accelerator** (1).



Enter the Accelerator's name and the URL of the Accelerator's listing on Tableau Exchange, then click **Connect**.



After it's connected, create an AppExchange listing for the Accelerator. To learn how to create a listing, check Create or Edit Your AppExchange Listing and the AppExchange Publishing for Partners Trailhead module.

SEE ALSO:

Developer Documentation: Create or Edit Your AppExchange Listing

Trailhead: AppExchange Publishing for Partners

Developer Documentation: Publish Your Solution on AppExchange

Improve AppExchange Listing Discoverability with New Business Needs Categories and Subcategories

When you create your AppExchange listing, you select the business needs that describe what your solution does or the challenge that it solves. Make it easier for customers to discover your listing with expanded and revised business needs options in the Salesforce Partner Console.

When: You can use the new business needs starting on Monday, October 2.

Who: Salesforce Partners with public packaged solution and API solution listings on AppExchange.

Why: Using the expanded and revised business needs, you can fine-tune your listing so that the customer benefits are clear. Changes include restructuring, new options, migrations, and new names—all designed to help your listing stand out to customers.

To make navigating the list easier, the flat list of business needs categories is now a two-level list of categories and subcategories.

- Categories align with general business processes or tasks. Use these for broader reach.
- Subcategories align with specific business processes or tasks. Use these to achieve more specificity.

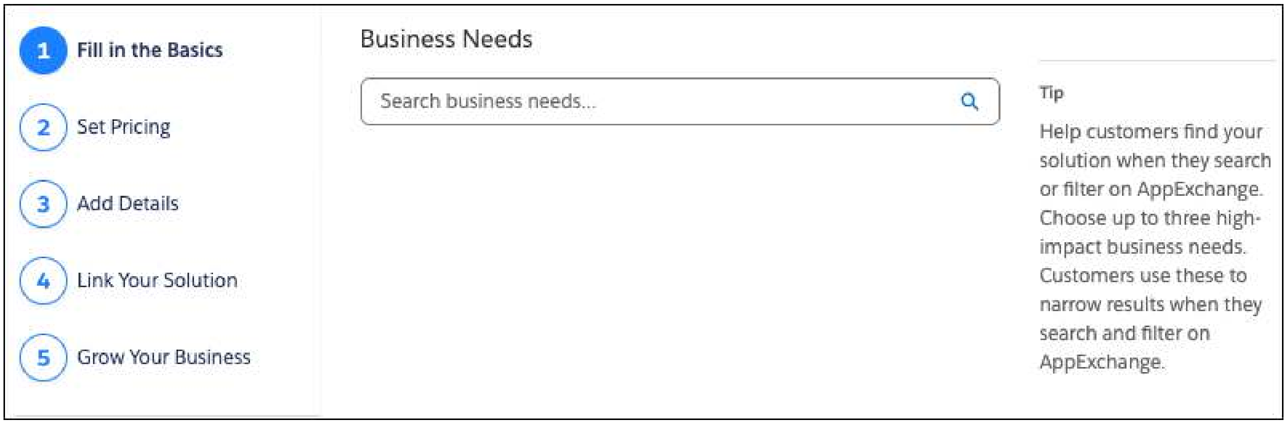
Several categories were renamed, migrated to new categories, or removed. If your listing uses a category that was renamed, it's automatically updated to use the new name. If your listing uses a migrated category, it's automatically updated to use the new category. If your listing uses a removed category, add a different business need to your listing.

- *Forecasting & Territory Management* was renamed to *Forecasting*.
- *Sales Methodologies* was renamed to *Sales Strategy*.
- *Chatter* was migrated to *Chat & Web Conferencing*.
- *Product Management* was removed.
- *Telephone* was removed.

- *Service* was removed.
- *Financial Services* was removed as a business need and added to the listing as a supported industry.

There are many new categories and subcategories to choose from. To see the complete list of business needs, edit a listing in the Partner Console, go to the Fill in the Basics step, and view the Business Needs field. Review the available business needs options to determine the best fit for your listing.

How: Edit your listing in the Partner Console, and then go to the Fill in the Basics step. To ensure that your listing aligns well with the value proposition of your solution, review and update the business needs



SEE ALSO:

Developer Documentation: Select Business Needs for Your AppExchange Solution

Change Data Capture

Receive change events for more objects.

IN THIS SECTION:

Receive Change Event Notifications for More Objects

With Change Data Capture, you can now receive notifications of record changes for more objects.

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

How: Select the objects that you want to get change events for on the Change Data Capture page in Setup or create a custom channel. You can now receive change events for:

- BroadcastTopicNetwork
- CareDiagnosis
- CareProgram
- CareProgramEligibilityRule
- CareProgramEnrollee
- CareProgramEnrolleeProduct

- CareProgramEnrollmentCard
- CareProgramProduct
- CareProgramProvider
- CareProgramTeamMember
- CareRequest
- CareRequestDrug
- CareRequestItem
- CareSpecialty
- ChangeRequestRelatedIssue
- ChangeRequestRelatedItem
- CodeSet
- CodeSetBundle
- CoverageBenefit
- CoverageBenefitItem
- EnrollmentEligibilityCriteria
- HealthcareFacility
- HealthcareProvider
- HealthcareProviderSpecialty
- IncidentRelatedItem
- Medication
- MedicationDispense
- MedicationRequest
- OcrDocumentScanResult
- OperatingHours (Introduced in API version 54.0)
- PatientMedicationDosage
- ProblemIncident
- ProblemRelatedItem
- ReceivedDocument
- ResourcePrefernece (Introduced in API version 54.0)
- ServiceResourceCapacity (Introduced in API version 54.0)
- ServiceResourceSkill (Introduced in API version 54.0)
- Shift (Introduced in API version 54.0)
- ShiftPattern (Introduced in API version 54.0)
- ShiftPatternEntry (Introduced in API version 54.0)
- SkillRequirement (Introduced in API version 54.0)
- TimeSlot (Introduced in API version 54.0)
- UnitOfMeasure

Platform Events

Process platform events with parallel Apex trigger subscriptions (pilot). Check out a behavior change for the REST `limits` resource and the retirement plan for some Streaming API versions.

IN THIS SECTION:

Process Platform Events at Scale with Parallel Subscriptions for Apex Triggers (Pilot)

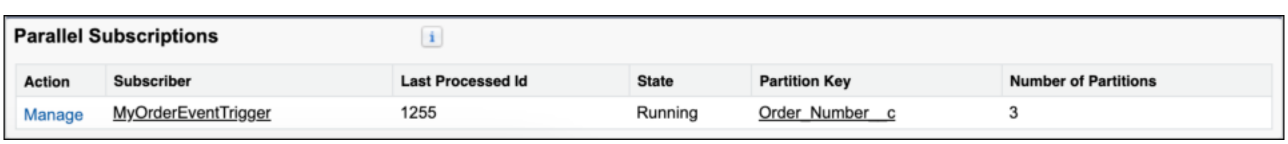
Speed up processing of platform events in an Apex trigger by processing multiple subscriptions simultaneously instead of a single subscription. Which events each subscription processes depends on the partition key that you specify—a platform event custom field or the standard `EventUuid` field. Also, you can specify up to 10 partitions, which are parallel subscriptions that are created internally for the trigger. Parallel subscriptions are available for custom platform events but not standard events or change events.

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

> Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

How: To configure parallel subscriptions for an Apex trigger, specify the event field used for partitioning (`PartitionKey`) and the number of partitions (`NumPartitions`) in PlatformEventSubscriberConfig using Tooling API or Metadata API.

To monitor your parallel subscriptions, from Setup, in the Quick Find box, enter *`Platform Events`*, select **Platform Events**, and then click your platform event. The parallel subscriptions are displayed on the platform event detail page, in the Parallel Subscriptions related list.



Parallel Subscriptions

Action	Subscriber	Last Processed Id	State	Partition Key	Number of Partitions
Manage	MyOrderEventTrigger	1255	Running	Order_Number__c	3

REST Limits Response Change for Usage-Based Entitlement for Platform Events and Change Events

For Salesforce orgs that haven’t purchased the add-on for additional high-volume platform events and change events, the REST `limits` response changed. It no longer includes the `MonthlyPlatformEventsUsageEntitlement` value because this value applies only to orgs that have the add-on.

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

SEE ALSO:

REST API Developer Guide: Limits

REST API Developer Guide: List Org Limits

Streaming API Versions 23.0 Through 36.0 Are Being Retired

Streaming API versions 23.0 through 36.0 are scheduled for retirement in Winter ’25. They’re deprecated and no longer supported. We strongly recommend that you use Streaming API versions 37.0 or later, which correspond to Durable Streaming. The newer Streaming API versions are being maintained with product enhancements and bug fixes.

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

SEE ALSO:

Knowledge Article: Streaming API Versions 23.0 through 36.0 Retirement

Event Bus

Create event relays in a Salesforce org that’s hosted on Hyperforce.

IN THIS SECTION:

Create Event Relays on Your Hyperforce Instance

You can now create event relays in a Salesforce org that’s hosted on Hyperforce. With event relays, you can select platform events and change data capture events to send to Amazon EventBridge. Previously, event relays weren’t available on Hyperforce instances.

Create Event Relays on Your Hyperforce Instance

You can now create event relays in a Salesforce org that’s hosted on Hyperforce. With event relays, you can select platform events and change data capture events to send to Amazon EventBridge. Previously, event relays weren’t available on Hyperforce instances.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. Event Relay isn’t available in Non-Hyperforce Public Cloud and Government Cloud.

How: From Setup, in the Quick Find box, enter *`Event Relays`*, and then select **Event Relays**. From the Event Relays page, click **New Event Relay**, and using the event relay creation wizard, provide the requested information.

To find out if your org is on Hyperforce, see Hyperforce Instances in Where is my Salesforce instance located?. To determine which instance your Salesforce org is on, see View instance information for your Salesforce Organization.

UTAM

Import multiple page object artifacts, and customize the element highlighter for the browser extension. Use the playground to quickly generate UTAM page objects from HTML. Use generator rules to customize the generated JSON page object for an HTML or JavaScript source file.

For more information, see utam.dev.

IN THIS SECTION:

Import Multiple Artifacts for the UTAM Browser Extension (Beta)

Import your own custom page object artifacts as well as the page object artifact provided by Salesforce. Previously, you could import only one page object artifact.

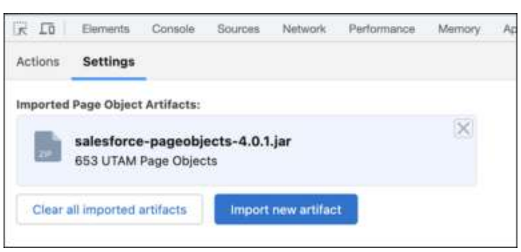
Where: This change applies to Lightning Experience and all versions of the Salesforce mobile app.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Install the UTAM browser extension from the Chrome Web Store.

The browser extension adds a UTAM tab to Chrome's developer tools.

The Settings subtab in the UTAM panel shows you any page object artifacts that you previously imported and is where you import a new page object artifact.



SEE ALSO:

utam.dev: Browser Extension

Customize the Element Highlighter for the UTAM Browser Extension (Beta)

Customize the properties of the element highlighter, such as border color, fill color, border style, border width, and fill opacity.

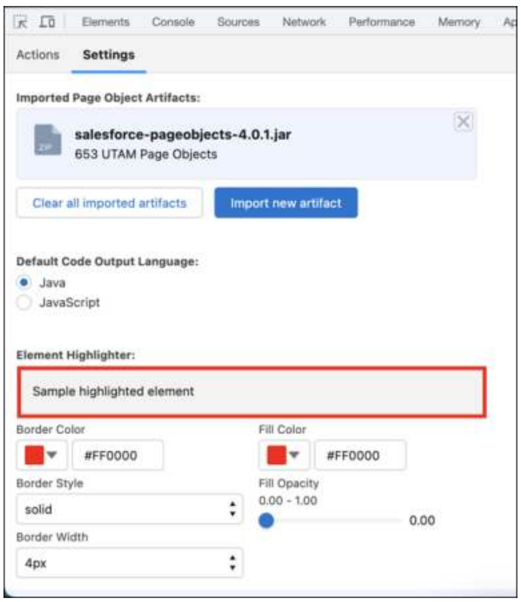
Where: This change applies to Lightning Experience and all versions of the Salesforce mobile app.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Install the UTAM browser extension from the Chrome Web Store.

The browser extension adds a UTAM tab to Chrome's developer tools.

The Settings subtab in the UTAM panel is where you customize the format of the element highlighter when you select page object methods in the Actions page tree.



SEE ALSO:

utam.dev: Browser Extension

Use the Playground to Generate UTAM Page Objects from HTML

The generator playground is a tool that quickly generates UTAM page objects from HTML. Use the generator as an alternative to setting up the generator in your own repository.

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

How: Go to the Generator Playground on utam.dev.

Copy your HTML into the HTML source code panel, and then use the generated JSON page object. You can also change the generator configuration options in the Generator Config panel.

Override UTAM Generator Output with Custom Rules

You can create page objects without manually editing the generated content. Add a generator rule file next to an HTML or JavaScript source file to customize the generated JSON page object. Create component-level rules to override any rules defined at the project level.

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

SEE ALSO:

utam.dev: Generator Override Content

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

IN THIS SECTION:

Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

IN THIS SECTION:

New and Changed Lightning Web Components

Build UI easily with these new and changed components.

New Components

The following components are new and require API version 59.0 or later.

`lightning-record-picker` (Beta)

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Use this component to search for a list of Salesforce records. It retrieves records with the GraphQL wire adapter and then displays them.

This component works best in the Salesforce Field Service app.

Changed Lightning Web Components

The following component has changed.

`lightning-input`

The internal structure of the `lightning-input` component has changed to prepare for native shadow DOM. See Be Aware of Base Component lightning-input Internal DOM Structure Changes.

SEE ALSO:

Component Library

New and Changed Modules for Lightning Web Components

Do more with Lightning web components by using modules.

New Modules

These modules are now available.

`lightning/toast`

Displays a toast notification with an icon, label, message, and links. See Create and Manage Toast Notifications (Generally Available).

`lightning/platformWorkspaceApi` (Beta)

Controls workspace tabs and subtabs in a Lightning console application. See Control Workspace Tabs and Subtabs (Beta).

`lightning/logger`

Logs messages to a new EventLogFile event type called Lightning Logger Event for use Event Monitoring. See Monitor Component Events with the Custom Component Instrumentation API (Beta).

Changed Modules

These modules have new, changed, or deprecated wire adapters and JavaScript functions.

`lightning/toastContainer` (Generally Available)

Manage and position a list of toast components created using `lightning/toast` on LWR sites. See Create and Manage Toast Notifications (Generally Available).

`lightning/uiGraphQLApi` (Generally Available)

Retrieve specific records, fields, and object information in a single server call using the GraphQL wire adapter. These features are now supported.

- Aggregate queries
- Custom objects with parent or child relationships
- Deploying a custom object in the same package as the Lightning web component that references it

- Referencing objects and fields that are defined in a namespaced package
- Using GraphQL from a component in a namespaced package

The GraphQL wire adapter doesn't currently support these features.

- Experience Cloud sites
- Dynamic construction of GraphQL queries at run time
- String interpolation constructs using `${}`
- Variables in directives such as using `@skip` and `@include`
- Mutations
- Referential integrity for aggregate queries

Additionally, when using pagination with an upper bound limit, the wire adapter expects the upper bound limit to stay constant for a given paginated collection. For more information, see the GraphQL API Developer Guide.

`lightning/uiRecordApi`

This module includes deprecated wire adapters and functions. The deprecation was first announced in Summer '22 and repeated in Winter '23. Support for the deprecated APIs has now ended.

- `getRecordUi` (Deprecated)—Support for this wire adapter has ended. We recommend using the `lightning-record-form`, `lightning-record-edit-form`, and `lightning-record-view-form` base components to enable users to work with records. Retrieving a layout using an alternative wire adapter isn't currently supported. Consider requesting for specific or optional fields using the `getRecord` and `getRecords` wire adapters instead. To load object info for lookup records, use `getRecord`, followed by `getObjectInfo` for the primary record, and `getObjectInfos` for all lookup field object infos.
- `getRecordInput` (Deprecated)—Support for this function has ended. We recommend constructing the record object in your code with the `apiName` and `fields` properties instead.
- `refresh` (Deprecated)—Support for this function has ended. We recommend using `refreshApex` or `getRecordNotifyChange` instead.

SEE ALSO:

Component Library

New and Changed Directives for Lightning Web Components

Add dynamic behavior to an HTML template with directives.

New Directives

This directive is now available.

lwc:external (Beta)

Renders a third-party web component or custom element as a native web component. See Use Third-Party Web Components in LWC (Beta).

`lwc:is`

Provides an imported constructor at runtime to the `<lwc:component>` managed element enabling a component to instantiate another component dynamically.

```
<template>
    <div class="container">
        <lwc:component lwc:is={componentConstructor}></lwc:component>
```

```
    </div>
</template>
```

`<lwc:component>` serves as a placeholder in the DOM that renders the specified dynamic component. You must use `<lwc:component>` with the `lwc:is` directive.

Lightning Web Security must be enabled in your org. For more information, see Dynamically Import and Instantiate Lightning Web Components.

SEE ALSO:

Lightning Web Components Developer Guide: HTML Template Directives (can be outdated or unavailable during release preview)

New and Changed Aura Components

Build UI easily with these new and changed components.

Changed Aura Components

This component has changed.

`lightning:omniToolkitAPI`

The `getAgentWorkload` method has these new responses.

- `configuredInterruptibleCapacity`—The agent's configured interruptible capacity (work that's assigned to the current user) through Presence Configuration.
- `currentInterruptibleWorkload`—The interruptible workload that's currently assigned to the agent.

SEE ALSO:

Component Library

Lightning Web Components Developer Guide

Lightning Aura Components Developer Guide

New and Changed Aura Component Events

Aura component events facilitate communication between components and increase interactivity in your apps.

Changed Event

The following event has changed.

lightning:omniChannelWorkloadChanged

This event has these new responses.

- `configuredInterruptibleCapacity`—The configured interruptible capacity for the agent.
- `previousInterruptibleWorkload`—The agent's interruptible workload before the change.
- `newInterruptibleWorkload`—The agent's new interruptible workload after the change.

Apex: New and Changed Items

These classes, enums, and interfaces are new or have changes.

For more information on these enhancements, see the Apex Developer Guide and the Apex Reference Guide.

IN THIS SECTION:

SEE ALSO:

Apex: New Features

Auth Namespace

The Auth namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Determine if the Headless Passwordless Login Flow is enabled

Use the new `getHeadlessPasswordlessLoginEnabled()` method in the `AuthConfiguration` class.

ConnectApi Namespace

The ConnectApi namespace (Connect in Apex) has new or changed classes, methods, or enums.

Many Connect REST API resource actions are exposed as static methods on Apex classes in the `ConnectApi` namespace. These methods use other `ConnectApi` classes to input and return information. The `ConnectApi` namespace is referred to as *Connect in Apex*.

For the new and changed ConnectApi classes, methods, and enums, see ConnectApi (Connect in Apex): New and Changed Classes and Enums.

System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

New Classes

Ensure that only one async queueable job is enqueued by detecting duplicates

Use the `QueueableDuplicateSignature` class methods `addId()`, `addInteger()`, and `addString()` to build the signature for your queueable job. Use the `DuplicateSignature` property in the `AsyncOptions` class to store the queueable job signature.

Perform locale-sensitive comparisons and sorting

Use the `getInstance` method in the new `Collator` class to obtain the locale-specific Collator object.

New or Changed Methods in Existing Classes

Specify a permission set for the user to strip fields from source records (Developer Preview)

Use the `Security.stripInaccessible()` method overload specifying a permission set ID.

Specify custom access via permission sets for user-mode database operations (Developer Preview)

Use the `AccessLevel.withPermissionSetId()` method specifying a permission set ID as a parameter.

Sort lists using Comparators

Use the `List.sort()` method overload specifying a Comparator instance as a parameter.

New Exceptions

Exception thrown with an attempt to enqueue a job with a duplicate queueable signature

The new `System.DuplicateMessageException` exception is thrown for the `System.enqueueJob()` method.

New Interfaces

Implement different sort orders by using Comparators

Implement the `compare()` method of the new `System.Comparator` interface and specify the Comparator as a parameter to `List.sort()`.

ConnectApi (Connect in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Connect in Apex.

Many Connect REST API resource actions are exposed as static methods on Apex classes in the `ConnectApi` namespace. These methods use other `ConnectApi` classes to input and return information. The `ConnectApi` namespace is referred to as *Connect in Apex*.

IN THIS SECTION:

New Connect in Apex Classes
These classes are new.

Changed Connect in Apex Input Classes
These input classes have changes.

Changed Connect in Apex Output Classes
These output classes have changes.

Changed Connect in Apex Enums
These enums have changes.

SEE ALSO:

Connect REST API

Apex Reference Guide: ConnectApi Namespace

Connect REST API Developer Guide

New Connect in Apex Classes

These classes are new.

Commerce

This new method is in the `ConnectApi.CommerceCart` class.

Get coupons or promotions associated with a cart

- `getCartItems(webstoreId, effectiveAccountId, activeCartOrId, productFields, pageParam, pageSize, sortParam, currencyIsoCode, includePromotions, includeCoupons)`

Named Credentials

These new methods are in the `ConnectApi.NamedCredentials` class.

Delete a credential with authentication parameters

- `deleteCredential(externalCredential, principalName, principalType, authenticationParameters)`

Update a custom credential

- `patchCredential(requestBody)`

Get a named credential

- `getNamedCredential(developerName)`

Get a list of named credentials in the org

- `getNamedCredentials()`

New output class: `ConnectApi.NamedCredentialList`

Changed Connect in Apex Input Classes

These input classes have changes.

Commerce

`ConnectApi.CartInput`

This input class has this new property.

- `typeAsString`—Type of the cart provided as a string.

`ConnectApi.CartItemInput`

This input class has this new property.

- `cartDeliveryGroupId`—ID of the cart delivery group.

`ConnectApi.CommerceAddressInput`

These properties are no longer available in this input class.

- `countryCode`
- `regionCode`

Changed Connect in Apex Output Classes

These output classes have changes.

Commerce

`ConnectApi.CartItemCollection`

This output class has these new properties.

- `cartCoupons`—Collection of coupons applied to the cart.
- `cartPromotions`—Collection of promotions applied to the cart.

`ConnectApi.CartSummary`

This output class has these new properties.

- `asyncOperationStatus`—Asynchronous processing status of the cart, if asynchronous processing is enabled for the store.
- `totalProductListAmount`—Total list amount for products in the cart.

`ConnectApi.CommerceAddress`

These properties are no longer available in this output class.

- `countryCode`
- `regionCode`

`ConnectApi.CommerceProductSummary`

This output class has this new property.

- `productSellingModelInformation`—Information about the product selling model.

`ConnectApi.ProductAttributesToProductEntry`

This output class has this new property.

- `urlSlug`—Variant URL slug for the selection of attributes.

`ConnectApi.ProductCategoryData`

This output class has this new property.

- `urlSlug`—SEO-friendly URL slug of the product category.

`ConnectApi.ProductCategoryDetail`

This output class has this new property.

- `urlSlug`—SEO-friendly URL slug of the product category.

`ConnectApi.ProductDetail`

This output class has this new property.

- `urlSlug`—SEO-friendly URL slug for the product.

`ConnectApi.ProductSellingModel`

This output class has this new property.

- `subscriptionTermRule`—Rules for the subscription term.

`ConnectApi.ProductSummary`

This output class has this new property.

- `productSellingModelInformation`—Information about the product selling model.

Experience Cloud Sites

`ConnectApi.NavigationMenuItem`

This output class has this new property.

- `pageReference`—Page reference for the navigation menu item. Page reference is returned only for the Storefront Categories data source.

Named Credentials

`ConnectApi.ExternalCredential`

This output class has this new property.

- `createdByNamespace`—Namespace of the package that created the external credential.

`ConnectApi.NamedCredential`

This output class has these new properties.

- `calloutStatus`—Indicates whether the named credential is enabled for callout.
- `createdByNamespace`—Namespace of the package that created the named credential.

Changed Connect in Apex Enums

These enums have changes.

For information about these enums, see ConnectApi Enums in the *Apex Reference Guide*.

`ConnectApi.CartType`

This enum has these new values.

- `ReadOnly`—Clone of a `Template` cart that the customer can check out with.
- `Template`—Cart created by an internal user.

`ConnectApi.CredentialAuthenticationProtocol`

This enum has this new value.

- `Jwt`—JSON Web Token

`ConnectApi.CredentialAuthenticationProtocolVariant`

This enum has these new values.

- `ClientCredentialsClientSecret`—OAuth 2.0 Client Credentials client secret.
- `ClientCredentialsJwtAssertion`—OAuth 2.0 Client Credentials JSON Web Token assertion.
- `NoAuthentication`—No authentication.

`ConnectApi.ManagedContentChannelType`

This enum has this new value.

- `UserPermission`—Channel backed by a system permission. All published content is available only to users with the permission.

`ConnectApi.OrchestrationStepType`

This enum has these new values.

- `ManagedContentVariantAutoPublishBackgroundStep`
- `ManagedContentVariantAutoUnpublishBackgroundStep`

API: New and Changed Items

Access more data objects and metadata types in API version 59.0.

IN THIS SECTION:

New and Changed Objects

Access more data through these new and changed standard objects.

Commerce

Get the selected delivery group for a delivery

Use the new `SelectedDeliveryMethodId` field on the existing CartDeliveryGroup object.

View whether shipping information for a delivery is set as the default

Use the new `isDefault` field on the existing CartDeliveryGroup object.

Get more information about a delivery group method

Use the new `Carrier`, `ClassOfService`, `IsActive`, `ProductId`, and `ReferenceNumber` fields on the existing CartDeliveryGroupMethod object.

Get the company name associated with a delivery

Use the new `CompanyName` field on the existing CartDeliveryGroup object.

Get the phone number associated with a delivery

Use the new `ShipToPhoneNumber` field on the existing CartDeliveryGroup object.

Get the company name associated with a delivery for a guest customer
Use the new `GuestCompanyName` field on the existing WebCart object.

Get the owner ID for a store
Use the `OwnerId` field on the existing WebStore object. Introduced in API version 53.0, this object has been added to the *Object Reference for the Salesforce Platform*.

Process add-to-cart requests asynchronously for improved performance
Use the new `OptionsCartAsyncProcessingEnabled` field on the existing WebStore object.

View whether custom field mapping is enabled for cart and order objects
Use the `OptionsCartToOrderAutoCustomFieldMapping` field on the existing WebStore object. Introduced in API version 57.0, this object has been added to the *Object Reference for the Salesforce Platform*.

View whether a cart can include multiple items with the same product ID.
Use the new `OptionsDuplicateCartItemsEnabled` field on the existing WebStore object.

View whether the cart calculate extension is enabled
Use the new `OptionsCartCalculateEnabled` field on the existing WebStore object.

View the order lifecycle type for a store
Use the `OrderLifecycleType` field on the existing WebStore object. Introduced in API version 55.0, this object has been added to the *Object Reference for the Salesforce Platform*.

Event Monitoring

Monitor changes to public group or queue membership
Use the new Group Membership event type.

Troubleshoot insufficient access errors
Use the new Insufficient Access event type.

Identify who's using Salesforce services through the UI or the API
Use the new `USER_ID_DERIVED` field on the Knowledge Article View Event type.

Identify the Large Language Model (LLM) used to generate Knowledge articles
Use the new `LARGE_LANGUAGE_MODEL` field on the Knowledge Article View Event type.

Experience Cloud

Use URL slugs by default on the Product and Category pages of LWR Commerce stores
Use the new `OptionsExpFriendlyUrlsAsDefault` field on the Network object.

Specify an email template for headless registration
Use the new `HeadlessRegistrationTemplateId` field on the existing Network object.

Field Service

Specify the average travel time to add to the work capacity usage of service appointments in the service territory
Use the new `AvgTravelTime` field on the ServiceTerritory object.

Specify if only primary members or both primary and secondary members of the service territory are included in work capacity availability calculations
Use the new `DoesAvlCalcInclPrimOnly` field on the FieldServiceOrgSettings. object.

Specify if to include overtime in work capacity availability calculations
Use the new `DoesAvlCalcInclOvertime` field on the FieldServiceOrgSettings. object.

Access travel information about the service territory
Use the new `TravelModeId` field on the ServiceTerritory object.

Allow desktop and mobile to send geolocation and map data to Google and Apple
Use the new `canPopulateGoogleAddress`field on the FieldServiceSettings object.

Configure and track the work capacity for a service territory
Use the new `WorkCapacityLimit`, `WorkCapacityAvailability`, and `WorkCapacityUsage` objects.

Allow Salesforce to send crash reports to Microsoft App Center
Use the new `canSendAppCenterCrashReports`field on the FieldServiceSettings object.

Allow third parties to store mobile analytics
Use the new `canStoreMobileAnalytics`field on the FieldServiceSettings object.

Mobile

View the custom metadata types configured for your offline mobile workforce
Custom metadata types are now supported as values for the existing `TargetEntity` field on the view-only BriefcaseRule object.

Media

Access common, filterable fields between media types with the lookup table
Use the new AdAvailabilityDimensions object.

Store batch job details that populate data in other aggregate tables
Use the new AdAvailabilityJob object.

Configure calendar view using enhanced configurations, filters, and legend colors storage
Use the new AdAvailabilityViewConfig object.

View available, booked, and forecasted units in digital media type calendars
Use the new AdDigitalAvailability object.

Display linear media metrics across multiple timeframes in the table
Use the new AdLinearAvailability object.

Manage buyer interaction with RFPs and proposals in the ad server
Use the new AdBuyServerAccount object.

Store media ad sales campaign attributes within opportunities
Use the new AdOpportunity object.

Link ad order item and ad creative size, capturing run frequency and companion data
Use the new AdOrderItemCreativeSizeType object.

Link ad quote line and ad creative size, capturing companion details and run counts
Use the new AdQuoteLineCreativeSizeType object.

Access the name and account type of Ad server account
Use the new `Name` and `Type` fields on the AdServerAccount object.

Revenue

Track when a price adjustment is overridden
Use the new value `AdjustmentOverride` for `TierType` in the PriceAdjustmentTier object when updating a price adjustment to override an item's list price.

Sales

Capture forecast managers' judgment on whether deals close

Use the new ForecastingSrcRecJudgment object.

Track deletion of opportunity team members, product splits, or opportunity splits on opportunity records

Use the new OpportunityRelatedDeleteLog object.

Store historical data for OpportunitySplit, OpportunityLineItemSplit, and OpportunityTeamMember records

Use the new OpportunitySplitHistory, OpportunityLineItemSplitHistory, and OpportunityTeamMemberHistory associated objects.

Specify the Enablement program type

Use the new `Type` field on the existing EnablementProgram object.

Allow sales reps to take and complete Feedback Request exercises in an Enablement program

Use the new LearningItemSubmission and LearningPractice objects.

Salesforce Flow

View the content key value for the form that triggers the flow

Use the new `form` field on the FlowStart object.

View the error code and error ID if the flow element run encounters an error

Use the new `ErrorCode` and `ErrorDetails` fields on the FlowRecord object.

Salesforce Payments

View the cart related to the payment link, identify the link owner, define whether the link is reusable, and customize the Pay Now page.

Use the new `CartID`, `OwnerID`, `Tax Amount`, `Title`, `Type`, and `UsageType` fields on the PaymentLink object.

Salesforce Scheduler

Relate an actionable list member to an appointment invitation and track the appointments that customers create using the appointment invitation

Use the new ActionableListMbrInvitation, ActionableListMbrInvitationFeed, and ActionableListMbrInvitationHistory objects.

Capture the date and time when the service resource accepts the appointment request of a waitlist participant

Use the new `AcceptanceTime` field on the WaitlistParticipant object.

Security, Identity, and Privacy

Automatically enable the OAuth 2.0 Proof Key for Code Exchange (PKCE) extension for supported authentication providers

Use the new `OptionsIsPkceEnabled` field on the existing AuthProvider object.

Store additional consent information for communication subscriptions

Use the new `DataUsePurposeId`, `EngagementChannelTypeId`, and `PartyId` fields on the existing CommSubscriptionConsent object.

Grant a trusted URL access to the user's camera or microphone

Use the new `CanAccessCamera` and `CanAccessMicrophone` fields on the existing CspTrustedSite object.

Configure enablement, access, and security for the Headless Passwordless Login Flow

Use the new `IsPwdlessLoginAllowed`, `IsRecaptchaRequiredPwdlessLogin`, and `DoesPwdlessLoginRequireAuth` fields on the existing NetworkAuthApiSettings object.

Monitor the status of policy jobs as they run in Privacy Center

Use the new PrivacyJobSession object.

Monitor the status of each object that is processed in a policy job as it runs in Privacy Center

Use the new PrivacyObjectSession object.

Track customer Right to Be Forgotten Requests in Privacy Center

Use the new PrivacyRTBFRequest object.

See error messages for failed policy jobs that are run in Privacy Center

Use the new PrivacySessionRecordFailure object.

Mark important records to be preserved from processing by Privacy Center policies

Use the new PrivacyHold and PrivacyHoldReasons objects.

Store license usage information within Security Center

Use the new TenantSecurityLicense object.

Store details of changes related to login IP ranges in Security Center.

Use the new TenantSecurityLoginIpRangeTrend object.

BEHAVIOR CHANGE: You can now add `AuthConfigId` and `AuthProviderId` values to an authentication provider that's configured to display on your login page

The `AuthConfigId` and `AuthProviderId` fields on the AuthConfigProviders object now support the Create property. Introduced in API version 58.0, this change has been added to the *Object Reference for the Salesforce Platform*.

Track user attempts to access external client apps

Use the new `ExternalClientApp` value in the existing `Activity` field on the IdentityVerificationEvent and VerificationHistory objects.

Service

Set work as interruptible and set agents' work capacity

Use the new `IsInterruptible` field on the existing AgentWork and PendingServiceRouting objects. Use the new `ConfiguredInterruptCapacity` field on the UserServicePresence object.

Let agents pause work

Use the new `PausedCapacityPercentage` and `PausedCapacityWeight` fields on the existing QueueRoutingConfig object.

Customize the work notification sound in Omni-Channel

Use the new `CustomSoundId` and `SoundLength` fields on the existing PresenceUserConfig and ServiceChannel objects.

View owner and status changes on cases

Use the new CaseHistory2 object to see changes on cases for case history reports.

Add data categories to your Lightning Web Runtime (LWR) Self-Service site

Use the new `DataCategoryGroupName`, `DataCategoryName`, and `NetworkId` fields on the NewtworkDataCateogry object.

Identify and easily troubleshoot broadcast communication issues

Use the new `BroadcastFailureReason` field on the existing BroadcastCommAudience object.

See when a broadcast Slack message was sent

Use the new `MessageTimeStamp` field on the existing BroadcastCommAudience object.

Track assets related to or impacted by a change request

Use the new ChangeRequestRelatedItem object.

Track assets or products related to or impacted by a problem
Use the new ProblemRelatedItem object.

Track assets or products related to or impacted by an incident
Use the new IncidentRelatedItem object.

Track problems and incidents that are related to each other
Use the new ProblemIncident object.

Bulk API 2.0

Enjoy a better development experience with improved Bulk API 2.0 query creation, processing, and performance.

Use Thousands of PK Chunking Enabled Objects with Bulk API 2.0
Extended coverage across thousands of standard objects improves query performance. Bulk API 2.0 can now optimize over 4,800 objects with PK chunking. Previously, PK chunking support for Bulk API 2.0 was limited to Bulk API's smaller list of objects. This change doesn't affect Bulk API.

Improved Bulk API 2.0 Query Processing
To increase job processing success, Bulk API 2.0 splits batches that have failed into smaller batches and chunk sizes. Previously, Bulk API 2.0 used a fixed chunk size. If a batch couldn't be processed, it was retried and then eventually marked as failed.

Removed Limit for Character Count in `SELECT` Clauses in Bulk API 2.0
Previously, Bulk API 2.0 enforced a limit of 32,000 characters in a `SELECT` SOQL clause. That limit has been removed.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

IN THIS SECTION:

New and Changed Connect REST API Resources
These resources are new or have changes.

Changed Connect REST API Request Bodies
These request bodies have changes.

Changed Connect REST API Response Bodies
These response bodies have changes.

SEE ALSO:

ConnectApi (Connect in Apex): New and Changed Classes and Enums
Connect REST API Developer Guide
Apex Reference Guide: ConnectApi Namespace

New and Changed Connect REST API Resources

These resources are new or have changes.

Commerce

Calculate taxes for a Commerce webstore

Make a POST request to the existing `/commerce/webstores/webstoreId/taxes/actions/calculate-taxes` resource.

New request body: Calculate Taxes Input

Import category data using a .csv file

Make a POST request to the new `/commerce/management/import/category/jobs` resource.

New request body: Category Import Input

New response body: Category Import

Get the status of a category import job

Make a GET request to the new `/commerce/management/import/category/jobs/`***`jobId`*** `resource.`

Cancel a category import job

Make a PATCH request to the new `/commerce/management/import/category/jobs/`***`jobId`*** `resource.`

New request body: Category Import Abort Input

Get all boost and bury rules for a webstore

Make a GET request to the new `/commerce/management/webstores/`***`webstoreId`***`/search/boost-bury-rules` resource.

New response body: Boost and Bury Rules Collection

Create a boost and bury rule for search results

Make a POST request to the new `/commerce/management/webstores/`***`webstoreId`***`/search/boost-bury-rules` resource.

New request body: Boost and Bury Rule Input

New response body: Boost and Bury Rule

Get boost and bury rule information

Make a GET request to the new `/commerce/management/webstores/`***`webstoreId`***`/search/boost-bury-rules/`***`ruleId`*** resource.

New response body: Boost and Bury Rule

Delete a boost and bury rule

Make a DELETE request to the new `/commerce/management/webstores/`***`webstoreId`***`/search/boost-bury-rules/`***`ruleId`*** resource.

Get coupons or promotions associated with a cart

Make a GET request to the existing `/commerce/webstores/`***`webstoreId`***`/carts/`***`cartStateOrId`***`/cart-items` resource.

New request parameters: `includeCoupons` and `includePromotions`

Named Credentials

Update a custom credential

Make a PATCH request to the existing `/named-credentials/named-credential` resource.

Delete a credential with authentication parameters

Make a DELETE request to the existing `/named-credentials/named-credential` resource.

New optional request parameter: `authenticationParameters`

Network Data Categories

Get the network data category tree for an Experience Cloud site

Make a GET request to the new `/connect/communities/`***`communityId`***`/data-category/network-data-category` resource.

New response body: Category Network Tree

Update the network data category tree for an Experience Cloud site

Make a PUT request to the new `/connect/communities/`***`communityId`***`/data-category/network-data-category` resource.

New request body: Data Category Group Collection Input

Get articles for a network data category in an Experience Cloud site

Make a GET request to the new `/connect/communities/`***`communityId`***`/network-data-category/`***`networkDataCategoryId`***`/knowledge-article` resource.

New response body: Lightning Knowledge Article Version Collection

Get catalog items for a network data category in an Experience Cloud site

Make a GET request to the new `/connect/communities/`***`communityId`***`/network-data-category/`***`networkDataCategoryId`***`/catalog-item` resource.

New response body: Service Catalog Item Collection

Get catalog items for a network data category in an org

Make a GET request to the new `/connect/network-data-category/`***`networkDataCategoryId`***`/catalog-item` resource.

New response body: Service Catalog Item Collection

Get active data category groups and their subcategories

Make a GET request to the new `/connect/data-category/category-group` resource.

New response body: Data Category Group Collection

OAuth Usage

Get OAuth usage information for apps

Make a GET request to the new `/apps/oauth/usage` resource.

New response body: App OAuth Usage Collection

Get OAuth users for an app

Make a GET request to the new `/apps/oauth/usage/`***`appIdentifier`***`/users` resource.

New response body: App OAuth Usage User Collection

Delete a refresh token

Make a DELETE request to the new `/apps/oauth/usage/tokens/`***`tokenIdentifier`*** resource.

Get refresh tokens for a user and an app

Make a GET request to the new `/apps/oauth/usage/`***`appIdentifier`***`/`***`userIdentifier`***`/tokens` resource.

New response body: App OAuth Usage Token Collection

Delete refresh tokens for a user and an app

Make a DELETE request to the new `/apps/oauth/usage/`***`appIdentifier`***`/`***`userIdentifier`***`/tokens` resource.

Delete refresh tokens for an app

Make a DELETE request to the new `/apps/oauth/usage/`***`appIdentifier`***`/tokens` resource.

Salesforce CMS

Incrementally index your CMS content

Make a POST request to the existing `/connect/cms/channels/`***`channelId`***`/search/indexes` resource.

New request parameter: `isIncremental`

Salesforce Scheduler

Get waitlist details with the list of participants

Make a GET request to the new `/connect/scheduling/waitlists` resource.

New response body: Waitlist Output

Check in a participant to a waitlist for a drop-in appointment

Make a POST request to the new `/connect/scheduling/waitlist-checkin` resource.

New request body: Waitlist Check In Input

New response body: Waitlist Check In

Changed Connect REST API Request Bodies

These request bodies have changes.

Commerce

Cart Item Input

This request body has this new property.

- `typeAsString`—Type of the cart provided as a string.

Cart Item

This request body has this new property.

- `cartDeliveryGroupId`—ID of the cart delivery group.

Commerce Address Input

These properties are no longer available in this request body.

- `countryCode`
- `regionCode`

Changed Connect REST API Response Bodies

These response bodies have changes.

Commerce

Address

These properties are no longer available in this response body.

- `countryCode`
- `regionCode`

Cart Item Collection

This response body has these new properties.

- `cartCoupons`—Collection of coupons associated with a cart.
- `cartPromotions`—Collection of promotions associated with a cart.

Cart Summary

This response body has this new property.

- `asyncOperationStatus`—Indicates asynchronous processing status of the cart, if asynchronous processing is enabled for the store.
- `totalProductListAmount`—Total list amount for products in the cart.

Product Attributes to Product Entry

This response body has this new property.

- `urlSlug`—Variant URL slug for the selection of attributes.

Product Category

This response body has this new property.

- `urlSlug`—SEO-friendly URL slug of the product category.

Product Category Detail

This response body has this new property.

- `urlSlug`—SEO-friendly URL slug of the product category.

Product Detail

This response body has this new property.

- `urlSlug`—SEO-friendly URL slug for the product.

Product Selling Model

This response body has this new property.

- `subscriptionTermRule`—Rules for the subscription term.

Product Summary

This response body has this new property.

- `productSellingModelInformation`—Information about the product selling model.

Experience Cloud Sites

Navigation Menu Item

This response body has this new property.

- `pageReference`—Page reference for the navigation menu item. Page reference is returned only for the Storefront Categories data source.

Named Credentials

External Credential

This response body has this new property.

- `createdByNamespace`—Namespace of the package that created the external credential.

Named Credential

This response body has these new properties.

- `calloutStatus`—Indicates whether the named credential is enabled for callout.
- `createdByNamespace`—Namespace of the package that created the named credential.

CRM Analytics REST API

Using the CRM Analytics REST API, convert data model objects (DMO) to datasets, enable pagination in table widgets, and override parameters in the grid layout widget.

IN THIS SECTION:

New and Changed CRM Analytics REST API Resources

These resources are new or have changes.

Convert a DMO to a dataset

Make a POST request to the new `/wave/data-conversions` resource.

New request body: Data Conversion Input

Get a lens bundle using the update MRU

Make a GET request to the `/wave/lens/`***`lensId`***`/bundle` resource.

New request parameter: `isUpdateMru`

Get the DMO mappings for a given data asset or folder ID

Make a GET request to the new `/wave/templates/mappings` resource.

Request parameters: `dataTransformNameOrId`, `datasetNameOrId`, `dmoNameOrId`, and `folderId`

New response body: Dataset Dmo Mapping Collection

Create a DMO mapping for a template

Make a POST request to the new `/wave/templates/mappings` resource.

New request body: Dataset Dmo Mapping Input

New response body: Dataset Dmo Mapping

Changed CRM Analytics REST API Request Bodies

These request bodies have changes.

Auto Install App Configuration Input

The request body has this new property.

- `dataRefreshSchedule`— The data refresh schedule for the app. This is a weekly schedule.

Compact Form Join Object Input

The request body has this new property.

- `fields`— A list of object fields to use in the join.

Component Widget Parameters Input

The request body has this new property.

- `dynamicAttributes`— A map of the dynamic attributes for the component widget.

Grid Layout Widget Parameters Input

The request body has these new properties.

- `parameterOverrides`— The parameter overrides for the widget.
- `type`— The widget type.

Interaction Action Input

The request body has these new properties.

- `clearType`— The clear type for the interaction. Valid values are `ClearAll`, `ClearExclude`, and `ClearInclude`.
- `lensIds`— A list of lens IDs. This list is used for the exclude and include of the clear type.

Repeater Widget Parameters Input

The request body has this new property.

- `sortableColumns`— A list of sortable fields for the repeater widget.

Table Widget Parameters Input

The request body has this new property.

- `enableAllDataFetch`— Indicates whether the table fetches all data (`true`) or paginates the data as needed (`false`).

Template Input

The request body has this new property.

- `dataTransformIds`— A list of the data transform IDs for this template.

Changed CRM Analytics REST API Response Bodies

These response bodies have changes.

Compact Form Join Object

The response body has this new property.

- `fields`— A list of object fields to use in the join.

Component Widget Parameters

The response body has this new property.

- `dynamicAttributes`— A map of the dynamic attributes for the component widget.

Dataset Type

The response body has these new properties.

- `currentVersionPredicate`— The security predicate for the current version of the dataset.
- `currentVersionSharingInheritance` — The sharing inheritance for the current version of the dataset.

Grid Layout Widget Parameters

The response body has these new properties.

- `parameterOverrides`— The parameter overrides for the widget.

- `type` — The widget type.

Interaction Action

The response body has these new properties.

- `clearType`— The clear type for the interaction. Valid values are `ClearAll`, `ClearExclude`, and `ClearInclude`.
- `lensIds`— A list of lens IDs. This list is used for the exclude and include of the clear type.

Number Type

The response body has these new properties.

- `format`— The display format for the number. Valid values are `Currency`, `Decimal`, `Percent`, and `PercentFixed`.
- `scale`— The maximum scale of the number.

Page Layout

The response body has these new properties.

- `guidancePanel`— The guidance panel to display on a template configuration wizard page.
- `navigation`— The navigation information for a template configuration wizard page.
- `type`— The type of template configuration wizard page. Valid values are `Configuration` and `Validation`.

Repeater Widget Parameters

The response body has this new property.

- `sortableColumns`— A list of sortable fields for the repeater widget.

Table Widget Parameters

The response body has this new property.

- `enableAllDataFetch`— Indicates whether the table fetches all data (`true`) or paginates the data as needed (`false`).

Text Item

The response body has this new property.

- `variant`— The text variant. The only supported value is `SubHeader`.

UI Layout Definition

The response body has these new properties.

- `appDetails`— The configuration information for the app details page of the template configuration wizard.
- `navigationPanel`— The configuration information for the navigation panel of the template configuration wizard.

Variable Item

The response body has these new properties.

- `tiles`— A map of the checkbox tiles details.
- `variant`— The variable variant. Valid values are `CheckboxTiles`.

Wave Features

The response body has this new property.

- `orgHasExploreInTableau`— Indicates whether the org can explore Tableau data in CRM Analytics (`true`) or not (`false`).

Invocable Actions

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs.

Invocable actions are available through REST API. The following action has changed:

Generate a URL so that authenticated and guest users can access order details.
Use the new generateOrderSummaryUrl action.

For more information on invocable actions, see the Actions Developer's Guide.

Metadata API

Access more metadata through these new and changed metadata types.

Salesforce Overall

Enable Quip for your org
Use the `enableQuip` field on the existing LightningExperienceSettings metadata type. Introduced in API version 51.0, this value has been added to the *Metadata API Developer Guide*.

Customization

See the quick actions used on related lists in the page layout (generally available)
Use the new `quickActions` field on the existing RelatedListItem subtype of the Layout metadata type.

Experience Cloud

Apply custom CSS to components in your enhanced LWR site
Use the new `componentType.customCssClasses` property on the existing DigitalExperienceBundle metadata type. This property appears as the CSS Class field available on the Style tab of every component.

DEPRECATED: The `enableExperienceFriendlyUrls` field is deprecated in API version 59.0
The `enableExperienceFriendlyUrls` field on the SiteSettings metadata type is available only in API version 58.0. For later API versions, use the new `expFriendlyUrlsAsDefault` field on the Network type instead.

Define visibility, padding, and margin values for a component in your enhanced LWR site
Use the `componentType.attributes.dxpStyle` property on the existing DigitalExperienceBundle metadata type. Introduced in API version 57.0, this field has been added to the *Metadata API Developer Guide*.

Create visibility rules and variations for components in your enhanced LWR site
Use the new `contentOperations` properties on the existing DigitalExperienceBundle metadata type. Introduced in API version 58.0, this field has been added to the *Metadata API Developer Guide*.

Marketing Cloud

Define Facebook account response settings in Social Studio
Use the `enableAllFBResponseAccounts` field on the existing SocialCustomerServiceSettings metadata type. Introduced in API version 56.0, this field has been added to the *Metadata API Developer Guide*.

Mobile

Customize the offline record experience for your mobile workforce
Enter the API name of a custom metadata type in the existing `targetEntity` field on the BriefcaseRule metadata type.

Salesforce Flow

Run an asynchronous background step in the context of the current running user of the orchestration

Use the new `runAsUser` field on the existing FlowStageStep metadata type.

Identify the type of condition that a requirement in an orchestration is used for

Use the new `FlowWaitConditionType` enum value with the new `conditionType` field on the existing FlowCondition metadata type.

Define up to 3 requirements to be met before exiting an orchestration stage

Use the `exitConditions` field on the existing FlowOrchestratedStage metadata type.

Define custom logic of requirements to be met before exiting an orchestration stage

Use the `exitConditionLogic` field on the existing FlowOrchestratedStage metadata type.

Define up to 3 requirements to be met before starting an orchestration step

Use the `entryConditions` field on the existing FlowStageStep metadata type.

Define custom logic of requirements to be met before starting an orchestration step

Use the `entryConditionLogic` field on the existing FlowStageStep metadata type.

Define up to 3 requirements to be met before exiting an interactive orchestration step

Use the new `exitConditions` field on the existing FlowStageStep metadata type.

Define custom logic of requirements to be met before exiting an interactive orchestration step

Use the new `exitConditionLogic` field on the existing FlowStageStep metadata type.

Transform data in flows to integrate systems outside Salesforce more easily (beta)

Use the new `transforms` field on the existing Flow metadata type.

Use a formula to transform data in flows (beta)

Use the new `formulaDataType` and `formulaExpression` fields on the existing FlowElementReferenceOrValue subtype. Supported only in transforms metadata.

Use Data Cloud data changes to trigger a flow

Use the new `DataCloudDataChange` enum value in the `triggerType` field on the existing FlowStart metadata type.

Build recommendations in Flow Builder

Use the `RecommendationStrategy` value in the existing `processType` field on the existing Flow metadata type. Introduced in API version 54.0, this value has been added to the *Metadata API Developer Guide*.

Trigger a flow with a segment

Use the `segment` field on the existing FlowStart metadata type. Introduced in API version 56.0, this value has been added to the *Metadata API Developer Guide*.

Security and Identity

Notify users during redirections for My Domain and *.force.com URL redirections

Use the new `doesWarnOnRedirect` and `doesWarnOnForceComRedirect` fields on the existing MyDomainSettings metadata type.

Specify the redirection behavior when users visit your instanced URL

Use the new `instancedUrlRedirectHandling` field on the existing MyDomainSettings metadata type.

Apply the Content-Security-Policy: frame-ancestors HTTP header directive when support is unclear

Use the new `sendCspForUncommonClients` field on the existing SecuritySettings metadata type.

Enable the Permissions-Policy HTTP header and control access to users' cameras and microphones

Use the new `enablePermissionsPolicy`, `grantCameraAccess`, and `grantMicrophoneAccess` fields on the existing SecuritySettings metadata type.

Grant a trusted URL access to the user's camera or microphone

Use the new `canAccessCamera` and `canAccessMicrophone` fields on the existing CspTrustedSite metadata type.

Temporarily allow cross-org redirections

Use the new `enableCrossOrgRedirects` field on the existing SecuritySettings metadata type.

Allow developers to create external client apps on your org

Use the new ExternalClientAppSettings metadata type to grant permission to create, update, package, and delete external client apps on your Salesforce org.

Create and configure external client apps

Use the new ExternalClientApplication metadata type to define an external client app header file. Use the new ExtlClntAppGlobalOauthSettings, ExtlClntAppOauthSettings, and ExtlClntAppOauthConfigurablePolicies metadata types to configure an OAuth plugin. Use these metadata types together to create local or packageable external client apps.

Require the OAuth 2.0 Proof Key for Code Exchange (PKCE) extension for supported authorization flows at an org-wide level

Use the new `isPkceRequired` field on the OauthOidcSettings metadata type.

Require the PKCE extension for a specific connected app

Use the new `isPkceRequired` field on the ConnectedAppOauthConfig metadata type.

Automatically enable the PKCE extension for supported authentication providers

Use the new `isPkceEnabled` field on the AuthProvider metadata type.

Configure the Authorization Code and Credentials Flow on a connected app

Use the new `isCodeCredentialEnabled` and `isCodeCredentialPostOnly` fields on the ConnectedAppOauthConfig metadata type. Introduced in API version 57.0, these fields have been added to the *Metadata API Developer Guide*.

Configure a connected app to get an access token for authenticated requests to Headless Passwordless Login API

Use the new `PwdlessLogin` enum value in the `scopes` field on the ConnectedAppOauthConfig metadata type.

Configure a connected app to get an access token for authenticated requests to Headless Registration API

Use the new `UserRegistration` enum value in the `scopes` field on the ConnectedAppOauthConfig metadata type. Introduced in API version 58.0, this enum value has been added to the *Metadata API Developer Guide*.

Set a user's session timeout to 90 minutes

Use the new `NinetyMinutes` enum value in the `sessionTimeout` field on the SessionSettings metadata type. Introduced in API version 58.0, this enum value has been added to the *Metadata API Developer Guide*.

Service

Designate work as interruptible

Use the new `interruptibleCapacity` field on the existing PresenceUserConfig metadata type. Use the new `IsInterruptible` field on the ServiceChannel metadata type.

Deliver file upload success messages in multiple languages

Use the new `successMessages`field on the BotVariableOperationTranslation subtype of the existing Translations metadata type. Introduced in API version 57.0, this field has been added to the *Metadata API Developer Guide*.

Build, reuse, and share bot blocks

Use the new BotBlock metadata type and the new `isPlaceholderDialog` field on the BotDialog subtype of the existing BotVersion metadata type. Introduced in API version 58.0, this type and this field have been added to the *Metadata API Developer Guide*.

Add a permission set to your bot template

Use the new `permissionSet` field on the existing BotTemplate metadata type. For more information, see Add Permission Sets to Your Custom Templates and Blocks.

Add a permission set to your bot block
Use the new `permissionSet` field on the BotBlockVersion subtype of the existing BotBlock metadata type. For more information, see Add Permission Sets to Your Custom Templates and Blocks.

Data Cloud

Provide a description of the associated data source bundle
Use the new `description` field on the existing DataSourceBundleDefinition metadata type. Introduced in API version 53.0, this field has been added to the *Metadata API Developer Guide*.

Icon used in the deployment flow
Use the new `icon` field on the existing DataSourceBundleDefinition metadata type. Introduced in API version 53.0, this field has been added to the *Metadata API Developer Guide*.

Reports and Dashboards REST API

Using the Reports and Dashboards REST API, change ownership of Lightning dashboards.

New Resources:

Change dashboard ownership.

Change the owner of one or more dashboards
Make a PATCH request to the new `/analytics/change-owner` resource.

For more information, see the Reports and Dashboards REST API Developer Guide.

Subscription Management API

Use the Subscription Management API to build self-service solutions for your recurring business.

Create an asset from an order item
Use the new `/actions/standard/createOrUpdateAssetFromOrderItem` request.

Cancel or downsell an asset for a one-time sale
Use the new `returnPolicyType` parameter in the `asset-management/assets/collection/actions/initiate-cancellation` and the `asset-management/assets/collection/actions/initiate-amend-quantity` requests.

Tooling API New and Changed Objects

Access more metadata through these new and changed Tooling API objects.

Security and Identity

Grant a trusted URL access to the user's camera or microphone
Use the new `CanAccessCamera` and `CanAccessMicrophone` fields on the existing CspTrustedSite object.

User Interface API

Prevent duplication of records with idempotent record writes on more UI API resources, and work with more objects.

IN THIS SECTION:

Supported Objects

All new standard objects are auto-enabled for use with User Interface API.

Previously, we provided a list of objects that are supported by User Interface API in the current release. From Summer '23, all new standard objects are automatically enabled for User Interface API usage unless otherwise specified.

Note: To view new objects that are auto-enabled for User Interface API, see New and Changed Objects.

These standard objects are not new to your org but are new for User Interface API.

- ActionCadenceStep
- ActionCadenceTracker
- ActionCadenceStepTracker
- QuoteLineItemAttribute
- SurveyQuestion

SEE ALSO:

User Interface API Developer Guide: Send a Request Using Postman

User Interface API Developer Guide: Supported Objects

New and Changed User Interface API Resources

These resources are new or have changes.

Salesforce Overall

Perform record create, update, and delete operations in a batch

Make a POST request to the new `/ui-api/records/batch` resource.

New request body: Batch Record Input

Create a record with fields that aren't in the layout

Make a POST request to `/ui-api/records/?includeFieldsInBody=true`.

New request parameter: `includeFieldsInBody`

When set to `true`, fields you provide in the request body that aren't in the layout are included in the response body. The default is `false`.

Update a record with fields that aren't in the layout

Make a PATCH request to `/ui-api/records/?includeFieldsInBody=true`.

New request parameter: `includeFieldsInBody`

When set to `true`, fields you provide in the request body that aren't in the layout are included in the response body. The default is `false`.

Get the record layout used by a quick action (generally available)

Make a GET request to `/ui-api/actions/layout/${actionApiName}`.

New and Changed User Interface API Response Bodies

These response bodies are new or have changes.

Salesforce Overall

Quick Action Layout (Generally Available)

This new response body returns the record layout used by a quick action.

GraphQL API

Modify records using GraphQL mutations. Use aggregate functions with ordering. Send queries with namespace support. Work with tasks, and events, and more.

Modify records using GraphQL mutations

With the `mutation` operation type, you can create, delete, or update records for UIAPI-supported objects. Each Salesforce object corresponds to a `RecordCreate`, `RecordEdit`, and `RecordDelete` field that returns a response payload that you define.

- `RecordCreate`—Creates a record with an `input` argument for field values. `RecordCreate` corresponds to the object name, for example, `AccountCreate`. To return a response payload, include the `Record` field with the fields that you want, such as the record's `Id` field.

```
mutation RecordCreateExample {
    uiapi {
        AccountCreate(input: {
            Account: {
                Name: "Salesforce"
                Billing City: "San Francisco"
            }
        }) {
            Record {
                Id
                Name {
                  value
                }
            }
        }
    }
}
```

- `RecordDelete`—Deletes a record with an `input` argument for the record's `Id` field. You can return a response payload that includes only the `Id` field.

```
mutation RecordDeleteExample{
    uiapi {
        AccountDelete(input: {
            Id: "001RM000005eiYYYYY"
        })
        {
```

```
            Id
        }
    }
}
```

- `RecordUpdate`—Updates a record with an `input` argument for field values and the record's `Id` field. `RecordUpdate` corresponds to the object name, for example, `ContactUpdate`. You can return a response payload only with the `success` field, which returns `true` or `false` to denote if the record update is successful.

```
mutation RecordUpdateExample{
    uiapi {
        ContactUpdate(input: {
          Contact: {
            FirstName: "Sam"
            LastName: "Smith"
          }
          Id: "003RM000008AAAAAA4"
        })
        {
            success
        }
    }
}
```

Use the `allOrNone` boolean argument on the `uiapi` field. To prevent naming conflicts on your operations, use an alias, for example, `first` and `second`.

```
mutation OperationName {
    uiapi(input: { allOrNone: false }) {
        first: AccountCreate(input: { ... })
        second: AccountCreate(input: { ... })
    }
}
```

- When `allOrNone` is `true`, either all operations are rolled back if any operation fails or all operations are executed within a transaction. This is the default.
- When `allOrNone` is set to `false`, only operations that fail are rolled back along with any operations that depend on those failed operations, allowing other successful operations to execute.

The `IdOrRef` scalar is new. Use fields of `IdOrRef` type to chain operations in a mutation request, such as creating a record and an associated child record. For example, the `AccountId` field on contacts corresponds to the `IdOrRef` type.

Paginate with an upper bound limit

The `upperBound` argument is new. `upperBound` specifies a limit for the number of records to retrieve. We recommend that you use `upperBound` when you expect to query more than 2,000 records.

To paginate with an upper bound limit, use these arguments.

- `first`—The batch size to query. Specify between 200 and 2000 records.
- `upperBound`—A limit for the number of records to retrieve. Specify a large number of records, such as 5000 or 10000, depending on the number of records you have.

```
query RecordsWithPagination {
    uiapi {
        query {
```

```
            Contact (first: 500, upperBound: 10000) {
                # Optional edges and node here
                totalCount
                pageInfo {
                    hasNextPage
                    endCursor
                }
            }
        }
    }
}
```

For example, the previous query is similar to the SOQL statement `SELECT <fields> FROM Contact LIMIT 10000` where `first: 500` represents a batch size of 500.

To request for the next batch of results, use the `first` and `after` arguments based on the `endCursor` value you receive.

Query records using aggregate functions with result ordering

Control the order of your query results on sortable fields, such as in an ascending or descending order. You can also display null values first or last. Each Salesforce object aggregate type, `RecordQueryAggregate`, in the GraphQL API schema has a corresponding order by type that uses the `_OrderBy` suffix. For example, Account includes an `Account_OrderBy` type for ordering by account fields.

Using the `aggregate` field, you can order results using this syntax.

```
query MyQueryName{
    uiapi {
        aggregate {
            ObjectApiName (
                orderBy: { orderByField: { function: functionName } },
                groupBy: { groupByField: { group: true } }
            )
            edges {
                node {
                    aggregate {
                        Field1 { functionName { value } }
                        Field2 { value }
                    }
                }
            }
        }
    }
}
```

- `ObjectApiName`—The Salesforce object, such as Account or Case
- `orderByField`—The field on a record to order by
- `groupByField`—The field on a record to group by
- ***`functionName`***—The aggregate function, such as `COUNT`, `COUNT_DISTINCT`, `MAX`, and `MIN`. Numerical fields also support `AVG` and `SUM`.

Here are several ways to use the `orderBy` argument.

- Order the results by an aggregate function on a specific field. For example, order by the aggregate function `MIN(AnnualRevenue)` and group by `Industry`.

```
Account (
    orderBy: { AnnualRevenue: { function: MIN } },
    groupBy: { Industry: { group: true } }
)
```

- Order the results by an aggregate function on multiple fields. For example, order by `COUNT(Name)` and `AVG(AnnualRevenue)`, and group by `Industry`.

```
Account (
    orderBy: {
        Name: { order: ASC, function: COUNT },
        AnnualRevenue: { order: ASC, function: AVG }
    },
    groupBy: { Industry: { group: true } }
)
```

- Order the results by an aggregate function on a specific field, and sort null values last. The default returns null values first.

```
Account (
    orderBy: {
        Name: { order: ASC, function: COUNT },
        AnnualRevenue: { order: ASC, function: AVG, nulls: LAST }
    },
    groupBy: { Industry: { group: true } }
)
```

Write queries with namespace support

You can reference objects and fields with namespaces in GraphQL queries for managed packages. If your org uses a namespace, namespacing is resolved automatically for custom objects and fields in your query even if your query doesn't include them. If you're referencing objects and fields from another namespace, include the namespace in your query using the format `namespace__MyCustomObject__c` and `namespace__MyCustomField__c`. See New and Changed Modules for Lightning Web Components.

Work with Task and Event objects (beta)

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Task and Event objects are now available in GraphQL API, though User Interface API doesn't currently support these objects. You can use Task and Event objects in:

- Record queries
- Aggregate queries
- Parent-to-child relationship queries
- Child-to-parent relationship queries
- Polymorphic field queries

Query compound fields

The `ObjectName__FieldName__CompoundField` GraphQL API type is now supported. This type represents compound fields, such as `BillingAddress` on the Account object, `Address` on the Lead object, or geolocation fields. For example, `BillingAddress` corresponds to the `Account_BillingAddress_CompoundField` type.

Compound fields follow these restrictions.

- Include a compound field with its constituent fields in a query.
- Use the constituent fields when ordering by or filtering using a `where` argument.
- Use the constituent fields when working with aggregate queries. Compound fields aren't supported for aggregate queries.

```
query AccountsWithBillingAddress{
  uiapi {
    query {
      Account {
        edges {
          node {
            Name { value  }
            BillingAddress {
              BillingCity {
                value
                displayValue
              }
              BillingCountry {
                value
                displayValue
              }
            }
          }
        }
      }
    }
  }
}
```

The `displayValue` field in GraphQL API matches the `displayValue` property returned by User Interface API (UI API)

The `displayValue` now matches its UI API counterpart. Previously, the `displayValue` field returned non-null values for properties that return a null value in UI API. For example, an Integer field that returns 1000 in UI API returns a null `displayValue`, so you can expect the same for `displayValue` in GraphQL API. This change applies to Integer and Double field values. The `displayValue` on currency and date and time fields remains the same.

```
//Before
"NumberOfEmployees": {
    "value": 1000,
    "displayValue": "1,000"
}

//After
"NumberOfEmployees": {
    "value": 1000,
    "displayValue": null
}
```

SEE ALSO:

GraphQL API Developer Guide

Einstein

Get ready to work smarter with all that Einstein has to offer. Einstein enhancements include new and updated AI-powered features across Search, Commerce, Field Service, Sales, and Service. Plus, view all of our generative AI innovations in one place.

Salesforce Overall

Einstein Search

Improve how you receive your search results. In Search Manager, configure searchable standard and custom objects, and capture search storage insights. You can also receive specific answers from a knowledge article with Einstein Search Answers.

Commerce

Commerce Einstein

Let Einstein generate multiple product fields in a single step. Add the new Einstein Frequently Bought Together component to show customers additional products that are related to the one they're viewing in their cart.

Einstein Generative AI

Einstein Generative AI Features

Learn more about how Einstein generative AI can supercharge productivity across all of our clouds. Our generative AI features are released as often as monthly, so check back again soon for our latest and greatest solutions. Features included in the September '23 monthly release become available when Winter '24 rolls out to your org.

Field Service

Field Service Einstein

Give mobile workers AI-generated briefings for their work orders.

Sales

Einstein Conversation Insights

Create call summaries with one click! Powered by Einstein, Call Summaries support voice and video calls, including providing next steps and customer feedback. Einstein Conversation Insights (ECI) users can access helpful out-of-the-box list views for calls. Related record matching was improved, and users without ECI licenses can see insights and transcript information that's relevant to them. You also get more platform features for video calls and video call participants.

Sales Cloud Einstein

Let Einstein generative AI draft sales emails from a sales rep's inbox or anywhere in Salesforce, and optionally include product information. Assess forecasting trends and sales predictions at a glance. The Forecast Changes chart with the Einstein Forecasting prediction graph, previously available only on the forecasts page, is now also available on the home page.

Service

Einstein Article Recommendations

Get custom AI-generated email drafts with Einstein for Service: Knowledge Grounded Email Response.

Einstein Bots

Use Article Answers, now generally available, to answer your customers' FAQs with your knowledge base. Build an intent model in multiple languages with fewer utterances with the cross-lingual intent model (beta). Add an inbound Omni-Channel flow to an enhanced channel without leaving the Bot Overview page for your enhanced bot. Quickly build and launch bots with access to the resources they need with the enhanced bot audit and optional permission sets for custom bot templates and blocks.

Einstein Classification

Close cases faster using Einstein for Service: Work Summaries with generative AI, now generally available.

Einstein Conversation Mining

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining. Use email conversations or related transcripts to build reports.

Einstein Reply Recommendations

Supercharge agent productivity using generative AI with Einstein for Service: Service Replies and Service Replies with Knowledge grounding, now generally available.

Einstein for Service Grounding

Get AI-generated responses that are grounded in your company's Case and Knowledge data, now generally available.

Einstein Generative AI

Supercharge your workforce efficiency with Einstein generative AI.

IN THIS SECTION:

SEE ALSO:

Salesforce Help: About Einstein Generative AI

Einstein Generative AI Features

Learn more about how Einstein generative AI can supercharge productivity across all of our clouds. Our generative AI features are released as often as monthly, so check back again soon for our latest and greatest solutions. Features included in the September '23 monthly release become available when Winter '24 rolls out to your org.

Cloud	Features and Enhancements
September '23	

Cloud	Features and Enhancements
Commerce	Enhance Product Fields in Commerce Stores with Einstein
Field Service	Get Your Mobile Workers Up to Speed with Pre-Work Briefing
Sales	Create Call Summaries Powered by Einstein
Sales	Personalize Sales Emails with Einstein Generative AI for Sales
Sales	Include Product Info in Sales Emails with Einstein Generative AI
Service	Optimize Agent Productivity and Response Quality with Einstein Service Replies (Generally Available)
Service	Close Cases Faster using Einstein Work Summaries with Generative AI(Generally Available)

SEE ALSO:

Einstein Release Notes

Enablement and Guidance

Deliver enablement programs focused on improving revenue outcomes for your company. Guide users to curated resources that can help them excel. Bring learning, career growth, skills development, and business-critical job performance to your users where they work in Salesforce.

IN THIS SECTION:

Enablement

Expand the scope of your company's enablement solution. Invite experienced peers and managers to share their wisdom to sales reps who are practicing their pitches or seeking feedback. Assign programs to more users with more efficiency, and see more detailed program status information. Adopt new permission set groups and permission sets that align your team members with the access their roles require. And, give users more visibility into the progress they make toward program outcomes and milestones.

IN THIS SECTION:

Keep Your Enablement Admin and Enablement User Permissions Up to Date

Ensure that your company's Enablement team members have all the updated permissions required to fully participate in Enablement programs. The default Enablement permission sets are renamed and included in new default permission set groups, which organize access to functionality by a user's role in your company. These permission set groups also include permission sets related to managing and accessing in-app guidance. Some individual user permissions are also renamed to better align with the jobs that team members fulfill.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, or Salesforce Platform. An Enablement add-on license is required.

Why: These permissions are renamed and reorganized for these reasons.

- The new Feedback Request exercise type for Enablement programs requires surveys, and managing surveys requires the View Setup and Configuration permission. To ensure that this permission is given only to appropriate users, this permission wasn't added to the default permission set for Enablement admins. Instead, this permission is added as part of a new default permission set, Manage Assessment Surveys, that you assign separately.
- Winter '24 adds default permission sets for Enablement admins to access and manage prompts and walkthroughs outside of Enablement programs. Managing in-app guidance also requires the View Setup and Configuration permission.
- Permission set groups have role-based names, which conflict with the names of the default permission sets.

How: These new names appear when you manage permissions for Enablement team members.

Item Type	New Name	Previous Name
Permissions	Manage All Enablement Features	Design and Deliver Enablement Programs
	Take Enablement Programs	Take Enablement Programs (no change)
	Take Custom Walkthroughs	View Walkthroughs
Permission sets	Manage Enablement Essentials	Enablement Admin
	Manage Assessment Surveys	None
	Manage In-App Guidance	None
	Use Enablement Programs	Enablement User
	Use Custom Walkthroughs	Access Walkthroughs
Permission set groups	Enablement Admin	None
	Enablement Resources Manager	None
	Enablement User	None

The new Manage Assessment Surveys and Manage In-App Guidance permission sets use the new Enablement Resources permission set license.

For all the new permission set groups, their permission sets and corresponding permission set licenses, and included permissions, check the See Also links.

SEE ALSO:

Roll Out In-App Guidance with Enablement More Easily

Salesforce Help: Enablement Permission Set Groups, Permission Sets, and Permissions (can be outdated or unavailable during release preview)

Salesforce Help: Assign Permissions to Your Enablement Team (can be outdated or unavailable during release preview)

Salesforce Help: Enablement Team Roles and Responsibilities (can be outdated or unavailable during release preview)

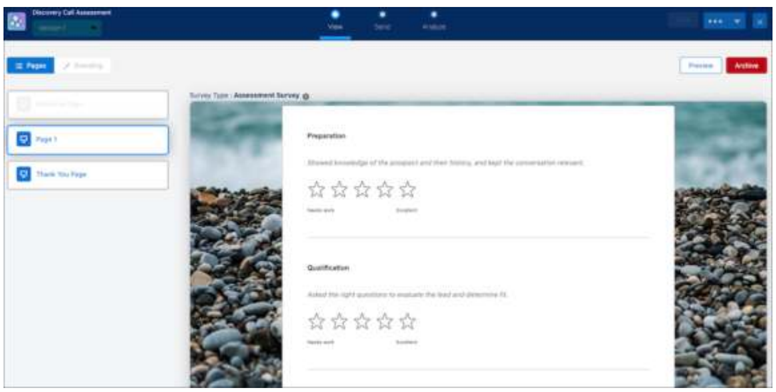
Coach Sales Reps Through the Perfect Pitch

Encourage collaboration and opportunities for asynchronous learning among your widely distributed sales teams. The Feedback Request exercise lets sales reps solicit feedback on their performance from experienced peers, managers, and other sales leaders at your company. Reps can request feedback from their reviewers by submitting an example of their work, such as a recording of a discovery call or deal negotiation. Reviewers then provide their feedback using an assessment survey designed by your Enablement team. After leaders provide feedback, Enablement teams can use new feedback response analytics to gain insight about reps' behavioral changes as they progress through the program.

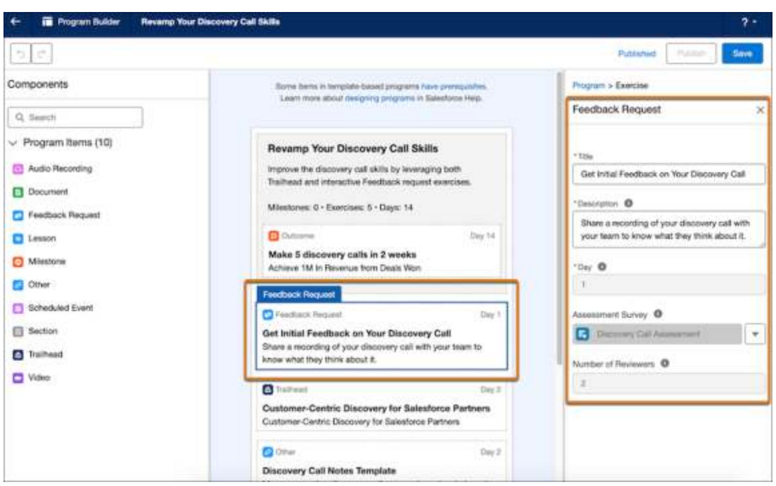
Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, or Salesforce Platform. An Enablement add-on license is required.

Who: Enablement admins, users, and peers can access assessment surveys, invitations, and responses for Feedback Request exercises. Only users with the Manage Assessment Surveys permission set can create assessment surveys.

How: Enable Surveys to let Enablement admins create an assessment survey for reviewers to evaluate Enablement users on key performance details. Enablement admins can create a survey quickly by copying and customizing the default Discovery Call Assessment survey.



Enablement admins add the Feedback Request exercise to a program from Program Builder and select an assessment survey.



When Enablement users encounter the Feedback Request exercise in the Guidance Center, they add a URL for the work they want feedback on and select their reviewers. Reviewers get an email to complete the survey. After the reviewers submit their feedback, Enablement users can see the feedback in the Guidance Center.

Enablement admins can analyze reviewer responses against changes in user behavior by creating custom reports and dashboards using the new report type, Feedback Responses Winter '24. Or, Enablement admins can use the new prebuilt Enablement analytics resources added to the Winter '24 analytics folders.

SEE ALSO:

Salesforce Help: Get Started with Feedback Request Exercises (can be outdated or unavailable during release preview)

Salesforce Help: Guidelines for Managing Feedback Request Exercise (can be outdated or unavailable during release preview)

Salesforce Help: View Enablement Analytics from the Dashboards Page (can be outdated or unavailable during release preview)

Get Deeper Insight into Milestone Progress from Enablement Analytics

Get more granular detail on the progress that users make toward the milestones that you set. Enablement analytics in the Winter '24 folders include the new Milestone Completion Status report, the donut chart dashboard widget Milestone Completion Status, and the bar chart dashboard widget Milestone Completion Status by Milestone. These resources help you quickly assess when milestones are not completed, behind, completed on time, completed late, overdue, or no longer tracked. Previously, Enablement analytics included completion statuses only for programs and exercises.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, or Salesforce Platform. An Enablement add-on license is required.

SEE ALSO:

Salesforce Help: Enablement Completion Statuses (can be outdated or unavailable during release preview)

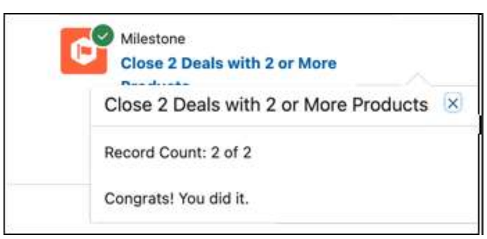
Salesforce Help: View Enablement Analytics from the Dashboards Page (can be outdated or unavailable during release preview)

Get a Clearer View of Your Progress While Taking a Program

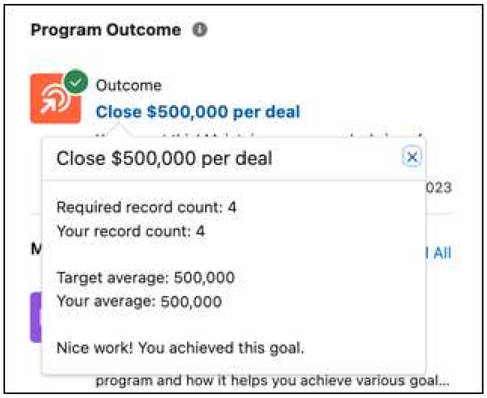
Enablement users better understand what's expected of them to achieve program goals by clicking into each outcome and milestone on the Guidance Center. Plus, users now see a message that indicates when it's no longer possible to get credit for completing an outcome or milestone or to fully complete a program. Previously, progress details were brief and easy to overlook, and users weren't able to tell when they could no longer get credit.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, or Salesforce Platform. An Enablement add-on license is required.

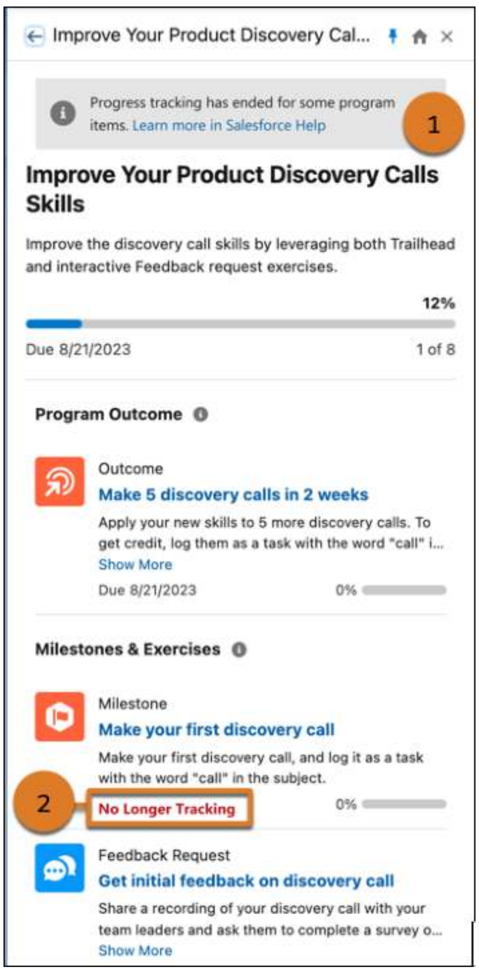
How: Users click each outcome and milestone title to compare their progress against the goal's requirements. For outcomes and milestones that are measured by counting records or tallying totals, the user sees their most-recently calculated progress compared to the required record count or the required total.



For outcomes and milestones that are measured using an average, both the record count and average requirements are shown.



When Enablement is no longer tracking progress on an outcome or milestone, users are directed to Salesforce Help to learn how untracked items affect their overall program progress (1). Each untracked outcome and milestone is labeled (2).



SEE ALSO:

Salesforce Help: Take Enablement Programs (can be outdated or unavailable during release preview)

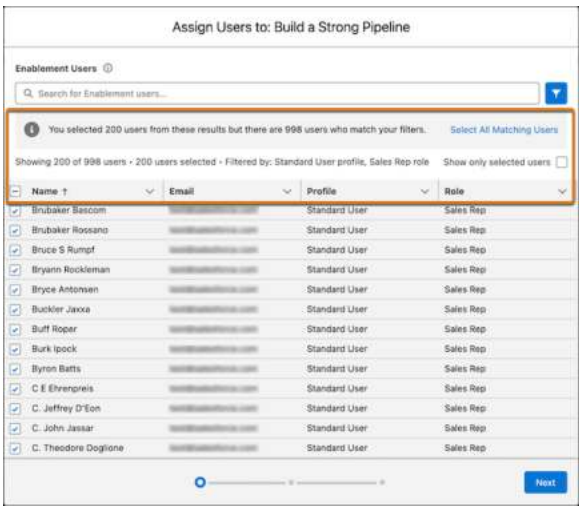
Salesforce Help: Considerations for Analyzing Program Completion (can be outdated or unavailable during release preview)

Assign Enablement Programs to More Users with Fewer Clicks

Expand the scope of your company's Enablement rollout to more users, more quickly. In the program assignment window, you can now filter the users that you want to assign to a program by their profile, role, and public group. With one click, you can select all users that match your applied filters, within your org's assignment limit. Previously, you could filter users in the assignment window only by public group. And you could assign all matching users only by scrolling enough times to load all users in the window and then selecting the header row checkbox.

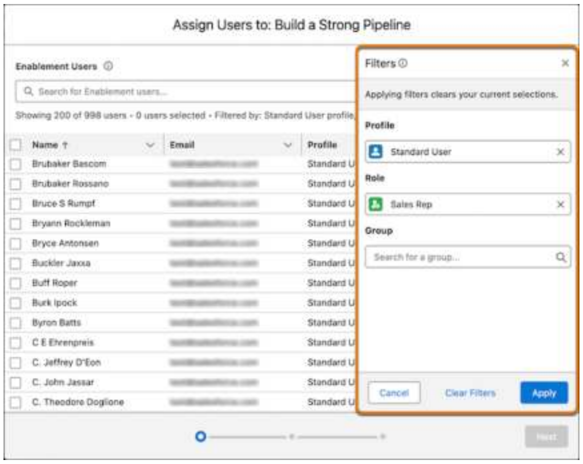
Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, or Salesforce Platform. An Enablement add-on license is required.

How: The assignment window includes these new options.



- A summary of the applied filters, the number of users that match the applied filters, the number of users shown, and the number of users selected.
- A banner that appears in some situations and includes an option to select all matching users with one click.
- An option to show only the users you selected.
- Columns for each user's name, profile, and role.

The Filters panel includes new fields for selecting a specific profile and role to filter the available users shown in the assignment window.



SEE ALSO:

Salesforce Help: Guidelines for Assigning Users to Enablement Programs (can be outdated or unavailable during release preview)

Salesforce Help: Assign Users to Enablement Programs Manually (can be outdated or unavailable during release preview)

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

Other Changes in Enablement

Salesforce admins, Enablement teams, and content creators benefit from other enhancements throughout the Enablement workflow.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, or Salesforce Platform. An Enablement add-on license is required.

How:

- The Enablement page in Setup is now named Enablement Settings. The page contains new and updated steps for assigning permission set groups, refreshing the prebuilt reports and dashboard, and enabling surveys.
- The Enablement workspace in the Digital Experiences app now supports the Salesforce CMS capabilities for importing and exporting content. You can export content in .zip files that you can import back into the workspace. You can import only the content types that the Enablement workspace supports: links, videos, rich text, and images.
- The Background Job log in Setup no longer shows completed Milestone Computation jobs, although those jobs are still shown on the Scheduled Jobs page. Program Status jobs continue to be shown on the Scheduled Jobs and Background Jobs pages.
- The Enablement dashboard widget Exercise Completion by Status was renamed to Exercise Completion Status by Exercise.
- To make room for the new outcome, milestone, and feedback response widgets, these widgets were removed from the Winter '24 Enablement dashboard. The data behind these widgets is still available, so you can rebuild them.
  - Exercise Completion Rate
  - Exercise Completion Status by Section
  - Milestone Progress horizontal bar chart comparing the average completion rate by outcome and milestone.
- Enablement reports, dashboard widgets, or custom report types with exercise completion statuses now include the status Overdue. Overdue shows when exercises aren't completed as of their program's overall due date. Previously, only the status Behind was available, which demonstrates lateness based on the individual exercise's due date. Now these various statuses work together to

give you a clear view of which deadline the user missed for each exercise and whether a user still can complete the exercise before the program ends.

SEE ALSO:

Salesforce Help: Guidelines for Digital Experiences Content in Enablement Programs (can be outdated or unavailable during release preview)

Salesforce Help: Refresh the Enablement Reports and Dashboard (can be outdated or unavailable during release preview)

Salesforce Help: Enablement Dashboard and Widgets (can be outdated or unavailable during release preview)

Salesforce Help: Enablement Reports (can be outdated or unavailable during release preview)

Guidance Center and In-App Guidance

Help your company create, deliver, and fine-tune your ideal onboarding experience more efficiently. Align your governance strategy for Enablement programs and in-app guidance, and bring tips, strategies, and insights from best-in-class sales professionals directly to your sales teams where they work.

IN THIS SECTION:

Roll Out In-App Guidance with Enablement More Easily

Publish and maintain prompts, walkthroughs, and Enablement programs side by side as part of your comprehensive onboarding strategy. If your company uses Enablement, the new default permission set groups include permission sets for accessing and managing in-app guidance outside of Enablement programs. With this change, you can streamline content creation and distribution across Enablement programs and in-app guidance, ensuring that your sales teams have the right resources in their flow of work.

Find New Names for Walkthroughs Permissions

Keep your company's walkthrough users aligned with other changes to Enablement and in-app guidance permissions. The default Access Walkthroughs permission set is now named Use Custom Walkthroughs, and the default View Walkthroughs permission is now named Take Custom Walkthroughs. These changes don't affect any functionality, and they apply even if your company doesn't have the Enablement add-on license.

Show Salesblazer Content in the Guidance Center

Inform and inspire your company's sales professionals with the latest insights, expertise, and pro tips from their peers, delivered in the flow of work in Salesforce. The Guidance Center now includes a Salesblazer section that shows content authored by sales leaders, sellers, and sales operations professionals. Clicking an item in the Salesblazer section opens the content in a new browser tab. Items remain in the Salesblazer section until the source content is refreshed, which occurs weekly on average.

Roll Out In-App Guidance with Enablement More Easily

Publish and maintain prompts, walkthroughs, and Enablement programs side by side as part of your comprehensive onboarding strategy. If your company uses Enablement, the new default permission set groups include permission sets for accessing and managing in-app guidance outside of Enablement programs. With this change, you can streamline content creation and distribution across Enablement programs and in-app guidance, ensuring that your sales teams have the right resources in their flow of work.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, or Salesforce Platform. An Enablement add-on license is required.

How: For all the new permission set groups, their permission sets, and included permissions, check the See Also links.

SEE ALSO:

Keep Your Enablement Admin and Enablement User Permissions Up to Date

Find New Names for Walkthroughs Permissions

Salesforce Help: Enablement Permission Set Groups, Permission Sets, and Permissions (can be outdated or unavailable during release preview)

Salesforce Help: In-App Guidance in Lightning Experience (can be outdated or unavailable during release preview)

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Where: These changes apply to Lightning Experience in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Keep Your Enablement Admin and Enablement User Permissions Up to Date

Roll Out In-App Guidance with Enablement More Easily

Salesforce Help: Enablement Permission Set Groups, Permission Sets, and Permissions (can be outdated or unavailable during release preview)

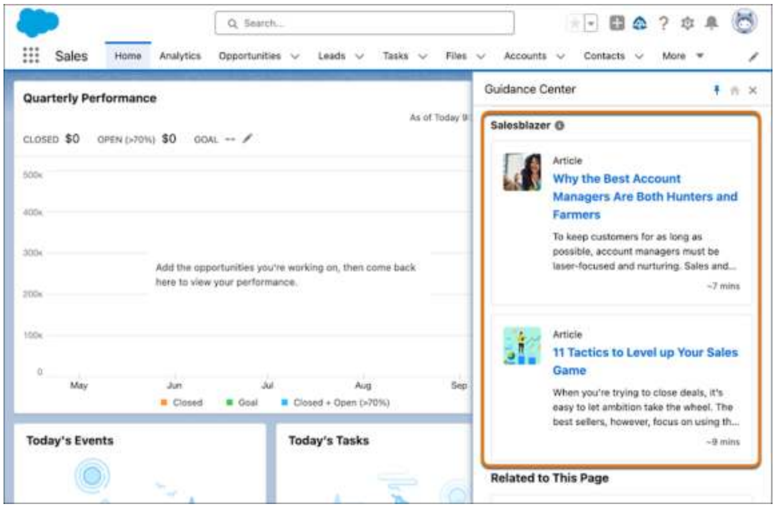
Salesforce Help: Assign Walkthrough Permissions in Lightning Experience (can be outdated or unavailable during release preview)

Show Salesblazer Content in the Guidance Center

Inform and inspire your company's sales professionals with the latest insights, expertise, and pro tips from their peers, delivered in the flow of work in Salesforce. The Guidance Center now includes a Salesblazer section that shows content authored by sales leaders, sellers, and sales operations professionals. Clicking an item in the Salesblazer section opens the content in a new browser tab. Items remain in the Salesblazer section until the source content is refreshed, which occurs weekly on average.

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

How: If the Salesforce Suggestions for End Users option in the Guidance Center page in Setup is on, the Salesblazer section in the Guidance Center is available for all users.



Salesblazer content is available only in English.

The Guidance Center still shows suggested content from Salesforce and content that's available to users based on their role at your company, including guidance sets and items assigned in Learning Paths.

To hide the Salesblazer section from all users, turn off **Salesblazer Content** in the Guidance Center page in Setup.

SEE ALSO:

Salesforce: Salesblazer Website

Salesforce Help: Turn Off Salesblazers Content in the Guidance Center (can be outdated or unavailable during release preview)

Salesforce Help: Explore the Guidance Center (can be outdated or unavailable during release preview)

Experience Cloud

Share CMS content from any workspace with your enhanced LWR site. Now all LWR sites that you create are enhanced. In other refinements to enhanced LWR, you can use Experience Builder to apply custom CSS to any component in the site, and use custom logic to apply flexible expression-based visibility rules to your components. You can also easily access and update the site's global style sheet from a new folder in DigitalExperiencesBundle. Enjoy more efficient, secure authentication into all your Experience Cloud sites, and use your sandbox org to test how disabling your site's content delivery network can affect your production org.

IN THIS SECTION:

Aura and LWR Sites

Share CMS content from enhanced or non-enhanced workspaces with any enhanced LWR site. Use coordinated interactions between the canvas and Page Structure panel in LWR sites to quickly find components in Experience Builder. Reach a larger global audience by translating your LWR site into even more languages. On Aura sites, visitors can use quick actions on related lists to create records for list items or perform mass updates on multiple related records.

Components in Experience Builder

On enhanced LWR sites, use custom logic to control component visibility even more precisely, and refine the appearance of your site with custom CSS classes. On all LWR sites, add a custom set of actions to an object detail page with the Actions Bar component, and let site visitors view and edit records with the Record Detail Component.

Developer Productivity

Get better information about the default site language for your Experience Cloud site. Easily find and update the global style sheets for your enhanced LWR sites in their new folder in DigitalExperienceBundle.

Site Performance

Test your CDN safely by disabling the default CDN in your sandbox org. After you enable enhanced domains, let users who visit your old URL know that they're being redirected to a new one. Respond to a Chatter email notification on a device with the latest iOS.

Mobile for Experience Cloud

Good things have come to Mobile Publisher, and you can enjoy them in Experience Cloud. Here are a few of the changes to keep an eye on.

Security and Sharing

Improve your security practices by requiring a sender name and email address to send Chatter notifications. Enjoy a host of new features, including better headless passwordless logins, a simplified headless registration setup, improved authorization flow performance, and more.

Query for All File Shares with ContentDocumentLink

Users with the Query All Files permission can query the ContentDocumentLink object. Previously, the Query All Files permission queried only ContentDocument and ContentVersion. The Query All Files permission must be part of a permission set. Now, users with the Query All Files permission and View All Data enabled can retrieve all files in the org, including files in non-member libraries and files in unlisted groups.

Aura and LWR Sites

Share CMS content from enhanced or non-enhanced workspaces with any enhanced LWR site. Use coordinated interactions between the canvas and Page Structure panel in LWR sites to quickly find components in Experience Builder. Reach a larger global audience by translating your LWR site into even more languages. On Aura sites, visitors can use quick actions on related lists to create records for list items or perform mass updates on multiple related records.

IN THIS SECTION:

Share CMS Content from Any Workspace with an Enhanced LWR Site

You can now share CMS content from enhanced and non-enhanced CMS workspaces with any enhanced LWR site. Previously, you could only share content from an enhanced CMS workspace with an enhanced LWR site.

New LWR Sites Are Now Enhanced Only

When you choose an LWR template, such as Build Your Own (LWR), you can no longer opt out of creating an enhanced LWR site. Previously, in Setup, you could disable the Enhanced Sites and Content Platform on the Settings page under Digital Experiences. However, now that you can share CMS content from non-enhanced CMS workspaces with enhanced LWR sites, you no longer need the opt-out option.

Find Components on Your LWR Site More Easily in Experience Builder

With synchronized interactions between the canvas and the Page Structure panel, you can easily find and select individual components for smoother, easier site editing on all LWR sites. On enhanced LWR sites, you can also quickly locate hidden components from the Page Structure panel and unhide them with a click. On the Experience Builder canvas, the label for any selected component now appears in full, even for narrow components, making component identification clearer.

Translate Your LWR Site into More Languages

Expand the reach of your site to a broader audience. You can now offer your site in up to 25 languages. Previously, you could offer your site in only 10 languages.

Use Quick Actions on Related Lists in Aura Sites (Generally Available)

Quick actions that you add on related lists in Lightning Experience are now also available in Aura Experience Builder sites. Quick actions appear on the Related List - Single component and when users click View All in the Related Record List component. With quick actions, your Aura site users can create related records for items in the list without leaving the page. Or they can perform mass updates on up to 100 related records at once.

Engage Pipeline Inspection in Salesforce PRM

View opportunities with Pipeline Inspection in your partner portal and strengthen your deal management. You can enable Pipeline Inspection when you create or modify a portal.

Share CMS Content from Any Workspace with an Enhanced LWR Site

You can now share CMS content from enhanced and non-enhanced CMS workspaces with any enhanced LWR site. Previously, you could only share content from an enhanced CMS workspace with an enhanced LWR site.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Publish Content from CMS Workspaces to Enhanced LWR Sites

New LWR Sites Are Now Enhanced Only

When you choose an LWR template, such as Build Your Own (LWR), you can no longer opt out of creating an enhanced LWR site. Previously, in Setup, you could disable the Enhanced Sites and Content Platform on the Settings page under Digital Experiences. However, now that you can share CMS content from non-enhanced CMS workspaces with enhanced LWR sites, you no longer need the opt-out option.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

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

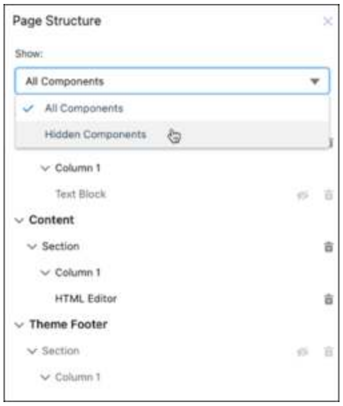
Find Components on Your LWR Site More Easily in Experience Builder

With synchronized interactions between the canvas and the Page Structure panel, you can easily find and select individual components for smoother, easier site editing on all LWR sites. On enhanced LWR sites, you can also quickly locate hidden components from the Page Structure panel and unhide them with a click. On the Experience Builder canvas, the label for any selected component now appears in full, even for narrow components, making component identification clearer.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: When you click a component in the Page Structure panel on any LWR site, Experience Builder scrolls the canvas to show the component and open its property panel. When you click a component on the canvas, Experience Builder scrolls the Page Structure panel to show the selected component there.

To locate hidden components in the Page Structure panel on an enhanced LWR site, select **Hidden Components** from the Show dropdown list. You can also unhide a component directly from the panel by clicking the eye icon next to the component's name.



Translate Your LWR Site into More Languages

Expand the reach of your site to a broader audience. You can now offer your site in up to 25 languages. Previously, you could offer your site in only 10 languages.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

LWR Sites for Experience Cloud: Create a Multilingual LWR Site (can be outdated or unavailable during release preview)

Use Quick Actions on Related Lists in Aura Sites (Generally Available)

Quick actions that you add on related lists in Lightning Experience are now also available in Aura Experience Builder sites. Quick actions appear on the Related List - Single component and when users click View All in the Related Record List component. With quick actions, your Aura site users can create related records for items in the list without leaving the page. Or they can perform mass updates on up to 100 related records at once.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

IdeaExchange Delivered: Save Time with Mass Quick Actions on Related Lists (Generally Available)

Engage Pipeline Inspection in Salesforce PRM

View opportunities with Pipeline Inspection in your partner portal and strengthen your deal management. You can enable Pipeline Inspection when you create or modify a portal.

Where: This change applies to Aura sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Partner Relationship Management and PRM for Slack

Components in Experience Builder

On enhanced LWR sites, use custom logic to control component visibility even more precisely, and refine the appearance of your site with custom CSS classes. On all LWR sites, add a custom set of actions to an object detail page with the Actions Bar component, and let site visitors view and edit records with the Record Detail Component.

IN THIS SECTION:

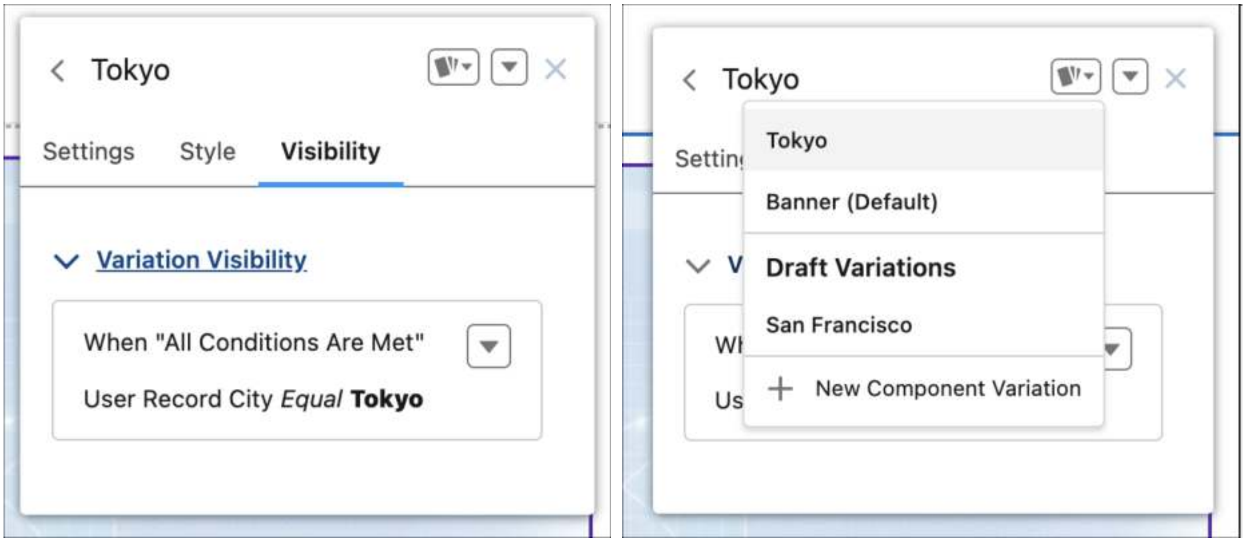
Create Component Variations in Enhanced LWR Sites (Beta)

Component Variations are now available in enhanced LWR sites. Create several versions of the same component and then use visibility rules to determine who sees what. Variations inherit properties from the default component and remain in a draft state until you add visibility rules. After you add a visibility rule, the variation leaves the draft state and can be prioritized.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Why: Want to show a different banner image to customers in different locations? Create a variation and assign it with the user location. When a component has multiple variations, you can put them into priority order. Priority determines which variation takes precedence when all conditions apply. When no variation visibility rules apply, your site visitors see the default component. To make each variation unique, modify its settings and style.



How: To create variations, go to your component. Select the Component Variations dropdown, and then select **New Component Variation**. Add a visibility rule to make it public. When a component has variations, you can identify them by finding the variations icon on the purple component header.

Use Custom Logic in Your Expression-Based Visibility Rules

Visibility rules, available for enhanced LWR sites, are now more flexible. You can now use two operators in the same rule. Previously, you could only add conditions with an AND or an OR operator in a single rule.

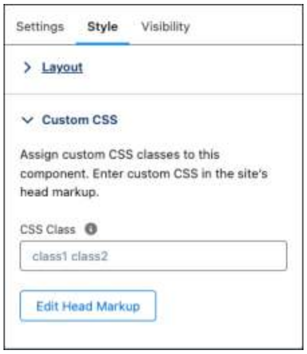
Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Apply Custom CSS from the New Style Tab on Components in Enhanced LWR Sites

The new CSS Class property, available on all Lightning web components in your LWR site, gives CSS-savvy site builders more granular control over the style of each component. Define CSS classes in your site's head markup and easily apply them to any component, including custom Lightning web components that you create for your site. The CSS Class property appears on the newly renamed Style tab in the component property panel. The Style tab, previously known as Spacing, was renamed to highlight this additional functionality.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Enter the CSS class in the component property panel. To add or edit the CSS markup, open the Head Markup editor. The class applies to the host element of the component.



SEE ALSO:

Salesforce Help: Add Markup to the Page <head> to Customize Your Experience Builder Site (can be outdated or unavailable during release preview)

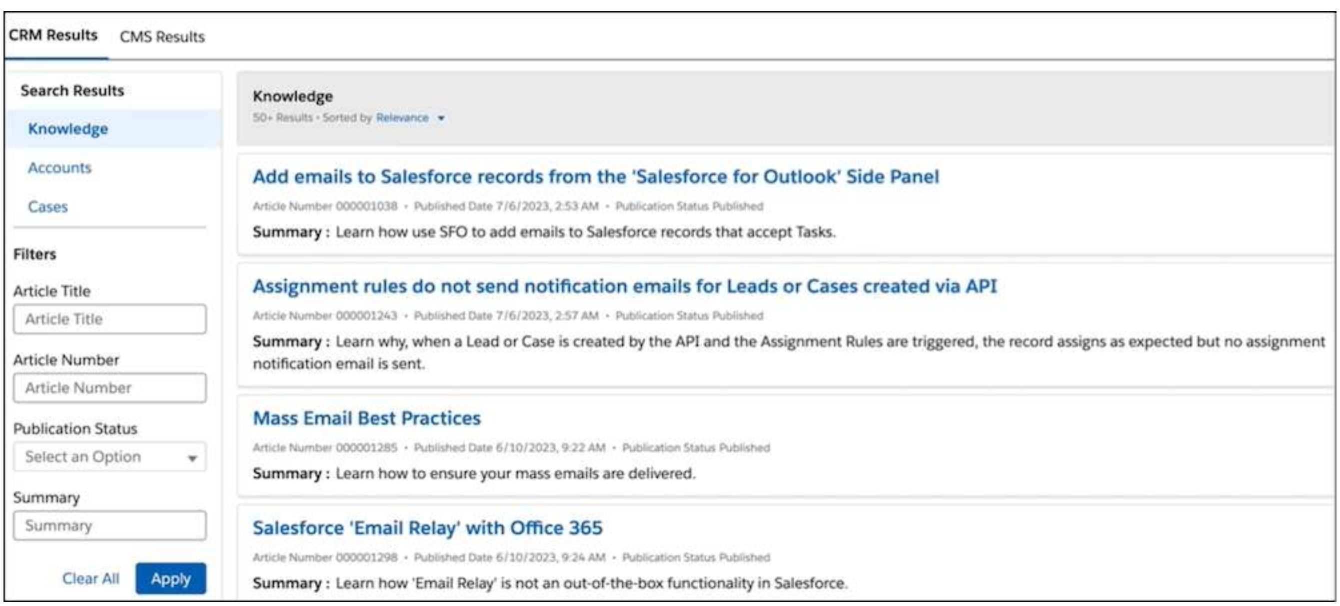
LWR Sites for Experience Cloud: Override Component Branding with Custom CSS (can be outdated or unavailable during release preview)

Display More Fields in Knowledge Search Results

Now you can customize additional Knowledge fields that display on the Search Results page. Previously, the Search Results page displayed only titles and summaries when knowledge articles were searched.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: From Object Manager, use Search Layouts to specify which Knowledge fields appear.

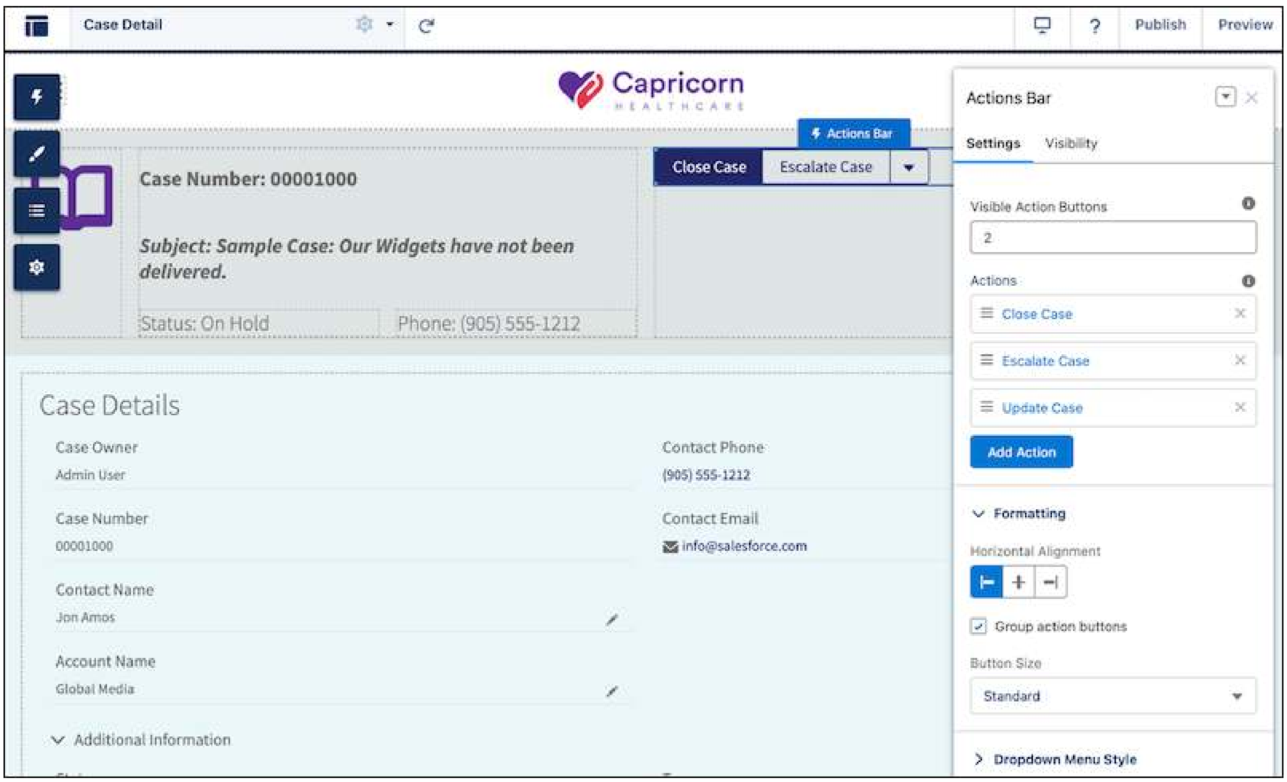


Do More in LWR Sites with the Actions Bar Component (Generally Available)

Site users can now create and update Salesforce records directly from your LWR site. Use the Actions Bar component to add a custom set of actions to an object detail page, and style the bar to match your site's branding settings. This feature, now generally available, includes some improvements since the last release. The Actions Bar component appears in the Components palette by default on more object detail pages, and minor label enhancements in the component's properties improve usability.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. You must have at least one active community license in your org to use this feature.

How: Drag the Actions Bar component anywhere on an object detail page, and then add your actions to the bar. The Actions Bar component supports the Edit standard action, Create a Record and Update a Record quick actions, and headless Lightning web component quick actions.



SEE ALSO:

Salesforce Help: Standard Components for the Build Your Own (LWR) Template (can be outdated or unavailable during release preview)

Salesforce Help: Actions Bar Considerations in LWR Sites (can be outdated or unavailable during release preview)

View and Edit More Records Using the Record Detail Component in LWR Sites (Generally Available)

Customers and partners can view and edit Salesforce records in your LWR site with the Record Detail component. For example, partners can update opportunity records, and customers can access their account information. In the component, users see the page layout that's assigned to their profile. The Record Detail component is now generally available for many standard and all custom object pages.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with active Experience Cloud licenses.

How: Open the object detail page, and drag the component to the page from the Records section of the component palette. For the list of supported standard object pages, see Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates. The list includes Note, Report, and ServiceReport objects, but they're not available for use with the Record Detail Component.

SEE ALSO:

Salesforce Help: Standard Components for the Build Your Own (LWR) Template (can be outdated or unavailable during release preview)

Developer Productivity

Get better information about the default site language for your Experience Cloud site. Easily find and update the global style sheets for your enhanced LWR sites in their new folder in DigitalExperienceBundle.

Create Custom Property Types and Editors for Lightning Web Components in Aura Sites (Beta)

Make component configuration more intuitive for your Aura site builders—add custom property editors and property types to your custom Lightning web components. Previously, this beta feature was available only for LWR sites.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

SEE ALSO:

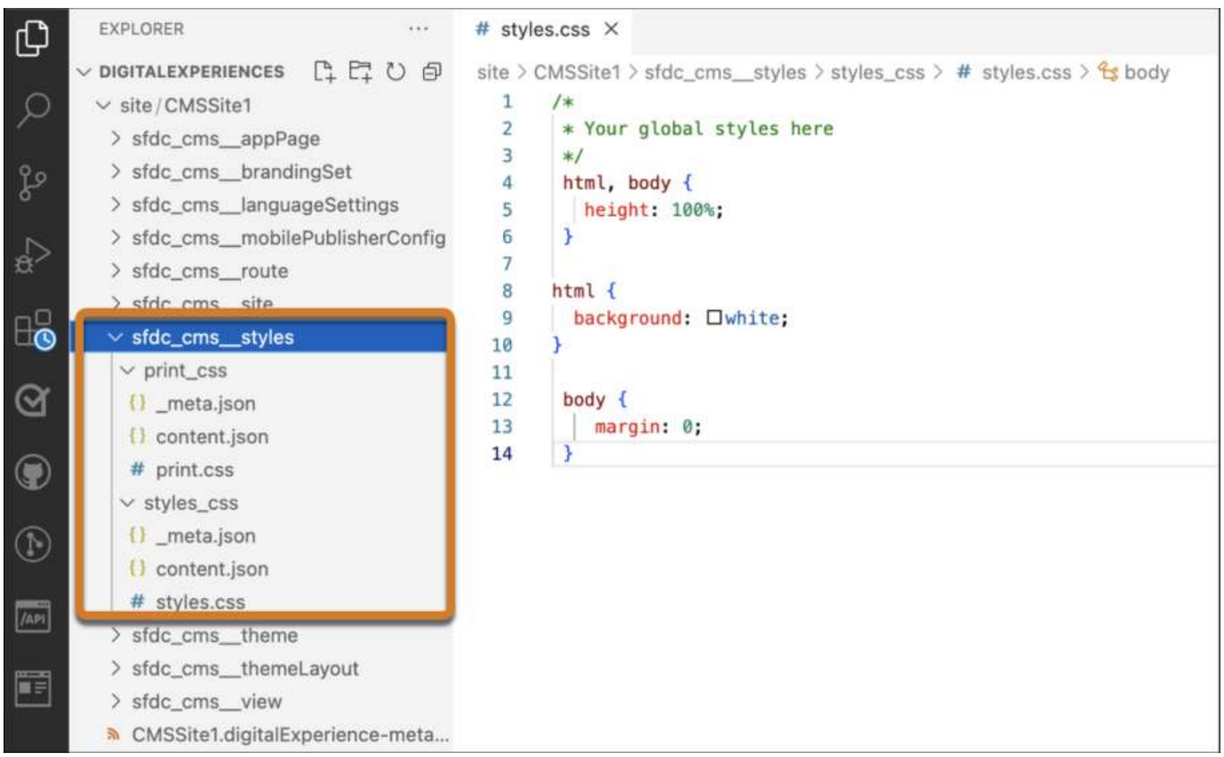
External Link: Custom Property Types and Property Editors (Beta) (can be outdated or unavailable during release preview)

Add Global Styles More Easily in Enhanced LWR Sites

A new folder in DigitalExperienceBundle houses your site's global site style sheets, making it easier to access, edit, and reference global styles in enhanced LWR sites.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: For enhanced LWR sites created in Winter '24 using the Build Your Own (LWR) template, the new sfdc_cms__styles folder in DigitalExperienceBundle includes the `styles.css` and the `print.css` style sheets. With `styles.css`, you can quickly define and update global styles that cascade throughout your site. And with `print.css`, you can add styles to help site visitors print a readable view of the site's pages.



In enhanced Build Your Own (LWR) sites, these style sheets are referenced in the site's head markup by default. For other enhanced LWR sites, the sfdc_cms__styles folder is supported in DigitalExperienceBundle, so you can add your own global style sheets to the folder and reference them in the site's head markup as needed.

Get Information About the Default Site Language in Lightning Web Components

When you retrieve the list of site languages using the `activeLanguages` property in the `@salesforce/site` module, the default site language now includes a `'default: true'` attribute. Previously, the returned list didn't identify which language was the site's default.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Use Dynamic Redirect Rules in LWR Sites (Generally Available)

With dynamic rules, you can redirect users from your site to an LWR site URL—without any coding. Configure dynamic URL redirect rules that use a pattern to identify a URL from your site and redirect it to an LWR site. Use mapping rules for large numbers of similar URLs to redirect, such as URLs in a specific category.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Redirect Users to Your Aura and LWR Site Pages (can be outdated or unavailable during release preview)

LWS Protects Static Resources in LWR Sites

Code that's loaded through `lightning/platformResourceLoader` now runs with Lightning Web Security (LWS) in LWR sites. This change means that the `loadScript` function loads static resource code into the sandbox where your custom Lightning web component runs. Previously, when using static resources in LWR sites, you implemented your own `loadScript` function to ensure that the code is loaded into your component's namespace sandbox.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Why: The `loadScript` and `loadStyle` APIs from `lightning/platformResourceLoader` now run in the namespace sandbox created by LWS. Your components can access global APIs that were added through static resources but any object mutations they make on the globals aren't reflected outside of the sandbox.

How: If your components use static resources and don't run correctly in LWR sites, use LWS tools to help find the issue. See Tools Support for Lightning Web Security and Troubleshoot in Lightning Web Security.

Alternatively, instead of using `lightning/platformResourceLoader`, consider using a privileged script tag in the head markup to load the script. See Integrate Third-Party Libraries Using the Privileged Script Tag.

Site Performance

Test your CDN safely by disabling the default CDN in your sandbox org. After you enable enhanced domains, let users who visit your old URL know that they're being redirected to a new one. Respond to a Chatter email notification on a device with the latest iOS.

IN THIS SECTION:

Disable Experience Cloud CDN for Enhanced Domains in Sandbox Orgs

Now you can disable your site's Experience Cloud content delivery network (CDN) on your own in sandbox orgs and see if there are any negative impacts before it's disabled in your production org. Previously, you contacted support to opt out of the Experience Cloud CDN but you weren't able to test out the change before it impacted production sites.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

How: Your *.my.site.com enhanced domain includes the Experience Cloud CDN by default. To test how disabling the CDN for enhanced domains affects your org, from My Domain Settings of your sandbox org, deselect **Use Content Delivery Network (CDN) by default when enhanced domains are enabled for Experience Cloud Sites**.

Alert Users During Redirections from Force.com Site URLs

When you enable enhanced domains, Salesforce redirects users that visit your old *.force.com site URLs to your new *.my.site.com URLs. To help your users update their outdated bookmarks and links, enable a message that lets them know about the new URL before they're redirected.

Where: This change applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Notify Users During My Domain Redirections

Respond to Chatter Email Notifications When Using an iOS Device

Reply to a Chatter email notification from a device that uses iOS 16 or later without getting an error. Previously, messages didn't go through, and you received an error.

Where: This change applies to Lightning Experience and all Salesforce mobile apps in all editions.

Mobile for Experience Cloud

Good things have come to Mobile Publisher, and you can enjoy them in Experience Cloud. Here are a few of the changes to keep an eye on.

IN THIS SECTION:

You can now set the default method for how your Mobile Publisher for Experience Cloud app opens URLs. Configure your app to open these links in an in-app web view, in-app browser, external browser, or in-app browser that shares cookies with your app's web view. Additionally, Setup for Mobile Publisher now has an enablement field for Marketing Cloud push notifications based on geofencing, which triggers notifications when the device enters or exits a specific location boundary.

Configure Your Mobile Publisher for Experience Cloud App's URLs and Location-Based Push Notifications

You can now set the default method for how your Mobile Publisher for Experience Cloud app opens URLs. Configure your app to open these links in an in-app web view, in-app browser, external browser, or in-app browser that shares cookies with your app's web view. Additionally, Setup for Mobile Publisher now has an enablement field for Marketing Cloud push notifications based on geofencing, which triggers notifications when the device enters or exits a specific location boundary.

Where: This change applies to apps created with Mobile Publisher for Aura and LWR sites in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

Set the Default Method for How Your Mobile Publisher for Experience Cloud App Opens URLs

Define Your Experience Cloud App's Location-Based Permissions and Push Notifications

Security and Sharing

Improve your security practices by requiring a sender name and email address to send Chatter notifications. Enjoy a host of new features, including better headless passwordless logins, a simplified headless registration setup, improved authorization flow performance, and more.

IN THIS SECTION:

To increase data security, administrators must provide a From Name and Email Address for Chatter email notifications to continue being sent.

[Take Advantage of New and Improved Headless Identity Features]

Round out your Headless Identity implementation with new flows for guest users and passwordless login. Improve security with the option to use reCAPTCHA Enterprise for all Headless Identity flows. Simplify your setup process by generating an Apex class template for your headless registration handler. And fine-tune your branding with a new email template for headless registration. Because Headless Identity APIs are exposed through Experience Cloud, you use Experience Cloud sites to connect to your off-platform app, even if the user doesn't directly interact with the site.

[Improve Authorization Flow Performance with JSON Web Token-Based Access Tokens (Generally Available)]

To make authorization flows more efficient for your Experience Cloud sites and off-platform apps, you can enable connected apps to issue JSON Web Token (JWT)-based access tokens. JWT-based access tokens are now generally available and supported for access to Salesforce REST APIs.

Require Sender Name and Email Address to Send Chatter Email Notifications (Release Update)

To increase data security, administrators must provide a From Name and Email Address for Chatter email notifications to continue being sent.

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

How: As of Winter '24, Chatter emails are no longer sent from orgs where the From Name and Email Address fields in Chatter Email Settings are blank.

To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. Follow the steps for Require Sender Name and Email Address to Send Chatter Email Notifications.

Take Advantage of New and Improved Headless Identity Features

Round out your Headless Identity implementation with new flows for guest users and passwordless login. Improve security with the option to use reCAPTCHA Enterprise for all Headless Identity flows. Simplify your setup process by generating an Apex class template for your headless registration handler. And fine-tune your branding with a new email template for headless registration. Because Headless Identity APIs are exposed through Experience Cloud, you use Experience Cloud sites to connect to your off-platform app, even if the user doesn't directly interact with the site.

Where: This change applies to LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Understand What Makes Your Users Tick with Guest User Identity

Streamline the Login Experience in Headless Apps

Secure Your Headless Identity Implementation with reCAPTCHA Enterprise

Simplify Your Setup with a Headless Registration Handler Template

Customize the Email Template for Headless Registration

Improve Authorization Flow Performance with JSON Web Token-Based Access Tokens (Generally Available)

To make authorization flows more efficient for your Experience Cloud sites and off-platform apps, you can enable connected apps to issue JSON Web Token (JWT)-based access tokens. JWT-based access tokens are now generally available and supported for access to Salesforce REST APIs.

Where: This change applies to LWR, Aura, and Visualforce sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer Editions.

SEE ALSO:

JSON Web Token (JWT)-Based Access Tokens Are Now Generally Available

Query for All File Shares with ContentDocumentLink

Users with the Query All Files permission can query the ContentDocumentLink object. Previously, the Query All Files permission queried only ContentDocument and ContentVersion. The Query All Files permission must be part of a permission set. Now, users with the Query All Files permission and View All Data enabled can retrieve all files in the org, including files in non-member libraries and files in unlisted groups.

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

How: To enable the permission, open the permission set for edit or create a new one. Then click **App Permissions** > **Edit**, and select the **Query All Files** permission name. Save your changes.

SEE ALSO:

Create Permission Sets

Field Service

AI-generated briefs keep mobile workers informed on work orders. Manage your busy team's hours with work capacity, and use a flow to help you easily move to the Enhanced Scheduling and Optimization engine. Hard-working dispatchers can create work more efficiently with the updated Gantt and user experience. Stay current on maintenance needs with a host of asset attribute functionality. Customize documents to showcase your brand. Learn what's driving Visual Remote Assistant efficiency by analyzing data on the Value dashboard. Mobile enhancements help workers manage error-prone data entry tasks. You can also streamline workflows by creating a customized tab bar suited to how your mobile team works.

IN THIS SECTION:

Field Service Asset Management

You can now get real-time updates on asset performance, create recordset filter criteria rules with asset fields and asset attributes more efficiently, and leverage the out-of-the-box Field Service data kit in Data Cloud. You can also track KPIs related to average asset repair and failure times and leverage asset attributes to stay ahead of maintenance needs. When working with asset attributes, you can set default values for the checkbox and date data types of attribute definitions and restrict the sharing of asset attributes. Additionally, learn how to prepare for the upcoming retirement of the maintenance plan's frequency fields.

Field Service Administration and Processes

Create brand-savvy service documents and make mobile workers' jobs more effective and efficient with Document Builder.

Field Service Customer Engagement

Improve your Visual Remote Assistant efficiency by analyzing data on the Value dashboard. Retain Visual Remote Assistant images temporarily for increased data security. Put your company at the forefront after each Visual Remote Assistant session by navigating customers to your company website. And, improve efficiency and provide better customer support by offering Visual Remote Assistant self-service sessions.

Field Service Mobile

Scan barcodes directly from the app. Use deep linking to reduce workflow friction between platforms. Customize the tab bar to improve workflows. Get automated timestamps from location-based actions. And, see two apps simultaneously on Android tablets.

Spotlight on Field Service Content

Use landing pages to guide you on your path to setup success.

Field Service APIs

Use Field Service Apex API to assign service appointments to resources according to their geolocations and schedule appointments for recurring visits. Give mobile workers the ability to use NFC tags with the new NFCService API and to scan documents with the new DocumentScanner API.

Field Service Einstein

Give mobile workers AI-generated briefings for their work orders.

IN THIS SECTION:

Get Your Mobile Workers Up to Speed with Pre-Work Briefing

Show mobile workers an AI-generated brief that tells them everything they need to know about their upcoming work orders. Previously, workers had to switch between the work order's tabs to find the relevant information.

SEE ALSO:

Einstein Release Notes

Get Your Mobile Workers Up to Speed with Pre-Work Briefing

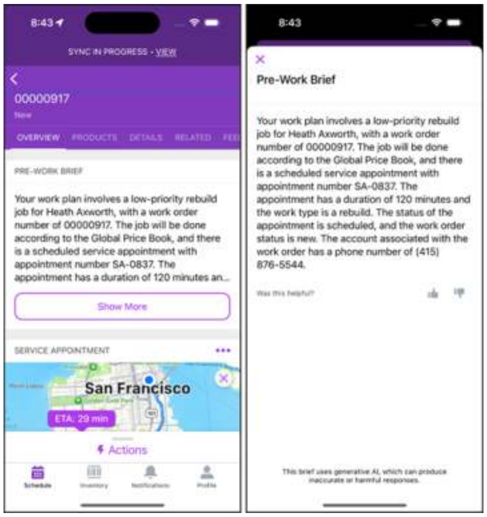
Show mobile workers an AI-generated brief that tells them everything they need to know about their upcoming work orders. Previously, workers had to switch between the work order's tabs to find the relevant information.

Where: This feature is available in the Field Service mobile app for Android and iOS. Einstein GPT is available in Lightning Experience.

To purchase the Einstein GPT add-on, contact your Salesforce account executive.

When: Mobile Work Briefing is available later in the Winter '24 release.

How: Ask your mobile workers to pay attention to the brief at the top of each work order. Mobile workers can also provide feedback about the brief.



SEE ALSO:

Einstein Generative AI Features

Field Service Resource Management

Enhanced Scheduling and Optimization helps you align with company priorities by controlling service resources' work using work capacity limits. Multiday work is now supported by Enhanced Scheduling and Optimization. And, group service appointments located at the same site when scheduling. If you used Salesforce prior to Summer '23, you can transition to Enhanced Scheduling and Optimization with an easy-to-follow flow. Crew Management tool enhancements offer search and filter capabilities to find the necessary service resources and required skills for your crew. Dispatcher console Gantt enhancements improve user experience and dispatcher productivity.

IN THIS SECTION:

Enhanced Scheduling and Optimization

Control the distribution between workstreams per territory to align with your company objectives by using work capacity limits. Conserve system limits by defining a scheduling policy for each service territory group in your scheduled job. Enhanced Scheduling and Optimization now supports multiday work optimization. Avoid having crews with idle resources by limiting the number of service resources. And, ensure that service appointments at the same location are scheduled together using the Same Site service objective. If you used Salesforce prior to Summer '23, you can now easily upgrade all service territories to use Enhanced Scheduling and Optimization with a simple guided flow. Qualify more candidates for service appointment scheduling with greater skill criteria flexibility. And, enhance scheduling efficiency by enabling complex work sliding for multiple resources.

Crew Management

Create or update service crews easily by filtering the Gantt for crew skills in the Crew Management tool. Search for the service resources that you need when creating a service crew or updating crew memberships. And, crew colors on the Gantt provide a quick means of identification.

Dispatcher Console

Increase the productivity of your dispatchers with the new Gantt enhancements. Create and update resource absences quickly on the Gantt. Sort candidates and time slots by grade and color to find the best candidates for scheduling. Use the updated skill filter to identify the best-qualified resources to assign to service appointments. And, get the most from your Gantt with the redesigned user experience.

Regulate Data Sharing with Advanced Security Settings

Choose whether to share data with external apps with new advanced security settings in the Field Service Org Settings. Three new fields let you limit data sharing on the Field Service mobile app and managed package.

Create Dependencies Between Service Appointments with More Flexibility

Implement complex work chains easily by selecting a wider variety of lookup fields to create dependencies between service appointments. Previously, you could select only service appointments with the same account or work order.

Get Better Results from Health Check to Improve Your Field Service Configuration

Health Check now runs relevant tests based on whether you're using Enhanced Scheduling and Optimization and provides more accurate results and recommendations.

Enhanced Scheduling and Optimization

Control the distribution between workstreams per territory to align with your company objectives by using work capacity limits. Conserve system limits by defining a scheduling policy for each service territory group in your scheduled job. Enhanced Scheduling and Optimization now supports multiday work optimization. Avoid having crews with idle resources by limiting the number of service resources. And, ensure that service appointments at the same location are scheduled together using the Same Site service objective. If you used Salesforce prior to Summer '23, you can now easily upgrade all service territories to use Enhanced Scheduling and Optimization with a simple guided flow. Qualify more candidates for service appointment scheduling with greater skill criteria flexibility. And, enhance scheduling efficiency by enabling complex work sliding for multiple resources.

IN THIS SECTION:

Limit Work Capacity According to Your Business Needs

Control the work performed by your workforce according to dynamic company priorities using work capacity limits. Limit the number of hours or percentage of the available work capacity on certain days for specific service territories. For example, during the holiday season, set a limit on maintenance work in New York to focus more on new installations. During a recall or mandatory repairs, limit new installations to reserve capacity for break-fix and maintenance work. Respond quickly to unexpected changes in demand by monitoring work consumption in real time relative to each limit you set.

Reduce System Maintenance by Running Fewer Scheduled Jobs

Avoid reaching your org limits by defining scheduled jobs that include different scheduling policies for each territory group in the job. Previously, you could define only one scheduling policy for the entire job. If you required different scheduling policies, you needed to set up multiple scheduled jobs.

Efficiently Optimize Multiday Work When Using Enhanced Scheduling and Optimization

Improve your organizational KPIs and reduce the need for manual intervention by optimizing service appointments that span multiple days. Multiday work optimization is now supported by Enhanced Scheduling and Optimization.

Utilize Crews Effectively by Limiting the Number of Service Resources in a Crew

Ensure that crews are optimally utilized and that no resources are idle by defining the maximum number of additional service resources. For example, if a service appointment requires a minimum of three service resources in a crew, specify that a maximum of two additional resources are allocated to the crew. This maximum means that a service appointment can be scheduled to a crew of size 3 to 5 service resources.

Improve Your Mobile Worker Efficiency by Grouping Same Site Service Appointments

Ensure that a minimal number of mobile workers visit the same location by having the optimization services group service appointments located at the same site. Use the Same Site service objective to prefer that jobs get scheduled together while considering all other objectives and KPIs.

Transition Smoothly to Enhanced Scheduling and Optimization with Guided Steps

Easily upgrade all service territories to use Enhanced Scheduling and Optimization with a guided flow comprising readiness checks and links to Salesforce Help. Discover what configuration updates are required for your Salesforce org, get workarounds for unsupported features, and review the differences in behavior when using the enhanced engine. This transparency helps users prior to Summer '23 adopt Enhanced Scheduling and Optimization and benefit from innovative features, more efficient services, and improved scalability, performance, and schedule quality.

Evaluate More Candidates for Service Appointment Scheduling by Relaxing Skill Requirements

Qualify more service resources to match at least one, but not necessarily all, skill requirements of a certain skill type. For example, a service appointment requires a caregiver who can perform procedures required for diabetes care, and the caregiver must speak English or Spanish. Previously, candidates had to have all the required skills in the Match Skills work rule, such as English and Spanish, even though only one language is sufficient. Now you can select the logic for each skill type.

Improve Scheduling Quality with Complex Work Sliding for Multiple Resources

Sliding is now available for appointments with dependencies that are scheduled to multiple resources. These appointments can move to a later time within each resource's availability. Previously, sliding was available only for appointments with dependencies that were scheduled to the same resource.

Limit Work Capacity According to Your Business Needs

Control the work performed by your workforce according to dynamic company priorities using work capacity limits. Limit the number of hours or percentage of the available work capacity on certain days for specific service territories. For example, during the holiday season, set a limit on maintenance work in New York to focus more on new installations. During a recall or mandatory repairs, limit new installations to reserve capacity for break-fix and maintenance work. Respond quickly to unexpected changes in demand by monitoring work consumption in real time relative to each limit you set.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that **Field Service Enhanced Scheduling and Optimization** is enabled. To enable Work Capacity, go to Field Service Settings and select **Allow defining work capacity limits**.

SEE ALSO:

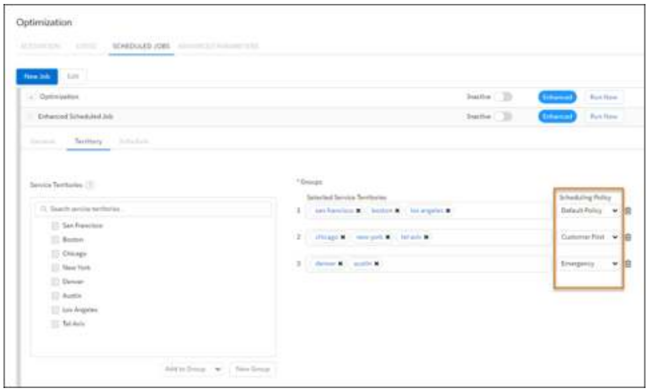
Salesforce Help: Manage Work Capacity in Field Service (can be outdated or unavailable during release preview)

Reduce System Maintenance by Running Fewer Scheduled Jobs

Avoid reaching your org limits by defining scheduled jobs that include different scheduling policies for each territory group in the job. Previously, you could define only one scheduling policy for the entire job. If you required different scheduling policies, you needed to set up multiple scheduled jobs.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that **Field Service Enhanced Scheduling and Optimization** is enabled. Then, in Field Service Settings, go to Scheduled Jobs under Optimization and create an enhanced optimization job. In the Territory tab, create groups of service territories, and select a scheduling policy for each group.



SEE ALSO:

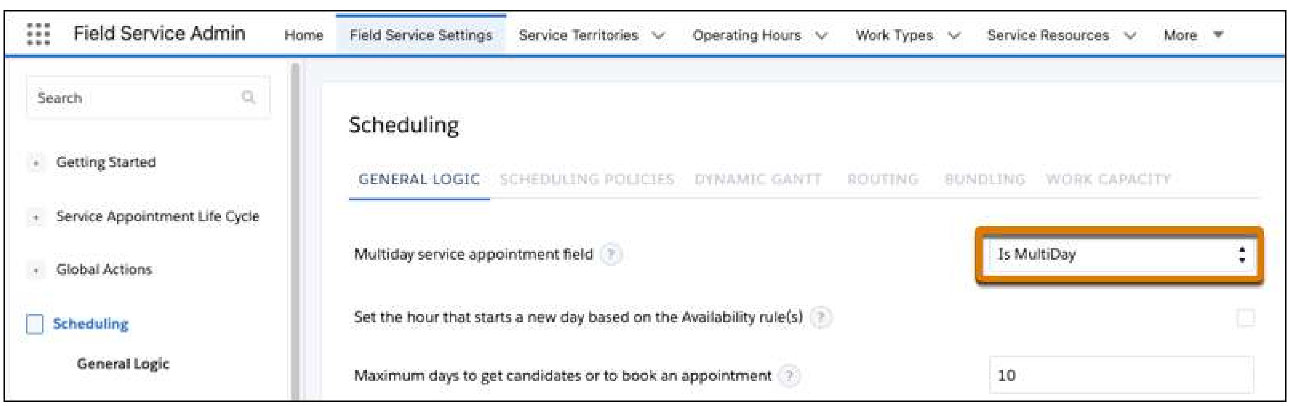
Salesforce Help: Manage Scheduled Jobs in Field Service (can be outdated or unavailable during release preview)

Efficiently Optimize Multiday Work When Using Enhanced Scheduling and Optimization

Improve your organizational KPIs and reduce the need for manual intervention by optimizing service appointments that span multiple days. Multiday work optimization is now supported by Enhanced Scheduling and Optimization.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that **Field Service Enhanced Scheduling and Optimization** is enabled. Then, in the Field Service Admin app, click the Field Service Settings tab and select **Scheduling** > **General Logic**. In the Multi-day service appointment field, select **Is MultiDay**.



SEE ALSO:

Salesforce Help: Enable Multiday Field Service Appointments (can be outdated or unavailable during release preview)

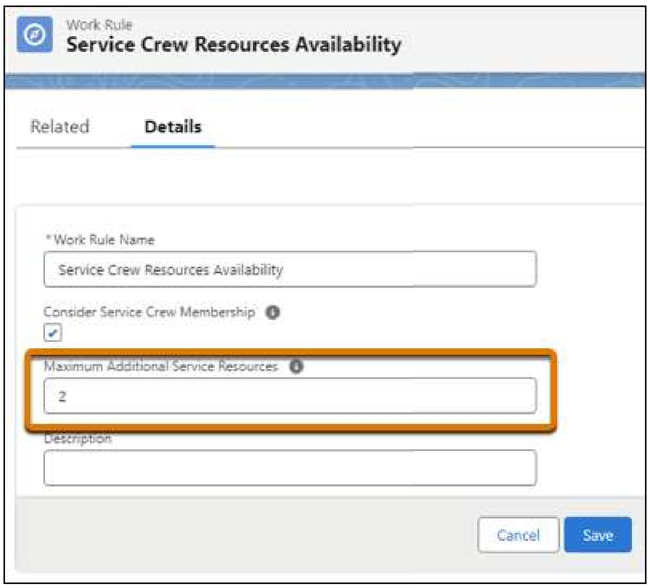
Salesforce Help: Get Ready for Field Service Scheduling and Optimization (can be outdated or unavailable during release preview)

Utilize Crews Effectively by Limiting the Number of Service Resources in a Crew

Ensure that crews are optimally utilized and that no resources are idle by defining the maximum number of additional service resources. For example, if a service appointment requires a minimum of three service resources in a crew, specify that a maximum of two additional resources are allocated to the crew. This maximum means that a service appointment can be scheduled to a crew of size 3 to 5 service resources.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that **Field Service Enhanced Scheduling and Optimization** is enabled. In the Field Service Admin app, on the Work Rules tab, select the Service Crew Resource Availability work rule. Enter the maximum number of additional service resources.



SEE ALSO:

Salesforce Help: Work Rule Type: Service Crew Resources Availability (can be outdated or unavailable during release preview)

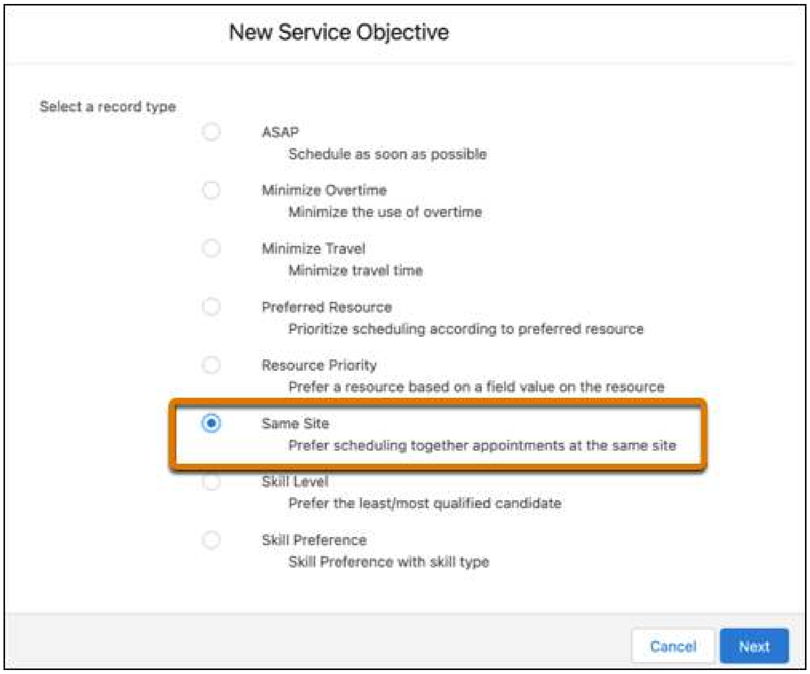
Salesforce Help: Get Ready for Field Service Scheduling and Optimization (can be outdated or unavailable during release preview)

Improve Your Mobile Worker Efficiency by Grouping Same Site Service Appointments

Ensure that a minimal number of mobile workers visit the same location by having the optimization services group service appointments located at the same site. Use the Same Site service objective to prefer that jobs get scheduled together while considering all other objectives and KPIs.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that **Field Service Enhanced Scheduling and Optimization** is enabled. Add the Same Site service objective to your scheduling policy from the Customize Scheduling Policies page in Guided Setup or the Scheduling Policy Objectives related list on a policy.



SEE ALSO:

Salesforce Help: Create and Manage Field Service Scheduling Policies (can be outdated or unavailable during release preview)

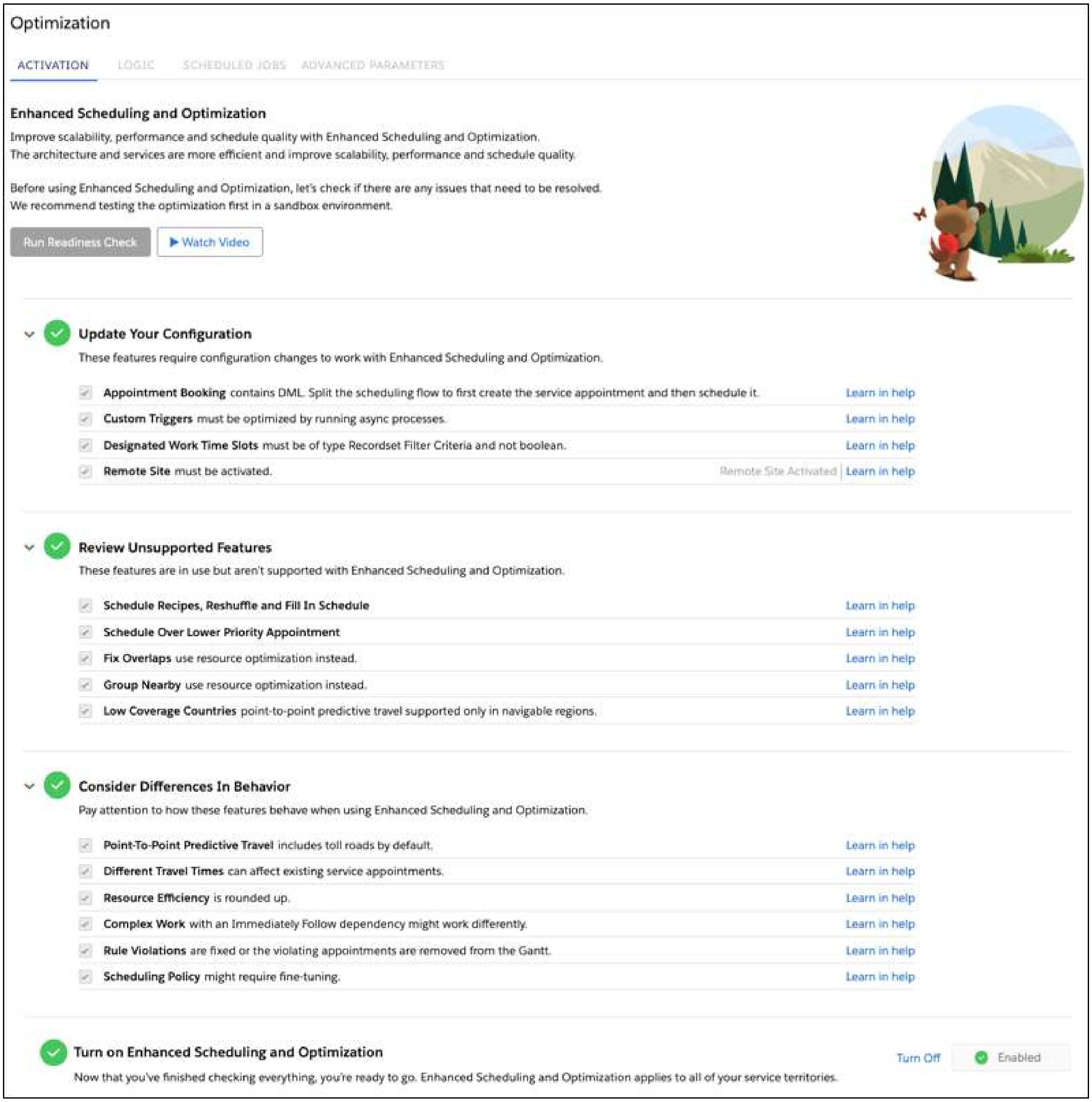
Salesforce Help: Get Ready for Field Service Scheduling and Optimization (can be outdated or unavailable during release preview)

Transition Smoothly to Enhanced Scheduling and Optimization with Guided Steps

Easily upgrade all service territories to use Enhanced Scheduling and Optimization with a guided flow comprising readiness checks and links to Salesforce Help. Discover what configuration updates are required for your Salesforce org, get workarounds for unsupported features, and review the differences in behavior when using the enhanced engine. This transparency helps users prior to Summer '23 adopt Enhanced Scheduling and Optimization and benefit from innovative features, more efficient services, and improved scalability, performance, and schedule quality.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In the Field Service Admin app, go to Field Service Settings. Select Getting Started and then select the Home tab, or go directly to the Activation page under Optimization. Click **Run Readiness Check**. Review the information, click to learn more in Salesforce Help, and then turn on Enhanced Scheduling and Optmization for all service territories.



SEE ALSO:

Salesforce Help: Transition to Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)

Salesforce Help: Get Ready for Field Service Scheduling and Optimization (can be outdated or unavailable during release preview)

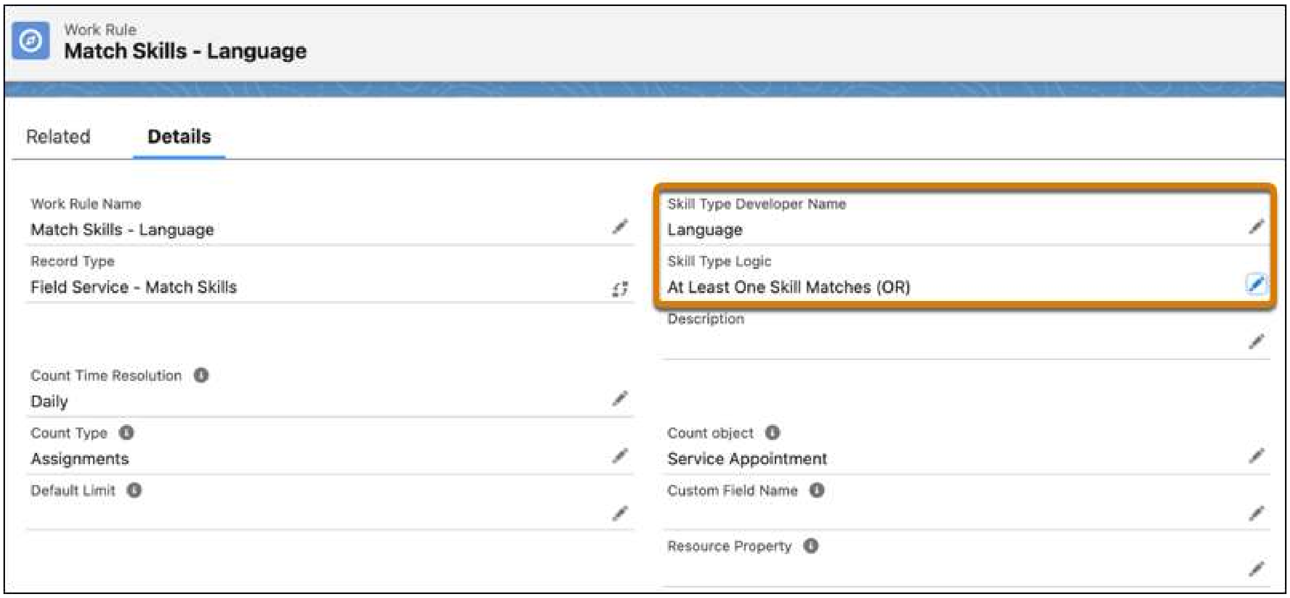
Salesforce Video: Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)

Evaluate More Candidates for Service Appointment Scheduling by Relaxing Skill Requirements

Qualify more service resources to match at least one, but not necessarily all, skill requirements of a certain skill type. For example, a service appointment requires a caregiver who can perform procedures required for diabetes care, and the caregiver must speak English or Spanish. Previously, candidates had to have all the required skills in the Match Skills work rule, such as English and Spanish, even though only one language is sufficient. Now you can select the logic for each skill type.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that **Field Service Enhanced Scheduling and Optimization** is enabled. In Setup, create skill types and assign them to relevant skills. Then, in the Match Skills work rule record, select the Skill Type Developer Name and the corresponding Skill Type Logic as any (OR) or all (AND).



SEE ALSO:

Salesforce Help: Work Rule Type: Match Skills (can be outdated or unavailable during release preview)

Salesforce Help: Get Ready for Field Service Scheduling and Optimization (can be outdated or unavailable during release preview)

Improve Scheduling Quality with Complex Work Sliding for Multiple Resources

Sliding is now available for appointments with dependencies that are scheduled to multiple resources. These appointments can move to a later time within each resource's availability. Previously, sliding was available only for appointments with dependencies that were scheduled to the same resource.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that **Field Service Enhanced Scheduling and Optimization** is enabled. Then, in the Field Service Settings app, enable service appointment sliding.

SEE ALSO:

Salesforce Help: Complex Work in Field Service (can be outdated or unavailable during release preview)

Crew Management

Create or update service crews easily by filtering the Gantt for crew skills in the Crew Management tool. Search for the service resources that you need when creating a service crew or updating crew memberships. And, crew colors on the Gantt provide a quick means of identification.

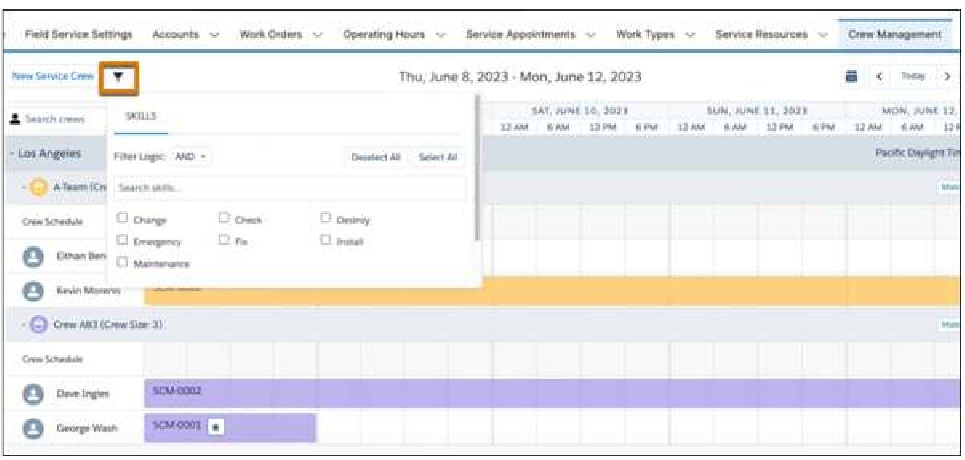
IN THIS SECTION:

Create and Maintain Crews More Efficiently by Filtering According to Crew Skills

Easily team up your crews in the Crew Management tool by filtering the Crew Management Gantt's contents based on service crew skills.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In the Crew Management tool, click the Gantt filter icon and then search for and select the relevant skills.



SEE ALSO:

Salesforce Help: Set Up Crew Management (can be outdated or unavailable during release preview)

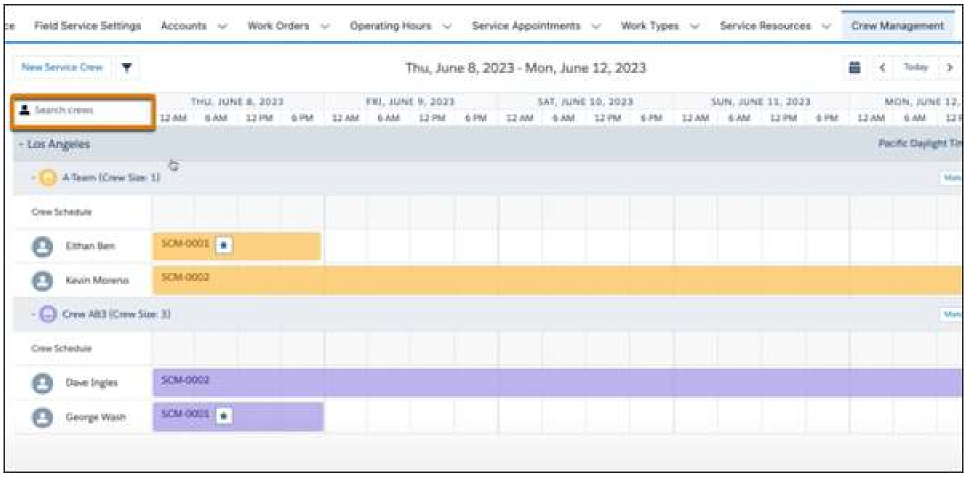
Salesforce Help: Manage Field Service Crew Membership (can be outdated or unavailable during release preview)

Search for Service Crews and Crew Members Easily in the Crew Management Tool

Find resources when creating service crews or updating service crew memberships using the new search capability. And, service crew resources are now colored on the Crew Management Gantt so that you can identify them at a glance.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In the Crew Management tool, enter a service crew or a crew member name in the search field. You can search for multiple resources by separating the names with a comma.



SEE ALSO:

Salesforce Help: Set Up Crew Management (can be outdated or unavailable during release preview)

Salesforce Help: Manage Field Service Crew Membership (can be outdated or unavailable during release preview)

Dispatcher Console

Increase the productivity of your dispatchers with the new Gantt enhancements. Create and update resource absences quickly on the Gantt. Sort candidates and time slots by grade and color to find the best candidates for scheduling. Use the updated skill filter to identify the best-qualified resources to assign to service appointments. And, get the most from your Gantt with the redesigned user experience.

IN THIS SECTION:

Define Resource Absences Easily on the Gantt

Add absence duration with more flexibility using the updated interface. You can now specify hours and minutes when creating resource absences on the Gantt. Previously, you could specify the duration only in minutes.

Reassign Resource Absences Effortlessly on the Gantt

Drag resource absences on the Gantt from one service resource to another to reassign absences. This update helps you manage resource absences and scheduling changes quickly. Previously, you could only delete the absence for one resource and create one for the other resource.

Modify Resource Absences from the Gantt More Efficiently

Edit absences from the Gantt to update resource availability quickly. Previously, you could edit only the resource absence record.

View Overlapping Resource Absences Easily on the Gantt

Define the height of overlapping resource absences shown on the Gantt to better identify resource absences. Previously, only one absence was visible, and additional absences were hidden behind it.

Identify Candidates on the Gantt More Efficiently

You can now sort candidates and time slots by grade and color on the Gantt to quickly identify the best scheduling options for candidates. Previously, sorting was unavailable.

Find the Best-Qualified Resources with the Skill Filter

With the updated skill filter, you can search through all your service resources' available skills to identify the best resource to assign to a service appointment. The last applied filter is saved until the next time you update it. Previously, the skill filter could search only through the first 50 skills of a service resource.

View More Information at a Glance on the Service Appointments List

Resize the Service Appointments list columns to show more information and use the scroll bar to view all the columns. Previously, only a limited amount of information could be shown.

Show Week Numbers on the Gantt for Better Orientation

Easily identify fiscal weeks by adding week numbers to the Gantt to align with your operational timeline.

Reflect Scheduling Changes Quickly on the Gantt

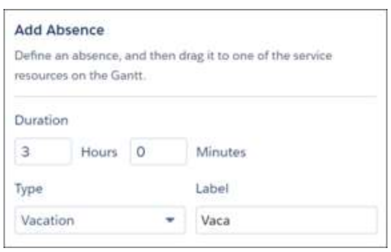
Update resource scheduling more efficiently by extending or shortening the duration of appointments and absences directly on the Gantt. Previously, you could edit only the service appointment or absence record to adjust its duration.

Define Resource Absences Easily on the Gantt

Add absence duration with more flexibility using the updated interface. You can now specify hours and minutes when creating resource absences on the Gantt. Previously, you could specify the duration only in minutes.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: On the Gantt, click the absence creator icon, enter the absence details, and then drag it to one of the service resources.



SEE ALSO:

Salesforce Help: Work in the Field Service Dispatcher Console (can be outdated or unavailable during release preview)

Reassign Resource Absences Effortlessly on the Gantt

Drag resource absences on the Gantt from one service resource to another to reassign absences. This update helps you manage resource absences and scheduling changes quickly. Previously, you could only delete the absence for one resource and create one for the other resource.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

SEE ALSO:

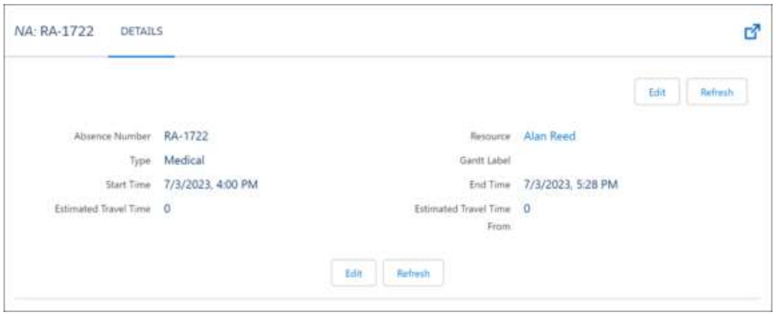
Salesforce Help: Work in the Field Service Dispatcher Console (can be outdated or unavailable during release preview)

Modify Resource Absences from the Gantt More Efficiently

Edit absences from the Gantt to update resource availability quickly. Previously, you could edit only the resource absence record.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Double-click a resource absence on the Gantt and then click **Edit** in the Details window.



SEE ALSO:

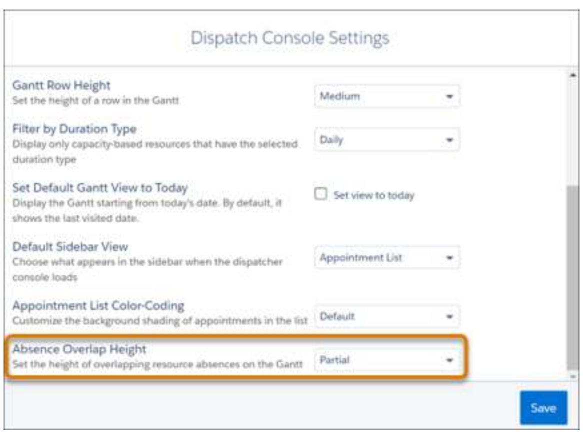
Salesforce Help: Work in the Field Service Dispatcher Console (can be outdated or unavailable during release preview)

View Overlapping Resource Absences Easily on the Gantt

Define the height of overlapping resource absences shown on the Gantt to better identify resource absences. Previously, only one absence was visible, and additional absences were hidden behind it.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Click **Dispatch Console Settings**, and then select the height in Absence Overlap Height.



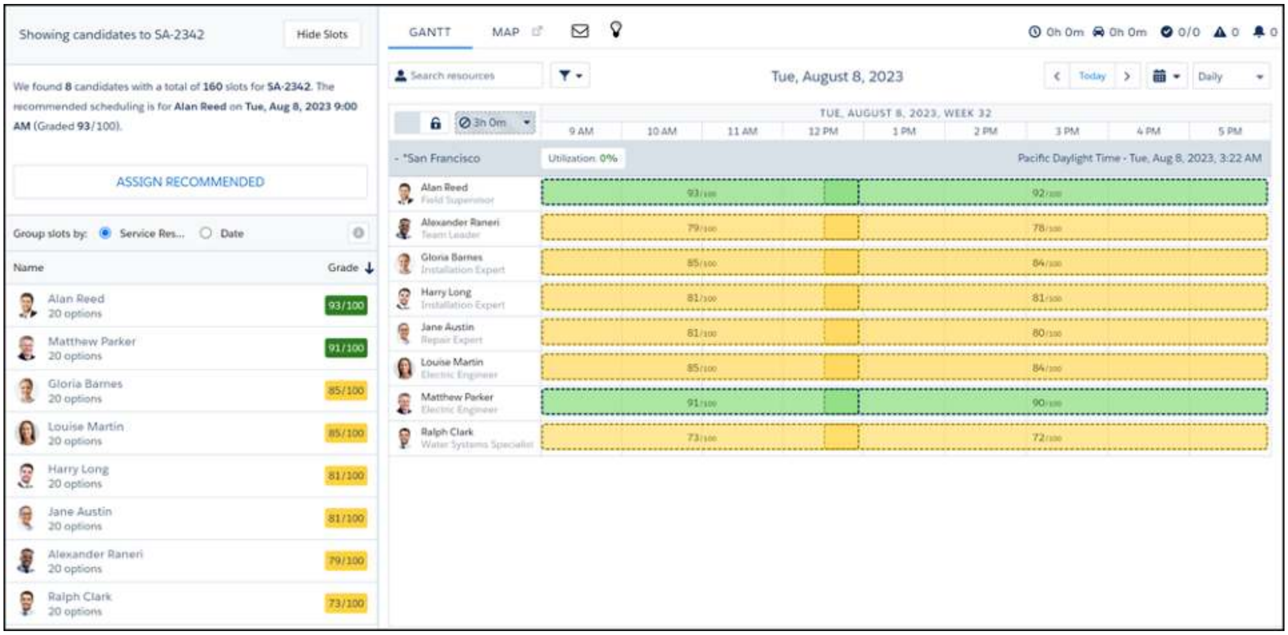
SEE ALSO:

Salesforce Help: Work in the Field Service Dispatcher Console (can be outdated or unavailable during release preview)

Identify Candidates on the Gantt More Efficiently

You can now sort candidates and time slots by grade and color on the Gantt to quickly identify the best scheduling options for candidates. Previously, sorting was unavailable.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.



SEE ALSO:

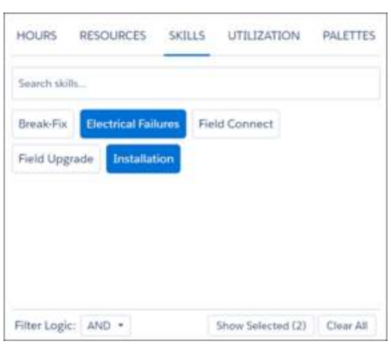
Salesforce Help: Work in the Field Service Dispatcher Console (can be outdated or unavailable during release preview)

Find the Best-Qualified Resources with the Skill Filter

With the updated skill filter, you can search through all your service resources' available skills to identify the best resource to assign to a service appointment. The last applied filter is saved until the next time you update it. Previously, the skill filter could search only through the first 50 skills of a service resource.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Click the Gantt filter icon and then select the relevant skills on the Skills tab.



SEE ALSO:

Salesforce Help: Work in the Field Service Dispatcher Console (can be outdated or unavailable during release preview)

View More Information at a Glance on the Service Appointments List

Resize the Service Appointments list columns to show more information and use the scroll bar to view all the columns. Previously, only a limited amount of information could be shown.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

SEE ALSO:

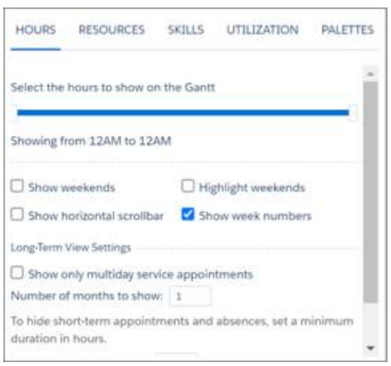
Salesforce Help: Work in the Field Service Dispatcher Console (can be outdated or unavailable during release preview)

Show Week Numbers on the Gantt for Better Orientation

Easily identify fiscal weeks by adding week numbers to the Gantt to align with your operational timeline.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Click the Gantt filter icon and then select **Show week numbers** on the Hours tab.



SEE ALSO:

Salesforce Help: Work in the Field Service Dispatcher Console (can be outdated or unavailable during release preview)

Reflect Scheduling Changes Quickly on the Gantt

Update resource scheduling more efficiently by extending or shortening the duration of appointments and absences directly on the Gantt. Previously, you could edit only the service appointment or absence record to adjust its duration.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, enable adjusting duration in the Field Service Dispatcher custom permissions.

SEE ALSO:

Salesforce Help: Work in the Field Service Dispatcher Console (can be outdated or unavailable during release preview)

Regulate Data Sharing with Advanced Security Settings

Choose whether to share data with external apps with new advanced security settings in the Field Service Org Settings. Three new fields let you limit data sharing on the Field Service mobile app and managed package.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Use the new settings to limit data sharing on the Field Service mobile app and managed package.

Create Dependencies Between Service Appointments with More Flexibility

Implement complex work chains easily by selecting a wider variety of lookup fields to create dependencies between service appointments. Previously, you could select only service appointments with the same account or work order.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: From the object management settings for service appointments, select **Complex Work Lookup Fields** in Field Sets to define the lookup fields available for selection.

SEE ALSO:

Salesforce Help: Complex Work in Field Service (can be outdated or unavailable during release preview)

Get Better Results from Health Check to Improve Your Field Service Configuration

Health Check now runs relevant tests based on whether you're using Enhanced Scheduling and Optimization and provides more accurate results and recommendations.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

SEE ALSO:

Salesforce Help: Test Your Field Service Configuration with Health Check (can be outdated or unavailable during release preview)

Field Service Asset Management

You can now get real-time updates on asset performance, create recordset filter criteria rules with asset fields and asset attributes more efficiently, and leverage the out-of-the-box Field Service data kit in Data Cloud. You can also track KPIs related to average asset repair and failure times and leverage asset attributes to stay ahead of maintenance needs. When working with asset attributes, you can set default values for the checkbox and date data types of attribute definitions and restrict the sharing of asset attributes. Additionally, learn how to prepare for the upcoming retirement of the maintenance plan's frequency fields.

IN THIS SECTION:

Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

The Frequency and Frequency Type fields on the Maintenance Plan are being retired. To prepare for this retirement and take advantage of updated features, migrate your Frequency and Frequency Type data to Maintenance Work Rules. This update was first available in Summer '22 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Winter '25.

Proactive Services

Get more proactive about your maintenance needs. Stay in the loop with real-time updates on asset performance. Efficiently create recordset filter criteria rules using asset fields and attributes. Take advantage of the out-of-the-box Field Service data kit in Data Cloud. Keep track of crucial KPIs like average asset repair and failure times. And, stay ahead of maintenance needs by leveraging valuable asset attributes.

IN THIS SECTION:

Leverage the Power of Field Service in Data Cloud

The SFS out-of-the-box data bundle now includes the Field Service Data Kit. Additionally, the data cloud reference model now supports these asset-related entities: Asset Warranty, Location, Service Appointment, Service Contract, Warranty Term, Work Order, Work Order Line Item, and Work Type.

Shift to Proactive Maintenance with Asset Attributes

Create usage-based maintenance work rules with asset attributes that represent specific asset use. For example, manage maintenance based on an attribute value such as vehicle mileage or hours since previous service.

Monitor Asset Performance with Real-Time Updates

Asset managers can now view real-time updates on the asset's threshold cards. This change reduces the chance of missing out on important updates related to the asset's health and helps automate asset monitoring. Previously, the browser had to be refreshed to view updates.

Get a Heads-Up on Maintenance Performance by Monitoring Asset Attributes

Create recurring work orders on a floating schedule based on asset attributes. For example, define maintenance conditions based on a specific attribute value, such as engine temperature or engine RPM. You can monitor these conditions, create and perform maintenance work for the engine, and schedule subsequent maintenance based on the last service date.

Create Recordset Filter Criteria Rules for Assets with More Flexibility

Define asset fields and asset attributes from the new Criteria Field dropdown list to create recordset filter criteria rules. Previously, you could add values to this field only from the recordset filter criteria record.

Track Asset Downtime for Repairs

Monitor the average time the team spends on repairs and how successful the team is at reducing future issues. On your asset, you can now review the average time to repair and average time between failures. These metrics are comparable to the industry standards Mean Time To Repair (MTTR) and Mean Time Between Failures (MTBF).

Leverage the Power of Field Service in Data Cloud

The SFS out-of-the-box data bundle now includes the Field Service Data Kit. Additionally, the data cloud reference model now supports these asset-related entities: Asset Warranty, Location, Service Appointment, Service Contract, Warranty Term, Work Order, Work Order Line Item, and Work Type.

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

SEE ALSO:

Salesforce Help: Get Started with Data Cloud (can be outdated or unavailable during release preview)

Shift to Proactive Maintenance with Asset Attributes

Create usage-based maintenance work rules with asset attributes that represent specific asset use. For example, manage maintenance based on an attribute value such as vehicle mileage or hours since previous service.

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

SEE ALSO:

Salesforce Help: Create Usage-Based Maintenance (can be outdated or unavailable during release preview)

Salesforce Help: Manage Field Service Asset Attributes (can be outdated or unavailable during release preview)

Monitor Asset Performance with Real-Time Updates

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

SEE ALSO:

Salesforce Help: Manage Field Service Asset Attributes (can be outdated or unavailable during release preview)

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

SEE ALSO:

Salesforce Help: Manage Field Service Asset Attributes (can be outdated or unavailable during release preview)

Create Recordset Filter Criteria Rules for Assets with More Flexibility

Define asset fields and asset attributes from the new Criteria Field dropdown list to create recordset filter criteria rules. Previously, you could add values to this field only from the recordset filter criteria record.

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

How: On the recordset filter criteria record, open the Related tab. Click **New** on the recordset filter criteria rules related list, and then select a field or attribute.

SEE ALSO:

Salesforce Help: Manage Field Service Asset Attributes (can be outdated or unavailable during release preview)

Track Asset Downtime for Repairs

Monitor the average time the team spends on repairs and how successful the team is at reducing future issues. On your asset, you can now review the average time to repair and average time between failures. These metrics are comparable to the industry standards Mean Time To Repair (MTTR) and Mean Time Between Failures (MTBF).

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

SEE ALSO:

Salesforce Help: Track Availability and Reliability (can be outdated or unavailable during release preview)

Asset Attributes

Set default values more efficiently for checkbox and date data types when creating attribute definitions, and keep your asset attributes information secure when sharing asset records by creating restriction rules.

IN THIS SECTION:

Add Default Values for Attribute Definitions Easily

When creating an attribute definition, you can now select a checkbox to set the default value for the checkbox data type. You can also define the default value for the date data type using the new calendar component. Previously, you could only enter free text for the default value. With the new components, the attribute definition's information is unified, making it easy to analyze and generate reports.

Secure Asset Attribute Information When Sharing Asset Records

Determine which asset attribute information to exclude when sharing asset records by creating restriction rules. The rules prevent sharing confidential asset attributes along with the asset record. For example, define a rule that restricts sharing the asset attribute if its data type is a number.

Add Default Values for Attribute Definitions Easily

When creating an attribute definition, you can now select a checkbox to set the default value for the checkbox data type. You can also define the default value for the date data type using the new calendar component. Previously, you could only enter free text for the default value. With the new components, the attribute definition's information is unified, making it easy to analyze and generate reports.

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

How: On the Attribute Definition tab, click **New**. Select the checkbox or date data type and then set the default value.

SEE ALSO:

Salesforce Help: Manage Field Service Asset Attributes (can be outdated or unavailable during release preview)

Secure Asset Attribute Information When Sharing Asset Records

Determine which asset attribute information to exclude when sharing asset records by creating restriction rules. The rules prevent sharing confidential asset attributes along with the asset record. For example, define a rule that restricts sharing the asset attribute if its data type is a number.

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

How: From the object management settings for asset attributes, go to Restriction Rules and click **Create New Rule**.

SEE ALSO:

Salesforce Help: Manage Field Service Asset Attributes (can be outdated or unavailable during release preview)

Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

The Frequency and Frequency Type fields on the Maintenance Plan are being retired. To prepare for this retirement and take advantage of updated features, migrate your Frequency and Frequency Type data to Maintenance Work Rules. This update was first available in Summer '22 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Winter '25.

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

When: This release update is enforced in Winter '25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: Recent changes to Maintenance Work Rules replace and improve the functionality provided by the frequency fields. In Winter '25, the retired fields will impact work order generation.

How: Find the release update in Setup. For Migration from Frequency Fields, follow the testing and activation steps.

For all impacted maintenance plans, select a maintenance plan that uses the frequency fields without the maintenance work rules. Update the selected maintenance plan to use maintenance work rules instead, and click **Enable Test Run**. To hide the frequency fields after the migration, go to Setup, turn off Field Service, and then turn it on again.

SEE ALSO:

Salesforce Help: Release Updates (can be outdated or unavailable during release preview)

Salesforce Knowledge Article: Migration Retirement Tips and Tricks (can be outdated or unavailable during release preview)

Salesforce Help: Get Excited about Using Maintenance Work Rules (can be outdated or unavailable during release preview)

Salesforce Video: Spotlight on Implementing Preventative Maintenance (can be outdated or unavailable during release preview)

Field Service Administration and Processes

Create brand-savvy service documents and make mobile workers' jobs more effective and efficient with Document Builder.

IN THIS SECTION:

Create Richly Formatted Service Documents with Document Builder (Beta)

Create service documents that reflect your business goals and branding, make your mobile workers' jobs more effective and efficient, and serve your customers' needs. Upgraded service documents now include document preview, signature capture, embedded images, and PDF generation features. Document Builder provides standard components that you can drag onto the Template Builder to create beautiful, functional service documents. Create custom Lightning web components (LWCs) to meet your needs. And you can now use spanning fields to target polymorphic lookups – drag polymorphic spanning fields from the component panel onto the canvas so your service document reflects relevant data from related records.

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Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Enterprise, Unlimited, and Developer editions.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: From Setup, in the Quick Find box, enter Field Service Settings, and select the **Enable Document Builder** checkbox. A notification informs you that your org is being registered. A few minutes later you receive an email notification letting you know whether you registered. After you're registered, you can start creating service document templates. Only Salesforce admins, with access to the Setup menu, can access the builder experience and create service document templates.

Field Service Customer Engagement

Improve your Visual Remote Assistant efficiency by analyzing data on the Value dashboard. Retain Visual Remote Assistant images temporarily for increased data security. Put your company at the forefront after each Visual Remote Assistant session by navigating customers to your company website. And, improve efficiency and provide better customer support by offering Visual Remote Assistant self-service sessions.

IN THIS SECTION:

Get Useful Information on Visual Remote Assistant with the Value Dashboard

Discover opportunities to reduce costs and increase the value gained when using Visual Remote Assistant with insights from the Value dashboard. This dashboard provides details on Visual Remote Assistant usage, potential value per session, and potential value increase.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Set Up Visual Remote Assistant for Field Service (can be outdated or unavailable during release preview)

Keep Data Safe by Limiting the Days You Retain Visual Remote Assistant Images

Ensure privacy and improve data security by using data retention policy settings. The images that your agent saves during the Visual Remote Assistant session are kept only for the number of days required by your business and are then automatically deleted. Previously, you could either keep the images indefinitely or not save them.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Set Up Visual Remote Assistant for Field Service (can be outdated or unavailable during release preview)

Increase Your Brand Awareness After a Visual Remote Assistant Session

Share information about your company, its products, or its services with your customers by redirecting them to your website after the Visual Remote Assistant session has ended.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Set Up Visual Remote Assistant for Field Service (can be outdated or unavailable during release preview)

Reduce Customer Wait Time by Offering a Visual Remote Assistant Self-Service Session

Let agents provide customers with a link to a self-service session. Customers then upload images at their convenience. Agents can leverage these images to support the customer, for example, by troubleshooting product issues or tailoring new offers. Previously, customers had to adapt to the agent's time for image uploading.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

Salesforce Help: Set Up Visual Remote Assistant for Field Service (can be outdated or unavailable during release preview)

Field Service Mobile

Scan barcodes directly from the app. Use deep linking to reduce workflow friction between platforms. Customize the tab bar to improve workflows. Get automated timestamps from location-based actions. And, see two apps simultaneously on Android tablets.

IN THIS SECTION:

Boost Productivity with a Customized Tab Bar

Use the Field Service Mobile App Builder to tailor the app's tab bar for your mobile workers and assign the configuration to profiles. Previously, the tab bar was static and couldn't be changed to meet your business needs.

Get Accurate Site Check-Ins and Check-Outs (Pilot)

Protect the privacy of your mobile workers while keeping track of the actual times that mobile workers arrived and left job sites. With automated timestamps for location-based actions, you can then create reports that give insights on the time that mobile workers spend at each location. Timestamps are captured even when the mobile app is offline and are more reliable than the manual input given by mobile workers.

Multitask Easily with Field Service Mobile for Android Tablets

Navigate between apps on Android tablets with an updated user experience. Mobile workers can now see two apps at the same time using split-screen functionality instead of switching between apps to get work done.

Save Time and Improve Accuracy by Scanning Barcodes

Get more out of the Field Service mobile app by creating a Lightning web component (LWC) that uses the Barcode Scanner plug-in. Then, in the Field Service mobile app, let the LWC use the iOS device's native camera to scan a barcode. Previously, you had to manually enter the numbers that the barcode represents. For example, use Barcode Scanner to help manage inventory.

Where: This feature is available in the Field Service mobile app for iOS.

SEE ALSO:

Salesforce Help: Customize and Extend the Mobile App with Lightning Web Components (can be outdated or unavailable during release preview)

Reduce Workflow Friction Between Platforms

Pass data between Lightning web components or from external apps with deep linking. This feature saves time and ensures accuracy instead of relying on manual, error-prone data entry in forms and similar content.

Where: This change applies to the Field Service mobile app for Android and iOS.

How: Use the deep linking schema for quick actions with your custom Lightning quick action and parameter key-value pairs for the data you want to pass. See the example provided in the Field Service developer guide.

SEE ALSO:

Salesforce Developers: Add Query Parameters (can be outdated or unavailable during release preview)

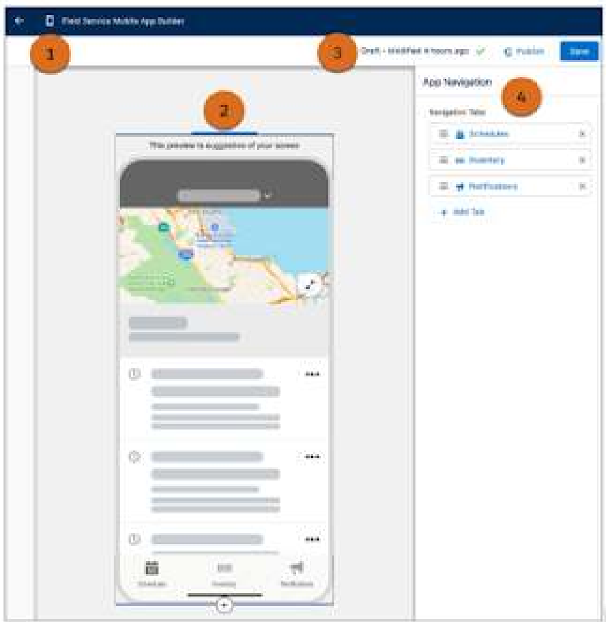
Boost Productivity with a Customized Tab Bar

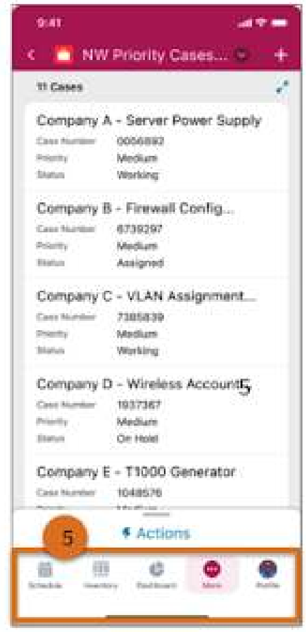
Use the Field Service Mobile App Builder to tailor the app's tab bar for your mobile workers and assign the configuration to profiles. Previously, the tab bar was static and couldn't be changed to meet your business needs.

Where: This feature is available in the Field Service mobile app for iOS and Android.

When: This feature is available in Winter '24 for iOS. This feature is available for Android on a rolling basis after the Winter '24 release is complete and is available to all customers by December 4, 2023.

How: Use the Field Service Mobile App Builder to customize tabs on the Field Service mobile app.





The builder interface consists of the header, which shows the page label (1) the page canvas, which shows a preview of the configured mobile app screen (2) the status bar which, shows the status of the configuration (3) and the properties pane, where you configure tabs (4). Here you see a customized tab bar in the Field Service mobile app (5).

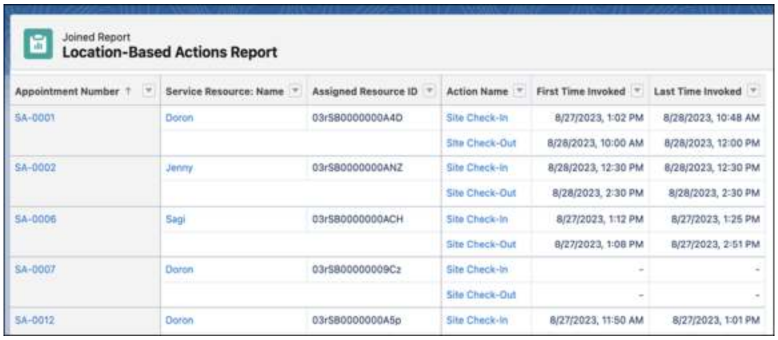
Get Accurate Site Check-Ins and Check-Outs (Pilot)

Protect the privacy of your mobile workers while keeping track of the actual times that mobile workers arrived and left job sites. With automated timestamps for location-based actions, you can then create reports that give insights on the time that mobile workers spend at each location. Timestamps are captured even when the mobile app is offline and are more reliable than the manual input given by mobile workers.

Where: This change applies to the Field Service mobile app for Android and iOS.

Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

How: Create a location-based action that's triggered when the mobile worker arrives at a location and another one for when they leave the location. Then, create a report that shows the timestamps.



Joined Report
Location-Based Actions Report

Appointment Number	Service Resource: Name	Assigned Resource ID	Action Name	First Time Invoked	Last Time Invoked
SA-0001	Doron	03rSB0000000A4D	Site Check-In	8/27/2023, 1:02 PM	8/28/2023, 10:48 AM
			Site Check-Out	8/28/2023, 10:00 AM	8/28/2023, 12:00 PM
SA-0002	Jenny	03rSB0000000ANZ	Site Check-In	8/28/2023, 12:30 PM	8/28/2023, 12:30 PM
			Site Check-Out	8/28/2023, 2:30 PM	8/28/2023, 2:30 PM
SA-0006	Sagi	03rSB0000000ACH	Site Check-In	8/27/2023, 1:12 PM	8/27/2023, 1:25 PM
			Site Check-Out	8/27/2023, 1:08 PM	8/27/2023, 2:51 PM
SA-0007	Doron	03rSB00000009Cz	Site Check-In	-	-
			Site Check-Out	-	-
SA-0012	Doron	03rSB0000000A5p	Site Check-In	8/27/2023, 11:50 AM	8/27/2023, 1:01 PM

SEE ALSO:

Salesforce Help: Set Up Location-Based Actions for the Field Service Mobile App (can be outdated or unavailable during release preview)

Multitask Easily with Field Service Mobile for Android Tablets

Navigate between apps on Android tablets with an updated user experience. Mobile workers can now see two apps at the same time using split-screen functionality instead of switching between apps to get work done.

Where: This feature is available in the Field Service mobile app for Android tablets with standard multi-window support.

How: Activate split-screen mode for Android tablets from the Recents screen. Check Android developers multi-window support for instructions.

Spotlight on Field Service Content

Use landing pages to guide you on your path to setup success.

IN THIS SECTION:

Simplify Setup Tasks with Landing Pages

The best of the Field Service learning map is now available in Help, designed as user-friendly landing pages to guide you as you set up Field Service. Landing pages in Help are translated and provide useful insights with Salesforce analytics that give you the best learning and setup experience. Previously, the Field Service learning map was available only in English, with limited information on user journeys.

Simplify Setup Tasks with Landing Pages

The best of the Field Service learning map is now available in Help, designed as user-friendly landing pages to guide you as you set up Field Service. Landing pages in Help are translated and provide useful insights with Salesforce analytics that give you the best learning and setup experience. Previously, the Field Service learning map was available only in English, with limited information on user journeys.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions and in the Field Service mobile app for Android and iOS.

When: Landing pages are available in Salesforce Help soon after the Winter '24 release.

SEE ALSO:

Salesforce Help: Where Do I Start with Field Service? (can be outdated or unavailable during release preview)

Field Service APIs

Use Field Service Apex API to assign service appointments to resources according to their geolocations and schedule appointments for recurring visits. Give mobile workers the ability to use NFC tags with the new NFCService API and to scan documents with the new DocumentScanner API.

IN THIS SECTION:

Identify All Matching Service Territories for a Service Appointment

Find all service territory polygons that match a geolocation using the new PolygonUtils Apex method. When polygons overlap, all relevant territories are found. Previously, only one territory was identified based on territory hierarchy. This change provides flexibility for assigning service appointments to service resources.

Where: This feature is available in Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Use the new getAllPolygonsByLatLong(longitude, latitude) Apex method.

SEE ALSO:

Salesforce Developers: PolygonUtils Class (can be outdated or unavailable during release preview)

Manage Repeat Visits with Recurring Appointments API

Schedule custom recurring patterns efficiently using the new Field Service Recurring Appointments global Apex method, instead of manually scheduling each service appointment. For example, a mobile medical care provider visits a patient for physical therapy two days per week for six weeks. You can also make room for exceptions to the recurring pattern, for example, if a customer has to reschedule for a different time or adjacent day.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

Hyperforce

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

IN THIS SECTION:

Access Salesforce in More Regions with Hyperforce

Use the scale and agility of the public cloud to deploy Salesforce apps and services in a growing number of regions around the world. Hyperforce gives you more choice and control over data residency.

Where: Delivery via Hyperforce of the Salesforce Customer 360 application suite, including Sales Cloud, Service Cloud, B2B Commerce, Platform, and Industries Cloud is newly available in Indonesia and Italy. It continues to be available in Australia, Canada, France, Germany, India, Japan, Singapore, the United Kingdom, and the United States. The Salesforce Customer 360 application suite is available on Hyperforce by request only in South Korea and Sweden. Additionally, these products are available on Hyperforce where noted.

Cloud	Product or Feature	Description	Available In
Marketing	CDP	Salesforce CDP can help keep you focused with a single source of truth, providing more intelligent, actionable, and trusted data.	Germany, India, United States
Marketing	Marketing Cloud Engagement	Marketing Cloud Engagement helps build customer relationships efficiently with personalized marketing messages and automated journeys.	India
Industries	Einstein Relationship Insights	Supercharge sales with intelligent relationship discovery. Automate account and contact research, visualize relationship networks, and connect with key decision-makers faster.	United States
Analytics	CRM Analytics	CRM Analytics, previously called Tableau CRM, is a cloud-based platform for connecting data	Australia, Brazil, Canada, France, Germany, India, Indonesia, Italy, Japan, Singapore, South Korea,

Cloud	Product or Feature	Description	Available In
		from multiple sources, creating interactive analytics on that data, and sharing those views in apps. CRM Analytics is a better way to distribute insights to business users so that they can understand and act on changing information.	Sweden, United Kingdom, United States

Migrate to Hyperforce with Hyperforce Assistant (Generally Available)

You can migrate to Hyperforce with help from Hyperforce Assistant. The assistant is now generally available for production and sandbox orgs. View the updated Hyperforce region availability map on the Learn page. Additionally, the hard-coded references and connectivity checks in the Prepare phase have been updated to provide you with a better overall experience.

Where: Hyperforce Assistant is available in Lightning Experience in all editions.

How: From Setup, in the Quick Find Box, enter `Hyperforce Assistant` and then select **Hyperforce Assistant**.

Salesforce Object ID Is Refined to Use Three Characters for Server IDs (Release Update)

Previously, a valid Salesforce Object ID had a two-character Server ID or Instance ID as the 4th and 5th characters in the overall 15-18 characters. With this change, Salesforce now generates three-character Server IDs, which are the 4th, 5th, and 6th characters in the Object ID. Existing Object IDs don't change and neither does the length of an Object ID, which is still 15-18 characters. This update can cause test cases to fail if the test code doesn't account for the new ID structure. This release update was first available in Summer '23 is enforced in Winter '24.

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

When: This release update was first made available in Summer '23 is enforced in Winter '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: This change impacts customers who have custom code or tests that assume the Server ID can be only the 4th and 5th characters of a Salesforce ID rather than the 4th, 5th, and 6th. After the change is enforced, valid test cases can fail and invalid ones can pass.

How: If test cases aren't working correctly due to code that assumes invalid ID structures, adjust your code to account for the new ID structure.

SEE ALSO:

Release Updates

Industries

Industries solutions shape Salesforce to the needs of your business, reducing the need for you to customize things yourself. Outcome Management and Context Service are now generally available. Improve engagement with stores and plan better promotions with Consumer Goods Cloud. Financial Services Cloud can now organize both internal and external data better with Data Cloud. Track grant recipients' budgets with Grantmaking. Health Cloud can now bring its CRM data into Marketing Cloud with Marketing Cloud Engagements. Automate and improve warranty claim adjudication processes with Manufacturing Cloud. Plan your company's social impact with materiality assessments in Net Zero Cloud. Manage the end-to-end lifecycle of contracts with Salesforce Contracts. We also have plenty of changes for Education Cloud, Nonprofit Cloud, Media Cloud, Industries common features, and many more.

IN THIS SECTION:

Industries Order Management

Industries Order Management (also called Order Management, IOM or just OM) is a product module that delivers best-in-class, next-generation order management capabilities to communications, media and energy companies.

Insurance

Insurance connects frontline agents, back-office teams, and customers with flexible components that support policy administration, benefit administration, claims, and billing.

Manufacturing Cloud

Design an end-to-end automated adjudication process for warranty claims with scalable business rules, and manage claims data more efficiently. Get actionable insights on warranty claims with CRM Analytics for Warranty Lifecycle Management. Adjudicate product warranty claims faster by using scores to assess the likelihood of the claims getting approved. Link an asset with all the stakeholders in its lifecycle. Track manufacturing fleet operations with Fleet Management features. Make the most out of enhancements to Engagement, Timeline, Actionable List Members, List Builder for Data Cloud Segment, and more.

Media Cloud

Salesforce Industries enables you to attract, engage, and support customers from anywhere, maximize lifetime value, and improve operational efficiency across the media value chain.

Loyalty Management

Integrate Loyalty Management with a Point of Sale (POS) system and enhance customer engagement, increase sales, and foster customer loyalty. Use Actionable Segmentation to get a list of members who are eligible for a promotion. View the vouchers that have been issued to a member on the member's Contact record.

Net Zero Cloud

Conduct double materiality assessments. Include employment compensation and care program performance data in your social and governance reports. Generate a disclosure report by copying responses from previous reports. Manage your energy attribute certificates and power purchase agreements. Use custom fuel types to calculate emissions from vehicles, and manage emissions factors published by data providers from Net Zero Marketplace. Use Intelligent Document Reader to transcribe and map document data.

OmniStudio Document Generation

OmniStudio Document Generation lets you generate documents from Microsoft Word (.docx) and Microsoft PowerPoint (.pptx) templates. These templates can include values from any JSON-based data in the text, including data from any Salesforce object. Additionally, the generated documents can be converted to PDF format. You can generate documents using provided sample client-side or server-side OmniScripts. Alternatively, you have the flexibility to create your own OmniScripts, Integration Procedures, or Apex classes for generating customized documents.

Outcome Management

Outcome Management is a new industry-disrupting impact measurement tool that defines, measures, and evaluates an organization's outcome strategy in one place. Set time-bound targets and baseline values and track results. Consistently measure the same indicators across different outcomes or programs. Organize outcomes into groups to reflect an organizational strategy, like a logic model or a set of outcomes that external stakeholders care about.

Program Management

Easily remove participants from a benefit session and get a list of field sets associated with benefit disbursement in program management.

Public Sector Solutions

Manage evidence in cases and case proceedings, use dynamic assessments with more objects, easily split households, and more.

Rebate Management

Get actionable, data-driven insights into rebate programs, identify special pricing trends, and analyze claims with a new CRM Analytics dashboard for Rebate Management. Improve rebate payout processing performance by using the new Compute Valid Transaction Journals Per Rebate Type custom node in Data Processing Engine definitions.

[Salesforce Contracts](#)

The Salesforce Contracts app allows customers to manage the end-to-end lifecycle of Contracts. Contracts can be associated with opportunities, orders, quotes, standard Salesforce objects, and custom objects. A contract lifecycle management is crucial to the overall health of the sales processes in an organization. The Salesforce Contracts app gives you complete control over the sales process integration, contract management process, and contract lifecycle that starts from contract authoring to activation.

[Salesforce for Education](#)

Salesforce for Education includes products that connect insights across recruitment, admissions, and student success for a unified view of every learner's journey—from prospective students to engaged alumni.

[Salesforce for Nonprofits](#)

Salesforce for Nonprofits includes products that meet the unique needs of nonprofits. These products empower organizations to go from siloed data to actionable insights, transforming constituent engagements into lifelong relationships.

[Industries Common Features](#)

Some Industries products are available for use in more than one Industries cloud, or in Clouds outside of Industries. In this release, we've improved the capabilities of these common features. Context Service is now generally available. Actionable List Members supports finer filtering options. Visualize relationships better with more customizable graphs in Actionable Relationship Center. Create personalized lists with Actionable Segmentation. Use List Builder for Data Cloud Segment to create more comprehensive lists with data from Data Cloud. We also have changes in Batch Management, Business Rules Engine, Data Processing Engine, and much more.

Automotive Cloud

Monitor fleet activities with the new Fleet, Fleet Asset, and Fleet Participant records. Set up an automated process to easily validate and adjudicate warranty claims. Use Scoring Framework to get helpful predictions about the likelihood of claims getting approved. Transfer serialized inventory, such as vehicles, to other locations with a few clicks. Make the most out of the enhancements to Timeline, Engagement, Actionable List Members, and List Builder for Data Cloud Segment.

IN THIS SECTION:

[Track Fleet Operations with Ease](#)

Get visibility into your commercial, material, or executive fleet operations using the new Fleet Management foundational features in Automotive Cloud. Fleet managers can monitor the distance covered by a vehicle, the residual value of a vehicle or an asset, and the usage of an asset when it's related to a fleet. Users can also associate accounts, contacts, or employees as fleet participants to track drivers, operations managers, or maintenance managers. Users can also track the period during which vehicles, assets, and participants are part of the fleet, and monitor the status of an asset, vehicle, or participant in relation to the fleet.

[Quickly Transfer Your Vehicles to Dealer Locations](#)

Transfer vehicles in your inventory to meet customer demand and drive sales. Inventory managers and operation managers can use Vehicle Inventory Search to select multiple search results and transfer serialized products to a selected destination location.

[Automatically Adjudicate Warranty Claims for Vehicles and Parts](#)

Automotive companies can build an automated process that reduces the workload of their claim adjudicators and prevents manual errors and subjectivity. Design detailed and flexible business rules to verify claims and validate warranty coverage of products related to the claim. Use a context definition to simplify the retrieval and consumption of claims data that's spread across multiple data sources.

[Adjudicate Vehicle and Part Warranty Claims Swiftly by Using Predicted Claim Approval Scores](#)

Based on previously approved claims, get scores about the likelihood of warranty claims getting approved. Review these scores to determine whether you can approve the claims as they are, or you must verify the claims further.

Automatically Extract Data from Documents to Update and Verify Records in Automotive Cloud

Use Intelligent Document Reader in Automotive Cloud. Automatically extract data such as identity documents, proof-of-sales, or invoices with Amazon Textract and map the document's data to various fields on a Salesforce object. The extracted information can be used to create or update record fields, or to verify the data that's already in the org. For example, upload customer information documents to automatically create Lead records, or upload invoices to automatically create repair work orders.

Get Meaningful Insights Into Dealer Claims

The Claims Analytics dashboards in the CRM Analytics for Warranty Lifecycle Management app help you address warranty claims quickly and ensure efficient claim resolutions. Identify the dealers with a high claim count and claim value to streamline operations, minimize financial impact, and focus on targeted improvements. Use trend analysis, location insights, past claims trends, and SLA management to analyze dealer claims.

Enhance Outreach Activities with Actionable List Enhancements in Automotive Cloud

Set a rule for automatically assigning new prospects by using the automatic prospect assignment feature. Easily identify the prospects to assign to agents by using the new filtering feature in the Actionable List Members component. Use a preconfigured KPI Bar to get valuable insights on the engagement status of the prospects in an actionable list. Streamline the assignment of prospects to agents by assigning prospects to a Service Cloud queue.

Show Engagement Events from Data Cloud on Automotive Timelines

Admins can now select the engagement events from Data Cloud data model objects (DMOs) that they want to show on a timeline. Agents can use the engagement events information to have contextual and concise communication with customers and prospects.

Watch Automotive Cloud Videos

New videos help your users learn about the capabilities of Vehicle Inventory Visibility in Automotive Cloud.

New and Changed Objects in Automotive Cloud

Automotive Cloud includes these new and changed objects.

Connect REST APIs

Connect REST APIs for Automotive Cloud help customers, partners, and ISVs integrate with Salesforce software and UIs.

Track Fleet Operations with Ease

Get visibility into your commercial, material, or executive fleet operations using the new Fleet Management foundational features in Automotive Cloud. Fleet managers can monitor the distance covered by a vehicle, the residual value of a vehicle or an asset, and the usage of an asset when it's related to a fleet. Users can also associate accounts, contacts, or employees as fleet participants to track drivers, operations managers, or maintenance managers. Users can also track the period during which vehicles, assets, and participants are part of the fleet, and monitor the status of an asset, vehicle, or participant in relation to the fleet.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Fleet Management are enabled.

Who: Users must have the Automotive Foundation User and Fleet Management permission sets assigned to them.

How: Use the enableFleetManagement metadata API to use Fleet, Fleet Asset, and Fleet Participant objects in your org.

Quickly Transfer Your Vehicles to Dealer Locations

Transfer vehicles in your inventory to meet customer demand and drive sales. Inventory managers and operation managers can use Vehicle Inventory Search to select multiple search results and transfer serialized products to a selected destination location.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Criteria-Based Search and Filter are enabled.

Who: Users must have the Automotive Foundation User and Criteria-Based Search and Filter permission sets assigned to them.

Why: While the Criteria-Based Search and Filter search experience helps users assess inventory, it's critical to promptly transfer vehicles from one location to another. To address this need, admins can now set up a Lightning Web Component-based action as part of the search configuration. The users can use this quick action in the search results to easily transfer multiple vehicles to the same location.

How: On the Criteria-Based Search and Filter Settings page in Setup, click **New** on the Action Configuration tab. Select **Lightning Web Component** as the action type and **Product Transfer** as the action reference.

Automatically Adjudicate Warranty Claims for Vehicles and Parts

Automotive companies can build an automated process that reduces the workload of their claim adjudicators and prevents manual errors and subjectivity. Design detailed and flexible business rules to verify claims and validate warranty coverage of products related to the claim. Use a context definition to simplify the retrieval and consumption of claims data that's spread across multiple data sources.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud, Warranty Lifecycle Management, Business Rules Engine, and Context Service are enabled.

Who: Users must have the Automotive Foundation User, Warranty Lifecycle Management, Claims Management Foundation, Context Service Admin, and Rule Engine Designer permission sets assigned to them.

Why: Using automation tools, such as Business Rules Engine, Context Service, and Flow Builder, admins can create a scalable and simple process. Context tags in the predefined Claims Details context definition map the canonical claims data structure to the objects, and retrieve the source data to be consumed in expression sets. The Claim Validation business element in the expression set validates claims against predefined rules. The output parameters of the business element help determine whether a claim is approved, and get the list of products that aren't covered by warranties.

How: Create an expression set with the Warranty Claims usage type and open a version of the expression set in Expression Set Builder. Add the Claims Validation business element and specify the resources for the input and output parameters in the expression set. Use the context tags from the Claim Details context definition to supply the claims data in the expression set.

Adjudicate Vehicle and Part Warranty Claims Swiftly by Using Predicted Claim Approval Scores

Based on previously approved claims, get scores about the likelihood of warranty claims getting approved. Review these scores to determine whether you can approve the claims as they are, or you must verify the claims further.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Automotive, Warranty Lifecycle Management, CRM Analytics for Automotive Cloud, and Scoring Framework are enabled.

Who: The Warranty Claim Approval Score (Manufacturing or Automotive Cloud) template configuration type in Scoring Framework is available to users with the Automotive Foundation User, Warranty Lifecycle Management, Claims Management Foundation, Revenue Intelligence for Automotive, and AI Accelerator with Scoring Framework permission set licenses.

How: To get predictions, go to the Scoring Framework page in Setup. Create a CRM Analytics template configuration by using the Warranty Claim Approval Score (Manufacturing or Automotive Cloud) template configuration type.

SEE ALSO:

Salesforce Help: Vehicle and Part Warranty Claim Approval Predictions by Using Scoring Framework (can be outdated or unavailable during release preview)

Automatically Extract Data from Documents to Update and Verify Records in Automotive Cloud

Use Intelligent Document Reader in Automotive Cloud. Automatically extract data such as identity documents, proof-of-sales, or invoices with Amazon Textract and map the document's data to various fields on a Salesforce object. The extracted information can be used to create or update record fields, or to verify the data that's already in the org. For example, upload customer information documents to automatically create Lead records, or upload invoices to automatically create repair work orders.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Automotive Cloud and Intelligent Document Reader enabled.

Who: Users must have the Intelligent Document Reader add-on license in their org and the Amazon Textract permission set assigned to them.

Get Meaningful Insights Into Dealer Claims

The Claims Analytics dashboards in the CRM Analytics for Warranty Lifecycle Management app help you address warranty claims quickly and ensure efficient claim resolutions. Identify the dealers with a high claim count and claim value to streamline operations, minimize financial impact, and focus on targeted improvements. Use trend analysis, location insights, past claims trends, and SLA management to analyze dealer claims.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Automotive Cloud, Warranty Lifecycle Management, and CRM Analytics.

Who: This feature is available to users with the CRM Analytics for Automotive or the Automotive Cloud Intelligence licenses.

Enhance Outreach Activities with Actionable List Enhancements in Automotive Cloud

Set a rule for automatically assigning new prospects by using the automatic prospect assignment feature. Easily identify the prospects to assign to agents by using the new filtering feature in the Actionable List Members component. Use a preconfigured KPI Bar to get valuable insights on the engagement status of the prospects in an actionable list. Streamline the assignment of prospects to agents by assigning prospects to a Service Cloud queue.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Automotive Cloud.

Who: Users must have the Industry Sales Excellence add-on license in their org and the Actionable Segmentation permission set assigned to them.

Show Engagement Events from Data Cloud on Automotive Timelines

Admins can now select the engagement events from Data Cloud data model objects (DMOs) that they want to show on a timeline. Agents can use the engagement events information to have contextual and concise communication with customers and prospects.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Automotive Cloud and Timeline are enabled.

Who: Users must have the Industry Service Excellence add-on license in their org and the Industry Service Excellence permission set assigned to them.

How: From Setup, in the Quick Find box, enter `Timeline`, and then click **Timeline**. Next, click **New Timeline**, select **Data Cloud Events**, and enter the details of the related object and the engagement data model object. Then, enter the conditions for showing records on the timeline, define the fields to show, and then activate the timeline.

Watch Automotive Cloud Videos

New videos help your users learn about the capabilities of Vehicle Inventory Visibility in Automotive Cloud.

- Learn About Vehicle Inventory Search in Automotive Cloud teaches you the concepts of Vehicle Inventory Search in Automotive Cloud, and the key steps in a typical workflow.
- Walkthrough of Vehicle Inventory Search in Automotive Cloud shows how admins and sales managers use the Vehicle Inventory Search feature in Automotive Cloud.
- Foundations of Partner Visit Management in Automotive Cloud teaches you the concepts of Partner Visit Management in Automotive Cloud, and the key steps in a typical workflow.
- Manage Partner Visits in Automotive Cloud shows how sales managers and field officers use the Partner Visit Management feature in Automotive Cloud..

New and Changed Objects in Automotive Cloud

Automotive Cloud includes these new and changed objects.

New Objects

Here are the new objects in Automotive Cloud.

Store details about a fleet
Use the new `Fleet` object.

Associate a vehicle with a fleet
Use the new `FleetAsset` object.

Associate an account, a contact, or a user with a fleet
Use the new `FleetParticipant` object.

Track product parts or raw material procured from a supplier
Use the new `SupplierProduct` object.

Store details about products under a contract
Use the new `SalesContractLine` object.

Changed Object

Here are the changed objects in Automotive Cloud.

Store your unique business data in custom fields
Configure up to 50 custom fields in each of these existing `EngagementAttendee`, `EngagementInteraction`, and `EngagementTopic` objects.

Connect REST APIs

Connect REST APIs for Automotive Cloud help customers, partners, and ISVs integrate with Salesforce software and UIs.

IN THIS SECTION:

New Connect REST API Resources

These resources are new for Automotive Cloud.

Perform a vehicle inventory transfer action search

Make a POST request to the new `/connect/inventory-visibility/actions` resource.

New request body: Inventory Actions Query Input

New response body: Inventory Actions Result

Communications Cloud

Communications Cloud extends Salesforce Customer 360 to provide a solution specifically for the communications industry. It helps businesses digitally transform to deliver new, industry-standard customer experiences while increasing operational efficiencies. Explore an industry-specific application suite and a range of cloud solutions including Digital Commerce, Industries Order Management, Contract Lifecycle Manage, Order Capture, Configure, Price, Quote (Industries CPQ), and Enterprise Product Catalog (EPC).

Learn about what's in this release in the Communications Cloud Release Notes

Consumer Goods Cloud

Your sales reps can predictively engage with the list of stores and provide a seamless experience to customers by using the new Consumer Goods Cloud for Sales app. Use the power of AI to plan your promotions better and maximize your revenue and sales. Also, learn about the other enhancements in Consumer Goods Cloud.

IN THIS SECTION:

Retail Execution

Place orders effectively and efficiently by using the UI changes and product prepopulation in orders. Add customizations to the Penny Perfect Pricing calculations in an order through the custom attributes. Standardize and handle the approval process for promotions. Simplify the promotion dashboard implementation by using the additional metadata in the Job Definition Template.

IN THIS SECTION:

Optimize the Settings of Your Mobile Synchronization

Experience the speed and reliability of the synchronization processes for large datasets between Salesforce and the Consumer Goods Cloud offline mobile app. Admins can set the increased default response time limit for the execution of batch SOQL and named fetch trees (NFT).

Allow Bluetooth Permissions for Consumer Goods Cloud Offline Mobile App in Android Devices

Make sure that you allow bluetooth permission after you upgrade to Winter'24 version of the Consumer Goods Cloud offline mobile app on your Android devices.

Increase User Satisfaction Through Enhanced Accessibility

Make the most out of the small but important changes that improve accessibility.

Place Orders Efficiently

Use a prepopulated product list to select products easily from the Order Items window while placing a New Advanced Order. Products are prepopulated based on the authorization list of the relevant trade org nodes in the account hierarchy. Enter the quantities for the listed products directly without manual search and add products from the product master.

Use the new filters and customer attributes in customer lookup to perform an advanced search for customers and to select the right customer on the New Order window. Narrow down the search for products on the Add Items window by using the Description, Product Code, GTIN, Category, Brand, Promoted, and Listed filters. You can further search for products on the Order Items window by using Category, Brand, and Order Template.

Where: These changes apply to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Why: These changes apply only when you place an order through Lightning Web Component.

Add Custom Attributes in Penny Perfect Pricing Calculation

Use the new object, Pricing Context Definition, to add custom attributes to the pricing context. Use the custom attributes to search for pricing conditions and in user exits.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: To create custom attributes, you need the Penny Perfect Pricing license and the Penny Perfect Pricing permission set. The admin must configure and provide the users with Read and View All permissions on the Pricing Context Definition object.

Why: The Default Context Field and Alias names can't be used as part of additional context field configuration. The custom attributes related to Order Items pricing context aren't fully supported.

Enhance Promotion Planning and Execution

Leverage advanced analytics to implement a promotional dashboard by using the additional metadata in the Job Definition Template object. Use the updated picklist values in the Primary Survey Policy field to analyze store participation, placement, and quality of the display of assets. Also, use the new Competitor Relevant field to analyze competitor situations (promotions, price, or placement of assets).

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Easily Share Attachments in Consumer Goods Cloud Offline Mobile App

Use the app's sharing feature to share attached files (with file types such as PDF, XLS and DOCX) from various tiles such as Customer, Sales Folder, Promotion, and Products.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: The sharing feature is available only for iOS users.

Analyze the Trend and Effectiveness of Promotions

Customize the Related list to view the approval history of a promotion. You can effectively streamline, track, and manage the approval process for standard promotions.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Why: This feature is available for all standard promotions.

How: To view the approval history, find and select the Promotions object in the Object Manager. Drag Approval History to the Related Lists section in Page Layouts.

SEE ALSO:

Page Layouts

Preview Signatures in the Print Layout

Use signature templates to configure the signature flow for an object and to include the signatures of multiple roles in the Print Layout. As an out-of-the-box solution, Order Confirmation PDF now includes the Store Manager's signatures confirming the order. You can even create custom print layouts for other processes such as customer contracts and daily reports. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: Available only to Consumer Goods Cloud offline mobile app users.

Additional Permissions for Sales Org

Using the additional metadata, get create and edit permissions on the Sales Org object. Starting with Winter '24, you're no longer required to add these permissions manually.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: Upgraded permissions are available only for Business Admins.

Optimize the Settings of Your Mobile Synchronization

Experience the speed and reliability of the synchronization processes for large datasets between Salesforce and the Consumer Goods Cloud offline mobile app. Admins can set the increased default response time limit for the execution of batch SOQL and named fetch trees (NFT).

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: Users with the Consumer Goods Cloud Mobile Sync Admin permission can configure the Sync Configuration custom settings.

How: From Setup, in Custom Settings, go to Sync Configuration, and then enter `4000` in the Batch Soql Response Time Limit and NFT Response Time Limit fields.

Allow Bluetooth Permissions for Consumer Goods Cloud Offline Mobile App in Android Devices

Make sure that you allow bluetooth permission after you upgrade to Winter'24 version of the Consumer Goods Cloud offline mobile app on your Android devices.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: This change applies to the users upgrading their Consumer Goods Cloud offline mobile app from 244.0001.00 to 246.0000.00 on Android 12 and 13 devices.

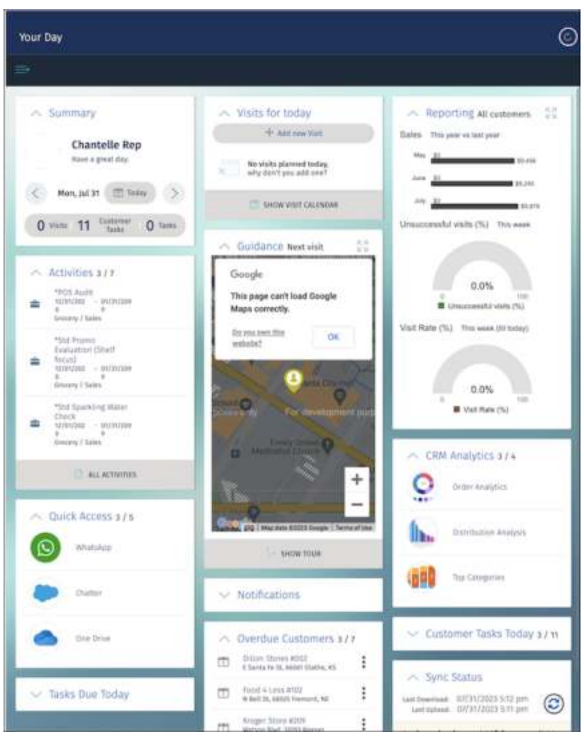
Increase User Satisfaction Through Enhanced Accessibility

Make the most out of the small but important changes that improve accessibility.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

How: Here are the details of the changes.

- Promotion Calendar is now compliant with the color contrast requirements of Web Content Accessibility Guidelines (WCAG) 2.1.
- Your content is now easier to see and use for people with low vision. Apply the new high contrast mobile app theme to your Consumer Goods Cloud offline mobile app. Non-text UI elements, such as buttons, and some text UI elements, such as links, now appear with improved color contrast to align with accessibility standards.



Trade Promotion Management

Improve the effectiveness of trade promotion strategies by predicting the sales uplift volume for each promotion. Enable custom labels in a Sales org with a custom calendar, and apply them to periods across views. Compare customer business plan scenarios to optimize revenue and sales for current and future financial years, and select the most suitable plan. Export key performance indicators with their associated bill of material components in a CSV file. Configure the product attributes in real-time reports.

IN THIS SECTION:

Updates for Permission Sets

Improvements have been made to the permissions that are assigned to CGCloud Finance Admin, CGCloud Business Admin, CGCloud Finance User, and CGCloud Finance Manager permission sets to provide better access control. The CGCloud Refresh Update Activation Service permission set is no longer available in Trade Promotion Management.

Increase User Satisfaction Through Enhanced Accessibility

Promotion Calendar is now compliant with the color contrast requirements of Web Content Accessibility Guidelines 2.1. Moreover, your content is now easier to see and use for people with low vision. Non-text UI elements, such as buttons, and some text UI elements, such as links, now appear with improved color contrast to align with accessibility standards.

Improve Performance of Promotions By Predicting the Sales Uplift Volume

Improve the effectiveness of trade promotion strategies by predicting the sales uplift volume for each promotion. Use these predictions to understand the impact of a particular combination of promotional tactics and attributes, improve the uplift volume by changing the promotional tactics for products, and maximize your investments in trade promotions.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud Trade Promotion Management, CRM Analytics for Consumer Goods Cloud, and Scoring Framework are enabled.

Who: When creating CRM Analytics template configurations in Scoring Framework, the Predict Sales Uplift Volume (Trade Promotion Optimization) template configuration type is available to Trade Promotion Management users with the CRM Analytics for Consumer Goods or Revenue Intelligence for Consumer Goods license permission set licenses.

How: To get predictions, go to the Scoring Framework page in Setup. Create a CRM Analytics template configuration by using the Predict Sales Uplift Volume (Trade Promotion Optimization) template configuration type. Click Predict Uplift on a Promotion record page to show the predicted sales uplift volume for that promotion on the Volume Planning card.

Easily Identify Custom Periods by Using Custom Labels

Enable custom labels in your Sales org to use a custom period's short description as a label. See the custom labels in various views in Trade Promotion Management, including Trade Calendar, promotion P&L views, volume planning cards, spend planning cards, account plans, customer business plans, and real-time reports.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

Choose the Best Scenario for Your Customer Business Plan

Create scenarios in your customer business plan (CBP) while planning for current and future financial years. Easily exclude promotions from a scenario and manually adjust key performance indicators (KPIs) to simulate different strategies. Compare KPIs from different scenarios and activate a suitable scenario to maximize your revenue and sales.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

Understand the Calculations Behind Your Promotion's Profit and Loss

Use APIs to analyze information related to your promotion's Profit and Loss calculations, including both raw data and calculated key performance indicators (KPIs). Review the source KPIs, calculation variables, and formulas used in the calculated KPIs. See how weekly values are distributed into daily values.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

Export Key Performance Indicator Grids Using APIs

Use APIs to export Key Performance Indicator (KPI) grids in Trade Promotion Management. The APIs can trigger calculation events and retrieve KPI information based on product levels, subsets, periods, and period types. Retrieve data for a specific period in JSON, serialized JSON, or CSV format.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

Gain Valuable Insights with Better Visibility into Bill of Material Products and Components

Export component level key performance indicators (KPIs) with their associated components in a CSV file. The exported CSV file contains information about promotions and their associated bill of material components, along with a field that indicates whether a product is a bill of material or not.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

Add Product Attributes in Real-Time Reports

Define the product attributes that are available in a real-time report based on your specific requirements. Show additional product attributes, such as Product ID, Product Code, or global trade item number (GTIN), in a real-time report. Previously, real-time reports used only the product dimension, and you couldn't define multiple product levels in the product hierarchy.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

Use Real-Time Reports More Intuitively

Real-time reports in Trade Promotion Management now show totals at the top of the details section of a Key Performance Indicator (KPI) report, instead of at the bottom. If a promotion or tactic falls within the selected report time frame by at least one day, it's included in the KPI report.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

Get Intelligent Document Reader with Trade Promotion Management

Automatically extract information from uploaded documents by using Amazon Textract through your AWS account. Use the extracted information to create or update record fields, or to verify data that's already in Salesforce.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

Who: Intelligent Document Reader is available with the Intelligent Document Reader add-on license.

Updates for Permission Sets

Improvements have been made to the permissions that are assigned to CGCloud Finance Admin, CGCloud Business Admin, CGCloud Finance User, and CGCloud Finance Manager permission sets to provide better access control. The CGCloud Refresh Update Activation Service permission set is no longer available in Trade Promotion Management.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Trade Promotion Management is enabled.

Increase User Satisfaction Through Enhanced Accessibility

Promotion Calendar is now compliant with the color contrast requirements of Web Content Accessibility Guidelines 2.1. Moreover, your content is now easier to see and use for people with low vision. Non-text UI elements, such as buttons, and some text UI elements, such as links, now appear with improved color contrast to align with accessibility standards.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Model Mobile App with Visual Studio Code Based Modeler for Consumer Goods Cloud

With the Visual Studio Code Based Modeler for Consumer Goods Cloud, customize your Consumer Goods (CG) Cloud offline mobile app on your Windows or Mac computer without the need to host a separate Windows server and database. Besides using Visual Studio Code as an editor for design contracts, benefit from the new CG Cloud Modeler command line interface (CLI) plugin that is fully integrated into the Salesforce CLI. The new Modeler CLI plugin helps you perform various Modeler operations such as validating contracts, building your custom app, running the simulation of your custom CG Cloud offline mobile app directly on your machine, and creating deployment packages.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Who: The Visual Studio Code Based Modeler is available to customizers and admins who want to update or customize the CG Cloud offline mobile app.

Improve Customer Satisfaction with Sales Excellence

With Sales Excellence, your users can proactively engage with a list of stores for a followup on regular orders, open invoices, promotions, damaged goods, and product introduction. With easy access to accounts, visits, orders, and engagement history records, sales reps can engage with customers and can perform the prescribed actions. Reps can drive revenue growth by placing orders by using the telesales capabilities powered by the Order Management and Penny Perfect Pricing features.

Where: This change applies to Enterprise and Unlimited editions where Consumer Goods Cloud Sales or Consumer Goods Cloud Sales and Service, and Actionable Segmentation are enabled.

Who: To use Sales Excellence, users need the Industry Sales Excellence add-on license with the Actionable Segmentation Engagement permission set. To use the Penny Perfect Pricing feature, users need the Consumer Goods Cloud Sales & Service license.

Why: Use data processing engine to create various actionable list definitions of customers. Curate, prioritize, and track the actionable list of customers by using actionable segmentation. Use OminScripts to guide sales agents to effectively engage with the customers interested in your products or services such as orders and promotions.

Achieve Better Performance and Error Handling of Automation

Use the new flows in Consumer Goods Cloud Managed Package for existing workflows and process builders.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

Why: The new flows are in an inactive state bundled with your existing workflows. Process Builders and their flow are no longer a part of the additional metadata static resource folder. They're included in the managed package as Flows in inactive state. Any existing customizations to the workflows and process builders are preserved and are applied to the new flows. We recommend that you deprecate workflows and process builders and start the transition to Flows in a phased approach.

How: To deactivate the workflow or process builder and activate the flow equivalent, use the workflow or process builder to flow mapping.

SEE ALSO:

Transition to Flow: Workflow and Process Builder Retirement

Consumer Goods Cloud Videos

New videos help you learn about the capabilities of Consumer Goods Cloud. The videos are now available on the Salesforce Help page and Vidyard.

- Set Up Orders: Learn about the various order capabilities and how to set up orders in Consumer Goods Cloud.
- Add a Custom Tile in Store Cockpit of the Consumer Goods Cloud Offline Mobile App: Watch this video series to learn how to create a custom object in Salesforce and sync data to the Modeler, to customize the object as a new tile by using contract files in the Modeler, and to test the custom tile on the simulator app in the Modeler.

New and Changed Objects

Do more with the changed objects in Consumer Goods Cloud.

Retail Execution

Analyze store participation, placement, and quality of display of the assets

Use the four new picklist values added to the `Primary Survey Policy` field of the JobDefinitionTemplate object.

Analyze competitor situations for promotions, price, or placement of assets

Use the new `Competitor Relevant`field of the JobDefinitionTemplate object.

New and Changed Metadata Types

Make the most of the new and changed metadata type in Consumer Goods Cloud.

Metadata Type

Configure which Salesforce object fields must be ignored during synchronization between Salesforce and the Consumer Goods Cloud offline mobile app

Use the new cgcloud_Sync_Ignored_Field__mdt custom metadata type.

Settings

Removed: Enable Object Detection Metadata Setting is being retired

The enableObjectDetection metadata setting is retired as of Winter '24. Salesforce no longer supports this metadata setting.

SEE ALSO:

Consumer Goods Developer Guide: Custom Metadata APIs

Energy and Utilities Cloud

Energy & Utilities Cloud (E&U Cloud) combines and extends the full power of Salesforce Sales and Service Cloud and the Salesforce Platform into an industry-specific solution for utilities, retail energy, and modern energy services companies.

Learn about what's in this release in the Energy and Utilities Cloud Release Notes

Financial Services Cloud

With Data Cloud, you can organize and unify data across Salesforce and other external data sources. The new Actionable Relationship Center templates help you get the most out of the Account Relationship Center. Transaction Dispute Management helps financial institutions in streamlining dispute resolution process.

IN THIS SECTION:

Actionable Segmentation

Enable your list creators to customize column preferences, refresh lists, and add object records to existing lists as list members. You can now use the guided setup to set up and configure Actionable Segmentation efficiently.

Actionable List Members

Filter the members who appear in the Actionable List Members component. Use the new key performance indicator (KPI) bar to assess the engagement status of actionable lists at a glance. Assign prospects to sales and service agents through Service Cloud Queues. And, set a rule to automatically assign new prospects to agents.

List Builder for Data Cloud Segments

Create actionable lists from Data Cloud segments and streamline sales and service efforts to unlock new growth opportunities.

Transaction Dispute Management

Transaction Dispute Management helps financial institutions overcome challenges related to complex processes, systems, and regulations by offering a streamlined dispute resolution process. With Transaction Dispute Management, you can eliminate the inefficiencies that arise from switching between systems, ensure regulatory compliance, and reduce operational costs while enhancing customer and employee experience.

Service Process Automation

Learn about the changes to Service Process Studio and the new self-service capabilities in Financial Services Client Portal.

Discovery Framework Enhancements

Use the Document Matrix element in Discovery Framework OmniScripts to automatically determine the documents that your users need to upload when submitting an assessment.

Financial Goals

Help clients reach short and long term financial goals.

Integrated Onboarding

Use our sample onboarding app to get started with onboarding faster. Quickly and easily validate the data in documents against Party Profile and its child objects.

Other Enhancements in the Financial Services Cloud

Learn about other important enhancements in Financial Services Cloud.

Financial Services Cloud Documentation Changes

The Financial Services Cloud Admin Guide and Installation Guide are now in Salesforce Help. The Quick Start Guide content has merged into the Financial Services Cloud Admin Guide. The Upgrade Guide is retired. Find the Actionable Relationship Center and Compliant Data Sharing documentation in a new place.

New and Changed Financial Services Cloud Object Fields
Do more with the new and updated Financial Services Cloud objects.

Actionable Segmentation

Enable your list creators to customize column preferences, refresh lists, and add object records to existing lists as list members. You can now use the guided setup to set up and configure Actionable Segmentation efficiently.

SEE ALSO:

Actionable Segmentation

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Actionable List Members

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IN THIS SECTION:

Streamline the Dispute Intake Process with Transaction Dispute Management
Enable your agents to quickly capture transaction dispute data through an easy-to-use dispute intake form. You can easily integrate the intake form with core banking systems. With this intake form, your agents can select multiple transactions to be disputed, pick an appropriate dispute reason, collect additional details related to the dispute through a dynamic questionnaire, and submit the dispute request. You can customize the intake form to meet your business needs.

Streamline the Dispute Intake Process with Transaction Dispute Management

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Where: This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud Growth license is enabled.

Why: By using the dedicated data model for Transaction Dispute Management, financial institutions can efficiently handle transaction disputes. For every dispute request that's submitted, case, dispute, dispute item, and assessment records are created so that you can easily monitor the dispute workflow. Additionally, you can configure case assignment rules based on dispute field values to route dispute cases to appropriate queues or team members. When payment networks update their guidelines for handling disputes, you can adapt to these evolving guidelines by customizing the dispute intake form easily with a low-code approach.

How: Activate the FSCTransactionDisputeManagement OmniScript and create an action launcher deployment for the dispute intake action. Add the action launcher component with the dispute intake action to the person account page layout. In the person account record, from the Action Launcher component, agents can search for Raise Transaction Dispute and then click **Raise Transaction Dispute**.

SEE ALSO:

Set Up Transaction Dispute Management

Service Process Automation

Learn about the changes to Service Process Studio and the new self-service capabilities in Financial Services Client Portal.

IN THIS SECTION:

Service Process Studio for Financial Services Cloud

Select the relevant fields of any object to store the base data attribute details of a service process. Use the Transaction Dispute template to quickly create a service process definition for handling transaction disputes.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need the Industry Service Excellence permission set.

SEE ALSO:

Service Process Studio

Self-Service Capabilities in Financial Services Client Portal

Learn about the new self-service capabilities in the Financial Services Client Portal. Self-service capabilities include creating service requests, scheduling appointments, browsing knowledge articles by topics, and providing feedback.

IN THIS SECTION:

Enhance Self-Service Experience for Financial Services Client Portal Users

Give your clients greater control and convenience in managing their financial services needs. The Financial Services Client Portal offers a comprehensive suite of new self-service capabilities, allowing you to deliver a superior self-service experience for your clients while simplifying your internal processes and reducing operational costs.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: The portal provides clients with a snapshot of their requests so that they can track open and closed service requests and manage appointments. Clients can quickly create a service request by searching for a service process in the portal's action launcher. Additionally, they can schedule appointments with options for in-person, phone, or video meetings, browse FAQs and knowledge articles for common issues, and give feedback through a dedicated channel. You can integrate the portal into your internet and mobile banking systems, offering clients an Omni-Channel solution for all their financial services needs.

How: From Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**. Click **New** and then from the available templates, select **Financial Services Client Portal**. Create an experience site with this template and configure the new self-service capabilities.

SEE ALSO:

Self-Service Capabilities in Financial Services Client Portal

Discovery Framework Enhancements

Use the Document Matrix element in Discovery Framework OmniScripts to automatically determine the documents that your users need to upload when submitting an assessment.

SEE ALSO:

Dynamically Identify the Documents to Upload for an Assessment

Financial Goals

Help clients reach short and long term financial goals.

IN THIS SECTION:

Work with Financial Goals

You no longer need to install the Financial Services Cloud Managed Package to use the Financial Goals object. Financial Goals is now available with your Financial Services Cloud license and has exciting new features using OmniStudio. The Financial Goals FlexCard gives your users quick access to their client's goals. Add a priority and status to each goal to help your clients quickly achieve their target value on the goals that are most important to them. The Goal Members FlexCard on the Financial Goals record page lets your users view members of a goal. The Financial Goals OmniScripts give your users a guided path for creating, editing, and deleting a goal and its members.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: Users need the Financial Services Cloud Extension and OmniStudio User permission sets to use this feature.

Why: Financial goals help your clients reach their short and long-term financial objectives as individuals and within their household. For example, on a person account record, create a goal to save for a new car. On another person account record, create a goal to save for a child's education. If both person account records are members of the same household record, view the goals together. Add priorities, track the actual amount saved toward the target value, and keep your clients up to date on all of their goals.

How: Add the Financial Goals FlexCard to your person account and household page layouts. Add the Goal Members FlexCard to your Financial Goals record page. The FinancialGoals OmniScripts let your users add, edit, or delete goals for their clients. To meet the needs of your team, you can customize the FlexCards and OmniScripts. Salesforce developers can use Financial Goals Business APIs to streamline the process of creating and updating financial goals.

SEE ALSO:

[Financial Goals]

New Connect REST API Resources

These Financial Goal resources are new.

Financial Goal

Create financial goals and goal members

Make a POST request to the new `/connect/financialplanning/financialgoals` resource.

New request body: Financial Goal List Create Input

New response body: Financial Goals Create Output

Query financial goals and goal members using the parent Person Account, Household, or Party Relationship Group record

Make a POST request to the new `/connect/financialplanning/financialgoals/query/${parentRecordId}` resource.

New request body: Financial Goal Query Input

New response body: Financial Goals List Output

Update a financial goal and its members

Make a PATCH request to the new `/connect/financialplanning/financialgoals/${goalId}` resource.

New request body: Financial Goal Patch Input

New response body: Financial Goal Patch Output

Integrated Onboarding

Use our sample onboarding app to get started with onboarding faster. Quickly and easily validate the data in documents against Party Profile and its child objects.

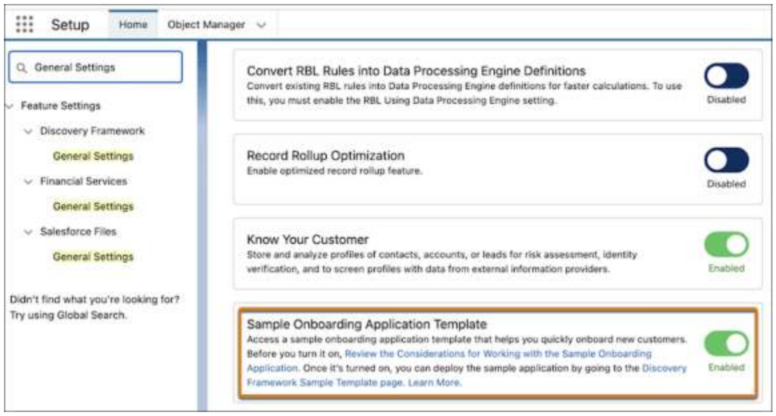
IN THIS SECTION:

Get Started with Customer Onboarding Faster

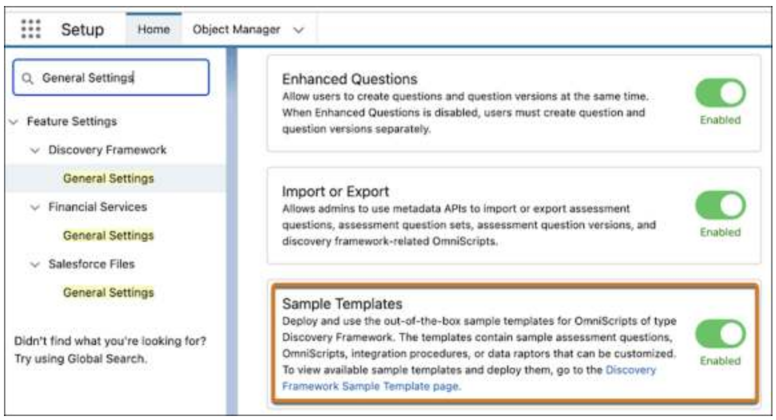
Give your users access to a sample onboarding app that streamlines and improves the customer onboarding process. Easily deploy the OmniScripts, flows, Integration Procedures, DataRaptors, and other components used in the sample onboarding app to your Salesforce org. You can then customize these components to meet your specific onboarding needs.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where the Financial Services Cloud Growth license is enabled.

How: To give access to the sample app, from Setup, in the Quick Find box, enter *General Settings*, and then under Financial Services Cloud, select **General Settings**. Next, turn on Sample Onboarding Application Template.



To deploy the app components, from Setup, in the Quick Find box, enter `General Settings`, and then under Discovery Framework, select **General Settings**. Turn on Sample Templates.



Next, from Setup, in the Quick Find box, enter `Discovery Framework Sample Templates`, and then select **Discovery Framework Sample Templates**. From the list of templates, select **FSC_ONB** and click **Deploy**.

SEE ALSO:

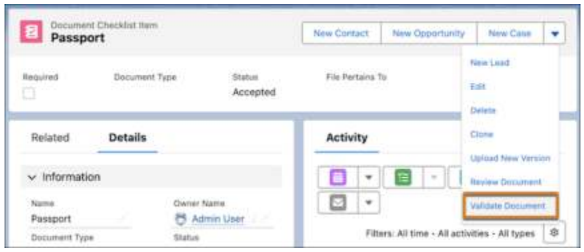
Streamline Your Customer Onboarding Experience

Streamline the End-to-End Document Approval Lifecycle

Your users can now validate a document in a Document Checklist Item against data from Party Profile and its child objects. They can validate data against records in multiple objects at a time. After validating the document, they can update the status of the document to Approved or Rejected and add comments. You can track the information on the user who validated the document, the validation date and time, and the history of changes to the Document Checklist Item status.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Open the Document Checklist Item record page that you want to validate. Then, from the quick actions menu, click **Validate Document**.



SEE ALSO:

Validate Documents in Document Checklist Items

Other Enhancements in the Financial Services Cloud

Learn about other important enhancements in Financial Services Cloud.

IN THIS SECTION:

Organize Interaction Records With Topics

You can now enable and configure Topics for the Interaction object so that your users can add topics to interaction records and organize them by common theme.

Find Changed Financial Deals at a Glance

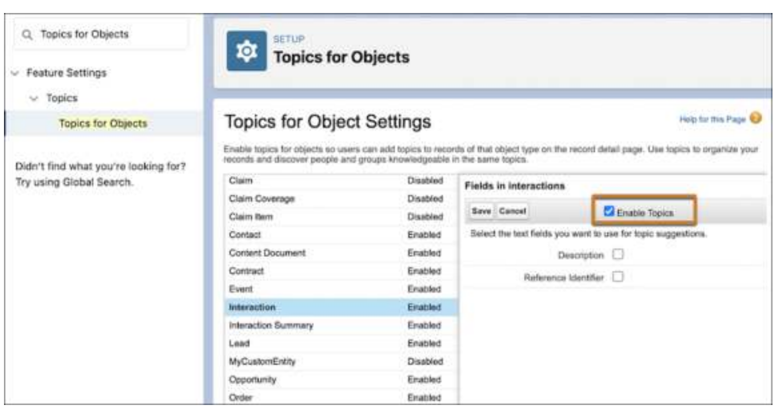
The Kanban view for financial deals gives your users a comprehensive view of all financial deals, so they can quickly see what's changed and make informed decisions.

Organize Interaction Records With Topics

You can now enable and configure Topics for the Interaction object so that your users can add topics to interaction records and organize them by common theme.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where the Financial Services Cloud Growth license is enabled.

How: From Setup, in the Quick Find box, enter `Topics for Objects`, and then select **Topics for Objects**. Select the **Interaction** object and, select **Enable Topics**.



Find Changed Financial Deals at a Glance

The Kanban view for financial deals gives your users a comprehensive view of all financial deals, so they can quickly see what's changed and make informed decisions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where the Financial Services Cloud Growth license is enabled.

How: Open the Financial Deal list view. From the Display As menu, select **Kanban**.

Financial Services Cloud Documentation Changes

The Financial Services Cloud Admin Guide and Installation Guide are now in Salesforce Help. The Quick Start Guide content has merged into the Financial Services Cloud Admin Guide. The Upgrade Guide is retired. Find the Actionable Relationship Center and Compliant Data Sharing documentation in a new place.

IN THIS SECTION:

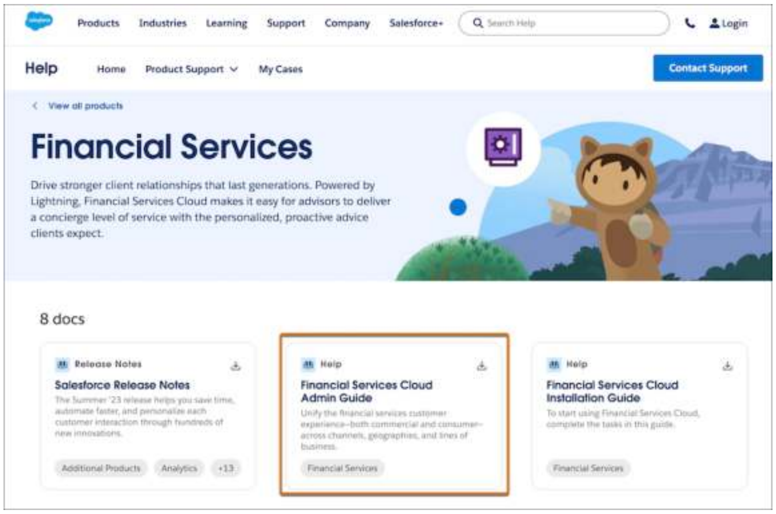
Financial Services Cloud Admin, Installation, Quick Start, and Upgrade Guides

The Financial Services Cloud Admin and Installation guides found a new home in Salesforce Help. Previously, the Financial Services Cloud Admin and Installation guides were published to developer.salesforce.com/docs. The Financial Services Cloud Quick Start Guide is now included in the Plan and Prepare section in the Financial Services Cloud Admin Guide. The Financial Services Cloud Upgrade Guide is retired.

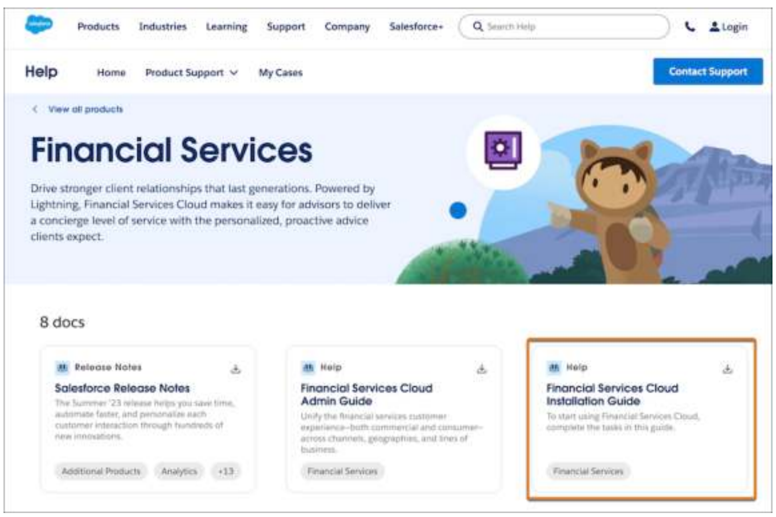
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions.

Why: In Salesforce Help, the Financial Services Cloud Admin and Installation guides are located with other relevant content such as the Industries Common Features Guide, where many essential features are documented, including Action Plans, Discovery Framework, Record Alerts, and Actionable Segmentation.

How: Navigate to Salesforce Help (help.salesforce.com) and click **View all products**. Then click the product tile for Financial Services and look for the Financial Services Cloud Admin Guide.



Similarly, navigate to Salesforce Help (help.salesforce.com) and click **View all products**. Then click the product tile for Financial Services and look for the Financial Services Cloud Installation Guide.



SEE ALSO:

Financial Services Cloud Admin Guide

Financial Services Cloud Installation Guide

Prepare to Use Financial Services Cloud

Actionable Relationship Center and Compliant Data Sharing Documentation Moved to Industries Common Features Guide

The Actionable Relationship Center (ARC) and Compliant Data Sharing documentation moved from the Financial Services Cloud Admin Guide to the Industries Common Features Guide in Salesforce Help. As ARC and Compliant Data Sharing expand to work with more clouds, this placement helps customers from other clouds find the documentation faster.

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

How: To find the ARC and Compliant Data Sharing documentation, navigate to Extend Your Industries Cloud with Common Features in Salesforce Help.

SEE ALSO:

Actionable Relationship Center (ARC)

Compliant Data Sharing

New and Changed Financial Services Cloud Object Fields

Do more with the new and updated Financial Services Cloud objects.

Integrated Onboarding

Track the high-level information of an application that's submitted for the product
Use the new `Applicant` object.

Capture information about an applicant's application for a product
Use the new `ApplicationForm` object.

View details about both application form and product
Use the new `ApplicationFormProduct` object.

Track the flow orchestration instances for a target object
Use the new `FlowOrchestrationInstRelaObj` object.

Document Validation

View details of the document checklist item and the target object that the document checklist item was validated against
Use the new `DocChkItemValidatedTarget` object.

Document Matrix

Show a document category that's used to group the document checklist items
Use the new `DocumentCategory` object.

View details of both document category and document type
Use the new `DocumentCategoryDocumentType` object.

Capture the decision criteria that's used to determine applicable documents
Use the new `DocumentDecisionRequirement` object.

Transaction Dispute Management

Store the details of a dispute that involves one or multiple disputed transactions
Use the new `Dispute` object.

Store the details of a transaction that's being disputed
Use the new `DisputeItem` object.

Financial Goals

Represents a financial goal for a person account

Use the new `Financial Goal` object.

Represents a junction between the financial goal and the person account

Use the new `Financial Goal Party` object.

Data Cloud for Financial Services Cloud

Data Cloud Data Model Objects (DMO) are used in the Data Cloud implementation for Financial Services Cloud. The DMOs listed below live in Data Cloud.

Specify how the party wants to interact with your company

Use the new fields Account Ownership Type, Account Rating Type, Account Source, Account Website URL, Annual Revenue Amount, Employee Count, Individual, Is Customer, Next Interaction Date, Next. Review Date, Party Object, Primary Industry, Review Frequency is Internal, Is Partner, Is Seller, and Is Supplier on the `Account` Data Model Object.

Add an individual who has a role specific to an account

Use the new fields Deceased Date, First Name, Gender, Last Name, Marital Status, Middle Name, Person Name, Sequence In Multiple Birth on the `Account Contact` Data Model Object.

Add a financial tool offered by a bank as a type of loan that gives access to a line of credit that you can access using a card

Use the new `Card Account` Data Model Object.

Add all contact points for a party

Use the `Contact Point` Data Model Object.

Add the mailing address for a party

Use the new field Is Used for Mailing on the `Contact Point Address` Data Model Object.

Add the email address for a party

Use the new field Is Used for Mailing on the `Contact Point Email` Data Model Object.

Add a phone number for a party

Use the `Contact Point Phone` Data Model Object.

Add a subtype of a financial account

Use the new `Deposit Account` Data Model Object.

Add the types of balances associated to a financial account

Use the new `Financial Account Balance` Data Model Object.

Add the types of fees associated to a financial account

Use the new `Financial Account Fee` Data Model Object.

Add the types of interest rates associated to a financial account

Use the new `Financial Account Interest Rate` Data Model Object.

Add types of limits associated to a financial account

Use the new `Financial Account Limit` Data Model Object.

Add the role of an organization account or person account associated to a financial account

Use the new `Financial Account Party` Data Model Object.

Add transactions with respect to a Financial Account. There can be various types of transactions such as Credit, Debit, and so forth

Use the new `Financial Account Transaction` Data Model Object.

Add a financial account such as an investment account, bank account, or insurance policy
Use the new `Financial Account` Data Model Object.

Add an extension of an account to capture financial services attributes
Use the new `Financial Customer` Data Model Object.

Add a junction between the financial goal and the person account
Use the new `Financial Goal Party` Data Model Object.

Add a financial goal for a person account
Use the new `Financial Goal` Data Model Object.

Create a financial holding such as securities, bonds, or Mutual Funds in relation to either an account or a financial account
Use the new `Financial Holding` Data Model Object.

Add a financial holding such as Securities, Bonds, Mutual Funds in relation to either an Account or a Financial Account (Investment Account)
Use the new `Financial Security` Data Model Object.

Add a person
Use the `Individual` Data Model Object.

Add types of insurance policies such as auto, home, and life
Use the new `Insurance Policy` Data Model Object.

Store custom tags that can be added to party, then can be used to define market segmentation
Use the new `Interest Tag Definition` Data Model Object.

Add a subtype of financial account such as investment account and retirement account
Use the new `Investment Account` Data Model Object.

Add a subtype of financial account such as loan account
Use the new `Loan Account` Data Model Object.

Add a financial asset associated to an individual or organization
Use the new `Party Financial Asset` Data Model Object.

Add a financial liability associated to an individual or organization
Use the new `Party Financial Liability` Data Model Object.

Add an association between a party and interest tag
Use the new `Party Interest Tag` Data Model Object.

Add a definition of who you are dealing with such as an individual or business
Use the new `Party` Data Model Object.

Add a payment system issued by a financial institution to a customer that allows its owner (the cardholder) to access funds in designated bank accounts
Use the new fields Active, Bank Identification Number, Card Ownership Type, and Payment Method on the `Payment Card` Data Model Object.

Specify a means by which a buyer compensates a seller for a purchased good or service
Use the new fields Financial Account and Party on the `Payment Method` Data Model Object.

Specify a client's life event such as a birth or marriage
Use the new `Person Life Event` Data Model Object.

Create an alert message about a specific record and track the status and active period of the alert as related to a financial account
Use the new `Record Alert` Data Model Object.

Grantmaking

Grant recipients can now enter actual budget spent data into Experience Cloud site to complete their interim and final reports. View their budget updates in real-time within CRM. In orgs with strict ownership-based sharing, let users add collaborators on Grantmaking objects.

IN THIS SECTION:

Enter Actual Budget Used in Experience Cloud

Grant recipients can now enter actual budget spent data into Experience Cloud site to complete their interim and final reports. View their budget updates in real-time within CRM.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

Who: To create and update budgets in an Experience Cloud site, users need the Experience Cloud for Grantmaking permission set. To view budgets in CRM, users need the Grantmaking Manager permission set.

SEE ALSO:

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

Add Budget Component to a Custom Experience Cloud Site

If you're setting up an Experience Cloud site without using the Grantmaking template, you can now add the Budget Lightning Web Component to your site.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

Who: To customize an Experience Cloud site, users need the Grantmaking Manager permission set.

Share Grantmaking Records with Compliant Data Sharing

In orgs with strict sharing policies, your users can use Compliant Data Sharing to share budgets, funding awards, and individual applications.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

Who: To set up Compliant Data Sharing for Grantmaking objects, users need the Grantmaking Manager permission set the Configure Compliant Data Sharing system permission. To share records using Compliant Data Sharing, users need the Use Compliant Data Sharing system permission and edit access on the record they're sharing. To have a record shared with them using Compliant Data Sharing, users with the Use Compliant Data Sharing system permission.

SEE ALSO:

Salesforce Help: Configure Compliant Data Sharing (can be outdated or unavailable during release preview)

Salesforce Help: Share Grantmaking Records with Users in Salesforce CRM (can be outdated or unavailable during release preview)

New Objects and Fields in Grantmaking

Track hierarchies and contracts with the new objects and fields in Grantmaking.

Use Compliant Data Sharing with Grantmaking records

Turn on Compliant Data Sharing for the new objects `BudgetParticipant`, `FundingAwardParticipant`, and `IndividualApplnParticipant`.

Link funding awards and funding award amendments to contracts

Use the new `Contract` field on the existing FundingAwards and FundingAwardAmendments.

Track program and funding opportunity hierarchies

Add hierarchy with the new `ParentProgram` field on the existing Programs object and the new `ParentFundingOpportunity` field on the existing FundingOpportunities object.

Use Dynamic Assessments with Grantmaking Objects

Select the new `FundingAward` and `FundingAwardRequirement` values in Dynamic Assessments.

SEE ALSO:

Developer Documentation: Grantmaking Developer Guide (can be outdated or unavailable during release preview)

Health Cloud

Use Advanced Therapy Management Enhancements to implement advanced scheduling and track custody events. Home Health now integrates with Medication Management and Integrated Care Management, and also supports electronic visit verification. Integrated Care Management now has a console app and supports care gaps. Get a comprehensive view of customer account hierarchies with Actionable Relationship Center in Health Cloud. With Crisis Support Center Management, you can now handle referrals, and counselors can now connect with clients over SMS and other forms of messaging. Guide users through the creation of referrals with the new Create Referral flow. Give users a 360-degree view of the behavioral or mental healthcare journeys of patients with the new Behavioral Health app.

IN THIS SECTION:

Assessments Enhancements

Prebuilt template assessments that use Discovery Framework and OmniStudio make it easier to get up and running with assessments.

Behavioral Health App

Get all the information related to a patient's behavioral or mental healthcare journey in one place in Health Cloud's Behavioral Health app. Get up and running more quickly by using the guided setup in the Behavioral Health app.

Crisis Support Center Management Enhancements

Crisis center counselors can now communicate with clients by using SMS and web chat. Social determinants of health associated with cases help counselors understand and address care barriers that clients face. A new flow sends emails to care facility admins requesting them to update the available bed count in their facilities and confirm requested beds for referrals. Follow the Digital Experiences guided setup to quickly configure these new Crisis Support Center Management features.

Healthcare Provider Enhancements

Upload photos of healthcare providers and track more details about them.

Home Health Enhancements

Health Cloud's Home Health now integrates with Medication Management and Integrated Care Management, promoting better patient care and safety. Facilitate effortless visit scheduling and tracking with electronic visit verification, automated checks for patient eligibility, and comprehensive calendar views.

Integrated Care Management Enhancements

Quickly launch Integrated Care Management by using the new console app from App Launcher. Identify gaps in care by using an OmniScript flow that evaluates measures to create care gaps. You can also import care gaps or create them manually. Then, launch an OmniScript flow to create care plans for patients from open care gaps. View these care gaps and their problems, goals, and interventions on the updated care plan interface. Updates to the Decision Tables user interface make mapping assessment question responses and recommendations easier.

Intelligent Document Automation Enhancements

Get Intelligent Document Workspace up and running faster by using guided setup.

Intelligent Sales Enhancements

Track the progress of sales agreements with Path on the Sales Agreement record page. Help med tech organizations make more informed purchasing decisions with Actionable Relationship Center enhancements. Also, help sales representatives mitigate product shortfall by defining flexible distance limits of up to 5000 miles (8047 km) for inventory search.

Marketing Cloud Engagement for Health Cloud

Use Marketing Cloud Engagement for Industries to its full potential and synchronize your Health Cloud CRM data with Marketing Cloud.

New Shield Platform Encryption for Health Cloud

Support encryption on more Health Cloud objects.

Referral Enhancements

Manage your referrals by using automation tools, enhanced Clinical Data Model objects, and APIs built for the Salesforce platform. New referral management features use standard objects in the FHIR R4-aligned data model.

Health Cloud Has New and Changed Objects

Store and access more data with these new and changed Health Cloud objects.

New and Changed Invocable Actions in Health Cloud

Use the new and changed invocable actions for Health Cloud.

New and Changed Health Cloud Metadata Types

Make the most of the new and changed metadata types of Health Cloud.

Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

Actionable Relationship Center Enhancements

Get a complete view of hierarchical accounts with Actionable Relationship Center's Graph Builder and Relationship Graph enhancements. Easily define a graph's starting point as an anchor node, track the anchor node path, and view the upward hierarchy of related entities.

IN THIS SECTION:

SEE ALSO:

Support Intelligent Sales Operations With Actionable Relationship Center

Show Upward Account Hierarchy in an ARC Graph

Gain more flexibility when you visualize entity relationships by using bi-directional navigation in an ARC graph. Users can now view the entities that exist in an upward hierarchy to the anchor node in the ARC graph. Previously, users visualized records only in a downward hierarchy and there was no way to know if the anchor node had any parent entities.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Foundation permission set and the Health Cloud Platform permission set license.

How: From Setup, go to Actionable Relationship Center under Feature Settings, and click **New Relationship Graph**. Configure all the entities you want to represent in Graph Builder. Select the node that you want as the starting point, and click **Assign as Anchor Node**. From the App Launcher, go to the anchor node object's record page to view the ARC Relationship Graph.

SEE ALSO:

Salesforce Help: Account Hierarchy Management Using ARC (can be outdated or unavailable during release preview)

Easily Set Up Flexible Anchor Nodes in ARC Graphs

Provide a complete representation of business relationships between entities by using flexible anchor nodes. Configure any node as the starting point of the ARC graph. Previously, only the topmost node was set as the anchor. Easily update the underlying object of the anchor node. The ARC graph builder also ensures that your graph always has an anchor. When you create a graph with no anchor node set, the builder prompts you to select the topmost record as the anchor. If you remove the anchor node, the builder automatically sets the topmost node as the anchor.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Foundation permission set and the Health Cloud Platform permission set license.

How: From Setup, go to Actionable Relationship Center under Feature Settings, and click **New Relationship Graph**. Configure the entities you want to represent in Graph Builder. Select the node that you want as the starting point, and click **Assign as Anchor Node**.

SEE ALSO:

Salesforce Help: Configure the Anchor Node in a Graph Type (can be outdated or unavailable during release preview)

Render Flexible ARC Relationship Graphs

You can now visualize an anchor node's immediate parent entity in the ARC Relationship Graph. The graph also shows the parent's parent entity and the siblings of the original anchor node. You can view multiple records for each node or switch to a more concise view. You can hide all the child objects of a container, and you can configure split containers to nest different child nodes together in the same container.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Foundation permission set and the Health Cloud Platform permission set license.

How: When you select the anchor node's parent, the canvas automatically shifts to provide a centralized view of the parent. Three records are visible in each node's card, and you can view more records under **Show More**. Switch to a more concise version of the graph by turning off **Show fields on card** to reduce each container's width.

You can use the original ARC graph without these enhancements if you turn off the anchor node settings toggle, or if the topmost node is the anchor.

SEE ALSO:

Salesforce Help: View Account Hierarchy in Actionable Relationship Center (can be outdated or unavailable during release preview)

Salesforce Help: Get a More Compact View of the ARC Graph (can be outdated or unavailable during release preview)

Salesforce Help: Follow the Anchor Node Indicator Path (can be outdated or unavailable during release preview)

Keep Track of the Anchor Node From Any Point in the ARC Graph

As you expand the ARC graph to view the hierarchy of entities, you can lose track of the anchor node. To guide you back to the anchor node, the ARC graph provides an icon to indicate the nearest parent entity of the anchor node. Click the record card next to the icon to easily follow the anchor node path, and reach the anchor node from any point in the graph.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Foundation permission set and the Health Cloud Platform permission set license.

How: From the App Launcher, go to the anchor node object's record page where the ARC is configured. Select the record next to to follow the anchor node path.

SEE ALSO:

Salesforce Help: Follow the Anchor Node Indicator Path (can be outdated or unavailable during release preview)

Advanced Therapy Management Enhancements

Effortlessly track chain of identity and chain of custody for biosamples with Advanced Therapy Management's new Custody Management feature. Customize the fields for a task and optimize the lead time of a clinical process, based on a hierarchy of conditions for override. Also, optimize searches for appointment slots with service territory prioritization rules.

IN THIS SECTION:

Create User Groups in Care Teams

Create user groups in care teams and help your care team perform therapy tasks faster. With user groups, you can configure more than one user in a role, such as a doctor or nurse, who can perform the same task.

Access Advanced Therapy Management From Experience Cloud

Advanced Therapy Management is now available on Experience Cloud. Users can search for slots, schedule appointments, and use the other features of Advanced Therapy Management from an Experience Cloud site. As an admin, you can set up the treatment center experience in a digital workspace using any template of your choice.

Represent Steps Within a Therapy Stage with Work Type Steps

Starting with Winter '24, you can't view or use the Associated Flow Name field on the Work Procedure Step object. Instead, use the new Work Type Step object to represent the steps within a therapy stage and associate the action plan templates that generate therapy tasks. The Process Advanced Therapy Work Orders orchestration flow continues to reference the data stored in the Associated Flow Name field before Winter '24. We recommend that you don't use the Associated Flow Name field as it can't be used with the Winter '24 enhancements.

Configure Lead Time In Hours

You can now set up the lead time of therapy processes in hours as well as days. Previously, you only configured lead time in days. With hour-based lead time, you can optimize the time taken to complete a therapy stage or step, and record more granular details.

Provide a Transparent Tracking Process Using Custody Management

Maximize the efficiency of a therapy's logistical operations by maintaining accurate digital trails of custody items. Support regulatory policy compliance by creating one chain of custody for each custody item. Assign a unique identifier for the custody item as it moves between sites during each stage, step, and task of a therapy.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

How: First, create a care program enrollee record to trigger the *Start Therapy Work Order* flow and generate care program enrollee work order records. The creation of a care program enrollee work order triggers the *Create Custody Chain Entries* flow and generates a custody item record and a custody chain entry record.

SEE ALSO:

Salesforce Help: Configure Chain of Identity for a Custody Item (can be outdated or unavailable during release preview)

Salesforce Help: Configure Custody Records With Workflows (can be outdated or unavailable during release preview)

Easily Customize Custody Records by Using Decision Tables

Use a combination of priority-based input parameters to generate the Custody Verification Type Override decision table, which is invoked by Salesforce flows to create custody records.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

How: From Setup, go to Advanced Therapy Management Settings. Under Configure Decision Tables, click **Generate Decision Tables**, and activate it.

In the App Launcher, find and select **Custody Verification Type Override**, and create a record according to your requirements.

SEE ALSO:

Salesforce Help: Configure Custody Records With Workflows (can be outdated or unavailable during release preview)

Track History of the Changes to Custody Records

Uphold data integrity of custody records for all patients by capturing the date and time of the changes in custody chain entry records. Track and record data about the therapy stage, step, or task during which a change occurred. Easily visualize relevant details by generating reports for custody record changes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions of the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

How: In the App Launcher, search for and select **Custody Items**, and view the list of records.

From Setup, go to Record Types. Click **Continue** and then click **New Custom Report Type**.

SEE ALSO:

Salesforce Help: Track Chain of Custody Data (can be outdated or unavailable during release preview)

Create Customized Field Lists By Using Decision Tables

Customize field configurations for therapy tasks by using a combination of rules. Based on the region, therapy process, or service territory that a therapy task is performed in, set an optional field as mandatory, change the order of display, and remove unnecessary fields.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

How: From Setup, go to Advanced Therapy Management Settings. Under Configure Decision Tables, click **Generate Decision Tables**.

From the App Launcher, find and select **Advanced Therapy Field Optionality Override**, and then click **New Override Rule**. Modify the fields as needed.

SEE ALSO:

Salesforce Help: Override Optionality of Mandatory Fields Based on Hierarchy (can be outdated or unavailable during release preview)

Configure Realistic Lead Times By Using Steps Within a Work Type

Provide an accurate representation of the overall lead time for a therapy stage by using work type steps. Get more flexibility by overriding the default lead time by using input parameters in decision tables, based on priority. Use the Calculate Lead Time Using Work Type Steps flow to invoke the lead time override decision table, and calculate the most optimal lead time to book slots.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Multi-Step Scheduling permission set and the Multi-Step Scheduling permission set license.

How: From App Launcher, find and select **Work Type Steps**, and add lead times for each step.

Then, from Setup, go to Advanced Therapy Management Settings. Under Advanced Scheduling, click **Activate Advanced Scheduling**. Next, under Configure Decision Tables, click **Generate Decision Tables**, and activate the lead time decision table. In the App Launcher, find and select **Work Type Step Lead Time Override**, and create a record according to your requirements.

When you search for slots, the Calculate Lead Time Using Work Type Steps flow automatically calculates the lead time based on the decision table output.

SEE ALSO:

Salesforce Help: Override Default Lead Time Based on Hierarchy (can be outdated or unavailable during release preview)

Optimize Site Utilization with Territory Prioritization Rules

Utilize advanced scheduling configurations to quickly find slots at your preferred combination of service territories. Define priority-based combinations of child service territories and their parent organization for each work type. With territory prioritization rules, the slot formation logic searches for slots in service territory combinations with the highest priority.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Multi-Step Scheduling permission set and the Multi-Step Scheduling permission set license.

How: From Setup, go to Advanced Therapy Management Settings. Under Advanced Scheduling, click **Activate Advanced Scheduling**. In the App Launcher, find and select **Work Type Service Territory Scheduling Priority**, and create a record according to your requirements.

SEE ALSO:

Salesforce Help: Set Up Service Territory Prioritization Rules(can be outdated or unavailable during release preview)

Create User Groups in Care Teams

Create user groups in care teams and help your care team perform therapy tasks faster. With user groups, you can configure more than one user in a role, such as a doctor or nurse, who can perform the same task.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

How: In Setup, go to Public Groups and create a group. In the App Launcher, find and select **Team Member**. Create a record or update a record and select the public group in the Member field.

SEE ALSO:

Salesforce Help: Set Up User Groups for Care Teams (can be outdated or unavailable during release preview)

Access Advanced Therapy Management From Experience Cloud

Advanced Therapy Management is now available on Experience Cloud. Users can search for slots, schedule appointments, and use the other features of Advanced Therapy Management from an Experience Cloud site. As an admin, you can set up the treatment center experience in a digital workspace using any template of your choice.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the following permission sets: Health Cloud Advanced Therapy Orchestration, Multi-Step Scheduling, Health Cloud Foundation, Action Plans, and Industries Visit permission sets.

How: From Setup, go to Sites, and click **New**. Select any template, such as Customer Account Portal, and click **Get Started**. Enter a name for the treatment center and click **Create**. Go to **Builder** to add new pages.

SEE ALSO:

Salesforce Help: Set Up Advanced Therapy Management for Experience Cloud (can be outdated or unavailable during release preview)

Represent Steps Within a Therapy Stage with Work Type Steps

Starting with Winter '24, you can't view or use the Associated Flow Name field on the Work Procedure Step object. Instead, use the new Work Type Step object to represent the steps within a therapy stage and associate the action plan templates that generate therapy tasks. The Process Advanced Therapy Work Orders orchestration flow continues to reference the data stored in the Associated Flow Name field before Winter '24. We recommend that you don't use the Associated Flow Name field as it can't be used with the Winter '24 enhancements.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Multi-Step Scheduling permission set and the Multi-Step Scheduling permission set license.

How: From the App Launcher, find and select **Work Type Steps**.

SEE ALSO:

Salesforce Help: Set Up a Work Type Step for Advanced Therapy Management(can be outdated or unavailable during release preview)

Configure Lead Time In Hours

You can now set up the lead time of therapy processes in hours as well as days. Previously, you only configured lead time in days. With hour-based lead time, you can optimize the time taken to complete a therapy stage or step, and record more granular details.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Multi-Step Scheduling permission set and the Multi-Step Scheduling permission set license.

How: From the App Launcher, find and select **Work Procedure**. Select the record to update. In the Lead Time Unit Type field, select **Hours**.

SEE ALSO:

Salesforce Help: Set Up a Work Procedure for Advanced Therapy Management(can be outdated or unavailable during release preview)

Assessments Enhancements

Prebuilt template assessments that use Discovery Framework and OmniStudio make it easier to get up and running with assessments.

IN THIS SECTION:

Save Time and Effort with Sample Healthcare Assessments

Start or expand your library of assessments with prebuilt templates for healthcare. The samples illustrate common, standard healthcare interactions. If you're new to assessments, the samples orient you to the typical configuration and use of assessments in a healthcare setting.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Foundation permission set.

How: Set up OmniStudio and Discovery Framework, enable the required settings, and deploy the sample assessments.

Use and customize samples of standard AUDIT-C, GAD-7, PHQ-9, intake, risk, and safety plan assessments. Integrate sample assessments into your workflow by using the Action Launcher or Assessment component in Integrated Care Management, the Crisis Support Center Management app, and the new Behavioral Health app.

SEE ALSO:

Salesforce Help: Deploy Sample Assessments (can be outdated or unavailable during release preview)

Behavioral Health App

Get all the information related to a patient's behavioral or mental healthcare journey in one place in Health Cloud's Behavioral Health app. Get up and running more quickly by using the guided setup in the Behavioral Health app.

IN THIS SECTION:

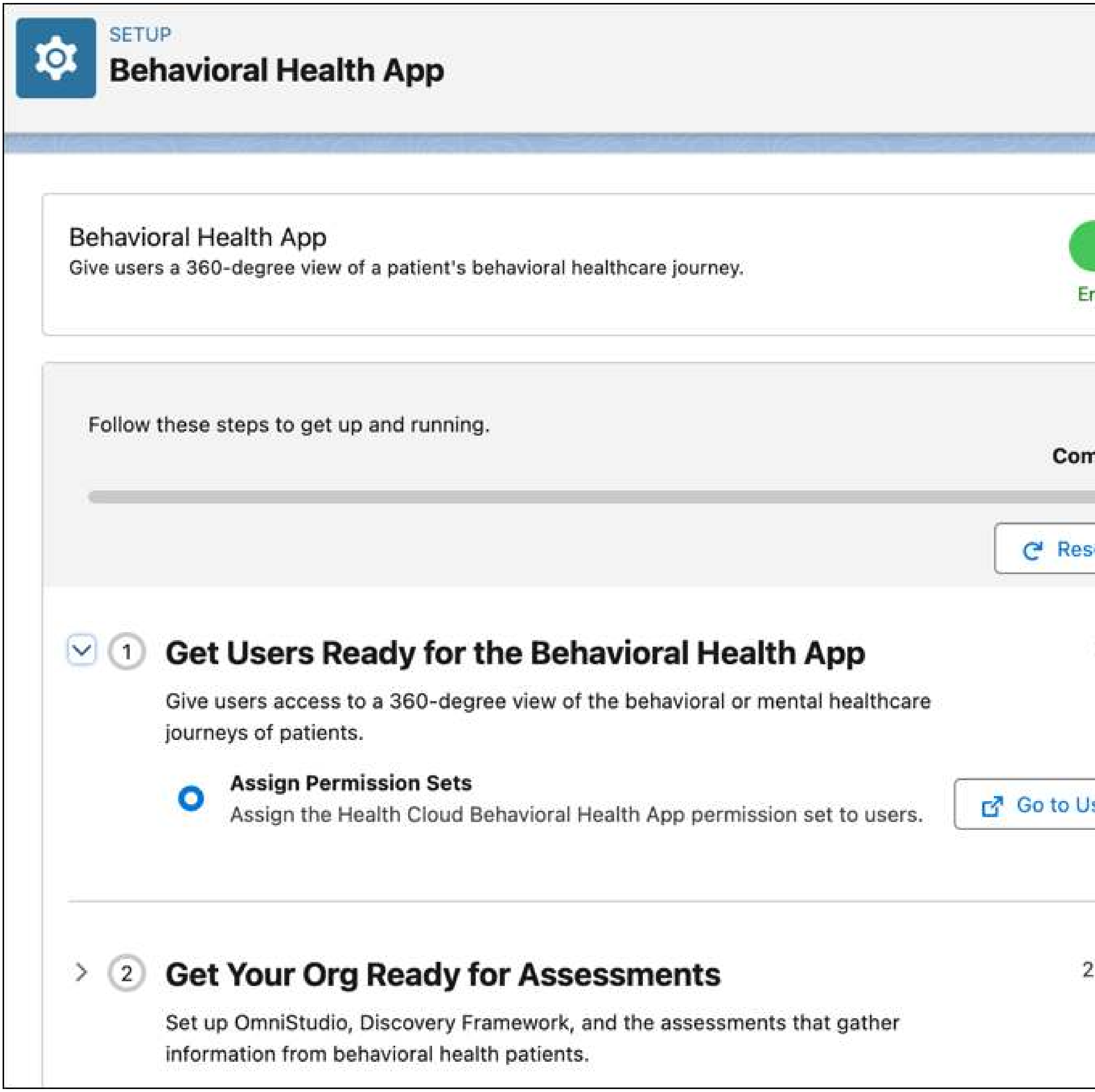
Manage Care More Easily by Using the Behavioral Health App

Give users a 360-degree view of the behavioral or mental healthcare journeys of patients. Behavioral health specialists can view a timeline of key events and engagements, analyze assessment results, and perform common tasks. It saves time to search for providers, maintain care plans, schedule appointments, and capture clinical notes all in one place.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users who are assigned the Health Cloud Behavioral Health App permission set license.

How: From Setup, in the Quick Find box, enter `Behavioral Health App Settings`, and then select **Behavioral Health App Settings**. Turn on **Behavioral Health App** and then follow the steps on the guided setup page.



SEE ALSO:

Salesforce Help: Behavioral Health App (can be outdated or unavailable during release preview)

Crisis Support Center Management Enhancements

Crisis center counselors can now communicate with clients by using SMS and web chat. Social determinants of health associated with cases help counselors understand and address care barriers that clients face. A new flow sends emails to care facility admins requesting them to update the available bed count in their facilities and confirm requested beds for referrals. Follow the Digital Experiences guided setup to quickly configure these new Crisis Support Center Management features.

IN THIS SECTION:

Add Social Determinants of Health to Cases

Recording social determinants of health helps crisis center counselors understand and address care barriers so clients can receive the care they need. Social determinants added to a case are also associated with the account linked to the case.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Crisis Support Center Management App permission set, Health Cloud Social Determinants permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: No additional configuration is necessary. You can find the Care Barriers tab in the case record FlexiPage.

SEE ALSO:

Salesforce Help: Add Social Determinants of Health to Cases

Expose Crisis Support Center Management to Experience Cloud Sites

The new Crisis Support Center Management for Experience Cloud permission set exposes the Crisis Support Center Management app to your Experience site users. With this permission set enabled, care facility admins can easily update the available bed count in their facilities and confirm the availability of requested beds for referrals with a few clicks.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Crisis Support Center Management for Experience Cloud permission set, OmniStudio User permission set, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: Enable the Crisis Support Center Management for Experience Cloud permission set in Setup. Make sure that your Experience Cloud site is configured.

SEE ALSO:

Salesforce Help: Set Up an Experience Site for Facility Admins to Update and Confirm Bed Availability

Salesforce Help: Set Up an Experience Site for Guest Users to Use Web Chat

Communicate with Clients by Using SMS and Web Chat

With SMS and messaging for web configured in Crisis Support Center Management, clients who aren't comfortable speaking on calls can still receive the support they need. Omni-Channel routes incoming messaging requests to counselors, and OmniStudio DataRaptors create messaging session records from ongoing messaging and web chat sessions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Service Cloud user license, Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: To set up Omni-Channel, SMS, and messaging for web, follow the steps in the Digital Experiences guided setup.

SEE ALSO:

Salesforce Help: Messaging for SMS in Crisis Support Center Management

Salesforce Help: Messaging for Web in Crisis Support Center Management

Salesforce Help: Set Up an Experience Site for Guest Users to Use Web Chat

Help Patients Receive Timely Care with the Create Referral Flow

Easily create referral requests to healthcare facilities and providers for clients by using the new Create Referral flow. The flow creates clinical service requests, clinical service requests details, and document links associated with a referral. The flow also creates or updates the associated patient account record.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: The flow is automatically available when you upgrade to Winter'24. Clone and configure it as required. See Automate Referral Creation for more details.

SEE ALSO:

Salesforce Help: Create Referral Flow for Crisis Support Center Management

Request Facility Admins to Update Bed Availability and Confirm Beds for Referrals

Configure flows that send emails to care facility admins requesting them to update the available bed count in their facilities, and confirm bed availability for referral requests. The emails contain links that direct facility admins to your Experience Cloud site, where they can update bed availability and confirm requested beds for referrals.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: The flows are automatically available when you upgrade to Winter'24. Clone and configure them as required.

SEE ALSO:

Salesforce Help: Set Up an Experience Site for Facility Admins to Update and Confirm Bed Availability

Salesforce Help: Clone the Send Emails to Request Facility Bed Availability Flow

Salesforce Help: Clone the Send Email to Account Contacts Flow

Create Follow-Up Lists by Using Actionable Segmentation

Create an actionable list of providers and clients that need follow-ups. Segment similar profiles, curate them, and design follow-up programs as needed.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Actionable Segmentation for Health Cloud permission set, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: Create and activate an actionable list definition. Then, create an actionable list by using the list definition. Set priority and manage assignments as needed.

SEE ALSO:

Salesforce Help: Actionable Segmentation for Crisis Support Center Management

Quickly Configure Crisis Support Center Management with the Updated Guided Setup

The guided setup for Crisis Support Center Management now includes steps for configuring flows that send emails to care facility admins requesting them to update and confirm bed availability. A new Digital Experiences Setup tab within the guided setup makes it easy to implement Omni-Channel, SMS, and web chat.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Crisis Support Center Management App permission set, Health Cloud Crisis Support Center Management permission set license, Health Cloud Foundation permission set, and Health Cloud Platform permission set license.

How: Follow the instructions in the guided setup on the Crisis Support Center Management Settings page in Setup.

Healthcare Provider Enhancements

Upload photos of healthcare providers and track more details about them.

IN THIS SECTION:

Track More Information About Healthcare Providers

Use the new objects and fields in the Provider data model to store details about conditions treated, treatments or services provided, hospital affiliations, and insurance plans or networks. Use the fields in the Contact Profile object to track race and ethnicity.

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

Who: This feature is available to users with the Health Cloud Foundation permission set.

SEE ALSO:

Developer Guide: Provider Relationship Management (can be outdated or unavailable during release preview)

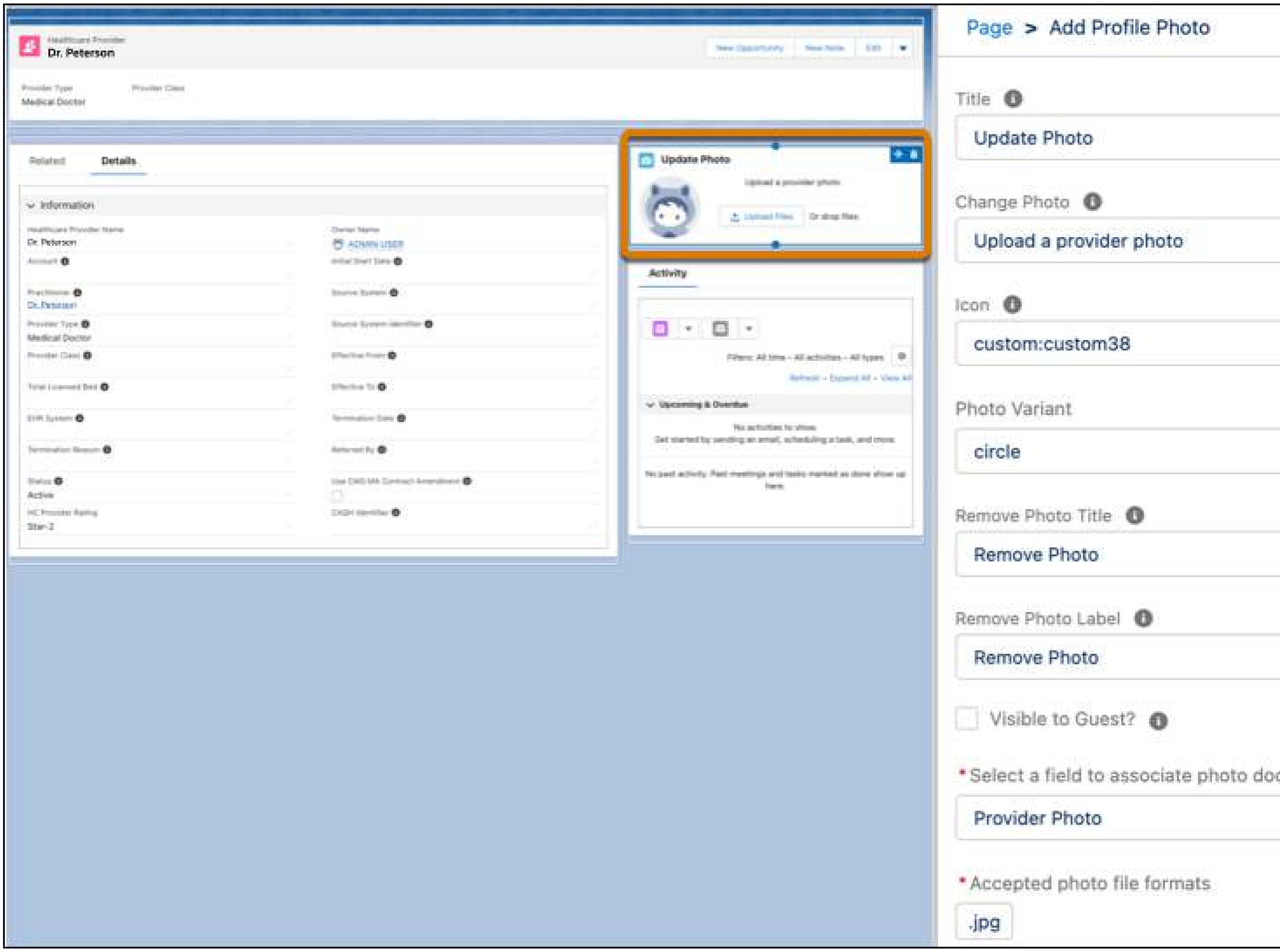
Upload Photos of Healthcare Providers

Healthcare specialists can see who their care providers are and feel a more personal connection with them.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Foundation permission set.

How: In the Lightning App Builder, add the Add Profile Photo component to the Healthcare Provider record page. To add an image to a record, click **Upload Files** or drag a .jpeg, .jpg, .bmp, or .png image file to the page.



Home Health Enhancements

Health Cloud's Home Health now integrates with Medication Management and Integrated Care Management, promoting better patient care and safety. Facilitate effortless visit scheduling and tracking with electronic visit verification, automated checks for patient eligibility, and comprehensive calendar views.

IN THIS SECTION:

Streamline Patient Care With Enhanced Care Plans

Home Health's integration with Integrated Care Management helps care professionals associate care plans, problems, and goals with home visits for promoting patient-centric care. By gathering patient health-related information, laying out well-defined care plans, and assigning the right patient-specific action items for home visits, your users can improve patient health outcomes, experience, and engagement.

Get Accurate Tracking and Recent Visit Information With Electronic Visit Verification Capabilities

Use the Field Service Mobile app to electronically verify the start and completion of home visits. Help your care resources and schedulers achieve real-time monitoring of visit details—date and time, location, type of care provided, and care provider information. Home Health's automatic or manual visit verification helps reduce administrative delays, promotes better accountability and transparency, improves patient care, and achieves regulatory compliance.

Enhance Operational Efficiency with Automatic Verification of Patient Eligibility

Help your schedulers take advantage of automated background checks that determine whether a patient has an active member plan and benefit coverage for recurring home visits. These automatic checks expedite the visit scheduling and prior authorization processes by minimizing administrative work, cutting down on repetitive eligibility verification steps, and by avoiding any manual errors.

Visualize Scheduled Visits With a Single Click

Use the new Calendar View option on the Person Account (Patient) and Care Resource pages to view all visits that are scheduled on a particular day or week. Your schedulers can easily scan upcoming visits, identify free time slots, and create visits without navigating away from the calendar. Use filters and time zones to zero in on particular visits.

Get the Latest Visit Count With a New Flow

Home Health has a new Verify Home Visit Electronically flow, which automatically updates the count of assigned, unassigned, completed, and created home visits for a care service visit plan associated with a patient. This time-saving flow gives a detailed split of the visit count approved by the payer and keeps your schedulers up to date for managing visits effectively. Use the new Refresh button on the Home Health Authorization lightning component to initiate the flow.

Reduce Scheduling Time by Using Care Professional Recommendations

Get the top three recommended care professionals for patients based on the care professionals' missed appointment history, treatment frequency for multiple parameters, utilization rates, and average service appointment duration. Use this information to identify care professionals who are best suited for patient needs, and avoid last-minute rescheduling. Maximize patient satisfaction by assigning available care professionals with high effectiveness scores, and avoid discontentment among care professionals by distributing work equitably.

Get More Information with the Updated Guided Setup for Home Health

Home Health's guided setup has a new step to help you clone and activate the Verify Home Visit Electronically flow. This flow automates updates to Electronic Visit Verification (EVV) information when the care visit status is updated.

Enhance Home Healthcare Service Efficiency

Streamline home-based healthcare management with the new dashboards for tracking and scheduling care resources' activities. Schedulers can use the Home Health Insights dashboard to get complete visibility into care resources' activities, schedules, and utilization rates for improved resource planning. Use insights into patient care requests, care type distribution, and authorizations to prioritize and manage care requests effectively. Healthcare resources can use the new embedded dashboard to track and manage their work hours, utilization rate, and appointments.

Improve Patient Health Outcomes With Effective Medication Management Services

Clinicians can now use the Field Service Mobile app to optimize, review, and efficiently manage a patient's medication list during home visits. They can add medications or alter the prescription or dosage to reduce medication-related errors, mitigate patient health issues, and provide safer healthcare services.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions in the Salesforce Field Service mobile app, with the Health Cloud and the Home Health add-on licenses.

Who: To use the mobile app, users need the Home Health Caregiver or the Home Health Clinician permission set license. To see a patient's clinical data and preferences, users need the Home Health Clinician permission set license.

How: No additional configuration is necessary.

SEE ALSO:

Salesforce Help: Manage Patient Medications During Home Visits

Streamline Patient Care With Enhanced Care Plans

Home Health's integration with Integrated Care Management helps care professionals associate care plans, problems, and goals with home visits for promoting patient-centric care. By gathering patient health-related information, laying out well-defined care plans, and assigning the right patient-specific action items for home visits, your users can improve patient health outcomes, experience, and engagement.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

Who: This feature is available to users with the Care Plans Access and Manage Home Health permission set licenses.

How: To enable Integrated Care Management, go to the Integrated Care Management Settings page in Setup. Turn on Enhanced Care Plans, Automatic Sharing for Goal Assignment Records, and Care Gap.

Next, in the Lightning App Builder, place the IndustriesHCCarePlanManager FlexCard on the Person Account record page.

SEE ALSO:

Salesforce Help: Integrate Home Health with Integrated Care Management

Salesforce Help: Manage Patient's Care Plans During Home Visits

Get Accurate Tracking and Recent Visit Information With Electronic Visit Verification Capabilities

Use the Field Service Mobile app to electronically verify the start and completion of home visits. Help your care resources and schedulers achieve real-time monitoring of visit details—date and time, location, type of care provided, and care provider information. Home Health's automatic or manual visit verification helps reduce administrative delays, promotes better accountability and transparency, improves patient care, and achieves regulatory compliance.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions in the Salesforce Field Service mobile app, with the Health Cloud and the Home Health add-on licenses.

Who: To use the mobile app, users need the Home Health Caregiver or the Home Health Clinician permission set license.

Why: To provide seamless electronic verification, Home Health is enhanced with two new flows, Verify Home Visit Electronically and Update Verified Home Visit Details. These flows automatically update the visit verification information when the visit status changes to In Progress or Completed.

How: From Setup, go to Flows, and clone and activate the Verify Home Visit Electronically Flow.

Then, from Setup, go to Field Service Mobile Settings, and configure the settings for electronic visit verification.

SEE ALSO:

Salesforce Help: Set Up Electronic Visit Verification

Salesforce Help: Manage Electronic Verification of Home Visits

Enhance Operational Efficiency with Automatic Verification of Patient Eligibility

Help your schedulers take advantage of automated background checks that determine whether a patient has an active member plan and benefit coverage for recurring home visits. These automatic checks expedite the visit scheduling and prior authorization processes by minimizing administrative work, cutting down on repetitive eligibility verification steps, and by avoiding any manual errors.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

Who: This feature is available to users with the Manage Home Health permission set license.

Why: The Schedule Home Healthcare Visit flow is enhanced to show a message when patients have an active benefit coverage for home visits, making it easier for schedulers to handle visit creation.

How: In the Lightning App Builder, place the Home Health Visits lightning component on the Person Account record page. No additional configuration is necessary as the Home Health coverage type is available in your org by default.

SEE ALSO:

Salesforce Help: Home Health

Salesforce Help: Set Up the Home Health Visits Component

Salesforce Help: Schedule Visits with Home Health

Visualize Scheduled Visits With a Single Click

Use the new Calendar View option on the Person Account (Patient) and Care Resource pages to view all visits that are scheduled on a particular day or week. Your schedulers can easily scan upcoming visits, identify free time slots, and create visits without navigating away from the calendar. Use filters and time zones to zero in on particular visits.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

Who: This feature is available to users with the Manage Home Health permission set license.

How: No additional configuration is necessary.

SEE ALSO:

Salesforce Help: Home Health

Salesforce Help: Schedule Visits with Home Health

Get the Latest Visit Count With a New Flow

Home Health has a new Verify Home Visit Electronically flow, which automatically updates the count of assigned, unassigned, completed, and created home visits for a care service visit plan associated with a patient. This time-saving flow gives a detailed split of the visit count approved by the payer and keeps your schedulers up to date for managing visits effectively. Use the new Refresh button on the Home Health Authorization lightning component to initiate the flow.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

Who: This feature is available to users with the Manage Home Health permission set license.

How: No additional configuration is necessary.

SEE ALSO:

Salesforce Help: Refresh Home Visit Counts

Reduce Scheduling Time by Using Care Professional Recommendations

Get the top three recommended care professionals for patients based on the care professionals' missed appointment history, treatment frequency for multiple parameters, utilization rates, and average service appointment duration. Use this information to identify care professionals who are best suited for patient needs, and avoid last-minute rescheduling. Maximize patient satisfaction by assigning available care professionals with high effectiveness scores, and avoid discontentment among care professionals by distributing work equitably.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Home Health, CRM Analytics, and Scoring Framework are enabled.

Who: The Effectiveness Score for Recommended Care Professionals (Health Cloud) template configuration type in Scoring Framework is available to users with the Home Health add-on license, and the Revenue Intelligence for Health and AI Accelerator with Scoring Framework permission set licenses.

How: To get predictions, go to the Scoring Framework page in Setup. Create a CRM Analytics template configuration by using the Effectiveness Score for Recommended Care Professionals (Health Cloud) template configuration type.

SEE ALSO:

Salesforce Help: Artificial Intelligence for Home Health (can be outdated or unavailable during release preview)

Get More Information with the Updated Guided Setup for Home Health

Home Health's guided setup has a new step to help you clone and activate the Verify Home Visit Electronically flow. This flow automates updates to Electronic Visit Verification (EVV) information when the care visit status is updated.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

How: From Setup, go to the Home Health Settings page to find the new guided setup step.

SEE ALSO:

Salesforce Help: Home Health

Enhance Home Healthcare Service Efficiency

Streamline home-based healthcare management with the new dashboards for tracking and scheduling care resources' activities. Schedulers can use the Home Health Insights dashboard to get complete visibility into care resources' activities, schedules, and utilization rates for improved resource planning. Use insights into patient care requests, care type distribution, and authorizations to prioritize and manage care requests effectively. Healthcare resources can use the new embedded dashboard to track and manage their work hours, utilization rate, and appointments.

Where: This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

Who: These dashboards are part of the Enhanced Analytics for Healthcare app and are available to users with the Healthcare Intelligence or CRM Analytics for Health Cloud add-on license. Users with the Healthcare Analytics Admin or Health Intelligence Admin permission sets can create, edit, and delete the app. Users with the Healthcare Analytics User or Health Intelligence User permission sets can view the app dashboards.

How: From Setup, in the Quick Find box, enter `Health Cloud CRM Analytics Settings`, and then select **Enhanced Analytics for Healthcare**. Follow the instructions on the page to set up Enhanced Analytics for Healthcare.

Integrated Care Management Enhancements

Quickly launch Integrated Care Management by using the new console app from App Launcher. Identify gaps in care by using an OmniScript flow that evaluates measures to create care gaps. You can also import care gaps or create them manually. Then, launch an OmniScript flow to create care plans for patients from open care gaps. View these care gaps and their problems, goals, and interventions on the updated care plan interface. Updates to the Decision Tables user interface make mapping assessment question responses and recommendations easier.

IN THIS SECTION:

Access Integrated Care Management from App Launcher

The new console app makes it easier to access Integrated Care Management components such as care plans, care gaps, and assessments. A CRM Analytics dashboard on the Home tab gives care managers a snapshot of their tasks and helps them optimize their workload.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Care Plans Access permission set license.

How: Follow the Health Cloud CRM Analytics guided setup to enable CRM Analytics and install the dashboard.

SEE ALSO:

Salesforce Help: CRM Analytics for Integrated Care Management

Identify Gaps in Patient Care by Using Care Gaps

Integrated Care Management includes an OmniScript flow that care managers can use to create care gaps automatically by evaluating a clinical measure. You can also import care gaps or create them manually. The new care gap interface gives care managers a comprehensive view of a patient's care gaps, including the care gap status and associated measures.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Care Plans Access permission set license.

How: Turn on Care Gap in Setup. Then, in Lightning App Builder, place the HealthCloudCareManagementCareGapManager FlexCard on the patient record page so users can access the care gap interface.

SEE ALSO:

Salesforce Help: Care Gaps

Create Care Gaps by Evaluating Clinical Measures

Care managers can now use an OmniScript flow to evaluate clinical measures and create care gap records for patients. This flow helps care managers ensure that their patients receive appropriate care based on clinical criteria.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Care Plans Access permission set license.

How: Turn on Care Gap in Setup. Then, in Lightning App Builder, place the HealthCloudCareManagementCareGapManager FlexCard on the patient record page. From the FlexCard, care managers can launch the flow by clicking **New Care Gap**.

SEE ALSO:

Salesforce Help: Enable Users to Create Care Gaps by Evaluating a Measure

Salesforce Help: Evaluate a Measure to Create a Care Gap

Create Care Plans from Care Gaps by Using an OmniScript Flow

The new OmniScript flow in Integrated Care Management helps care managers select one or more open care gaps, and specify details such as the care plan name, start date, and end date. If the selected care gaps are linked with problem definitions, care managers can add goals and interventions to the care plan.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Care Plans Access permission set license.

How: Turn on Care Gap in Setup. Care managers can launch the OmniScript flow by clicking **New Care Plan** on the care plan interface and selecting**Care Gaps** as the care plan creation method.

SEE ALSO:

Salesforce Help: Create a Care Plan from Care Gaps

View Care Gaps by Using the Enhanced Care Plan Interface

When care managers create care gaps from care plans, they can now view the care gaps and problems, goals, and interventions directly on the care plan interface. Care managers can also create or edit problems, goals, and interventions from the interface without having to navigate to other pages.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Care Plans Access permission set license.

How: Make sure you've configured the IndustriesHCCarePlanManager FlexCard on the patient record page. Then, turn on Care Gap in Setup to access the updated interface.

SEE ALSO:

Salesforce Help: Add the Care Gaps FlexCard to the Patient Record Page

Enhance Assessment Question and Response Mapping with Updated Decision Tables

With the updated decision tables, you can now use multiple objects as data sources, categorize decision tables, and choose filter preferences for decision table results.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

SEE ALSO:

Easily Filter Decision Table Results by Choosing Your Filter Preference

Use Multiple Objects as Data Sources for Decision Table Creation

Easily Maintain Decision Tables by Categorizing Them

Expose Care Gaps to Experience Cloud Sites

Community users can now access the Care Gap, Care Gap Criteria Result, Clinical Measure, Clinical Measure Criteria, and Clinical Measure Criteria Group objects. Care managers, patients, and their care teams can quickly view which care gaps have been identified for the patient and take actions to close the care gaps.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Integrated Care Management for Experience Cloud Sites permission set and the Health Cloud for Community Add-on license.

How: Enable the Integrated Care Management for Experience Cloud Sites permission set in Setup. Make sure that your Experience Cloud site is configured.

SEE ALSO:

Salesforce Help: Care Gaps Access for Experience Cloud Sites

Intelligent Document Automation Enhancements

Get Intelligent Document Workspace up and running faster by using guided setup.

IN THIS SECTION:

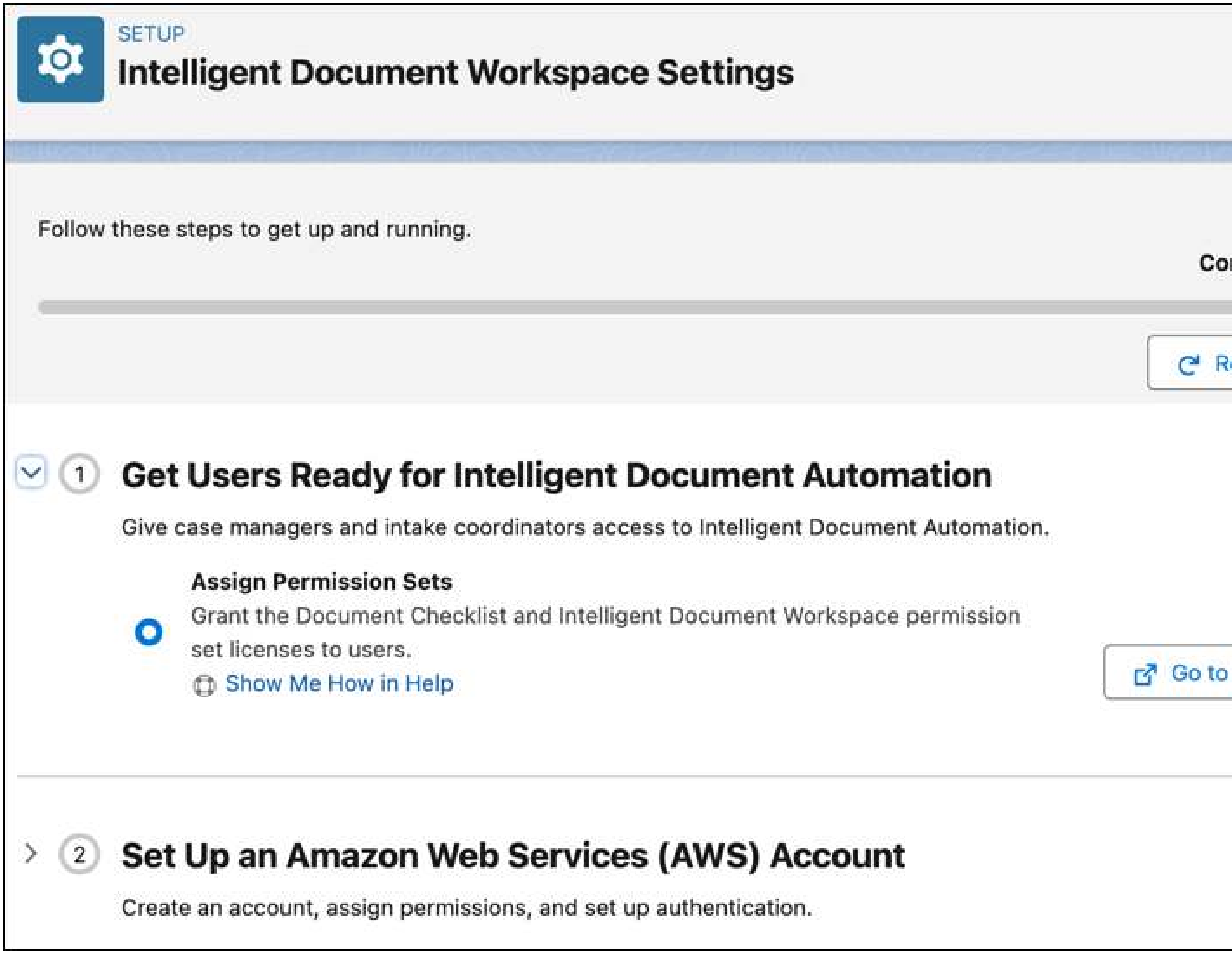
Set Up Intelligent Document Workspace More Easily

Follow guided setup steps to configure the Intelligent Document Workspace. The tasks have in-app links that help you configure permissions and set up required settings and features. Help links point to topics that provide more context and guidance for each task.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Foundation permission set.

How: From Setup, in the Quick Find box, enter *`Intelligent Document Workspace Settings`*, and then select **Intelligent Document Workspace Settings**. Turn on the toggle and complete the guided setup steps.



SEE ALSO:

Salesforce Help: Intelligent Document Automation

Intelligent Sales Enhancements

Track the progress of sales agreements with Path on the Sales Agreement record page. Help med tech organizations make more informed purchasing decisions with Actionable Relationship Center enhancements. Also, help sales representatives mitigate product shortfall by defining flexible distance limits of up to 5000 miles (8047 km) for inventory search.

IN THIS SECTION:

Track the Status of Sales Agreements with Path

Provide greater visibility into business processes by helping users easily monitor the progression of a sales agreement. Configure path settings by using the Sales Agreement object's Status field, and visualize its progress on the Sales Agreement record page.

Search for Product Inventory in a Larger Radius

Help sales reps optimize their search for inventory and execute successful product transfers. Search for a product's inventory with the maximum distance radius in the range of 50 miles (80.47 km) to 5000 miles (8047 km). Also, view search results for product inventory in batches of 25, instead of a continuous scroll.

Support Intelligent Sales Operations With Actionable Relationship Center

Optimize the commercial operations of med tech companies by providing a complete visual representation of complex account relationships in an interactive graph. Easily use Intelligent Sales with Actionable Relationship Center (ARC) enhancements to represent upward and downward account hierarchy, define the starting point of an ARC graph, and display records.

Track the Status of Sales Agreements with Path

Provide greater visibility into business processes by helping users easily monitor the progression of a sales agreement. Configure path settings by using the Sales Agreement object's Status field, and visualize its progress on the Sales Agreement record page.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Foundation permission set and the Health Cloud Platform permission set license.

How: From Setup, go to Path Settings, and click **New Path**. Configure a path with the Sales Agreement object and the Status field, and activate it.

From the App Launcher, find and select **Sales Agreement**. Edit a Sales Agreement record page. In Lightning App Builder, move the standard Path component to an editable part of the record page.

SEE ALSO:

Salesforce Help: Configure Path Settings for Sales Agreements (can be outdated or unavailable during release preview)

Search for Product Inventory in a Larger Radius

Help sales reps optimize their search for inventory and execute successful product transfers. Search for a product's inventory with the maximum distance radius in the range of 50 miles (80.47 km) to 5000 miles (8047 km). Also, view search results for product inventory in batches of 25, instead of a continuous scroll.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Foundation permission set, the Industries Visit permission set, and the Action Plans permission set.

How: From Setup, go to Intelligent Sales Settings. Click **Enable** to activate Intelligent Sales. Under Define Distance Limit for Transfer Requests, add a maximum distance radius.

SEE ALSO:

Salesforce Help: Request a Product Transfer on the Mobile App (can be outdated or unavailable during release preview)

Support Intelligent Sales Operations With Actionable Relationship Center

Optimize the commercial operations of med tech companies by providing a complete visual representation of complex account relationships in an interactive graph. Easily use Intelligent Sales with Actionable Relationship Center (ARC) enhancements to represent upward and downward account hierarchy, define the starting point of an ARC graph, and display records.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud or Health Cloud for Life Sciences license.

Who: This feature is available to users with the Health Cloud Foundation permission set and the Health Cloud Platform permission set license.

How: From Setup, go to Actionable Relationship Center under Feature Settings, and click **New Relationship Graph**. Configure all the entities you want to represent in Graph Builder.

SEE ALSO:

Salesforce Release Notes: Actionable Relationship Enhancements

Marketing Cloud Engagement for Health Cloud

Use Marketing Cloud Engagement for Industries to its full potential and synchronize your Health Cloud CRM data with Marketing Cloud.

IN THIS SECTION:

Increase Patient Engagement by Using Marketing Cloud Engagement for Health Cloud

Use the guided setup to easily connect Health Cloud with Marketing Cloud. Then design and automate patient outreach by using customizable journeys specifically for healthcare. Synchronize your Salesforce data with Marketing Cloud so that you have the most up-to-date patient information in your communication.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the MC Engagement for Industries add-on license and where Health Cloud is enabled.

Who: This feature is available to users with the Health Cloud Foundation permission set.

Why: Marketing Cloud Engagement for Health Cloud provides journeys that guide agents and patients through common activities. For example, create journeys to close care gaps. In one journey, remind a plan member to schedule a routine screening and create a case to follow up if you don't hear back. In another journey, send an appointment reminder with instructions about preparing for an office visit.

How: Set up My Domain and install the Marketing Cloud Engagement for Industries package in Salesforce. Then connect Marketing Cloud with Salesforce and create a synchronized data source. Customize and manage journeys for Health Cloud.

SEE ALSO:

Salesforce Help: Marketing Cloud Engagement for Health Cloud (can be outdated or unavailable during release preview)

New Shield Platform Encryption for Health Cloud

Support encryption on more Health Cloud objects.

Encrypt Consent and Healthcare Provider Data

Support encryption at-rest for the Name field on a range of Health Cloud objects with Shield Platform Encryption. Users can inadvertently enter protected health information in the Name field of certain Health Cloud objects. These fields don't expose information directly, but they can include patient information in the naming scheme.

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

Who: The change to authorization form objects is available to customers who purchased Salesforce Shield or Shield Platform Encryption. The change to the Healthcare Provider Treated Condition object is available to customers who purchased Salesforce Shield or Shield Platform Encryption and the add-on subscriptions for Health Cloud or Health Cloud for Life Sciences.

How: On the Encryption Policy page, click **Encrypt Fields**. Then click **Edit**. You can now encrypt the Name field with the probabilistic, case-sensitive deterministic, or case-insensitive deterministic encryption schemes on these objects.

- AuthorizationForm
- AuthorizationFormConsent
- AuthorizationFormDataUse
- AuthorizationFormText
- HlthCareProvTreatedCondition

SEE ALSO:

Salesforce Help: Which Standard Fields Can I Encrypt? (can be outdated or unavailable during release preview)

Referral Enhancements

Manage your referrals by using automation tools, enhanced Clinical Data Model objects, and APIs built for the Salesforce platform. New referral management features use standard objects in the FHIR R4-aligned data model.

Transform Inbound Documents into Referrals

The new Process Received Document invocable action turns documents received by fax and email into clinical service requests. The action uses text extracted from documents to populate details about the patient and the procedure or diagnostic service requested.

Automate Referrals with the Create Referral Flow

Guide users through the creation of referrals and have automation tools gather data and create related records for them. The new Create Referral flow creates clinical service requests, clinical service request details, and document links associated with a referral. The flow also creates or updates the associated patient account record.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

When: This feature is available to users with the Health Cloud Foundation permission set.

Why: An efficient referral management process assists care coordinators and helps ensure patients get more timely access to care, which improves patient outcomes, acquisition, and retention.

How: In Flow Builder, run the Create Referral flow and decide whether to use the flow as is or customize it. Add a Create Referral action to the Provider Search or Patient Account record pages. If you use the Crisis Support Center Management app, you can also add the Create Referral quick action to the Bed Search component. When users click the quick action, the flow is prepopulated with relevant patient and provider details.

SEE ALSO:

Salesforce Help: Configure the Create Referral Flow (can be outdated or unavailable during release preview)

Create a Referral in the Provider Portal

Guide providers through the creation of a referral and have automation tools gather data and create related records for them. Add the new Create Referral flow to the Provider Portal Experience cloud site.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Foundation permission set.

SEE ALSO:

Salesforce Help: Build an Experience Cloud Site for the Provider Portal (can be outdated or unavailable during release preview)

Track Accepted Referrals

Accept referrals directly from a clinical service request. To gain insights into referrals, create reports or flows triggered by the acceptance of a referral.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Foundation permission set.

How: In a clinical service request, click the **Accept Referral** quick action. Easily identify accepted referrals by confirming that Accepted is selected in clinical service requests.

SEE ALSO:

Salesforce Help: Accept Referrals from Clinical Service Requests (can be outdated or unavailable during release preview)

Transform Inbound Documents into Referrals

The new Process Received Document invocable action turns documents received by fax and email into clinical service requests. The action uses text extracted from documents to populate details about the patient and the procedure or diagnostic service requested.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Foundation permission set and the Intelligent Document Reader add-on license.

Health Cloud Has New and Changed Objects

Store and access more data with these new and changed Health Cloud objects.

Where: This change applies to Enterprise and Unlimited editions.

Advanced Therapy Management

Store a list of fields with changed optionality, based on certain parameters
Use the new `AdvTherapyFieldOptOverride` object.

Store information about an event or entry in the chain of custody
Use the new `CustodyChainEntry` object.

Store information about an item in the chain of custody
Use the new `CustodyItem` object.

Store default and override configuration information about a custody record's verification type
Use the new `CustodyVerfcTypeOverride` object.

Store the priority of the combination of the service territory, work type, and work procedure for fetching appointment slots
Use the new `WorkTypeSvcTerrSchdPrio` object.

Store each step within a work type
Use the new `WorkTypeStep` object.

Represent the lead time that overrides the default lead time for a combination of work procedure, work type, or work type step performed at a service territory
Use the new `WorkTypeStepLdTimeOvride` object.

Store the previous work order that's executed for an associated care program enrollee
Use the new `PreviousWorkOrder` field in the CarePgmEnrolleeWorkOrder object.

Represent the service territory where an advanced therapy care program is executed
Use the new `EnrollmentLocation` field in the CareProgramEnrollee object.

Represent the unit of measure for the lead time required to complete a work procedure
Use the new `LeadTimeUnitType` field in the WorkProcedure object.

Home Health

Represent the ID of the care plan, care plan detail, goal assignment, or action plan associated with the care service visit
Use the new `CarePlanContext` field in the CareServiceVisit object.

Represent the ID of the care service visit plan associated with the care service visit
Use the new `CareServiceVisitPlan` field in the CareServiceVisit object.

Represent the type of the care service visit
Use the new `VisitType` field in the CareServiceVisit object.

Represent the ID of the account associated with the patient who received the care service
Use the new `Account` field in the CareServiceVisit object.

Represent the start date and time of the care service visit that's verified and updated by a care professional from the Home Health agency
Use the new `ManVerifiedVisitStartDtTm` field in the CareServiceVisit object.

Represent the end date and time of the care service visit that's verified and updated by a care professional from the Home Health agency
Use the new `ManVerifiedVisitEndDtTm` field in the CareServiceVisit object.

Represent the start date and time of the care service visit that's automatically updated from the care giver's mobile device
Use the new `AutoVrfyVisitStartDtTm` field in the CareServiceVisit object.

Represent the end date and time of the care service visit that's automatically updated from the care giver's mobile device
Use the new `AutoVerifiedVisitEndDtTm` field in the CareServiceVisit object.

Represent the start location of the care service visit that's verified and updated by a care professional from the Home Health agency
Use the new `ManVrfyVisitStartLoc` field in the CareServiceVisit object.

Represent the end location of the care service visit that's verified and updated by a care professional from the Home Health agency
Use the new `ManVrfyVisitEndLoc` field in the CareServiceVisit object.

Represent the start location of the care service visit that's automatically updated from the care giver's mobile device
Use the new `AutoVrfyVstStartLoc` field in the CareServiceVisit object.

Represent the end location of the care service visit that's automatically updated from the care giver's mobile device
Use the new `AutoVrfyVisitEndLoc` field in the CareServiceVisit object.

Represent the ID of the care giver who starts the care service visit
Use the new `StartedBy` field in the CareServiceVisit object.

Represent the ID of the care giver who ends the care service visit
Use the new `EndedBy` field in the CareServiceVisit object.

Represent the ID of the care plan, care plan detail, goal assignment, or action plan associated with the care service visit
Use the new `CarePlanContext` field in the CareServiceVisitPlan object.

Represent the number of created visits in the planned care service
Use the new `CreatedVisitCount` field in the CareServiceVisitPlan object.

Represent the number of approved visits in the planned care service
Use the new `ApprovedVisitCount` field in the CareServiceVisitPlan object.

Indicate whether a clinical service request is accepted or not
Use the new `IsAccepted` field in the ClinicalServiceRequest object.

Provider Relationship Management

Represent an affiliation between a healthcare provider and a healthcare facility
Use the new `CareProviderAfflRoleConfig` object.

Associate a healthcare service with a healthcare provider, healthcare facility, or healthcare practitioner facility
Use the new `HealthcareProviderService` object.

Represent a healthcare treatment, service, or procedure offered by a provider, practitioner, or facility
Use the new `CareService` object.

Associate a healthcare service with a code set bundle

Use the new `HealthcareServiceDetail` object.

Associate a healthcare provider, facility, or practitioner with a problem definition that's related to a health condition

Use the new `HlthCareProvTreatedCondition` object.

Track more information about a healthcare provider

Use the new `Service`, `ServiceCode`, and `Condition` fields in the CareProviderSearchableField object.

Associate a healthcare provider with their related User record

Use the new `RelatedUser` field in the HealthcareProvider object.

Associate a healthcare provider with a Content Document file that is their photo

Use the new `ProviderPhoto` field in the HealthcareProvider object.

Benefits Verification

Associate a patient with a payer insurance plan or network

Use the new `PayerNetwork` field in the MemberPlan object.

Health Insurance

Associate a patient with a payer insurance plan or network

Use the new `PayerNetwork` field in the MemberPlan object.

Clinical Data Model

Indicate whether a clinical service request is accepted or not

Use the new `IsAccepted` field in the ClinicalServiceRequest object.

Intelligent Document Automation

Track the processing status of a document

Use new picklist values on the existing `Status` field in the ReceivedDocument object.

Represent the reason for the processing status when processing and transforming a document

Use the new `StatusReason` field in the ReceivedDocument object.

Integrated Care Management

Represent gaps in patient care through a specified period

Use the new `Care Gap` object.

Represent a structured and computable definition of a health-related measure for identifying care gaps

Use the new `Clinical Measure` object.

Represent a computable criteria of a health-related measure

Use the new `Clinical Measure Criteria` object.

Represent a group of computable criteria for a health-related measure

Use the new `Clinical Measure Criteria Group` object.

Represent the result of an evaluated criteria

Use the new `Care Gap Criteria Result` object.

SEE ALSO:

Developer Guide: Clinical Data Model

Developer Guide: Benefits Verification

Developer Guide: Intelligent Document Automation

Developer Guide: Advanced Therapy Management

Developer Guide: Provider Relationship Management (can be outdated or unavailable during release preview)

Developer Guide: Health Insurance

Developer Guide: Home Health

New and Changed Invocable Actions in Health Cloud

Use the new and changed invocable actions for Health Cloud.

Get the ID of the care service visit plan record that's associated with the service request

Use the new *`careServiceVisitPlanId`* output field on the existing scheduleRecurringHomeVisit action.

Create clinical services request records and the associated clinical service request detail records for patient referrals

Use the new *`createReferral`* action.

Create a record with the processed results of a received document

Use the new *`processReceivedDocument`* action.

Update the status of a care gap record

Use the new *`updateCareGapStatus`* action.

SEE ALSO:

Developer Guide: Health Cloud Standard Invocable Actions

New and Changed Health Cloud Metadata Types

Make the most of the new and changed metadata types of Health Cloud.

Salesforce Flow

Create clinical services request records and the associated clinical service request detail records for patient referrals

Use the new `createReferral` value in the existing `actionType` field, which is on the existing FlowActionCall subtype of the Flow metadata type.

Create a record with the processed results of a received document

Use the new `processReceivedDocument` value in the existing `actionType` field, which is on the FlowActionCall subtype of the Flow metadata type.

SEE ALSO:

Developer Guide: Flow for Health Cloud

Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

IN THIS SECTION:

New Connect REST API Resources
These resources are new in Health Cloud.

SEE ALSO:

Developer Guide: Health Cloud Business APIs

New Connect REST API Resources

These resources are new in Health Cloud.

Create a patient referral

Make a POST request to the new

```
/connect/health/referral-management/referrals
```

resource.

New request body: Referral Management Input

New response body: Referral Management Output

Industries Order Management

Industries Order Management (also called Order Management, IOM or just OM) is a product module that delivers best-in-class, next-generation order management capabilities to communications, media and energy companies.

Learn about what's in this release in the Industries Order Management Release Notes

Insurance

Insurance connects frontline agents, back-office teams, and customers with flexible components that support policy administration, benefit administration, claims, and billing.

Learn about what's in the Winter '24 release in the Insurance Winter '24 Release Notes.

Manufacturing Cloud

Design an end-to-end automated adjudication process for warranty claims with scalable business rules, and manage claims data more efficiently. Get actionable insights on warranty claims with CRM Analytics for Warranty Lifecycle Management. Adjudicate product warranty claims faster by using scores to assess the likelihood of the claims getting approved. Link an asset with all the stakeholders in its lifecycle. Track manufacturing fleet operations with Fleet Management features. Make the most out of enhancements to Engagement, Timeline, Actionable List Members, List Builder for Data Cloud Segment, and more.

IN THIS SECTION:

Automation of Warranty Claims Adjudication

Build a versatile, automated adjudication process for warranty claims to boost adjudication accuracy, to reduce your warranty team's workload, and to prevent subjectivity in adjudication. Empower your warranty team to design exhaustive, flexible business rules to validate claims by using Business Rules Engine. Use Context Service to streamline the sharing and usage of warranty claims data in adjudication processes.

IN THIS SECTION:

SEE ALSO:

Salesforce Help: Automated Adjudication of Warranty Claims (can be outdated or unavailable during release preview)

Validate Claims Quickly and Accurately by Using Complex, Extensible Business Rules

Design more sophisticated, detailed business rules in expression sets to verify the warranty coverages of defective products and to validate claim payment details against eligibility rules. Use the Claims Validation business element to validate if all replaced or repaired parts in a claim are covered under a warranty. Use list groups and list filters to conditionally filter and iterate over different Claim Coverage Payment Detail records associated with a Claim record. Add other elements to the list group to perform further operations on the filtered records, such as determining the approved claim amount for each record.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud, Warranty Lifecycle Management, and Business Rules Engine.

Who: This feature is available to users with the Warranty Lifecycle Management Psl, Claims Management Foundation, and Rules Engine Designer permission sets.

How: Create an expression set with the Warranty Claim usage type and open a version of the expression set in Expression Set Builder. Add the List Group, List Filter, and Claims Validation elements to the expression set version. Specify other meaningful elements and resources.

Create Warranty Claims Adjudication Rules with Greater Flexibility and Ease

Simplify the usage of warranty claims data in claims adjudication rules by using the predefined Claim Details context definition with Business Rules Engine. Warranty administrators can use context tags of the context definition in expression sets to design business rules with more flexibility, to eliminate redundant input, and to improve process performance.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud, Warranty Lifecycle Management, Context Service, and Business Rules Engine.

Who: This feature is available to users with the Warranty Lifecycle Management Psl, Claims Management Foundation, Rules Engine Designer, and Context Service Admin permission sets.

How: Use the context tags from the Claim Details context definition to supply the appropriate claims data to process automation tools.

SEE ALSO:

Use Attributes from Context Definitions as List Variables in Expression Sets

CRM Analytics for Warranty Lifecycle Management

Set up CRM Analytics for Warranty Lifecycle Management easily by using the new guided setup. Get insights from the analytics dashboards to effectively manage warranty claims and improve process efficiency.

IN THIS SECTION:

Set Up CRM Analytics for Warranty Lifecycle Management Easily

Initiate the request to create a CRM Analytics app for Warranty Management more easily by using the new guided setup. Follow the steps to configure and create an app with dashboards.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud, Warranty Lifecycle Management, and CRM Analytics.

Who: This feature is available to users with the Manufacturing Analytics add-on license.

How: From Setup, in the Quick Find box, enter *`Manufacturing`*, and then select **Set Up CRM Analytics for Warranty Lifecycle Management**. Then, follow the instructions on the page to set up CRM Analytics for Warranty Lifecycle Management and initiate the request to create an app.

Manage Your Warranty Claims More Efficiently

The CRM Analytics for Warranty Lifecycle Management app now features Claims Analytics dashboards that provide in-depth analysis of warranty claims. Identify the dealers with a high claim count and claim value to streamline operations, minimize financial impact, and focus on targeted improvements. Use trend analysis, location insights, past claims trends, and SLA management to address warranty claims quickly and ensure efficient claim resolutions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud, Warranty Lifecycle Management, and CRM Analytics.

Who: This feature is available to users with the Manufacturing Analytics add-on license.

Adjudicate Product Warranty Claims Swiftly by Using Predicted Claim Approval Scores

Based on previously approved claims, get scores about the likelihood of warranty claims getting approved. Review these scores to determine whether you can approve the claims as they are, or must verify the claims further.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Warranty Lifecycle Management, CRM Analytics for Manufacturing, and Scoring Framework are enabled.

Who: The Warranty Claim Approval Score (Manufacturing or Automotive Cloud) template configuration type in Scoring Framework is available to users with the Warranty Lifecycle Management, Claims Management Foundation, Revenue Intelligence for Manufacturing, and AI Accelerator with Scoring Framework permission set licenses.

How: To get predictions, go to the Scoring Framework page in Setup. Create a CRM Analytics template configuration by using the Warranty Claim Approval Score (Manufacturing or Automotive Cloud) template configuration type.

SEE ALSO:

Salesforce Help: Product Warranty Claim Approval Predictions by Using Scoring Framework (can be outdated or unavailable during release preview)

Track Order Recalls and Returns for a Sales Agreement

Order products with negative quantities and negative unit prices are now considered in the actuals of sales agreements. Sales teams create order products with negative quantities to represent order recalls and returns. Sales teams can track the actuals calculated for order returns and recalls in a sales agreement's terms.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud.

Who: This feature is available to users with the Manufacturing Sales Agreement Psl permission set.

SEE ALSO:

Salesforce Help: Create Direct Orders for Actuals Calculation (can be outdated or unavailable during release preview)

Track the Stakeholders in an Asset's Lifecycle

Link the assets you manufacture, deliver, and sell with related stakeholders. Associate an asset with accounts by creating Asset Account Participant records, and with contacts by creating Asset Contact Participant records. For example, relate an asset with the accounts of its financier, supplier, and owner. And relate the asset with the contacts of its sales executive, technician, and service manger.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud.

Who: This feature is available to users with the Claims Management Foundation or the Service Console for Manufacturing permission set.

How: From the App Launcher, find and select **Asset Account Participants** or **Asset Contact Participants**, and then click **New**. Specify the details of the record.

SEE ALSO:

Salesforce Help: Manage Asset Information in Manufacturing Cloud (can be outdated or unavailable during release preview)

Get Visibility Into Your Manufacturing Fleet Operations

Track your fleet of assets like mobile equipment, fixed systems, or power tools with the Fleet Management features in Manufacturing Cloud. Capture details about fleet assets, including their usage, status in relation to the fleet, and the dates when they became a part of the fleet. Monitor the participants involved in all stages of a fleet's lifecycle, including maintenance managers and operations managers.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud.

Who: This feature is available to users with the Fleet Management permission set.

How: Use the enableFleetMangement Metadata API to use the Fleet, Fleet Asset, and Fleet Participant objects in your org.

SEE ALSO:

Salesforce Help: Manage Fleets of Assets in Manufacturing Cloud (can be outdated or unavailable during release preview)

Visualize Account Hierarchies by Using Actionable Relationship Center in Manufacturing Cloud

Visualize complex organizational hierarchies and business relationships on an interactive, intuitive graph by making the most out of Actionable Relationship Center (ARC) enhancements. Users can now view the upward hierarchy of related entities on an ARC graph, such as the parent accounts of an account. They can easily define any node in an ARC graph as the anchor node to set it as the graph's starting point and to easily navigate back to it from any point in the graph.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud.

Who: This feature is available to users with the Actionable Relationship Center permission set license.

SEE ALSO:

Salesforce Help: Actionable Relationship Center for Manufacturing Cloud(can be outdated or unavailable during release preview)

Save Time and Resources by Automatically Extracting Information from Documents in Manufacturing Cloud

Use Intelligent Document Reader to automatically extract information from documents with optical character recognition and create, update, and verify records. You can upload documents such as claims, invoices, and leases and map the document's data to various fields on a Salesforce object. For example, upload a rebate claim invoice to automatically create Transaction Journal records.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and Intelligent Document Reader.

Who: This feature is available to users with the Intelligent Document Reader add-on license in their org and the Amazon Textract permission set.

SEE ALSO:

Salesforce Help: Intelligent Document Reader in Manufacturing Cloud (can be outdated or unavailable during release preview)

Build Trusted Relationships with Prospects by Using Actionable List Member Enhancements in Manufacturing Cloud

Easily identify the prospects to assign to agents by using the new filtering feature in the Actionable List Members component. Use the preconfigured KPI Bar to get valuable insights on the engagement status of the prospects in an actionable list. Streamline the assignment of prospects to agents by assigning prospects to a Service Cloud queue. Set a rule to automatically assign new prospects by using the automatic prospect assignment feature.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud.

Who: To use this feature, users need the Industry Sales Excellence add-on license and the Actionable Segmentation permission set.

SEE ALSO:

Salesforce Help: Actionable List Members(can be outdated or unavailable during release preview)

Improve Information Visibility by Showing Engagement Events on Timelines in Manufacturing Cloud

Admins can show agents engagement events from data model objects in Data Cloud on timelines. The events help agents easily retrieve information, understand the historical context, and have contextual and concise communication with customers and prospects.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud.

Who: To use this feature, users need the Industry Service Excellence add-on license.

How: From Setup, in the Quick Find box, enter `Timeline`, and then click **Timeline**. Next, click **New Timeline**, select **Data Cloud Events**, and enter the details of the related object and the engagement data model object. Then, enter the conditions for showing records on the timeline, define the fields to show, and then activate the timeline.

SEE ALSO:

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

Drive Targeted, Personalized Engagement with Prospects Using List Builder for Data Cloud

Use the audience segments generated in Data Cloud to create actionable lists to unlock new growth opportunities and elevate customer satisfaction.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud and List Builder for Data Cloud Segment.

Who: This feature is available to users with the Industry Sales Excellence add-on, Customer 360 Audiences Corporate or Genie Data Platform Starter and CDP Segments Activations Card licenses, and the Actionable Segmentation permission set.

SEE ALSO:

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

Visualize Your Data Processing Engine Definitions and Debug Them Easily in Manufacturing Cloud

Use the new node canvas to get a visual representation of the nodes in a data processing engine (DPE) definition and get a deeper understanding of a DPE definition's structure. Optimize your DPE definitions by seeing which nodes reference each other. Use the Data Cloud runtime for your DPE definition to read data from Manufacturing Cloud and Data Cloud, transform data, and write the results back to Manufacturing Cloud and Data Cloud. Debug your DPE definitions easily by viewing the failed writeback records.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Manufacturing Cloud.

Who: This feature is available only to users who have the Data Pipelines Base User permission set.

New and Changed Objects in Manufacturing Cloud

Manufacturing Cloud includes these new and changed objects.

New Objects

Here are the new objects in Manufacturing Cloud.

Store details about a supplier
Use the new `Supplier` object.

Track product parts or raw material procured from a supplier
Use the new `SupplierProduct` object.

Store details about products under a contract
Use the new `SalesContractLine` object.

Associate an asset with its related account
Use the new `AssetAccountParticipant` object.

Associate an asset with its related contact
Use the new `AssetContactParticipant` object.

Changed Object

Here are the changed objects in Manufacturing Cloud.

Store your unique business data in custom fields
Configure up to 50 custom fields in each of these existing `EngagementAttendee`, `EngagementInteraction`, and `EngagementTopic` objects.

Media Cloud

Salesforce Industries enables you to attract, engage, and support customers from anywhere, maximize lifetime value, and improve operational efficiency across the media value chain.

Learn about what's in this release in the Media Cloud Release Notes

Loyalty Management

Integrate Loyalty Management with a Point of Sale (POS) system and enhance customer engagement, increase sales, and foster customer loyalty. Use Actionable Segmentation to get a list of members who are eligible for a promotion. View the vouchers that have been issued to a member on the member's Contact record.

IN THIS SECTION:

Perform Loyalty Actions from POS System with Loyalty Management POS API

Integrate Loyalty Management with a Point of Sale (POS) system through Salesforce integration package and MuleSoft, and experience seamless communication between Loyalty Management and the POS system. Make API requests to Salesforce from the POS system to enroll members, view member details, view transactions, manage vouchers, create orders, and accrue and redeem points and vouchers.

Where: This change applies to Lightning Experience where Loyalty Management is enabled.

When: Loyalty Management POS API Powered by MuleSoft is available later in Winter '23.

How: To integrate Loyalty Management with a POS system by using the unlocked package, install the package, set the relevant permissions, create a connected app, and manage the custom settings for the POS integration kit. To integrate by using MuleSoft, enable access to industry integrations, create a client application and an AnyPoint MQ, enable the integration app, and manage the policies.

SEE ALSO:

Salesforce Developer Documentation: Get Started with Loyalty Management Integrations API (can be outdated or unavailable during release preview)

Generate Targeted Members Lists with Minimal Fuss

Use Actionable Segmentation to determine the members who are eligible for promotion campaigns based on their membership profile or their program engagement. For example, admins can create actionable list definitions based on program tiers or member points balance. Use the member list generated by the definition to create targeted promotion campaigns.

Where: This feature is available in Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management and Industries Sales Excellence are enabled.

How: Admins can create actionable list definitions on the Loyalty Program Member object by using Data Processing Engine. In a Data Processing Engine definition, use multiple data sources along with Loyalty Program Member to filter members eligible for a promotion. Use the actionable list definition to create an actionable list of members targeted for a specific promotion. Set up a custom process to add the promotion's target members to the promotion's campaign.

While designing a promotion, program managers can associate the campaign with the promotion to ensure that the promotion is valid only for the intended member audience.

SEE ALSO:

Salesforce Help: Generate Targeted Member Lists for Promotions with Actionable Lists (can be outdated or unavailable during release preview)

View Vouchers of a Contact

Loyalty program managers and service reps can easily view the vouchers issued to a contact when they're members of a loyalty program. The vouchers issued to a member are now associated with the member's Contact record.

Where: This change applies to Lightning Experience in Developer, Enterprise, Performance, and Unlimited editions where Loyalty Management is enabled.

How: Admins can add the Vouchers related list to the Contact page layout.

SEE ALSO:

Salesforce Help: Managed Issued Vouchers (can be outdated or unavailable during release preview)

Watch Loyalty Management Videos

New videos help your users learn about the capabilities of Loyalty Management.

- Embed Loyalty Engagement Widgets shows how you can deploy Loyalty Management's member engagement widgets on an Experience Cloud site or an external website.
- Experience Loyalty Management on Your Mobile Devices demonstrates how an effective mobile application for your loyalty program elevates loyalty and customer experience.
- Loyalty Management POS API for In-Store and E-Commerce Unlocked Package demonstrates how to set up the Loyalty Management POS API Unlocked Package and use APIs to get member profile details, enroll individual members, manage vouchers, and create orders.

Net Zero Cloud

Conduct double materiality assessments. Include employment compensation and care program performance data in your social and governance reports. Generate a disclosure report by copying responses from previous reports. Manage your energy attribute certificates and power purchase agreements. Use custom fuel types to calculate emissions from vehicles, and manage emissions factors published by data providers from Net Zero Marketplace. Use Intelligent Document Reader to transcribe and map document data.

IN THIS SECTION:

Allocate Energy Attribute Credits to Manage Renewable Energy

Reduce your scope 2 emissions using renewable energy sources by accounting for energy attribute certificates in Net Zero Cloud. Track a power purchase agreement with a renewable energy supplier to claim usage of renewable electricity or buy unbundled energy attribute certificates. Manage energy attribute certificate credits, and allocate these credits to your stationary assets energy use to reduce your carbon footprint.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Starter or Growth license is enabled.

SEE ALSO:

Salesforce Help: Allocate Energy Attribute Certificate Credits to Reduce Scope 2 Emissions (can be outdated or unavailable during release preview)

Conduct Materiality Assessments

Conduct double materiality assessments to identify areas of risk to your business and opportunities for making a positive impact on the environment and society. Set up surveys to gather stakeholder feedback on the relative importance of various environment, social, and governance (ESG) topics, which is a crucial first step in defining your corporate social responsibility (CSR) and ESG strategies. You can visualize topic scores in a Materiality Matrix with Salesforce Reports.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Growth license and the Materiality Assessment Add-On license are enabled.

How: Configure Salesforce Feedback Management and turn on Manage Materiality Assessments in the Net Zero Settings page in Setup.

SEE ALSO:

Salesforce Help: Materiality Assessment (can be outdated or unavailable during release preview)

Copy Disclosure Responses from Previous Years

In Disclosure and Compliance Hub, easily generate a disclosure report by copying responses from previous year's disclosures. The disclosure information depends on the disclosure type, definition, and a valid assessment context on the disclosure.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Growth license is enabled.

How: To turn on Manage Disclosure and Compliance Hub, go to the Disclosure and Compliance Hub Settings page in Setup. If you're an independent software vendor (ISV), you can use this feature when creating a managed package.

SEE ALSO:

Salesforce Help: Copy Previously Submitted Disclosure Responses (can be outdated or unavailable during release preview)

Salesforce Help: Create a Disclosure (can be outdated or unavailable during release preview)

Include More Data in Social and Governance Reports

Capture summaries of employment compensation data, managed care program performance, and monetary loss for organization incidents in your social and governance reporting.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Growth license is enabled.

SEE ALSO:

Salesforce Help: Summarize Organization Incident Information (can be outdated or unavailable during release preview)

Salesforce Help: Summarize Employment Compensation Information (can be outdated or unavailable during release preview)

Salesforce Help: Summarize Managed Care Program Performance (can be outdated or unavailable during release preview)

Enhance Carbon Accounting with Custom Fuel Types

Expand your vehicle emissions calculations by including custom fuel types, units of measure, and their conversion factors. Add a conversion factor for the custom fuel type and its source and destination unit of measure. To calculate the vehicle emissions, select the fuel type and specify the conversion factors.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Starter or Growth license is enabled.

SEE ALSO:

Salesforce Help: Configure Custom Values for Net Zero Cloud (can be outdated or unavailable during release preview)

Manage Emissions Factors from Net Zero Marketplace

In Net Zero Marketplace, data providers can publish emissions factors across geographies, emissions types, and other needs that an organization might have. You can purchase and download the published emissions factors as a CSV file and load the data into Net Zero Cloud.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Net Zero Cloud Starter or Growth license is enabled.

Who: Only organizations with a US entity can buy and download the emissions factors.

SEE ALSO:

Salesforce Help: Which Reference Data to Load? (can be outdated or unavailable during release preview)

Salesforce Help: Other Available Reference Data Sources (can be outdated or unavailable during release preview)

Load Document Data to Net Zero Cloud Objects with Intelligent Document Reader

Intelligent Document Reader pulls data from your uploaded documents, such as utility bills, into Net Zero Cloud object records, saving you time and manual effort. To extract data, Intelligent Document Reader uses Amazon Textract. To use Textract, you need an Amazon Web Services (AWS) account.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where the Intelligent Document Reader add-on license is enabled.

Who: Users need the Amazon Web Services (AWS) account and the Intelligent Document Workspace User and Document Checklist permission sets.

SEE ALSO:

Salesforce Help: Intelligent Document Reader (can be outdated or unavailable during release preview)

Salesforce Help: Upload Documents with Intelligent Document Reader (can be outdated or unavailable during release preview)

Improve Decarbonization Strategy with Programs and Outcome Management

Plan and track carbon reduction projects and other environment, social, and governance (ESG) impact improvement projects across your portfolio. Ensure that your impact strategy is measurable and actionable.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where the Net Zero Cloud Growth license is enabled.

SEE ALSO:

Salesforce Release Notes: Outcome Management (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Programs and Initiatives in Net Zero Cloud (can be outdated or unavailable during release preview)

Salesforce Help: Improve Decarbonization Strategy with Sustainability Programs (can be outdated or unavailable during release preview)

Generate an ESRS Report with the Disclosure and Compliance Hub Template

Easily generate an European Sustainability Reporting Standards (ESRS) report with formatted questionnaires to gather the necessary information by using the Net Zero Cloud Disclosures for ESRS managed package.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Cloud Growth license.

How: Install the Net Zero Cloud Disclosures for ESRS package in your Net Zero Cloud org. To generate a disclosure, from Setup, in the Quick Find box, enter `Disclosure and Compliance Hub`, and then select **Disclosure and Compliance Hub Settings**. Turn on **Manage Disclosure and Compliance Hub**.

SEE ALSO:

Salesforce Help: Net Zero Cloud Disclosures for ESRS Package(can be outdated or unavailable during release preview)

Salesforce Help: Create ESRS Disclosures Report with the Net Zero Cloud Template(can be outdated or unavailable during release preview)

CRM Analytics for Net Zero Cloud

Set up CRM Analytics apps for Net Zero Cloud easily by using the new guided setup. Use the new Emissions Forecast and What-If Analysis dashboard in the Net Zero Analytics app to explore different metrics, simulate potential outcomes, and evaluate the impact of various planned sustainability measures on your carbon footprint.

IN THIS SECTION:

Set Up Net Zero Analytics Easily

Initiate the request to create a CRM Analytics app for Net Zero Analytics more easily by using the new guided setup. Follow the steps to configure the objects and fields that track your Net Zero activities and create an app with dashboards for the configuration. Your business users can get valuable insights on their emissions data by viewing the prebuilt dashboards in the app.

Where: This feature is available in Lightning Experience in Enterprise and Unlimited editions where Net Zero Cloud is enabled.

Who: To set up the Net Zero Analytics app, you need the CRM Analytics Plus Admin and Net Zero Analytics Admin permissions.

How: From Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Configurations**. Then, follow the instructions on the page to set up and enable CRM Analytics and Net Zero Analytics.

Take Educated Sustainability Actions Based on Impact Analysis of Specific Forecasted Emissions

The new Emissions Forecast and What-If Analysis dashboard shows a comprehensive view of your organization's actual and forecasted carbon emissions based on specific years, locations, and so on. Use the What If Analysis feature to experiment with various values for planned sustainability metrics and visualize potential outcomes to analyze their impact on total carbon emissions. You can also compare the current KPIs (Key Performance Indicators) for emissions with KPIs for previous periods to track the progress of your sustainability business practices.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Net Zero Cloud is enabled.

Who: To use the Net Zero Analytics app, you need the CRM Analytics Plus User and Net Zero Analytics User permissions.

How: From Setup, in the Quick Find box, enter *Net Zero*, and then select **Net Zero Configurations**. Then, follow the instructions on the page to set up a Net Zero Analytics app with the Emissions Forecast and What-If Analysis dashboard.

Plan More Impactful DEI Initiatives with Pay Gap and Representation Insights

The DEI Insights dashboard now offers analytics visualization to identify your organization's pay gap and workforce representation across various parameters, such as gender, ethnicity, disability, and so on. Use these data-driven insights to assess diversity in your organization, address any disparities, and build a more inclusive work environment.

Where: This change applies to CRM Analytics in Lightning Experience in Enterprise, Unlimited, and Performance editions where Net Zero Cloud is enabled.

Who: To use the DEI Insights dashboard in Net Zero Cloud, you need the CRM Analytics Plus Admin and Net Zero Analytics Admin permissions.

How: From Setup, in the Quick Find box, enter `Net Zero`, and then select **Net Zero Configurations**. Set up CRM Analytics and enable DEI Analytics.

New and Changed Objects for Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

Changed Objects

These Net Zero Cloud objects have changes.

Copy responses from a previous disclosure
Use the new `ReplicateResponsesFromId` field of the Disclosure object.

Track the total monetary loss for an incident
Use the new `MonetaryLoss` field of the OrgIncidentSummary object.

Allocate the energy attribute certificate credits to the energy use record
Use the new `AllocEnrgyAttrCrInKwh`, `AllocEnrgyAttrCrBiomass`, `AllocEnrgyAttrCrGeothermal`, `AllocEnrgyAttrCrWind`,and `AllocEnrgyAttrCrSolar` field of the StnryAssetEnrgyUse object.

New Objects

These Net Zero Cloud objects are new.

Manage a clean energy project that provides credits for purchase
Use the new CleanEnergyProject object.

Represents the number of credits distributed for energy use
Use the new EnergyAttrCreditDstr object.

Manage energy attribute certificate credits
Use the new EnergyAttrCertCredit object.

Manage the purchase of energy attribute certificates
Use the new EnergyAttrCertPurchase object.

Track the average hourly wage and percentage of facility-based employees earning minimum wage
Use the new EmploymentCompensationSummary object.

Manage sustainability initiatives in a program
Use the new ProgramInitiative object.

Manage enrollment details of a sustainability initiative
Use the new ProgramInitiativeEnrl object.

Track the rating and enrollee retention rate of a managed care plan
Use the new ManagedCareProgramPrfm object.

Manage stakeholder engagement to assess the relative importance of environmental, social, and governance (ESG) issues
Use the new MaterialityAssessment object.

Manage the materiality matrix score
Use the new MaterialityMatrixScore object.

Manage materiality stakeholder information
Use the new MaterialityStakeholder object.

Manage categories to organize materiality stakeholders into groups
Use the new MaterialityStkhldrCatg object.

Manage possible topics for materiality assessment
Use the new MaterialityTopic object.

Manage the mapping between materiality assessment topics and survey questions
Use the new MaterialityTopicQstn object.

SEE ALSO:

Net Zero Cloud Developer Guide: Net Zero Cloud Standard Objects(can be outdated or unavailable during release preview)

Metadata API

Make the most of the new metadata types in Net Zero Cloud.

Settings

Allow customers to enable the Manage Materiality Assessments feature
Use the new `enableMaterialityAssessment` field on the IndustriesSettings metadata type.

Allow customers to enable the Manage Environmental, Social, and Governance Programs feature
Use the new `enableNZCMngEsgPgm` field on the IndustriesSettings metadata type.

SEE ALSO:

Net Zero Cloud Developer Guide: IndustriesSettings Metadata API

OmniStudio Document Generation

OmniStudio Document Generation lets you generate documents from Microsoft Word (.docx) and Microsoft PowerPoint (.pptx) templates. These templates can include values from any JSON-based data in the text, including data from any Salesforce object. Additionally, the generated documents can be converted to PDF format. You can generate documents using provided sample client-side or server-side OmniScripts. Alternatively, you have the flexibility to create your own OmniScripts, Integration Procedures, or Apex classes for generating customized documents.

Learn about what's in this release in the OmniStudio Document Generation Release Notes

Outcome Management

Outcome Management is a new industry-disrupting impact measurement tool that defines, measures, and evaluates an organization's outcome strategy in one place. Set time-bound targets and baseline values and track results. Consistently measure the same indicators across different outcomes or programs. Organize outcomes into groups to reflect an organizational strategy, like a logic model or a set of outcomes that external stakeholders care about.

IN THIS SECTION:

SEE ALSO:

Improve Decarbonization Strategy with Programs and Outcome Management

Track Desired Outcomes and Efforts That Move the Needle

Track and manage the change you want to see with Outcomes. Use Outcome Activities to connect Outcomes to the efforts, like programs or benefits, that contribute to the desired end goal.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Outcome Management is enabled.

Who: Users with the Outcome Management permission set can manage outcomes and outcome activities. Users with the Program and Benefit Management Access permission set can connect outcome activities to programs and benefits.

SEE ALSO:

Salesforce Help: Define Outcomes and Outcome Activities (can be outdated or unavailable during release preview)

Get a Holistic View of How Outcomes Contribute to Success

Use Impact Strategies and Impact Strategy Assignments to group Outcomes to see your entire strategy in one place. You can group Outcomes to show your organizational logic model or theory of change. You can also group Outcomes based on your strategic plan or for an external stakeholder.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Outcome Management is enabled.

Who: Users with the Outcome Management permission set can manage impact strategies and impact strategy assignments.

SEE ALSO:

Salesforce Help: Create an Impact Strategy and Assign It to Outcomes (can be outdated or unavailable during release preview)

Measure the Work You Do to Affect Change

Indicators define how you measure your outcomes. Use indicator definitions to build your library of indicators that ensure you consistently measure your impact. Connect the indicator definitions to multiple outcomes or programs to measure different aspects of your work. Use time-bound indicator performance periods to track your starting point and where you aim to get to when measuring your efforts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Outcome Management is enabled.

Who: Users with the Outcome Management permission set can manage indicator definitions, indicator assignments, time periods, and indicator performance periods. Users with the Program and Benefit Management Access permission set can connect indicator assignments to programs.

SEE ALSO:

Salesforce Help: Measure Your Strategy with Indicators (can be outdated or unavailable during release preview)

Track Interim and Final Results

Add indicator results to track your progress against your time-bound target and baseline values. Use results to store aggregated values from assessments, program enrollments, benefit disbursements, and other data sources.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Outcome Management is enabled.

Who: Users with the Outcome Management permission set can manage indicator results.

SEE ALSO:

Salesforce Help: Track Progress with Indicator Results (can be outdated or unavailable during release preview)

Get a Comprehensive View of Your Impact Strategy

Use the Outcome Management app home page to check if your indicators are on target, see recent indicator results, manage assessments, and more.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Outcome Management is enabled.

Who: Users with the Outcome Management permission set can manage records linked to from the home page. Users with the Dynamic Assessment Access permission set can add assessments from the Outcome Management home page.

SEE ALSO:

Salesforce Help: Explore the Outcome Management App (can be outdated or unavailable during release preview)

Watch Outcome Management Videos

New videos help your users learn about the capabilities of Outcome Management.

Introduction to Outcome Management shows how you can drive greater outcomes by making your impact strategy, such as a logic model or theory of change, measurable, and actionable.

New Objects and Fields for Outcome Management

Do more with the new Outcome Management objects.

Track desired changes and relate the changes to efforts

Use `Outcome` to define the changes you hope to see through your organization's work. Use `OutcomeActivity` to relate the anticipated changes to the efforts you plan to do to achieve them.

Group outcomes for a complete view of the organization's logic model or outcomes that external stakeholders care about

Use `ImpactStrategy` to set up your groups. Use `ImpactStrategyAssignment` to connect your impact strategies to outcomes.

Consistently measure contributions to your outcomes or programs

Use `IndicatorDefinition` to set up your library of indicators. Use `IndicatorAssignment` to connect them to what they measure (for example, Outcome or Program).

Measure the changes against time-bound baseline and target values

Use `TimePeriod` to add consistent time periods for indicators. Use `IndicatorPerformancePeriod` to set time-bound baseline and target values. Use `IndicatorResult` to add interim or final results for the indicator performance periods.

SEE ALSO:

Developer Documentation: Outcome Management Developer Guide (can be outdated or unavailable during release preview)

Program Management

Easily remove participants from a benefit session and get a list of field sets associated with benefit disbursement in program management.

IN THIS SECTION:

New Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

New Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

New Connect APIs

Get the API names of the field sets associated with benefit disbursement

Make a GET request to the new `/connect/fieldset/${objectName}` resource.

New response body: Field Sets Output

Get gift transactions associated with a gift commitment

Make a GET request to the new `/connect/fundraising/gift-commitments/${commitmentId}/gift-transactions` resource.

Get gift transactions associated with a gift commitment for a donor account

Make a GET request to the new `/connect/fundraising/donor/${donorId}/commitments` resource.

Get gift designations

Make a GET request to the new `/connect/fundraising/transaction/${transactionId}/designations` resource.

Get the default gift designations associated with a gift campaign

Make a GET request to the new `/connect/fundraising/campaign/${campaignId}/default-designations` resource.

Get the default gift designations associated with a gift commitment

Make a GET request to the new `/connect/fundraising/commitment/${commitmentId}/default-designations` resource.

Remove participants from a benefit schedule

Make a DELETE request to the new `/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/benefit-assignments` resource.

SEE ALSO:

Nonprofit Cloud Developer Guide: Program Management Business APIs (can be outdated or unavailable during release preview)

Public Sector Solutions

Manage evidence in cases and case proceedings, use dynamic assessments with more objects, easily split households, and more.

IN THIS SECTION:

Quickly View Contextual Data in Actionable Relationship Center Graphs

Customize Actionable Relationship Center (ARC) graphs on records. Change the objects that appear in the graph, and apply filters to one or more nodes to show records based on certain criteria. For example, apply a filter on the Cases node to show only open cases and related records in the graph. Save custom views with applied filters to easily access the views later. Pin frequently used views and update or delete views.

Refer Constituents to Appropriate Service Providers and Track Service Delivery

Map benefits to providers' specialties, and create benefit schedules and sessions based on when and where providers deliver services. With benefits mapped to specialties, caseworkers can search for and find providers who offer specific services, refer constituents to suitable providers and facilities, and enroll participants in benefit schedules and sessions. Then, using benefit disbursements, caseworkers can track each benefit recipient's participation in a session.

Use Dynamic Assessments with More Objects, Including Custom Objects

Do more with dynamic assessments by creating them for business licenses, programs, funding awards, funding award requirements, and custom objects. For example, create a questionnaire to assess post-award grant compliance and to monitor activities such as site inspections and audits related to funding awards.

Process Benefit Applications Efficiently by Using a Guided Flow

Add a guided flow to the individual application record page to help caseworkers evaluate benefit applications for missing information, determine eligibility, and assign benefits. The guided flow summarizes the key details of the application: the number of participants, their total income and expenses, and the estimated benefit amount the participants are eligible to receive. With the flow, caseworkers can assess the application for completeness and accuracy, add or correct details in consultation with applicants, and send the application back for more information. They can determine benefit eligibility and calculate the benefit amount using automated rules and expressions, and assign the benefit amount to participants in a timely manner.

Easily Manage Evidence in Cases and Case Proceedings

Manage and track the collection, preservation, and storage of physical and digital evidence. Track the possession and location of each custody item throughout its lifecycle to ensure integrity, security, and admissibility. Associate custody items with the related case or case proceeding, connect regulatory codes to maintain compliance with laws, regulations, or codes, and record regulatory code violations. Easily manage access to custody item records by using sharing settings and sharing rules.

Capture Service Requests for More Scenarios by Using Service Process Studio

Capture service requests related to licensing, permitting, applications, benefit management, and case proceedings by using Service Process Studio. For example, set up a request form so that attorneys can request an extension for a case proceeding.

Give Caseworkers a Complete Provider Search Experience

Search for providers who can deliver services to constituents, and then quickly take action when you find a match. For example, search for providers who offer marriage counseling, and apply search criteria, distance filters, and grouping and sorting rules to optimize your results. See useful details for the providers who are returned in search results. Select suitable providers and start a Salesforce Flow or an OmniScript guided flow to take the relevant action.

Easily Split Party Relationship Groups by Using a Guided Workflow

Move members, related contacts, groups, and business accounts from one party relationship group to another group or to a new group by using the Split workflow. Specify member roles and relationships, and the relationships of related contacts, groups, and business accounts in the split group. Review related information such as the cases and complaints associated with the original group, move required records to the split group, and create reminder tasks to review records later.

Simplify Access to Information by Aggregating and Associating Records from Unrelated Objects

Aggregate one object's records and associate them with the record of an unrelated object to consolidate information and make it easy for users to access information from both objects. For example, aggregate the party income records for household members and associate them with the party relationship group that represents the household. That way, caseworkers can quickly access the aggregated records and find the income for each member of the group.

Set Up the Complaint Intake Guided Flow Quickly with Out-of-the-Box Components

Use OmniStudio components available in your org to set up a guided flow for complaint intake. Previously, you had to download the components from the Salesforce Industries Process Library and deploy them to your Public Sector Solutions org before setting up the guided flow.

Track Actual Budget Spent in an Experience Cloud Grantmaking Site and Share Records Using Compliant Data Sharing

Give grant recipients the ability to enter their actual budget spent in an Experience Cloud site, and show grant makers their updates in real time in Salesforce. In orgs with strict ownership-based sharing, enable users to share Grantmaking objects.

Consolidate Financial Data with Your Accounting System by Using Accounting Subledger

Use Accounting Subledger to record financial transactions such as regulatory transaction fees, funding awards, and benefit disbursements in your accounting system. Track how and where funds are received, paid, and allocated; improve communication across finance and accounting teams; access and act on insights from financial data; and plan with accurate, up-to-date financial projections.

Enhance Your Constituent Impact Strategy by Using Outcome Management

Drive better outcomes by making your impact strategy—such as a logic model or theory of change—measurable and actionable.

New and Changed Objects in Public Sector Solutions

Do more with these new and changed Public Sector Solutions objects.

PublicSectrSltn Namespace

The PublicSectrSltn namespace has this new class.

Quickly View Contextual Data in Actionable Relationship Center Graphs

Customize Actionable Relationship Center (ARC) graphs on records. Change the objects that appear in the graph, and apply filters to one or more nodes to show records based on certain criteria. For example, apply a filter on the Cases node to show only open cases and related records in the graph. Save custom views with applied filters to easily access the views later. Pin frequently used views and update or delete views.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Configure and View Graphical Representations of Constituent Relationships (can be outdated or unavailable during release preview)

Salesforce Help: Actionable Relationship Center (ARC) (can be outdated or unavailable during release preview)

Refer Constituents to Appropriate Service Providers and Track Service Delivery

Map benefits to providers' specialties, and create benefit schedules and sessions based on when and where providers deliver services. With benefits mapped to specialties, caseworkers can search for and find providers who offer specific services, refer constituents to suitable providers and facilities, and enroll participants in benefit schedules and sessions. Then, using benefit disbursements, caseworkers can track each benefit recipient's participation in a session.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Provider Service Delivery Data Model (can be outdated or unavailable during release preview)

Use Dynamic Assessments with More Objects, Including Custom Objects

Do more with dynamic assessments by creating them for business licenses, programs, funding awards, funding award requirements, and custom objects. For example, create a questionnaire to assess post-award grant compliance and to monitor activities such as site inspections and audits related to funding awards.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Dynamic Assessments in Public Sector Solutions (can be outdated or unavailable during release preview)

Process Benefit Applications Efficiently by Using a Guided Flow

Add a guided flow to the individual application record page to help caseworkers evaluate benefit applications for missing information, determine eligibility, and assign benefits. The guided flow summarizes the key details of the application: the number of participants, their total income and expenses, and the estimated benefit amount the participants are eligible to receive. With the flow, caseworkers can assess the application for completeness and accuracy, add or correct details in consultation with applicants, and send the application back for more information. They can determine benefit eligibility and calculate the benefit amount using automated rules and expressions, and assign the benefit amount to participants in a timely manner.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Benefit Application Review Guided Flow (can be outdated or unavailable during release preview)

Easily Manage Evidence in Cases and Case Proceedings

Manage and track the collection, preservation, and storage of physical and digital evidence. Track the possession and location of each custody item throughout its lifecycle to ensure integrity, security, and admissibility. Associate custody items with the related case or case proceeding, connect regulatory codes to maintain compliance with laws, regulations, or codes, and record regulatory code violations. Easily manage access to custody item records by using sharing settings and sharing rules.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Case Proceedings in Public Sector Solutions (can be outdated or unavailable during release preview)

Capture Service Requests for More Scenarios by Using Service Process Studio

Capture service requests related to licensing, permitting, applications, benefit management, and case proceedings by using Service Process Studio. For example, set up a request form so that attorneys can request an extension for a case proceeding.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Case Proceedings in Public Sector Solutions (can be outdated or unavailable during release preview)

Give Caseworkers a Complete Provider Search Experience

Search for providers who can deliver services to constituents, and then quickly take action when you find a match. For example, search for providers who offer marriage counseling, and apply search criteria, distance filters, and grouping and sorting rules to optimize your results. See useful details for the providers who are returned in search results. Select suitable providers and start a Salesforce Flow or an OmniScript guided flow to take the relevant action.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

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

Easily Split Party Relationship Groups by Using a Guided Workflow

Move members, related contacts, groups, and business accounts from one party relationship group to another group or to a new group by using the Split workflow. Specify member roles and relationships, and the relationships of related contacts, groups, and business accounts in the split group. Review related information such as the cases and complaints associated with the original group, move required records to the split group, and create reminder tasks to review records later.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Split a Party Relationship Group by Using a Guided Workflow (can be outdated or unavailable during release preview)

Simplify Access to Information by Aggregating and Associating Records from Unrelated Objects

Aggregate one object's records and associate them with the record of an unrelated object to consolidate information and make it easy for users to access information from both objects. For example, aggregate the party income records for household members and associate them with the party relationship group that represents the household. That way, caseworkers can quickly access the aggregated records and find the income for each member of the group.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Record Aggregation (can be outdated or unavailable during release preview)

Set Up the Complaint Intake Guided Flow Quickly with Out-of-the-Box Components

Use OmniStudio components available in your org to set up a guided flow for complaint intake. Previously, you had to download the components from the Salesforce Industries Process Library and deploy them to your Public Sector Solutions org before setting up the guided flow.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Set Up a Complaint Intake Guided Flow (can be outdated or unavailable during release preview)

Track Actual Budget Spent in an Experience Cloud Grantmaking Site and Share Records Using Compliant Data Sharing

Give grant recipients the ability to enter their actual budget spent in an Experience Cloud site, and show grant makers their updates in real time in Salesforce. In orgs with strict ownership-based sharing, enable users to share Grantmaking objects.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

How: Read about the new Grantmaking features that enhance your Experience Cloud site in the Grantmaking release notes.

SEE ALSO:

Grantmaking

Consolidate Financial Data with Your Accounting System by Using Accounting Subledger

Use Accounting Subledger to record financial transactions such as regulatory transaction fees, funding awards, and benefit disbursements in your accounting system. Track how and where funds are received, paid, and allocated; improve communication across finance and accounting teams; access and act on insights from financial data; and plan with accurate, up-to-date financial projections.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

SEE ALSO:

Salesforce Help: Accounting in Public Sector Solutions (can be outdated or unavailable during release preview)

Enhance Your Constituent Impact Strategy by Using Outcome Management

Drive better outcomes by making your impact strategy—such as a logic model or theory of change—measurable and actionable.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Who: Assign the Outcome Management permission set to users, or add the Manage Outcomes system permission to your permission sets or profiles.

SEE ALSO:

Outcome Management

New and Changed Objects in Public Sector Solutions

Do more with these new and changed Public Sector Solutions objects.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Evidence Management

Store information about an item in custody

Use the new CustodyItem object.

Store the location, custodian, and duration of a custody item
Use the new CustodyChainEntry object.

Associate a case or a case proceeding with an item in custody
Use the new CustodyItemRelation object.

Associate a regulatory code violation with an item in custody
Use the new CustodyItemRgltyCodeVio object.

Provider Management

Map the benefits provided to constituents with the specialties offered by a network of service providers
Use the new BenefitSpecialty object.

Map a benefit to a code set bundle
Use the new BenefitItemCode object.

Collect denormalized data from selected fields of Provider Management objects to enable Provider Search
Use the new BenefitPrvdSearchableFld object.

Associate a practitioner facility with a benefit schedule
Use the new `PractitionerFacility` field on the existing BenefitSchedule object.

Associate a practitioner facility with a benefit session
Use the new `PractitionerFacility` field on the existing BenefitSession object.

Associate a practitioner or provider facility with a referral
Use the new `ProviderFacilityId` field on the existing Referral object.

Associate a provider with a referral
Use the updated `ProviderId` field on the existing Referral object.

Specify a benefit assignment as the source of an outbound referral
Use the new `OutboundSourceId` field on the existing Referral object.

Benefit Management

Mark as an assessment question as important
Use the new `IsImportant` field on the existing OmniProcessAsmtQuestionVer object.

PublicSectrSltn Namespace

The PublicSectrSltn namespace has this new class.

New Class

Retrive a list of person accounts, business accounts, and contacts
Use the new `GetAccountsAndContacts` class.

SEE ALSO:

Public Sector Solutions Developer Guide: PublicSectrSltn Namespace

Rebate Management

Get actionable, data-driven insights into rebate programs, identify special pricing trends, and analyze claims with a new CRM Analytics dashboard for Rebate Management. Improve rebate payout processing performance by using the new Compute Valid Transaction Journals Per Rebate Type custom node in Data Processing Engine definitions.

IN THIS SECTION:

CRM Analytics for Rebate Management

Set up Rebate Analytics easily by using the new guided setup. Use the data-driven Rebate Analytics insights to design more efficient and effective rebate programs that provide higher value to your partners.

IN THIS SECTION:

Set Up Rebate Analytics Easily

Initiate the request to create a CRM Analytics app for Rebate Management more easily by using the new guided setup. Follow the steps to configure the objects and fields that track your rebate program performance and create an app with dashboards for the configuration. Your business users can get valuable insights on rebates by viewing the prebuilt dashboards in the app.

Where: This change applies to CRM Analytics in Lightning Experience in Enterprise, Unlimited, and Performance editions where Rebate Management is enabled.

Who: This feature is available to users with Manufacturing Cloud Intelligence or CRM Analytics for Manufacturing add-on license.

How: From Setup, in the Quick Find box, enter `Manufacturing`, and then select **Set Up CRM Analytics for Manufacturing**. Then, follow the instructions in the Get Analytics on Rebates section to set up Rebate Analytics and initiate the request to create an app.

Optimize Partner Value by Analyzing Your Ship and Debit Programs

The new Rebate Analytics dashboard offers manufacturers a comprehensive view and insights into the effectiveness of their current ship and debit rebate programs. Track the status of claims, view trends, identify accounts with the highest claim amounts, and analyze the impact of special pricing. Compare current key performance indicator (KPI) values with the KPIs of previous periods to optimize rebate programs and build stronger relationships with your partners.

Where: This change applies to CRM Analytics in Lightning Experience in Enterprise, Unlimited, and Performance editions where Rebate Management is enabled.

Who: This feature is available to users with Manufacturing Cloud Intelligence or CRM Analytics for Manufacturing add-on license.

Increase Scalability of Your DPE Definitions with a Custom Node (Generally Available)

Having a large number of filter conditions to evaluate valid transactions for rebate payout calculations, and aggregating the transactions can cause Data Processing Engine (DPE) definition failures. To reduce DPE definition failures, use the new Compute Valid Transaction Journals Per Rebate Type custom node in DPE definition that's specified as the calculation definition on rebate types. The new custom node reduces DPE definition failures by reducing the recipe size that the DPE definitions create to process transactions. You can also use the new custom node to update existing definitions used in rebate calculations to ensure that the recipes comply with the processing limit.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Rebate Management is enabled.

How: Clone any DPE template of process type Rebates, ad activate the new definition. If you are using definitions that you didn't create from the templates, or if you are using existing definitions in rebate calculations, you can customize the definition to add the new node.

SEE ALSO:

Salesforce Help: Customize Data Processing Engine Definitions To Support Large Number of Rebate Eligibility Conditions (can be outdated or unavailable during release preview)

Salesforce Contracts

The Salesforce Contracts app allows customers to manage the end-to-end lifecycle of Contracts. Contracts can be associated with opportunities, orders, quotes, standard Salesforce objects, and custom objects. A contract lifecycle management is crucial to the overall health of the sales processes in an organization. The Salesforce Contracts app gives you complete control over the sales process integration, contract management process, and contract lifecycle that starts from contract authoring to activation.

Learn about what's in this release in the Salesforce Contracts Cloud Release Notes

Salesforce for Education

Salesforce for Education includes products that connect insights across recruitment, admissions, and student success for a unified view of every learner's journey—from prospective students to engaged alumni.

Learn about what's in this release in the Salesforce for Education Release Notes.

Salesforce for Nonprofits

Salesforce for Nonprofits includes products that meet the unique needs of nonprofits. These products empower organizations to go from siloed data to actionable insights, transforming constituent engagements into lifelong relationships.

Learn about what's in this release in the Salesforce for Nonprofits Release Notes.

Industries Common Features

Some Industries products are available for use in more than one Industries cloud, or in Clouds outside of Industries. In this release, we've improved the capabilities of these common features. Context Service is now generally available. Actionable List Members supports finer filtering options. Visualize relationships better with more customizable graphs in Actionable Relationship Center. Create personalized lists with Actionable Segmentation. Use List Builder for Data Cloud Segment to create more comprehensive lists with data from Data Cloud. We also have changes in Batch Management, Business Rules Engine, Data Processing Engine, and much more.

IN THIS SECTION:

Intelligent Document Reader

Get Intelligent Document Reader for multiple Industries clouds with an add-on license. Watch the Set Up Intelligent Document Reader video to learn how to set up Intelligent Document Reader.

List Builder for Data Cloud Segment

Create actionable lists from Data Cloud segments and streamline sales and service efforts to unlock new growth opportunities.

Service Process Studio

Do more with Service Process Studio. Use the Transaction Dispute template to quickly create a service process definition for handling transaction disputes. Select relevant fields on a standard or custom object to store the base data attribute details.

Timeline

Configure Timeline to show engagement events from Data Cloud.

SEE ALSO:

Industries Common Features Enhancements in Summer '23

Actionable List Members

Filter the members who appear in the Actionable List Members component. Use the new key performance indicator (KPI) bar to assess the engagement status of actionable lists at a glance. Assign prospects to sales and service agents through Service Cloud Queues. And set a rule to automatically assign new prospects to agents.

IN THIS SECTION:

Narrow Down on Prospects Easily and Save Time by Using Filters

List creators can apply multiple filters and easily identify the prospects to assign to agents by using the new filtering feature in the Actionable List Members component.

Get Valuable Insights on Prospects and Make Smarter Business Decisions Using KPI Bar

List creators can now see the engagement status of the prospects in an actionable list on the preconfigured KPI Bar. When list creators apply filters on prospect records, the dynamic KPI Bar instantly shows updated information. List creators can also manually update the information on the KPI Bar.

Optimize the Workload of Agents by Assigning Prospects to Service Cloud Queues

List creators can assign prospects to a Service Cloud queue to simplify the assignment of prospects to agents. The routing logic of the queue optimally assigns the prospects to agents, enhancing team collaboration and improving prospect engagement.

Boost Your Efficiency by Automating the Assignment of New Prospects in an Actionable List to Agents

List creators can use the automatic prospect assignment feature to set a rule for automatically assigning new prospects. List creators can use the assignee type from the previous assignment or select another assignee type.

Changed Objects in Actionable List Members

Use the changed objects to automatically assign the new prospects in an actionable list to agents and to create new actionable lists from Data Cloud segments.

Connect REST APIs

Connect REST APIs for actionable list members to help customers, partners, and ISVs integrate with Salesforce software and UIs.

SEE ALSO:

Salesforce Help: Actionable List Members (can be outdated or unavailable during release preview)

Narrow Down on Prospects Easily and Save Time by Using Filters

List creators can apply multiple filters and easily identify the prospects to assign to agents by using the new filtering feature in the Actionable List Members component.

Where: This change applies to Lightning Experience in clouds where Actionable List Members is available.

Who: To use this feature, users need the Industry Sales Excellence add-on license and the Actionable Segmentation permission set.

How: Click in the Actionable List Members component, and then click **Add Filter** to specify the criteria for filtering.

Get Valuable Insights on Prospects and Make Smarter Business Decisions Using KPI Bar

List creators can now see the engagement status of the prospects in an actionable list on the preconfigured KPI Bar. When list creators apply filters on prospect records, the dynamic KPI Bar instantly shows updated information. List creators can also manually update the information on the KPI Bar.

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List creators can assign prospects to a Service Cloud queue to simplify the assignment of prospects to agents. The routing logic of the queue optimally assigns the prospects to agents, enhancing team collaboration and improving prospect engagement.

Where: This change applies to Lightning Experience in clouds where Actionable List Members is available.

Who: To use this feature, users need the Industry Sales Excellence add-on license and the Actionable Segmentation permission set.

How: On the Actionable List Members component, click **Configure and Assign List**, and then select a queue. You can also configure a list and then assign prospects to the queue by selecting prospects in the Actionable List Members component, clicking **Change Assignee**, and then selecting a queue.

Boost Your Efficiency by Automating the Assignment of New Prospects in an Actionable List to Agents

List creators can use the automatic prospect assignment feature to set a rule for automatically assigning new prospects. List creators can use the assignee type from the previous assignment or select another assignee type.

Where: This change applies to Lightning Experience in clouds where Actionable List Members is available.

Who: To use this feature, users need the Industry Sales Excellence add-on license and the Actionable Segmentation permission set.

How: On the Actionable List Members component, click **Configure and Assign List**. Turn on Assign new records in the list automatically, and then specify the rule for future prospect assignment.

Changed Objects in Actionable List Members

Use the changed objects to automatically assign the new prospects in an actionable list to agents and to create new actionable lists from Data Cloud segments.

Indicate whether automatic assignment of new actionable list members is allowed (true) or not (false)

Use the new `IsAutoAssignmentAllowed` field on the ActionableList object.

Identify the segment an actionable list is created from

Use the new `SegmentIdentifier` field on the ActionableList object.

Name the segment membership history table that tracks the existing records in a segment and the records that are added to or removed from the segment

Use the new `SegmentMembershipTable` field on the ActionableList object.

Indicate whether an actionable list is refreshed (true) or not (false)

Use the new `IsSynchronizationAllowed` field on the ActionableList object.

Record the date and time when an actionable list last synchronized with a Data Cloud segment

Use the new `LastSynchronizationDateTime` field on the ActionableList object.

Record the date and time when an actionable list started to synchronize with a Data Cloud segment

Use the new `SyncStartDateTime` field on the ActionableList object.

Track the number of times an actionable list fails to synchronize with a Data Cloud segment

Use the new `SynchronizationFailureCount` field on the ActionableList object.

Specify the source type of the actionable list

Use the new `SourceType` field on the ActionableList object.

Record the batch calculation job definition related to the actionable list

Use the new `BatchCalcJobDefinition` field on the ActionableList object.

Specify the person or queue the actionable list members are assigned to

Use the changed `Assignee` field on the ActionableList object.

Specify the type of assignee that the new members in an actionable list are automatically assigned to

Use the new `AutomaticAssigneeType` field on the ActionableList object.

Specify the assignee that the new members in an actionable list are automatically assigned to

Use the new `AutomaticAssignee` field on the ActionableList object.

Indicate whether an actionable list is configured (true) or not (false)

Use the new `IsActionableListConfigured` field on the ActionableList object.

Specify the assignment status of an actionable list member

Use the new `AssignmentStatus` field on the ActionableListMember object.

Specify the method used to assign members to an actionable list

Use the new `AssignmentMethod` field on the ActionableListMember object.

Specify the source type of the actionable list

Use the new `SourceType` field on the ActionableListDefinition object.

Connect REST APIs

Connect REST APIs for actionable list members to help customers, partners, and ISVs integrate with Salesforce software and UIs.

IN THIS SECTION:

New Connect REST API Resources

These Actionable List Members resources are new.

Update the member count of an actionable list

Make a POST request to the new `/connect/actionable-list-member-count` resource.

New request body: Actionable List Update Member Count Input

New response body: Actionable List Update Member Count Output

Actionable Relationship Center

Visualize relationships on customizable, easy-to-navigate graphs.

IN THIS SECTION:

Quickly View Contextual Data in Actionable Relationship Center Graphs

Customize Actionable Relationship Center (ARC) graphs on records. Change which objects appear in the graph, and apply filters to one or more nodes to show records based on certain criteria. For example, show only open cases and related records in the graph. Save custom views to easily access them later.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Action Relationship Center is available.

SEE ALSO:

Salesforce Help: Actionable Relationship Center (ARC) (can be outdated or unavailable during release preview)

Actionable Segmentation

Enable your list creators to customize column preferences, refresh lists, and add object records to existing lists. You can now use the guided setup to set up and configure Actionable Segmentation efficiently.

IN THIS SECTION:

Get an Enhanced View of Data in List Builder by Using Aggregated Fields

You can now map fields derived by using aggregate functions when creating actionable list definitions. Help your list creators build comprehensive actionable lists by showing aggregated fields in List Builder. Aggregated fields give a list creator a more comprehensive representation of the underlying information.

Get Up and Running with Actionable Segmentation by Using Guided Setup

Use a guided setup to configure Actionable Segmentation efficiently. Follow the steps in the flow to complete tasks, such as assigning permissions, enabling the feature, and creating and configuring actionable list definitions. Stay on track with links to other in-app Setup pages and contextual Help.

Actionable Segmentation Videos

New videos help you learn about the capabilities of Actionable Segmentation.

New Objects

Access more data with these new objects.

Metadata API

Access more metadata through this changed metadata type.

Personalize the List Creation Experience by Customizing Display Columns

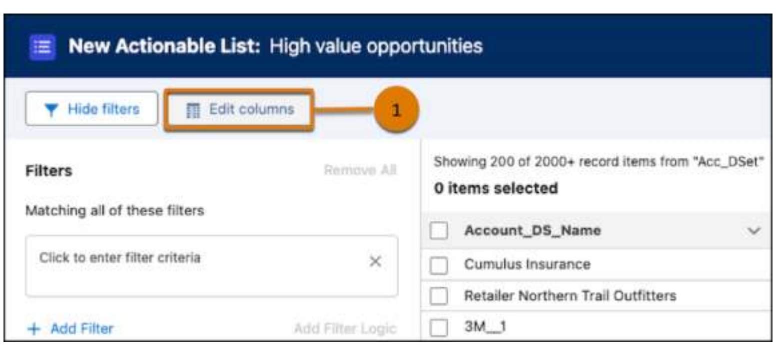
When creating actionable lists in List Builder, list creators can now customize column preferences by choosing what columns to show and their display order. Column preferences are stored individually for each list creator and the corresponding list definition. Preferences set by a list creator in a list apply to all lists created by that list creator, as long as they have a common list definition. These preferences also persist across sessions. Customizing column preferences helps list creators view the relevant information easily and streamline the list creation experience.

Where: This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

Who: To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

Why: When creating a list definition, you can select a default set of visible columns. If these columns don't meet the business needs of different list creators when creating different actionable lists, you can adjust them. For example, to create an actionable list of high net worth individuals, a wealth manager requires columns such as account name, annual revenue, billing city, and opportunity value. On the other hand, a supervisor overseeing these wealth managers requires columns such as account name, opportunity age in days, and campaign id.

How: On the Actionable List Builder page, select **Edit Columns** (1) to select the columns to display and their display order.



SEE ALSO:

Salesforce Help: Customize Column Preferences for Actionable Lists (can be outdated or unavailable during release preview)

Add Latest Matching Records to Get Updated Actionable Lists

Your list creators can now add newer dataset records to existing actionable lists. However, the newer dataset records must match the filter criteria of the actionable list they're added to. If the number of records that match the filter criteria is more than 200, the records are added to the list asynchronously, and users are notified after the list is updated. The ability to refresh lists this way lets your list creators keep their lists synchronized with their data sources.

Where: This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

Who: To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

How: On the list details page, from the quick action menu, click **Add Latest Records**, and select records matching the list filter criteria.

SEE ALSO:

Salesforce Help: Add Latest Matching Dataset Records to Actionable Lists (can be outdated or unavailable during release preview)

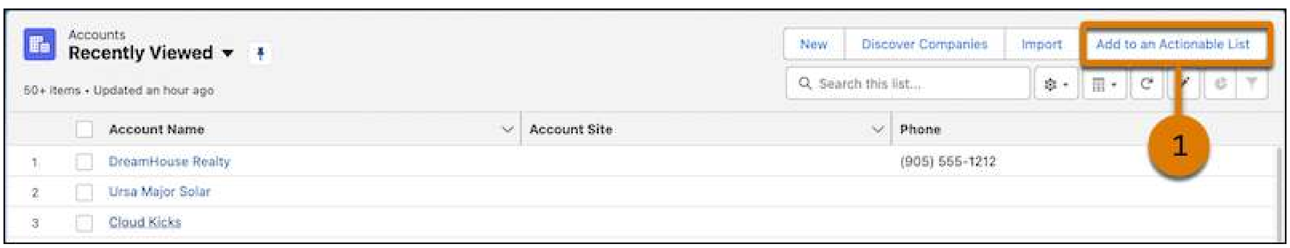
Add Members to Actionable Lists Efficiently with a Quick Action

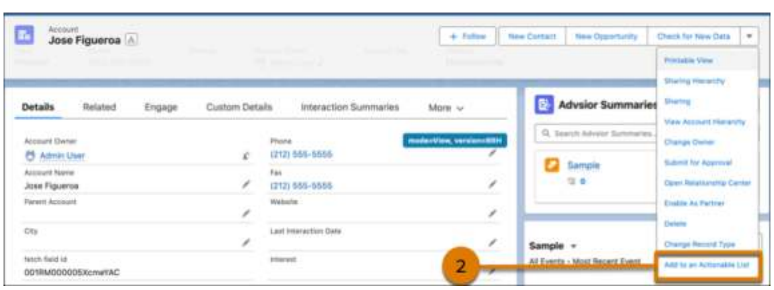
Your list creators can now add Account, Contact, Case, Opportunity, and Lead records to existing actionable lists quickly with the Add to an Actionable List quick action. List creators can use this quick action from list views on object pages or from record pages. This change helps your list creators boost their efficiency by eliminating the need for repetitive searches and manual consolidations.

Where: This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

Who: To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

How: On an object page, select one or more records in the list view and click **Add to an Actionable List** (1). Alternatively, go to a record page and click **Add to an Actionable List** (2) in the actions menu. Select the list to which you want to add the record and save the list.





SEE ALSO:

Salesforce Help: Add Members to Actionable Lists with a Quick Action (can be outdated or unavailable during release preview)

Get an Enhanced View of Data in List Builder by Using Aggregated Fields

You can now map fields derived by using aggregate functions when creating actionable list definitions. Help your list creators build comprehensive actionable lists by showing aggregated fields in List Builder. Aggregated fields give a list creator a more comprehensive representation of the underlying information.

Where: This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

Who: To use this feature, users need the Actionable Segmentation permission set and the Query for Datapipelines User permission set.

How: When creating a list definition using Data Processing Engine, create a node of type Group and Aggregate, and ensure that you refer to it when defining the writeback node.

SEE ALSO:

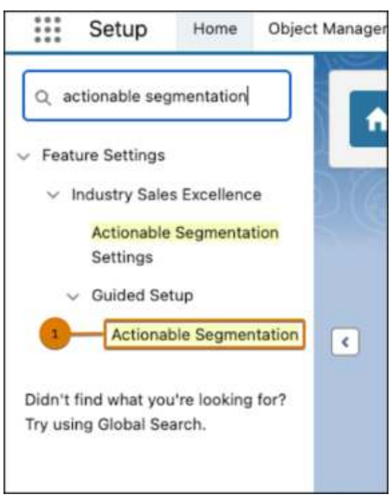
Salesforce Help: Create Actionable List Definitions(can be outdated or unavailable during release preview)

Get Up and Running with Actionable Segmentation by Using Guided Setup

Use a guided setup to configure Actionable Segmentation efficiently. Follow the steps in the flow to complete tasks, such as assigning permissions, enabling the feature, and creating and configuring actionable list definitions. Stay on track with links to other in-app Setup pages and contextual Help.

Where: This change applies to Lightning Experience in clouds that have Industry Sales Excellence Add On and Query for Datapipelines User licenses.

How: From Setup, in the Quick Find box, enter `Actionable Segmentation`, and then in the Guided Setup section, select **Actionable Segmentation** (1).



Actionable Segmentation Videos

New videos help you learn about the capabilities of Actionable Segmentation.

- Overview of Actionable Segmentation explores the end-to-end workflow for the Actionable Segmentation feature, which helps you segment and curate similar client profiles, and design timely and personalized client outreach programs.

New Objects

Access more data with these new objects.

Store the user preference for an actionable list dataset column

Use the new `ActionableListDtastClmnUsr` object.

Store a logical expression containing filter conditions to include or exclude data from the dataset that's associated with the actionable list

Use the new `ActionableListFilterCriteria` object.

Store the filter condition for including data in or excluding data from the dataset associated with the actionable list

Use the new `ActionableListFilterCondition` object.

SEE ALSO:

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

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

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

Metadata API

Access more metadata through this changed metadata type.

Determine whether the dataset column is grouped by the object defined in the actionable list definition

Use the new `IsGroupedByListDefObj` field on the ActionableListDatasetColumn metadata type.

SEE ALSO:

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

Batch Management

Filter batch job records based on future and previous days. Further refine your batch job record results by using IN and Not IN operator values in your filters.

IN THIS SECTION:

Filter Batch Job Records with In and Not In Operators

Further refine your batch job record results by using IN and Not IN operator values in your filters. When you use the IN operator, records include all lines that have any of the selected values for the specified field. Use the Not IN operator to ignore all lines that have any of the selected values for the specified field.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management, Manufacturing Cloud, or Loyalty Management is enabled.

How: When you add a condition to a batch job, if the resource type is from a picklist, the IN and Not IN values are selectable in the Operator field.

Filter Batch Job Records with Date Literals

Filter batch job records based on future and previous days. You can now use the NEXT_N_DAYS:n or N_DAYS_AGO:n date literals as an input variable for a condition. The value of n can be 7, 30, 60, 90, or 120. For standard date filters, NEXT_N_DAYS returns records that start at 12:00:00 AM on the day that the report is run for the selected n days. For custom field filters, records start at 12:00:00 AM on the next day. N_DAYS_AGO returns records that start at 12:00:00 AM n days before the current day and continues for 24 hours.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Rebate Management, Manufacturing Cloud, or Loyalty Management is enabled.

Business Rules Engine

Use context definition tags as list variables in expression sets. Easily filter lists and perform mathematical operations on list variables by using list filters and list groups in expression sets. Use multiple objects to create decision tables. With Decision Explainer enhancements for expression sets, create customizable explainability message templates and show dynamic decision explanations to your users.

IN THIS SECTION:

Experience more flexibility in creating and managing expression sets by using tags from context definitions as list variables in expression set versions. Context definitions are nested structures that contain the information required to execute a business process. The definitions represent the hierarchical relationship between nodes and their attributes, which are mapped to sObjects to load the data. The nodes and attributes have corresponding tags. The attribute tags appear as list variables in Expression Set Builder, and can be used like any resources in an expression set version.

Expression Set Builder now supports list group and list filter as step elements. Use list groups to iterate on items in a list. List groups support list filter, calculation, and lookup table elements. Use a list filter to conditionally filter complex list inputs. You can then use a calculation element as a subsequent step in the list group to perform mathematical operations on the filtered list. You can also use a lookup table element in the group to look up values in the selected lookup table and get the corresponding output for the input values.

With the new list functions in expression sets, you can manipulate and transform the data in all items in a list at once. Now use the LISTSUM, LISTAVG, and LISTSIZE functions in calculation steps and list group steps in your expression set versions. The LISTSUM function calculates the sum of all values in a list variable. The LISTAVG function calculates the average value of all items in a list variable. The LISTSIZE function provides a count of the number of values in a list variable. List functions make working with list variables simple and efficient.

For versions of an expression set that references a context definition, you can now map variables from a selected lookup table to list variables in the version. With the support for mapping lookup table input variables to list variables, you can easily look up multiple items from a list and get their corresponding output values from the table. Previously, lookup tables could handle only one set of inputs at a time, match them to the lookup table row, and return the corresponding output values of the matching row.

Decision Explainer Enhancements for Expression Sets

With the enhanced Decision Explainer functionality, customize decision explanations by using tokens in explainability message templates. When you reference the templates in the expression set versions steps, map the tokens to the expression set version resources. When the version is run or simulated, the messages dynamically show the values that correspond to the mapped resources.

Fourfold Increase in the Number of Active Decision Tables Per Org

Your Salesforce org can now have up to 40 active decision tables at a time. The increased number of active decision tables provides the flexibility to have decision tables that focus on both critical and less time-sensitive business requirements, without having to deactivate tables that you don't require immediately.

Use Multiple Objects as Data Sources for Decision Table Creation

Use fields from multiple objects to enrich your decision tables with diverse, interconnected attributes that provide a broader business context. When you create a decision table, you can now select a source object and up to four related objects and their fields to include in the table. The support for multiple objects helps you use a more comprehensive set of data to define your decision tables, which previously required creating multiple decision tables, each using a single source object.

Create Decision Tables with 10 Times More Rows

You can now group table rows by two input fields to create smaller groups. Previously, you could group rows by a single input field, with a cumulative limit of 100,000 rows. When you group rows by two input fields, each unique combination of values in the grouping fields creates a separate group. With this grouping, your decision table can have a total of one million rows. This enhancement supports tables with more row data and gives you more flexibility to create them.

Easily Maintain Decision Tables by Categorizing Them

When you create a decision table, you can now select a usage type to assign to the table. This enhancement improves the efficiency and ease of selecting a decision table in a lookup table step in an expression set version. The search option in the lookup table step shows only the tables that share the expression set's usage type, and the tables that don't have a usage type assigned. Categorizing decision tables by usage types ensures that you don't have to sift through irrelevant tables and helps you find the tables that you need quickly and effortlessly.

Easily Filter Decision Table Results by Choosing Your Filter Preference

When a decision table lookup returns multiple matching results, you now have the flexibility to choose how the results are filtered. While creating a decision table, select one of these filter options: First Match, Any Value, or Output Order. With these filter options, decision table lookups can handle multiple matching scenarios effectively and produce accurate outcomes. When using a decision table in an expression set version, the version can read only a single result, even if there are multiple matches. Therefore, if you plan to call decision tables from expression set versions, use the Any Value or First Match filter options. Previously, expression sets were limited to reading only the first match from a decision table lookup.

Create Expression Sets by Using Additional Data Type and Functions

Expression set versions now support resources with the Date & Time data type, expanding beyond the previous support limited to the Date data type. This enhancement ensures that you can use Date & Time values as inputs in your expression set versions. Expression set versions now also support the DateValue, ABS, LOG, and LN functions. You can use the DateValue function to extract the date portion from a date and time value. With this function you can convert any Date & Time value to a Date value to use additional functions that apply only to Date resources.

Use Decision Tables with More Data Types in Expression Set Versions

You can now design expression sets that look up decision tables with columns of all the data types other than Picklist (Multi) that decision tables support. Previously, expression sets supported lookup tables that had columns only with text or string, number, currency, percent, or date data types. By including decision tables with additional data types, your expression set versions can cater to a broader range of business scenarios. Whether for retrieving information related to email addresses, URLs, or making selections from picklist options, this enhanced functionality ensures that your expression sets align with the specific needs of your business.

Create Decision Tables with More Input Columns

You can now create decision tables with up to 30 input columns. Previously, the maximum limit was 10 input columns. This increased capacity is achieved by optimizing the column structure for lookups. To simplify lookups and conserve space, up to 21 columns with the following criteria are considered a single column: the columns are required for input, use the Equals operator, and are joined using AND logic. This enhancement enables you to create more comprehensive decision tables with increased flexibility for defining complex and nuanced conditions.

Export Decision Matrix Versions to DMN Files from Decision Matrix Builder

Decision Model Notation (DMN) is a standardized specification for writing business rules. With DMN files, you can reuse a matrix version created in Business Rules Engine in any tool that supports DMN files. Previously, decision matrix versions could be exported to DMN files by using only Connect REST API.

Effortlessly Map Lookup Table Variables to Expression Set Resources

After you add a lookup table in an expression set version, you can now map the table variables to expression set version resources at the same time. You can also assign literal values to the lookup table variables. Previously, passing values to a lookup table involved creating multiple calculation steps to map each version resource individually. With mapping support, you no longer have to create calculation steps for resource mapping. This enhancement makes it easy to manage expression set versions by reducing the number of version steps.

Other Changes in Business Rules Engine

When you select an expression set from the expression set list, you now see the expression set's details and versions on the Details tab. Previously, you switched to the Versions tab to see the expression set's versions. The Versions tab is now merged into the Details tab. When you select a version, it directly opens in Expression Set Builder. Previously, you selected the version and then clicked Open in Expression Set Builder in the version header. You can now edit a version's properties only from the Expression Set Builder. You can create a version by opening a version in the builder and saving it as another version.

New and Changed Business Rules Engine Objects

Do more with these new and changed objects in Business Rules Engine.

New and Changed Business Rules Engine Tooling API Objects

Do more with these new and changed tooling API objects in Business Rules Engine.

New and Changed Business Rules Engine Metadata Types

Make the most of the new and changed metadata types of Business Rules Engine.

Connect REST APIs

Connect REST APIs for Business Rules Engine help customers, partners, and ISVs integrate with Salesforce software and UIs.

Use Attributes from Context Definitions as List Variables in Expression Sets

Experience more flexibility in creating and managing expression sets by using tags from context definitions as list variables in expression set versions. Context definitions are nested structures that contain the information required to execute a business process. The definitions represent the hierarchical relationship between nodes and their attributes, which are mapped to sObjects to load the data. The nodes and attributes have corresponding tags. The attribute tags appear as list variables in Expression Set Builder, and can be used like any resources in an expression set version.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Context Service are enabled.

Who: Users with System Administrator permissions can create context definitions. Users with Rule Engine Advanced Designer permissions can associate a context definition to an expression set while creating an expression set, and use the definition's tags as list variables in expression set versions.

How: Create an expression set and select one of the context definitions available in your Salesforce org. Open a version of the expression set in Expression Set Builder to see and use the tags as list variables in the version steps.

Work with List Variables Easily Using List Groups and Filters

Expression Set Builder now supports list group and list filter as step elements. Use list groups to iterate on items in a list. List groups support list filter, calculation, and lookup table elements. Use a list filter to conditionally filter complex list inputs. You can then use a calculation element as a subsequent step in the list group to perform mathematical operations on the filtered list. You can also use a lookup table element in the group to look up values in the selected lookup table and get the corresponding output for the input values.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Context Service are enabled.

Who: Users with System Administrator permissions can create context definitions. Users with Rule Engine Advanced Designer permissions can use context tags as list variables in expression set versions.

How: Open an expression set version in Expression Set Builder. Add a list group element on the builder canvas. By default, a list filter is the first element inside the list group. Use list variables to define filter conditions in the list filter. Add a calculation or a lookup table element as subsequent steps in the list group to perform further operations on the filtered list.

Easily Configure Complex Calculations with List Functions

With the new list functions in expression sets, you can manipulate and transform the data in all items in a list at once. Now use the LISTSUM, LISTAVG, and LISTSIZE functions in calculation steps and list group steps in your expression set versions. The LISTSUM function calculates the sum of all values in a list variable. The LISTAVG function calculates the average value of all items in a list variable. The LISTSIZE function provides a count of the number of values in a list variable. List functions make working with list variables simple and efficient.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Context Service are enabled.

Who: Users with the Rule Engine Advanced Designer permissions can use list functions in expression sets that are associated with context definitions.

Provide Inputs to Lookup Tables in Bulk

For versions of an expression set that references a context definition, you can now map variables from a selected lookup table to list variables in the version. With the support for mapping lookup table input variables to list variables, you can easily look up multiple items from a list and get their corresponding output values from the table. Previously, lookup tables could handle only one set of inputs at a time, match them to the lookup table row, and return the corresponding output values of the matching row.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Context Service are enabled.

Who: Users with the Rule Engine Advanced Designer permissions can map lookup table variables to list variables.

Decision Explainer Enhancements for Expression Sets

With the enhanced Decision Explainer functionality, customize decision explanations by using tokens in explainability message templates. When you reference the templates in the expression set versions steps, map the tokens to the expression set version resources. When the version is run or simulated, the messages dynamically show the values that correspond to the mapped resources.

IN THIS SECTION:

Add Expression Set Resource Placeholders in Explainability Message Templates

You can now make explainability message templates customizable for Rule Engine Designer users by using tokens. Tokens are placeholders for expression set version resources. Create tokens from Setup, and use them in explainability message templates to write generic explanations. The Rule Engine Designer users can then customize the messages by mapping the tokens to resources from the expression set version in which the template is used. Using tokens ensures that the same template can be customized differently in different expression set versions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Decision Explainer are enabled.

How: Create tokens and then use them in explainability message templates.

- From Setup, search for and select **Expression Set Message Token**.
- Create the tokens that you need.
- From Setup, search for and select **Explainability Message Template**.
- Create a template and add the tokens within {} in the template message.

In this example, Resource1 and Resource2 are tokens. When the template is referenced in an expression set version step, the tokens can be mapped to the resources from the version.

SEE ALSO:

Salesforce Help: Create Expression Set Message Tokens (can be outdated or unavailable during release preview)

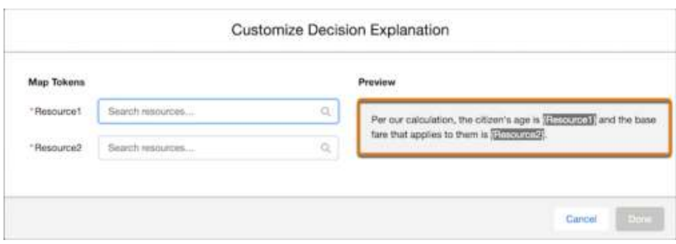
Show Dynamic Decision Explanations for Expression Set Version Steps

When you select explainability message templates for an expression set version step, you can now customize the message in the template by mapping the message tokens to resources from the version. When the expression set runs, the messages populate with the values of the mapped resource for that specific run. With this functionality, you can show your users contextual and personalized explanations for expression set steps.

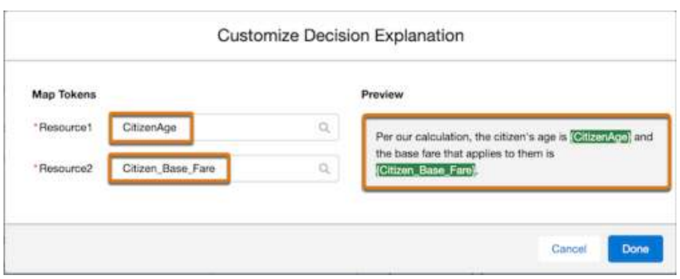
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Decision Explainer are enabled.

Who: Users with the Rule Engine Designer permission set can customize messages in explainability templates that are referenced in expression set version steps.

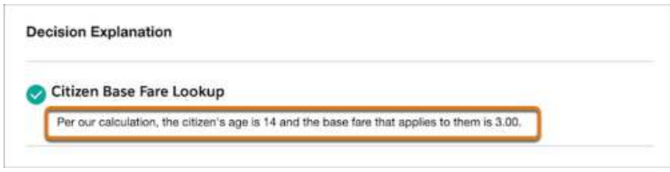
How: Assign an explainability message template to a version step from the Expression Set Builder. Then, click for the template and map the tokens that are used in the message to expression set version resources.



Here, the message in the explainability message template that's referenced in a version step uses the tokens Resource1 and Resource2. The tokens are mapped to the version resources, CitizenAge and Citizen_Base_Fare.



When the expression set version is simulated or run with the required inputs, here's how your users see the decision explanation for the step:



SEE ALSO:

Salesforce Help: Create an Explainability Message Template (can be outdated or unavailable during release preview)

Salesforce Help: Show Rule Explanations to Users (can be outdated or unavailable during release preview)

Show Explanations When a Lookup Step in Expression Sets Gives No Result

You can now create explainability message templates for scenarios where a lookup step in an expression set version doesn't find any matching result. Previously, you could create templates only for scenarios where the lookup step gave a result (Passed) or the step resulted in an execution error (Failed). This enhancement enables you to create decision explanations for a broader range of scenarios in your expression set versions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Decision Explainer are enabled.

How: From Setup, search for and select **Explainability Message Template**. Create a template. For Expression Set Step Type, select **Decision Table Lookup**. For Result Type, select **No Result**.

Compare and Analyze Multiple Runs of an Expression Set

When you capture action logs for an expression set that is enabled to show decision explanations, the Decision Explainer Log History now provides the option to compare different runs of the same expression set. With this feature, you can analyze why the same expression set gave different results for each run.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine and Decision Explainer are enabled.

Fourfold Increase in the Number of Active Decision Tables Per Org

Your Salesforce org can now have up to 40 active decision tables at a time. The increased number of active decision tables provides the flexibility to have decision tables that focus on both critical and less time-sensitive business requirements, without having to deactivate tables that you don't require immediately.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

How: If your business requires you to have more than 10 simultaneously active decision tables, contact Salesforce Customer Support to get the limit increased to 40 active tables.

Use Multiple Objects as Data Sources for Decision Table Creation

Use fields from multiple objects to enrich your decision tables with diverse, interconnected attributes that provide a broader business context. When you create a decision table, you can now select a source object and up to four related objects and their fields to include in the table. The support for multiple objects helps you use a more comprehensive set of data to define your decision tables, which previously required creating multiple decision tables, each using a single source object.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

How: In the Business Rules Engine app, select **Lookup Tables**. Click **New**, and select **Decision Table**. Select a source object, and up to four related objects. Select the fields from the selected related objects that you want to use in the decision table. All fields from the source object are available to use in the decision table by default.

Create Decision Tables with 10 Times More Rows

You can now group table rows by two input fields to create smaller groups. Previously, you could group rows by a single input field, with a cumulative limit of 100,000 rows. When you group rows by two input fields, each unique combination of values in the grouping fields creates a separate group. With this grouping, your decision table can have a total of one million rows. This enhancement supports tables with more row data and gives you more flexibility to create them.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

Easily Maintain Decision Tables by Categorizing Them

When you create a decision table, you can now select a usage type to assign to the table. This enhancement improves the efficiency and ease of selecting a decision table in a lookup table step in an expression set version. The search option in the lookup table step shows only the tables that share the expression set's usage type, and the tables that don't have a usage type assigned. Categorizing decision tables by usage types ensures that you don't have to sift through irrelevant tables and helps you find the tables that you need quickly and effortlessly.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

Easily Filter Decision Table Results by Choosing Your Filter Preference

When a decision table lookup returns multiple matching results, you now have the flexibility to choose how the results are filtered. While creating a decision table, select one of these filter options: First Match, Any Value, or Output Order. With these filter options, decision table lookups can handle multiple matching scenarios effectively and produce accurate outcomes. When using a decision table in an expression set version, the version can read only a single result, even if there are multiple matches. Therefore, if you plan to call decision tables from expression set versions, use the Any Value or First Match filter options. Previously, expression sets were limited to reading only the first match from a decision table lookup.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

Create Expression Sets by Using Additional Data Type and Functions

Expression set versions now support resources with the Date & Time data type, expanding beyond the previous support limited to the Date data type. This enhancement ensures that you can use Date & Time values as inputs in your expression set versions. Expression set versions also support the DateValue, ABS, LOG, and LN functions. You can use the DateValue function to extract the date portion from a date and time value. With this function you can convert any Date & Time value to a Date value to use additional functions that apply only to Date resources.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

SEE ALSO:

Salesforce Help: Supported Operators and Functions in Expression Sets (can be outdated or unavailable during release preview)

Use Decision Tables with More Data Types in Expression Set Versions

You can now design expression sets that look up decision tables with columns of all the data types other than Picklist (Multi) that decision tables support. Previously, expression sets supported lookup tables that had columns only with text or string, number, currency, percent, or date data types. By including decision tables with additional data types, your expression set versions can cater to a broader range of business scenarios. Whether for retrieving information related to email addresses, URLs, or making selections from picklist options, this enhanced functionality ensures that your expression sets align with the specific needs of your business.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

SEE ALSO:

Supported Data Types in Expression Sets

Create Decision Tables with More Input Columns

You can now create decision tables with up to 30 input columns. Previously, the maximum limit was 10 input columns. This increased capacity is achieved by optimizing the column structure for lookups. To simplify lookups and conserve space, up to 21 columns with the following criteria are considered a single column: the columns are required for input, use the Equals operator, and are joined using AND logic. This enhancement enables you to create more comprehensive decision tables with increased flexibility for defining complex and nuanced conditions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

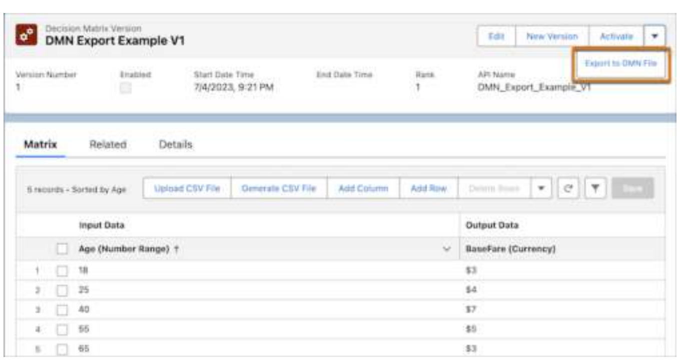
Why: For example, your table has seven input columns that are required for input and use the Equals operator. The input columns are joined using conditional logic such as (1 AND 2 AND 3 AND 4) OR (5 AND 6 AND 7). In this case, the table is considered as having input 2 columns.

Export Decision Matrix Versions to DMN Files from Decision Matrix Builder

Decision Model Notation (DMN) is a standardized specification for writing business rules. With DMN files, you can reuse a matrix version created in Business Rules Engine in any tool that supports DMN files. Previously, decision matrix versions could be exported to DMN files by using only Connect REST API.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

How: From the Business Rules Engine app, select **Lookup Tables**. Select a decision matrix. From the Related tab of the matrix, select a version. Click **Export to DMN File**.



When the export is complete, the exported file is available from the Related tab of the matrix version.

SEE ALSO:

Salesforce Help: Export and Download Matrix Versions Exported to DMN Files (can be outdated or unavailable during release preview)

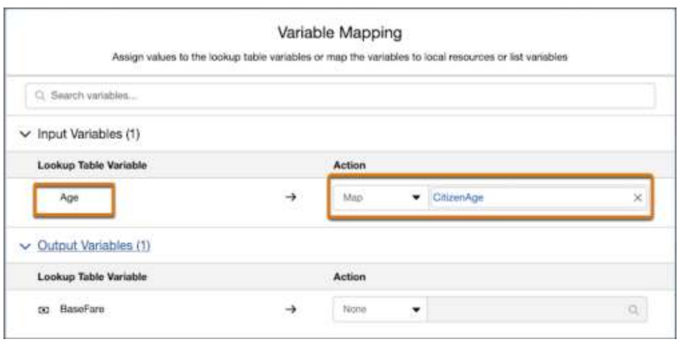
Salesforce Help: Limitations for Exporting Matrix Versions to DMN Files (can be outdated or unavailable during release preview)

Effortlessly Map Lookup Table Variables to Expression Set Resources

After you add a lookup table in an expression set version, you can now map the table variables to expression set version resources at the same time. You can also assign literal values to the lookup table variables. Previously, passing values to a lookup table involved creating multiple calculation steps to map each version resource individually. With mapping support, you no longer have to create calculation steps for resource mapping. This enhancement makes it easy to manage expression set versions by reducing the number of version steps.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

How: Open an expression set version in Expression Set Builder. Select the Lookup Table step where you want to implement resource mapping, Click **Map Variables**.



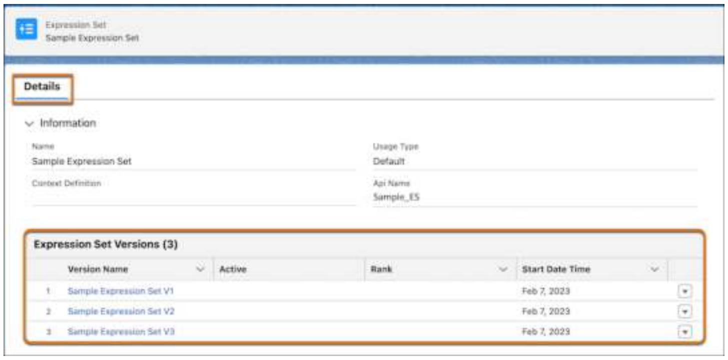
Here, an expression set version has a calculation step that gets a citizen's age based on their birth date. The citizen's age is stored in the local variable CitizenAge. The next step in the version is a lookup table, which has the input variable Age and Output variable BaseFare. To pass the citizen's age from the output of the calculation step to the lookup table, the variable CitizenAge is mapped to the Age variable in the lookup table.

Other Changes in Business Rules Engine

When you select an expression set from the expression set list, you now see the expression set's details and versions on the Details tab. Previously, you switched to the Versions tab to see the expression set's versions. The Versions tab is now merged into the Details tab. When you select a version, it directly opens in Expression Set Builder. Previously, you selected the version and then clicked Open in Expression Set Builder in the version header. You can now edit a version's properties only from the Expression Set Builder. You can create a version by opening a version in the builder and saving it as another version.

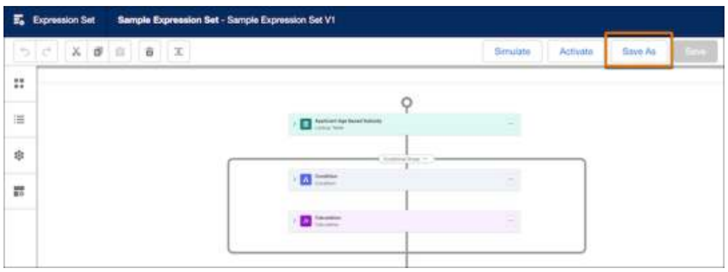
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions for Industries clouds where Business Rules Engine is enabled.

How:



To edit version properties, to add steps to a version, or to activate a version, select the version. The version opens in Expression Set Builder.

To create a version, open any version in the builder, and click **Save As**. The version is cloned. You can then edit the version's properties.



New and Changed Business Rules Engine Objects

Do more with these new and changed objects in Business Rules Engine.

New Object

Store information about decision matrix version column, when the column's data type is number or text range
: Use the new CalcMatrixColumnRange object.

Changed Object

Specify a usage type for a decision matrix
: Use the new `UsageType` field on the CalculationMatrix object.

New and Changed Business Rules Engine Tooling API Objects

Do more with these new and changed tooling API objects in Business Rules Engine.

New Tooling API Objects

Create expression set message tokens
: Use the new ExpressionSetMessagetoken object.

Define the fields and values from the decision table that are used in the table's condition logic
: Use the new DecisionTableSourceCriteria object.

Changed Tooling API Objects

New Fields on DecisionTable

Specify the data source that's used for creating the decision table
Use the new `DataSourceType` field.

Specify how the decision table's results are filtered
Use the new `FilterResultBy` field.

Specify how the condition logic to process the data in the decision table's input fields
Use the new `SourceConditionLogic` field.

Specify the type of the decision table based on the table's data volume
Use the new `Type` field.

Specify the usage type for a decision table
Use the new `UsageType` field.

New Fields on DecisionTableParameter

Indicate the domain object for a decision table field's hierarchy
Use the new `DomainObject` field.

Specify the path of a decision table field in relation to the object the field belongs to
Use the new `FieldPath` field.

Indicate whether an input field in the decision table requires input values for lookup
Use the new `IsRequired` field.

Changed Fields on ExplainabilityMessageTemplate

Specify an explainability message template for a decision table that returns no result
Use the new `NoResult` value for the `ResultType` field.

Create explainability message templates for List Filter and List Group elements
Use the new `ListFilter` and `ListEnabledGroup` values for the `ExpressionSetStepType` field.

New and Changed Business Rules Engine Metadata Types

Make the most of the new and changed metadata types of Business Rules Engine.

Metadata Types

Determine whether the decision explanation is exposed to external users
Use the new `shouldShowExplExternally` field on the ExpressionSetDefinitionVersion subtype of the ExpressionSetDefiniton metadata type. Introduced in API version 56.0, this type has been added to the *Industries Common Resources Developer Guide*.

Incorporate custom elements into an Expression Set
Use the new `ExpressionSetCustomElement` subtype of the ExpressionSetStep metadata type on the existing ExpressionSetDefinition metadata type. Introduced in API version 56.0, this type has been added to the *Industries Common Resources Developer Guide*.

Specify a new result type in the message template
Use the new `NoResult` value in the existing `evaluationResult` field on the ExplainabilityMsgTemplate metadata type.

Specify new step types in an expression set in an explainability message template
Use the new `ListEnabledGroup`, `ListFilter`, and `ReferenceProcedure` values in the existing `expressionSetStepType` field on the ExplainabilityMsgTemplate metadata type.

Customize module identification in Expression Set builder

Use the new `interfaceSourceType` field on the ExpressionSetDefinition metadata type. Introduced in API version 59.0, this type has been added to the *Industries Common Resources Developer Guide*.

Enable mapping between various parameters in ExpressionSetDecisionTable

Use the new `mappings` field on the ExpressionSetDecisionTable subtype of the ExpressionSetDefiniton metadata type. Introduced in API version 59.0, this type has been added to the *Industries Common Resources Developer Guide*.

Get the explainability message template with the result type as No Result

Use the new `noResultExplainerTemplate` field on the ExpressionSetStep subtype of the ExpressionSetDefiniton metadata type.

Get the list of the token resource mappings of the no result explainability message template

Use the new `noResultMessageTokenMappings` field on the ExpressionSetStep subtype of the ExpressionSetDefiniton metadata type.

Get the list of the token resource mappings of the failed explainability message template

Use the new `failedMessageTokenMappings` field on the ExpressionSetStep subtype of the ExpressionSetDefiniton metadata type.

Get the list of the token resource mappings of the passed explainability message template

Use the new `passedMessageTokenMappings` field on the ExpressionSetStep subtype of the ExpressionSetDefiniton metadata type.

Enhance CRUD operations on Expression Set Message Token

Use the new ExpressionSetMessageToken metadata type. Introduced in API version 59.0, this type has been added to the *Industries Common Resources Developer Guide*.

Connect REST APIs

Connect REST APIs for Business Rules Engine help customers, partners, and ISVs integrate with Salesforce software and UIs.

IN THIS SECTION:

New Connect REST API Resources

These are the new Business Rules Engine resources.

Retrieve lookup tables

Make a GET request to the new `/connect/business-rules/lookup-tables` resource.

New response body: Lookup Tables Result List

Changed Connect REST API Request Bodies

These request bodies have changes.

Expression Set Version Step Input

This request body has these new properties.

- `failedMessageTokenMappings`—Specifies the list of the token resource mappings of the failed explainability message template.
- `noResultExplainerTemplate`—Specifies the name of the explainability message template that's used when the evaluation result of the selected element type is No Result.
- `noResultTokenMappings`—Specifies the list of the token resource mappings of the no result explainability message template.
- `passedMessageTokenMappings`—Specifies the list of the token resource mappings of the passed explainability message template.

Decision Table Definition Input

This request body has this changed property.

- `decisionResultPolicy`—The enum values - CollectOperator, Priority, RuleOrder, and UniqueValues - are no longer available.

Changed Connect REST API Response Bodies

These response bodies have changes.

Expression Set Version Step Output

This response body has these new properties.

- `failedMessageTokenMappings`—Specifies the list of the token resource mappings of the failed explainability message template.
- `noResultExplainerTemplate`—Specifies the name of the explainability message template that's used when the evaluation result of the selected element type is No Result.
- `noResultTokenMappings`—Specifies the list of the token resource mappings of the no result explainability message template.
- `passedMessageTokenMappings`—Specifies the list of the token resource mappings of the passed explainability message template.

Calculation Procedure Step Output

This response body has these new properties.

- `failedExplainerTemplateId`—Specifies the ID of the failed explainability message template in the Decision Table lookup procedure step. Introduced in API version 56.0, this property is added to the Business Rules Engine Developer Guide.
- `failedMessageTokenMappings`—Specifies the list of the token resource mappings of the failed explainability message template.
- `noResultExplainerTemplateId`—Specifies the ID of the no result explainability message template in the Decision Table lookup procedure step.
- `noResultTokenMappings`—Specifies the list of the token resource mappings of the no result explainability message template.
- `passedExplainerTemplateId`—Specifies the ID of the passed explainability message template in the Decision Table lookup procedure step. Introduced in API version 56.0, this property is added to the Business Rules Engine Developer Guide.
- `passedMessageTokenMappings`—Specifies the list of the token resource mappings of the passed explainability message template.

Lookup Table Details

This response body has this new property.

- `apiName`—Unique developer name of the Decision Table or Decision Matrix.

Decision Table Definition Output

This response body has this changed property.

- `decisionResultPolicy`—The enum values - CollectOperator, Priority, RuleOrder, and UniqueValues - are no longer available.

Context Service (Generally Available)

Simplify the sharing and consumption of data for business applications by using Context Service. Acting as a generic module, Context Service forms a layer between applications and procedures, enabling easy retrieval and utilization of data across various Industries clouds at every step of the digital process. Create context definitions to build a structure for efficient data access. Map the nodes and attributes defined in your definition to the right input data sources. Import and export context definitions between orgs. Invoke and hydrate context instances through invocable actions by using Salesforce Flows.

IN THIS SECTION:

Cross Org Migrations

Using Cross Org Migrations, users can import and then export a context definition between two different orgs. All context definitions are migrated in inactive status from the subscriber org, regardless of their status in the publisher org.

New Objects in Context Service

Do more with these new Context Service objects.

Access Data by Using Context Service

Using Context Service, your users can enhance the application's performance by optimizing data access and eliminating redundant input. Additionally, they can modify the application fields that use the data stored in an object for use throughout the digital process. Context Service acts as a layer between the application and the rules or procedures, providing the requested data during both the configuration (design time) and execution (run time) stages.

Where: This change applies to Lightning Experience in Developer, Enterprise, Professional, and Unlimited editions for Industries clouds where Context Service is enabled.

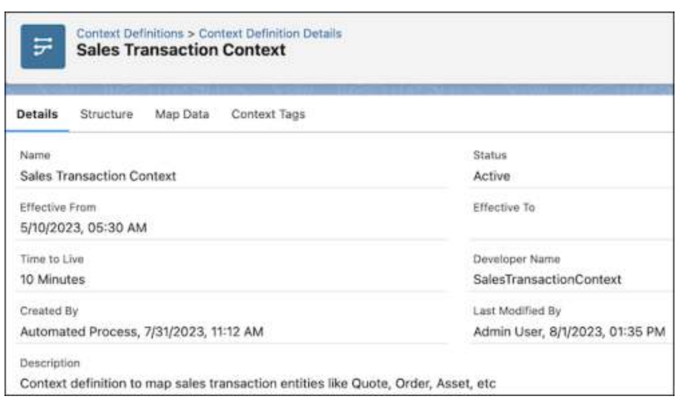
Why: All business applications require real-time execution of rules or procedures to fulfill requests. These procedures rely on input data to process a request and generate results for their respective applications. In cases where a procedure involves multiple steps, multiple requests are sometimes made to a database to fetch similar data. By using Context Service, applications can reuse the data available in their cache, set a duration for how long they want to use the data, and minimize the calls made to the database to fetch this data.

Create Context Definitions

Use context definitions to build a complete set of information required to execute any digital process. All context definitions describe the relationship between a node and attributes that are set in a hierarchical structure. Context tags ensure that the right data is queried from source objects. For example, when you're determining the price of a product, you must provide and cache data at every step of the pricing process. By creating custom nodes, attributes, and tags, each node, and attribute consumes the right data, making the pricing process more efficient. In addition to creating context definitions, you can also activate, edit, clone, and delete a context definition.

Where: This change applies to Lightning Experience in Developer, Enterprise, Professional, and Unlimited editions for Industries clouds where Context Service is enabled.

How: On the Context Definitions page, click **Add Context Definitions** to create a structure, define nodes, attributes, and their tags.



SEE ALSO:

Salesforce Help: Context Definitions(can be outdated or unavailable during release preview)

Map Context Definitions to Data Sources

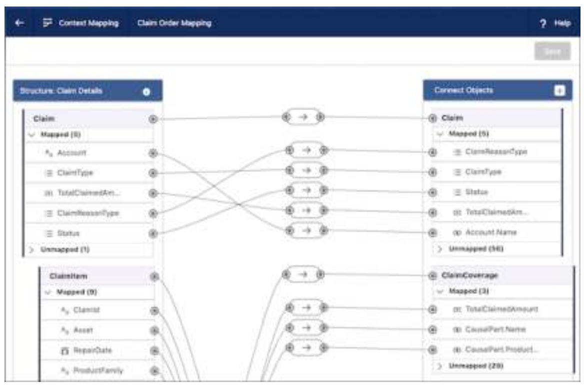
To ensure that the right data is fetched from the source objects, map the nodes and attributes in your context definition to the right source object. Mapping a context definition is made easy for the user by using a simple click-and-connect action. You can select (click) the node and an attribute and then select the corresponding Salesforce object or other input data source to begin the process of fetching data.

Where: This change applies to Lightning Experience in Developer, Enterprise, Professional, and Unlimited editions for Industries clouds where Context Service is enabled.

Why: All context definitions must be mapped to a source object. This source object can be sObjects or they can be any input data source you choose. By default, an input data source is set as your mapping type, but you can choose neither and conduct the mapping process manually for your context definition.

Context Service has two mapping types that specify where you can retrieve data for your context definition.

How: Open the context definition that you want to add a mapping to. On the Context Definition Details page, go to the Map Data tab to begin mapping.



SEE ALSO:

Salesforce Help: Map Context Definitions(can be outdated or unavailable during release preview)

Retrieve and Deploy Context Data to Applications and Database

Use Context Service to read data from input data sources and provide that information to consuming applications. Utilize a Context Service to persist the processed data back to the database so that it can be retrieved and used later. For example, you can use Context Service to persist data from a Salesforce object when a quote is converted to an order, or when a contract to a sales agreement needs data to be written back to the database.

Where: This change applies to Lightning Experience in Developer, Enterprise, Professional, and Unlimited editions for Industries clouds where Context Service is enabled.

Invoke Build Context from Flows

You can now invoke build context in flows that are created by using Salesforce Flow. A build context flow fetches data from the database by passing an ID or the user can manually input the data and save it to the cache.

Where: This change applies to Lightning Experience in Developer, Enterprise, Professional, and Unlimited editions for Industries clouds where Context Service is enabled.

Who: Users need the Context Service Admin and Context Service Runtime permission sets to call build context from flows that are created in Flow Builder.

How: In Flow Builder, drag the Action element onto the canvas. Select the Context Service category. Search for and select **Build Context**, and then enter values for the input parameters that are defined in the Build Context core action.

SEE ALSO:

Salesforce Help: Invoke a Build Context in a Flow(can be outdated or unavailable during release preview)

Invoke Persist Context Data from Flows

You can now invoke persist context data in flows that are created by using Salesforce Flow. A persist context data flow fetches data from the cache and stores the data in the database. All updates to the data can be completed in the database.

Where: This change applies to Lightning Experience in Developer, Enterprise, Professional, and Unlimited editions for Industries clouds where Context Service is enabled.

Who: Users need the Context Service Admin and Context Service Runtime permission set to call persist context data from flows that are created in Flow Builder.

How: In Flow Builder, drag the Action element onto the canvas. Select the Context Service category. Search for and select **Persist Context Data**, and then enter values for the input parameters that are defined in the Persist Context Data core action.

SEE ALSO:

Salesforce Help: Invoke a Persist Context Data in a Flow(can be outdated or unavailable during release preview)

Cross Org Migrations

Using Cross Org Migrations, users can import and then export a context definition between two different orgs. All context definitions are migrated in inactive status from the subscriber org, regardless of their status in the publisher org.

IN THIS SECTION:

Group Context Definition Setup Objects as a Package

Users can migrate context definition objects as a package from one org to another org. This migration can be accomplished by using the Package Manager or Workbench, which is also referred to as an Unmanaged Package. All objects such as nodes and attributes within the context definition are automatically added to the package.

Support Migration of Custom Objects and Fields for a New Package

When selecting a context definition, the custom objects and fields associated with it are automatically included in the package. Users can then verify the contents and proceed to upload them to the new package.

Group Context Definition Setup Objects as a Package

Users can migrate context definition objects as a package from one org to another org. This migration can be accomplished by using the Package Manager or Workbench, which is also referred to as an Unmanaged Package. All objects such as nodes and attributes within the context definition are automatically added to the package.

Where: This change applies to Lightning Experience in Developer, Enterprise, Professional, and Unlimited editions for Industries clouds where Context Service is enabled.

Why: Improving application performance involves avoiding redundant tasks like creating context definitions with the same set of data, nodes, and attributes that exist in a different org. Users can also edit, modify, or delete context definition from packages after migrating to another org.

SEE ALSO:

Salesforce Help: Context Definitions Packages(can be outdated or unavailable during release preview)

Support Migration of Custom Objects and Fields for a New Package

When selecting a context definition, the custom objects and fields associated with it are automatically included in the package. Users can then verify the contents and proceed to upload them to the new package.

Where: This change applies to Lightning Experience in Developer, Enterprise, Professional, and Unlimited editions for Industries clouds where Context Service is enabled.

New Objects in Context Service

Do more with these new Context Service objects.

Create a context definition
Use the new `ContextDefinition` object.

Indicate the version of your context definitions
Use the new `ContextDefinitionVersion` object.

Create nodes to query relevant data
Use the new `ContextNode` object.

Associate your nodes with attributes
Use the new `ContextAttribute` object.

Provide shortened names for nodes or attributes
Use the new `ContextTag` object.

Indicate data being invoked by using an input data source
Use the new `ContextInputSchema` object.

Indicate the input data of a node in the context structure
Use the new `ContextInputNode` object.

Indicate the input data of an attribute for a specific node
Use the new `ContextInputAttribute` object.

Create a relationship between nodes and attributes with a data source
Use the new `ContextMapping` object.

Associate a node in the context to the values in a data source
Use the new `ContextNodeMapping` object.

Associate an attribute in the context to the values in a data source
Use the new `ContextAttributeMapping` object.

Indicate the database queries that fetch data for a chosen node or attribute from a data source
Use the new `ContextAttrHydrationDetail` object.

Data Processing Engine

Use the node canvas to configure nodes, see a visual representation of them, and view how they reference each other. View failed writeback records to get a clearer picture of how to improve your definition and its data. Use the Data Cloud runtime in your definition to process large volumes of data.

IN THIS SECTION:

Build Definitions Faster with the New Node Canvas

The new node canvas gives you a visual representation of all the nodes that you're using in your definition to transform data. As you configure your nodes, you can see how they relate to each other. Previously, you relied on a text list. You can still view your nodes as a list, but now the node canvas makes it easier to work with your nodes and conceptualize your definition. The node canvas opens automatically when you create or open a definition.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

See Which Nodes Reference Each Other in a Definition

Select a node on the node canvas to see the nodes that are referencing it as a source. Knowing the reference nodes can help you troubleshoot errors in your definition. The References tab lists each node that's using elements from the selected node, for example, node sources and mapped fields. The node canvas also provides a visual representation of the relationship between nodes.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

Transform Data with Data Cloud

Process large volumes of data by using the Data Cloud runtime for your definition. With the Data Cloud runtime, you can read data from Industries Cloud and Data Cloud, join multiple sources, filter out records, and write back results to Industries Cloud or Data Cloud.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

How: In Data Processing Engine, click **New** to create a definition, enter your details, and then select **Data Cloud**.

View Failed Writeback Records for Troubleshooting

If a definition run fails during the writeback process, view the failed records and see what went wrong. The Failed Writeback Records tab shows up to 50 records that have failed during the writeback process. After you address the issues, you can rerun the definition with the right logic.

Where: This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions where Data Processing Engine is enabled.

How: In Monitor Workflow Services, in the Batch Jobs section, click the batch job name, then open the Failed Writeback Records tab.

Changed Data Processing Definition Objects

Do more with these changed objects in Data Processing Engine.

Changed Objects

Choose the runtime platform for the Data Processing Engine definition

Use the new`ExecutionPlatformType` field on the BatchCalcJobDefinitionView object.

Changed Data Processing Engine Tooling API Objects

Do more with changed Tooling API objects in Data Processing Engine.

Changed Tooling API Objects

Choose the runtime platform for the Data Processing Engine definition

Use the new`ExecutionPlatformType` field on the BatchCalcJobDefinition object.

Metadata API

Make the most of the changed metadata types of Data Processing Engine.

Metadata Types

Select the platform for running the Data Processing Engine definition

Use the new `executionPlatformType` field on the existing BatchCalcJobDefinition metadata type.

Enable sourcefield from runtime parameter

Use the new `runtimeParameter` field on the existing BatchCalcJobWritebackMapping subtype of the BatchCalcJobDefinition metadata type.

Discovery Framework Enhancements

Use the Document Matrix element in Discovery Framework OmniScripts to automatically determine the documents that your users need to upload when submitting an assessment.

IN THIS SECTION:

Quickly and Easily Identify the Documents to Upload for an Assessment

Streamline the assessment process and ensure that respondents upload the correct documents. Add the new Discovery Framework Document Matrix element to an assessment form to dynamically generate the list of documents that respondents must upload based on their responses.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Financial Services Cloud is enabled.

How: Open an OmniScript of type Discovery Framework. To add the Document Matrix element to the OmniScript, from the Build panel, search for the Document Matrix element. Then, from the search results, drag the element onto the OmniStudio Designer canvas.

Next, from the canvas, click the **Document Matrix** element to configure its properties.

SEE ALSO:

https://help.salesforce.com/s/articleView?id=sf.discovery_framework_dynamic_document_identification.htm

New Connect REST API Resources

These Document Decision resources are new.

Document Decision

Invoke a Decision Table, accept key-value pairs that match the Decision Table keys, and return either Document Types or Document Categories and the Document Types associated with them

Make a POST request to the new `/connect/document-matrix/document-decision/${decisionTableId}` resource.

New request body: Document Decision Input

New response body: Document Decision Response

Engagement

Do more with the changed Engagement objects.

IN THIS SECTION:

Changed Objects

Access more data with these changed objects in Engagement.

SEE ALSO:

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

Changed Objects

Access more data with these changed objects in Engagement.

Store your unique business data in custom fields

Configure up to 50 custom fields in each of these objects:

- EngagementAttendee
- EngagementInteraction
- EngagementTopic

Industry Integration Solutions

Easily access and enable multiple Industry Cloud integrations, and remove unwanted integration instances. Reenable integrations that failed to enable previously. View the integrations that you developed in MuleSoft Automation Services.

IN THIS SECTION:

Easily Access Multiple Industry Cloud Integrations

Focus on critical and time-sensitive business requirements without having to enable permissions for each Industry Cloud separately. You can now access integration assets of multiple Industry Clouds that you're subscribed to at the same time.

Connect an Integration to Multiple External Systems

Enable an integration multiple times to create different instances, which you can then use to connect to different external systems.

Reenable Failed Integration Instances

If an integration instance failed to enable previously, you can now retry enabling it with the same settings.

Remove Unwanted Integration Instances

Delete unwanted integration instances from Salesforce and MuleSoft Runtime Manager.

View Integrations in MuleSoft Automation Services

You can now view the integration apps that you've created in your MuleSoft instance in MuleSoft Automation Services.

Use Third-Party Connectors to Connect to External Systems

Some integrations use third-party connectors to connect to external systems. View and accept the terms and conditions of the third-party connectors.

Easily Access Multiple Industry Cloud Integrations

Focus on critical and time-sensitive business requirements without having to enable permissions for each Industry Cloud separately. You can now access integration assets of multiple Industry Clouds that you're subscribed to at the same time.

Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

How: From Setup, go to **Integrations** > **Industry Integration Solutions** > **Integrations Setup**. Click **Get Started**. After you connect to your MuleSoft instance, you can view all the integrations that you have access to.

Connect an Integration to Multiple External Systems

Enable an integration multiple times to create different instances, which you can then use to connect to different external systems.

Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

How: From Setup, go to **Integrations** > **Industry Integration Solutions** > **Integrations Setup**. In the Available Integrations area, enable the integration.

Reenable Failed Integration Instances

If an integration instance failed to enable previously, you can now retry enabling it with the same settings.

Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

How: From Setup, go to **Integrations** > **Industry Integration Solutions** > **Integrations Setup** In the Available Integrations area, click **Retry** for the failed instance.

Remove Unwanted Integration Instances

Delete unwanted integration instances from Salesforce and MuleSoft Runtime Manager.

Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

How: From Setup, go to **Integrations** > **Industry Integration Solutions** > **Integrations Setup**. In the Available Integrations area, expand the integration whose enabled instance you want to delete. In the App Instances area, click the down arrow next to the instance you want to delete and click **Delete Instance**.

View Integrations in MuleSoft Automation Services

You can now view the integration apps that you've created in your MuleSoft instance in MuleSoft Automation Services.

Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

How: From Setup, go to **Integrations** > **Industry Integration Solutions** > **Integrations Setup**. In the MuleSoft Instance area, click the down arrow and click **Private Exchange**.

Use Third-Party Connectors to Connect to External Systems

Some integrations use third-party connectors to connect to external systems. View and accept the terms and conditions of the third-party connectors.

Where: This change applies to Lightning Experience where Industry Integration Solutions is enabled.

How: From Setup, go to **Integrations** > **Industry Integration Solutions** > **Integrations Setup**. In the Available Integrations area, expand an integration, click **View Terms and Conditions**, and click **Accept**.

Intelligent Document Reader

Get Intelligent Document Reader for multiple Industries clouds with an add-on license. Watch the Set Up Intelligent Document Reader video to learn how to set up Intelligent Document Reader.

IN THIS SECTION:

Get Intelligent Document Reader with More Industries Clouds

Automatically extracts information from uploaded documents by using Amazon Textract through your AWS account. Use the extracted information to create or update record fields, or to verify data that's already in Salesforce.

Where: This change applies to Lightning Experience of multiple Industries clouds.

Who: Apart from Financial Services Cloud, Health Cloud, and Public Sector Solutions, Intelligent Document Reader is also available with the Intelligent Document Reader add-on license for these clouds:

- Automotive Cloud
- Consumer Goods Cloud
- Education Cloud
- Manufacturing Cloud
- Media Cloud
- Net Zero Cloud

SEE ALSO:

Salesforce Help: Intelligent Document Reader (can be outdated or unavailable during release preview)

Watch the Set Up Intelligent Document Reader Video

Watch the video for Intelligent Document Reader to learn how to set up Intelligent Document Reader.

Set Up Intelligent Document Reader shows you how to enable Intelligent Document Reader, to enable image preview for the documents that you upload, to give your users the object permissions that they need, and to create document types and templates to extract information.

Connect REST APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

IN THIS SECTION:

Changed Connect REST API Request Bodies

These request bodies have changes.

Document Process Input

This request body has this new property.

- `templateApiName`—The API name of the document template to retrieve.

DocumentReader Namespace

The DocumentReader namespace has these new classes.

New Classes

Store the details of the field that are created or updated in the target object

Use the new `AdditionalField` class.

Store a list of the fields of the target object

Use the new `AdditionalFields` class.

SEE ALSO:

Industries Common Resources Developer Guide: DocumentReader Namespace

List Builder for Data Cloud Segment

Create actionable lists from Data Cloud segments and streamline sales and service efforts to unlock new growth opportunities.

IN THIS SECTION:

Improve Customer Satisfaction by Personalizing Engagement with Your Prospects Using List Builder for Data Cloud Segment

List creators can use the audience segments generated in Data Cloud to create targeted actionable lists to drive personalized engagement with prospects and meet business goals. You can keep actionable lists updated by synchronizing actionable lists with their associated segments.

Where: This change applies to Lightning Experience in clouds where List Builder for Data Cloud Segment is available.

Who: To use this feature, users need the Industry Sales Excellence add-on, Customer 360 Audiences Corporate or Genie Data Platform Starter and CDP Segments Activations Card licenses, and the Actionable Segmentation permission set.

How: On the Actionable Lists list view, click **Create new list**. Select **Data Cloud Segment** as the source. Then, enter the name and description of the list, select a segment, specify the publishing schedule, select columns, and then configure engagement statuses.

Service Process Studio

Do more with Service Process Studio. Use the Transaction Dispute template to quickly create a service process definition for handling transaction disputes. Select relevant fields on a standard or custom object to store the base data attribute details.

IN THIS SECTION:

Define Service Processes with More Relevant Data

When creating a service process definition, you can now associate base data attributes with fields of any object. Previously, these base attributes were stored only in the Service Catalog Request object. By mapping the data attributes with fields in relevant objects, you can effortlessly build complex service processes that need rich analytics capabilities and extensive integrations with external systems.

How: From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**. Click **New Service Process** and then under Data Attributes, click **New Data Attributes**. Select **Base** as the Attribute Type, and then select the required base object.

SEE ALSO:

Data Attributes

Get Started Quickly with the Transaction Dispute Template

Use the Transaction Dispute template to quickly set up the Transaction Dispute Management service process. The template provides a set of predefined data attributes organized into logical sections, enabling you to get started with streamlining the dispute-handling process.

How: From Setup, in the Quick Find box, enter `Service Process Studio`, and then select **Service Process Studio**. Click **New Service Process**. Select **Create from Template** and then click **Transaction Dispute**.

SEE ALSO:

Create a Transaction Dispute Service Process Definition with the Default Template

New Connect REST API Resources

These Service Process Studio resources are new.

Service Process Studio

Retrieve service process layout data

Make a GET request to the new `/connect/service-excellence/service-catalog-request/layout-data/case/${Id}` resource.

New response body: Service Process Request Layout Data

Timeline

Configure Timeline to show engagement events from Data Cloud.

IN THIS SECTION:

Show Engagement Events on Timeline to Improve Visibility and Facilitate Personalized Engagement

Administrators can select the engagement events from Data Cloud data model objects to show to agents on the timeline. The events help agents enhance information retrieval, understand the historical context, and have contextual and concise communication with customers and prospects.

Show Engagement Events on Timeline to Improve Visibility and Facilitate Personalized Engagement

Administrators can select the engagement events from Data Cloud data model objects to show to agents on the timeline. The events help agents enhance information retrieval, understand the historical context, and have contextual and concise communication with customers and prospects.

Where: This change applies to Lightning Experience in clouds where Timeline is available.

Who: To use this feature, users need the Industry Service Excellence add-on license.

How: From Setup, in the Quick Find box, enter *`Timeline`*, and then click **Timeline**. Next, click **New Timeline**, select **Data Cloud Events**, and enter the details of the related object and the engagement data model object. Then, enter the conditions for showing records on the timeline, define the fields to show, and then activate the timeline.

Note: Showing Engagement Events on Timeline isn't currently supported on Experience Cloud sites.

Marketing

Marketing Cloud is the premier platform for delighting customers with 1:1 customer journeys. It enables you to build a single view of your customer, leveraging data from any source. Plan and optimize unique customer journeys based on your business objectives. Deliver personalized content across every channel and device at precisely the right time. Measure the impact of each interaction on your business so that you can optimize your approach in real time and deliver better results.

Learn about our latest features and enhancements in Marketing Cloud Release Notes.

SEE ALSO:

Marketing Cloud Overview

Marketing Cloud: Earlier Release Notes

Salesforce Marketing Cloud Facebook Page

Marketing Cloud Account Engagement

Make your Engagement Studio programs more precise with wait times less than a day. Copy assets from sandbox to production business units with API V5 for Flow, and free up system bandwidth by removing old visitor activity records.

IN THIS SECTION:

General Enhancements

Deliver a faster, more personalized experience for your customers with Engagement Studio wait times less than a day. You can now have Account Engagement automatically delete old visitor activity records and restrict which domains can show your form code.

IN THIS SECTION:

Update Email Templates with Invalid Senders

As part of the domain validation requirement from Spring '23, Account Engagement doesn't send email templates with a sender address that includes an unverified domain. You can now review templates with invalid senders in Optimizer. To continue using the template, change the sender email address or validate the sending domain.

Remove Unconverted Visitor Activity Records

Free up system bandwidth by removing old visitor records that didn't convert to prospects. Use the new Stale Unconverted Visitors option in your Business Unit Settings to automatically remove unconverted records older than 365 days.

Restrict Which Domains Can Display Account Engagement Assets

To help protect the security of your data, you can now restrict or limit iframing for your Account Engagement assets, such as forms and landing pages. From your Business Unit Settings, you can restrict iframing completely, allow iframing only for specific domains, or have no restrictions. Business units created after the Winter '24 release have iframing restricted by default. Business units created before the Winter '24 have iframing unrestricted by default.

Where: This change applies to all Account Engagement editions.

SEE ALSO:

Salesforce Help: Restrict or Limit Iframing for Account Engagement Assets (can be outdated or unavailable during release preview)

Chart Historical Prospect Changes by Feature

Review prospect changes at a glance using the new Prospect Change Monitor histogram in the Account Engagement Optimizer. Easily focus on specific feature areas or view all changes across your business unit.

Where: This change applies to all Account Engagement editions.

SEE ALSO:

Salesforce Help: Monitor Features That Cause Prospect Changes in Account Engagement (can be outdated or unavailable during release preview)

Restore a Paused Prospect by Deleting Their Visitor Records

Prospects are paused when their activity levels are high enough to impact Account Engagement's performance. If you have a paused prospect who is important to your business, you can restore the prospect by deleting their visitor activity records. Choose a date in the past and Account Engagement removes the prospect's activity records before that date. When you remove enough activity records, Account Engagement restores tracking for that prospect. If the prospect exceeds the activity threshold in the future, they're paused again.

Where: This change applies to all Account Engagement editions.

Why: Most of the time, a high level of activity is the result of a bot, and it's best to delete the prospect. However, if you have a long-time customer or you use a prospect for testing purposes, use this feature to continue to work with that prospect record.

How: On the Visitors tab of a prospect record, use the Tools menu to delete activity records. When you select a date, review the prospect status preview to confirm that enough records will be deleted to restore the prospect. You can also see how many visitor records remain and how many are being removed.

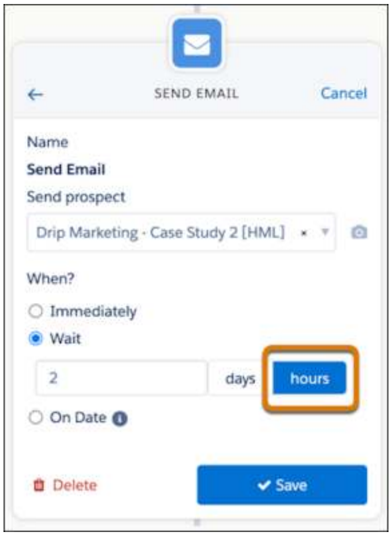
SEE ALSO:

Salesforce Help: Delete Visitor Records to Restore Paused Prospects (can be outdated or unavailable during release preview)

Design Engagement Programs with More Precise Wait Times

Prospects can now wait in Engagement Studio Program email send steps from 2 to 8 hours. Previously, wait times were limited to increments of days.

Where: This change applies to all Account Engagement editions.



SEE ALSO:

Salesforce Help: How Wait Periods Work in Engagement Programs (can be outdated or unavailable during release preview)

Update Email Templates with Invalid Senders

As part of the domain validation requirement from Spring '23, Account Engagement doesn't send email templates with a sender address that includes an unverified domain. You can now review templates with invalid senders in Optimizer. To continue using the template, change the sender email address or validate the sending domain.

Where: This change applies to all Account Engagement editions.

When: This feature is available to all customers as of August 14, 2023.

Remove Unconverted Visitor Activity Records

Free up system bandwidth by removing old visitor records that didn't convert to prospects. Use the new Stale Unconverted Visitors option in your Business Unit Settings to automatically remove unconverted records older than 365 days.

Where: This change applies to all Account Engagement editions.

APIs and Integrations

Copy marketing assets from a sandbox to a production business unit with API V5 for Flow. External Activities are now fully packageable. You also get new and updated fields in Account Engagement API version 5.

IN THIS SECTION:

Account Engagement API: New and Changed Items

Access more of your data with new and updated objects for Account Engagement API version 5. Copy marketing assets from sandbox to production business units using Salesforce Flow.

Updated Objects in Version 5

New Dynamic Content Endpoint

Added support for Dynamic Content endpoint.

Optimized Exports

Improved large export processing speeds.

Query by ID Array

Added support for querying by ID array.

Other API Changes

Copy Marketing Assets Using API Version 5 for Flow

Now you can copy marketing assets between business units or from sandbox to production business units using Salesforce Flow.

New Account Engagement Sandbox to Production Flow

An example flow is included to help you model your own custom copy flows.

Mobile

Salesforce Mobile App Plus now supports searching Briefcase for records, more easily accessible swipe actions on the Landing Page, list filters on the Landing Page, and quicker address configuration. Define your Mobile Publisher for Experience Cloud app's default URL behavior and location-based permissions and push notifications. Use Briefcase Builder to apply custom metadata types to your mobile workforce's offline record experience.

IN THIS SECTION:

Salesforce Mobile App

Salesforce Mobile App Plus now supports searching Briefcase for records, swipe actions and filters on the Landing Page, and attaching images to records while offline. Enable Dynamic Forms on Mobile is now GA and gives your mobile users the same customized record-page experience as your desktop users.

IN THIS SECTION:

Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The new Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determine the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of October 16, 2023.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Navigation and Actions			
Do More with Enhanced Offline Landing Page Features	✔	✔	
Analytics			
Share Reports Anytime, Anywhere	✔	✔	
Update CRM Analytics Dashboards Automatically	✔	✔	✔
Get Better Widget Navigation with Single-Click Interactions	✔	✔	✔
Offline Access			
Search Your Briefcase for Offline Records	✔	✔	
Attach Images to Records While Offline	✔	✔	
Offline App Onboarding Wizard Is Generally Available	✔	✔	✔
Setup			
Enable Dynamic Forms on Mobile (Generally Available)	✔	✔	✔

Get Better Widget Navigation with Single-Click Interactions

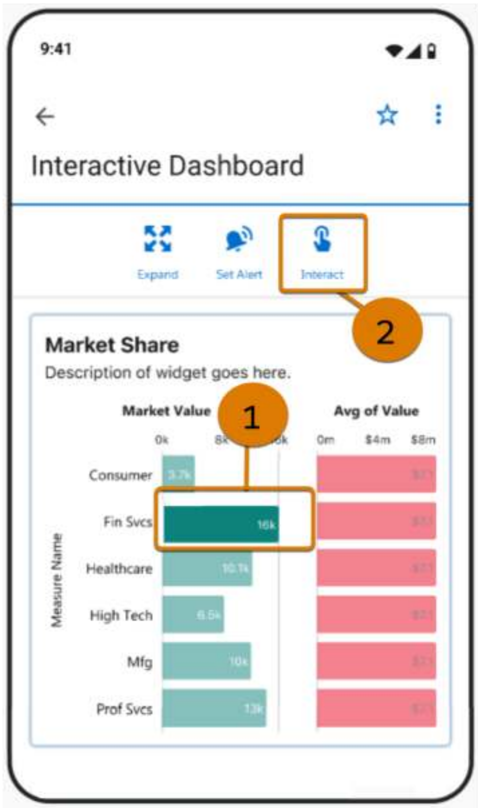
Widget interactions, previously confined to desktops, now extend to your mobile devices. On mobile devices, you get the same single-click experience that transforms a static overview widget into an interactive navigation experience.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited editions.

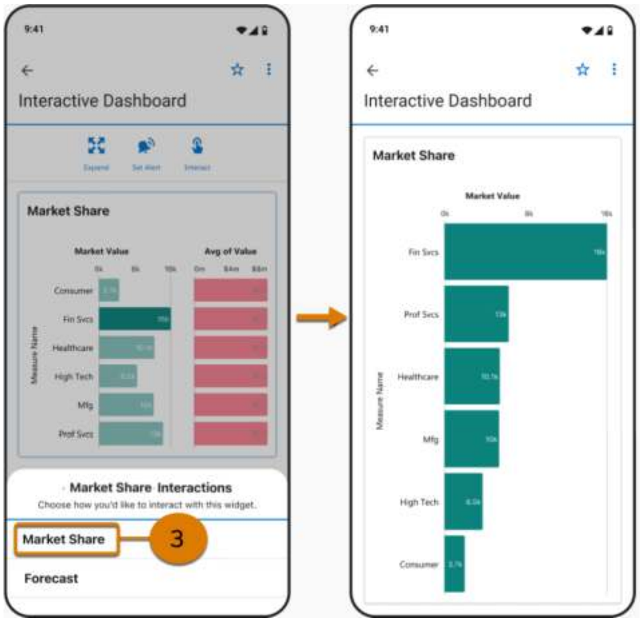
When: Single-click interaction is available the week of October 16, 2023.

Who: A CRM Analytics license is required to access CRM Analytics assets.

How: Tap **All Items**, and select **Analytics** in the Salesforce mobile app. Open a CRM Analytics dashboard, and tap a metric in a chart (1). Tap **Interact** (2) in the menu bar.



Tap the view (3) you want to open.



SEE ALSO:

Salesforce Help: Configure a Widget Interaction (can be outdated or unavailable during release preview)

Update CRM Analytics Dashboards Automatically

Widget additions and changes now automatically sync across a dashboard's layouts. For example, if a widget is added to a mobile layout, the widget is automatically added to the desktop layout.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited editions.

When: Layout synchronization is available the week of October 16, 2023.

Who: A CRM Analytics license is required to access CRM Analytics assets.

How: CRM Analytics dashboard setup is done on the desktop by the admin or dashboard builder.

SEE ALSO:

Synchronize Modifications Across Layouts Effortlessly

Salesforce Help: Generate Unique CRM Analytics Dashboard Layouts for Different Devices (can be outdated or unavailable during release preview)

Share Reports Anytime, Anywhere

You can now share your reports in Salesforce mobile. With this update, you can conveniently share your reports from anywhere with your mobile device, without waiting until you have access to your desktop.

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Professional, Developer, Enterprise, and Unlimited editions.

When: Reports sharing is available the week of October 16, 2023.

How: Open a report in the Salesforce mobile app. Tap ••• , then tap **Share**.

SEE ALSO:

Salesforce Help: Unify All Your Analytics on Unified Analytics (can be outdated or unavailable during release preview)

Do More with Enhanced Offline Landing Page Features

Lightning Swipe Actions are now more easily accessible. Save time when you configure the address that is used for navigation with one field instead of five. Filter support for lists is now available.

Where: These changes apply to the Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

Who: All three new capabilities are available in orgs with the Salesforce Mobile App Plus license and to users within that org who have the Mobile Offline for Salesforce Mobile App Plus user permission.

Why: To easily access Lightning Swipe Actions, users can now swipe right on contacts to show a half sheet that contains all available LWC actions.

To configure the address that is used with the Map action, you can now input the address in a single field instead of five separate fields, making configuration less time consuming.

Lightning Page Filter Support for Lists is now available, which allows users to filter their list data with simple or conditional filters.

How: To ensure that LWC actions are available, configure them in Object Manager. To configure the navigation address and add filters, customize the UEM.

SEE ALSO:

Salesforce Help: Customize The Landing Page (can be outdated or unavailable during release preview)

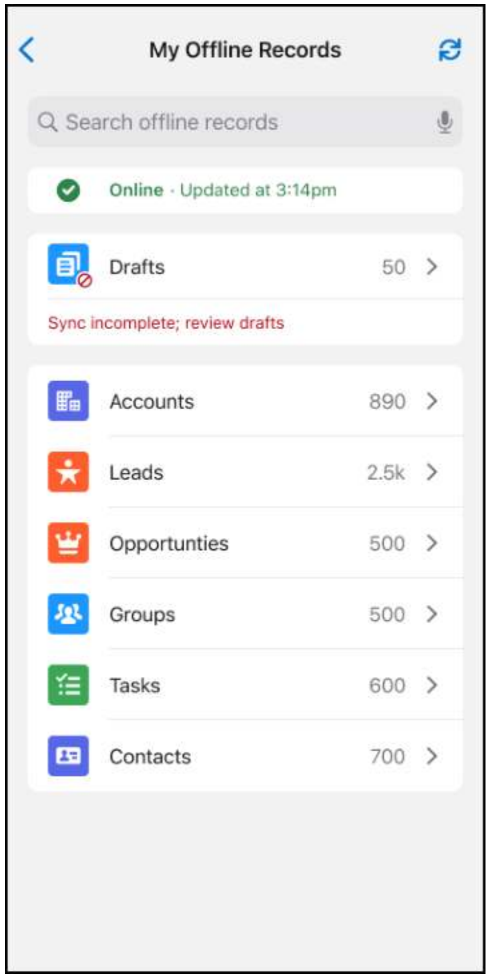
Search Your Briefcase for Offline Records

Users can now search their Briefcase for records, whether their devices are online or offline.

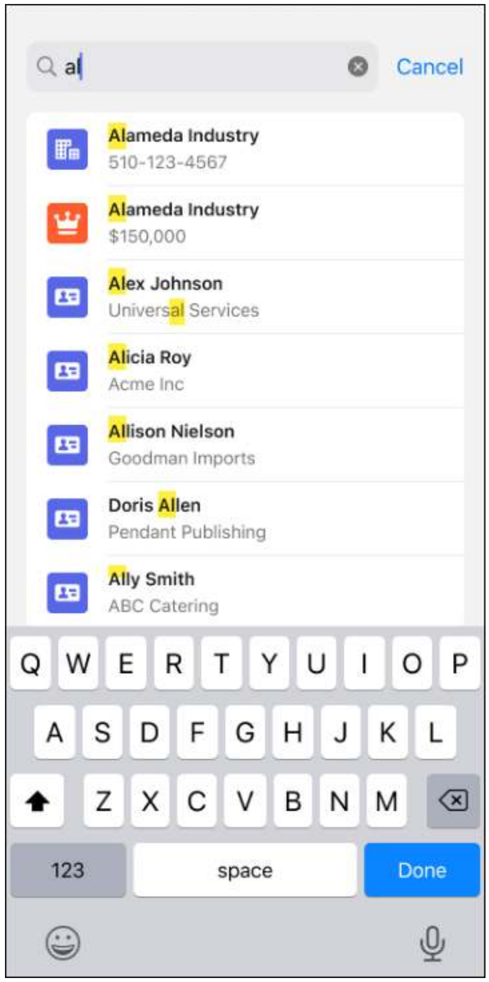
Where: This change applies to the Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

Who: Briefcase Search is available in orgs with the Salesforce Mobile App Plus license and to users within that org who have the OfflineForMobilePlus user permission.

How: Users can access the Briefcase search bar from the Briefcase Home and Briefcase Records List page.



Matching search results are highlighted and users can tap on them to navigate to the record detail page.



Offline App Onboarding Wizard Is Generally Available

The Offline App Onboarding Wizard guides you with easy-to-follow prompts to configure the Offline Starter Kit project for the Salesforce Mobile App Plus offline experience.

Where: This change applies to the Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

Who: Mobile Offline is available in orgs with the Salesforce Mobile App Plus license and to users within that org who have the OfflineForMobilePlus user permission.

Why: To make the offline development and set-up process easier, we created a tool called the Offline App Onboarding Wizard.

How: Download the Salesforce Offline App Onboarding Wizard Visual Studio Code Extension. Alternatively, if you're in Visual Studio Code, go to the Extensions (Shift-Command-X on Mac) and search for the Salesforce Offline Starter Kit Wizard and click **Install**.

SEE ALSO:

GitHub: Offline App Developer Starter Kit

Mobile Offline Developer Guide: Customize the Offline Experience for the Salesforce Mobile App

Attach Images to Records While Offline

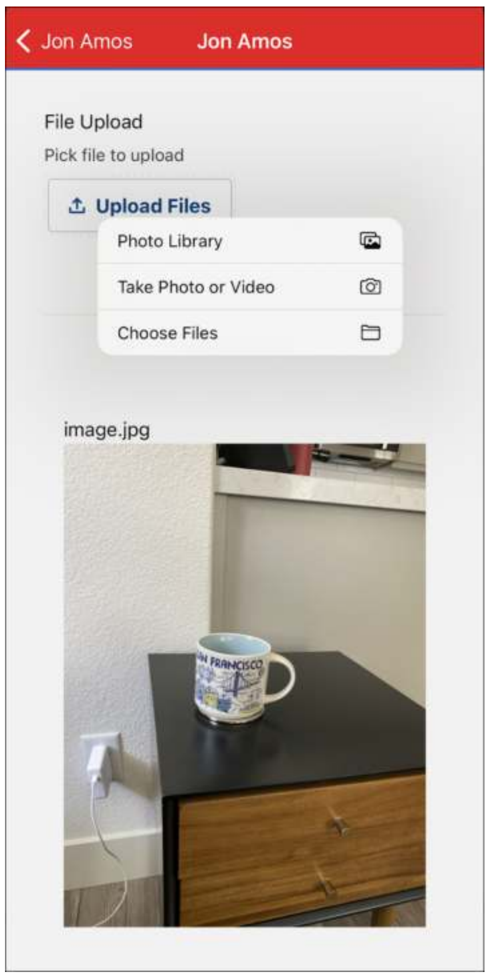
Mobile users can now attach images to records when their devices are in areas of no or low network connectivity.

Where: This change applies to the Salesforce Mobile App Plus for iOS and Android on phone and tablets in all editions, except Database.com.

Who: Offline Images is available in orgs with the Salesforce Mobile App Plus license and to users within that org who have the OfflineForMobilePlus user permission.

How: Users can attach an image or file (PDF) to a record in multiple ways.

- Choose an image from their device's photo library.
- Take a photo from their device's camera.
- Choose a file from their device.



The draft record with the attached image is synced when network connectivity is restored on the device.

Additionally, the Offline App Developer Starter Kit contains the `fileUpload` LWC example component so that you can add the functionality to your mobile app.

SEE ALSO:

GitHub: Offline App Developer Starter Kit

GitHub: fileUpload

Enable Dynamic Forms on Mobile (Generally Available)

With Dynamic Forms, you have greater customization options on your record pages. Now, when you enable Dynamic Forms on Mobile, your mobile users have the same customized experience your desktop users have. Dynamic Forms on Mobile was in beta in Spring '23 and is now generally available.

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

SEE ALSO:

IdeaExchange Delivered: Give Your Mobile Users the Dynamic Forms Experience (Generally Available)

Mobile Publisher

Configure your Mobile Publisher for Experience Cloud app's default URL behavior and location-based permissions and push notifications.

IN THIS SECTION:

Set the Default Method for How Your Mobile Publisher for Experience Cloud App Opens URLs

Configure your app to open these links in an in-app web view, an in-app browser, an external browser, or an in-app browser that shares cookies with your app's web view. For any exceptions, you can specify certain URLs to open using a method other than the default method that you select. These URL management settings are also now available in the Publisher Playground app for your testing use cases. Previously, you entered and configured each URL in your app's Setup for Mobile Publisher project, without the option to set one default method for opening URLs.

Define Your Experience Cloud App's Location-Based Permissions and Push Notifications

In Setup for Mobile Publisher, you can now enable and configure the description for the permission request to a device's Background Location for Marketing Cloud push notifications. For Android apps, you can also enable and configure the descriptions for your app's permissions requests to a device's Coarse Location and Fine Location. Additionally, Setup for Mobile Publisher now has an enablement field for Marketing Cloud push notifications based on Geofencing, which triggers notifications when the device enters or exits a specific location boundary.

Update Your Device to iOS 15 or Later for Experience Cloud Apps

Starting in app version 11.6, Mobile Publisher for Experience Cloud iOS apps no longer support iOS 14 devices. Experience Cloud iOS apps now require devices with iOS 15 or later.

Set the Default Method for How Your Mobile Publisher for Experience Cloud App Opens URLs

Configure your app to open these links in an in-app web view, an in-app browser, an external browser, or an in-app browser that shares cookies with your app's web view. For any exceptions, you can specify certain URLs to open using a method other than the default method that you select. These URL management settings are also now available in the Publisher Playground app for your testing use cases. Previously, you entered and configured each URL in your app's Setup for Mobile Publisher project, without the option to set one default method for opening URLs.

Where: This change applies to:

- Apps created with Mobile Publisher for your Experience Cloud Aura and LWR sites in Enterprise, Performance, Unlimited, and Developer editions.
- Mobile Publisher for Experience Cloud apps in iOS app version 11.6 and later.
- Mobile Publisher for Experience Cloud apps in Android app version 11.7 and later.
- Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

How: In your app's Setup for Mobile Publisher project, configure the settings in the URL Management section.

SEE ALSO:

Salesforce Help: Manage How URLs Open from Your App (can be outdated or unavailable during release preview)

Salesforce Help: Test How URLs Open in the Playground Publisher App (can be outdated or unavailable during release preview)

Define Your Experience Cloud App's Location-Based Permissions and Push Notifications

In Setup for Mobile Publisher, you can now enable and configure the description for the permission request to a device's Background Location for Marketing Cloud push notifications. For Android apps, you can also enable and configure the descriptions for your app's permissions requests to a device's Coarse Location and Fine Location. Additionally, Setup for Mobile Publisher now has an enablement field for Marketing Cloud push notifications based on Geofencing, which triggers notifications when the device enters or exits a specific location boundary.

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

How: In your app's Setup for Mobile Publisher project, configure location-based permissions in the App Permissions for Device Capabilities section and enable location-based notifications in the Marketing Cloud section.

If you enable Geofencing for notifications on an iOS app, you must also enable Location for notifications in the Marketing Cloud section. Then, you must enable the Location and Background Location permissions in the iOS App Permissions for Device Capabilities section.

If you enable Geofencing for notifications on an Android app, you must enable the Coarse Location, Fine Location, and Background Location permissions in the Android App Permissions for Device Capabilities section.

SEE ALSO:

Salesforce Help: Enable Marketing Cloud Push Notifications for Mobile Publisher Apps (can be outdated or unavailable during release preview)

Salesforce Help: App Permissions for Device Capabilities (can be outdated or unavailable during release preview)

Update Your Device to iOS 15 or Later for Experience Cloud Apps

Starting in app version 11.6, Mobile Publisher for Experience Cloud iOS apps no longer support iOS 14 devices. Experience Cloud iOS apps now require devices with iOS 15 or later.

Where: This change applies to:

- Apps created with Mobile Publisher for your Experience Cloud Aura and LWR sites in Enterprise, Performance, Unlimited, and Developer editions.
- Mobile Publisher for Experience Cloud iOS app versions 11.6 and later.

SEE ALSO:

Salesforce Help: Requirements for Mobile Publisher for Experience Cloud (can be outdated or unavailable during release preview)

Briefcase Builder

Briefcase Builder now supports rules for custom metadata types.

IN THIS SECTION:

Customize the Offline Record Experience with Custom Metadata Types

Now that Briefcase Builder supports custom metadata types, you can add a custom metadata type rule to your briefcase to bring your organization's customized metadata to your offline mobile workforce. For example, add a custom metadata rule to your briefcase to support a custom flow in the Salesforce Field Service mobile app.

Where: This change applies to Lightning Experience desktop and in Salesforce with Field Service (SFS) enabled. Briefcase Builder supports the Salesforce Field Service mobile app for iOS and Android and Salesforce Mobile App Plus.

SEE ALSO:

Salesforce Help: Briefcase Creation (can be outdated or unavailable during release preview)

Revenue

Roll out Subscription Management quoting features selectively, without disrupting existing business processes. Give reps a centralized and consolidated view of assets for an account, and control order product conversion to assets. Salesforce CPQ now supports only standard quotes, and the Lightning Web Component rich text editor replaced CKEditor.

IN THIS SECTION:

Subscription Management

Roll out Subscription Management quoting features without disrupting other business processes. Give reps a centralized and consolidated view of assets for an account, and control order product conversion to assets. Some labels were changed, and accessibility was improved in Collections.

IN THIS SECTION:

Use Your Existing Quotes Alongside Subscription Management Quotes

Easily roll out Subscription Management quoting features to sales reps without disrupting existing business processes.

Where: This change applies to Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in the same editions.

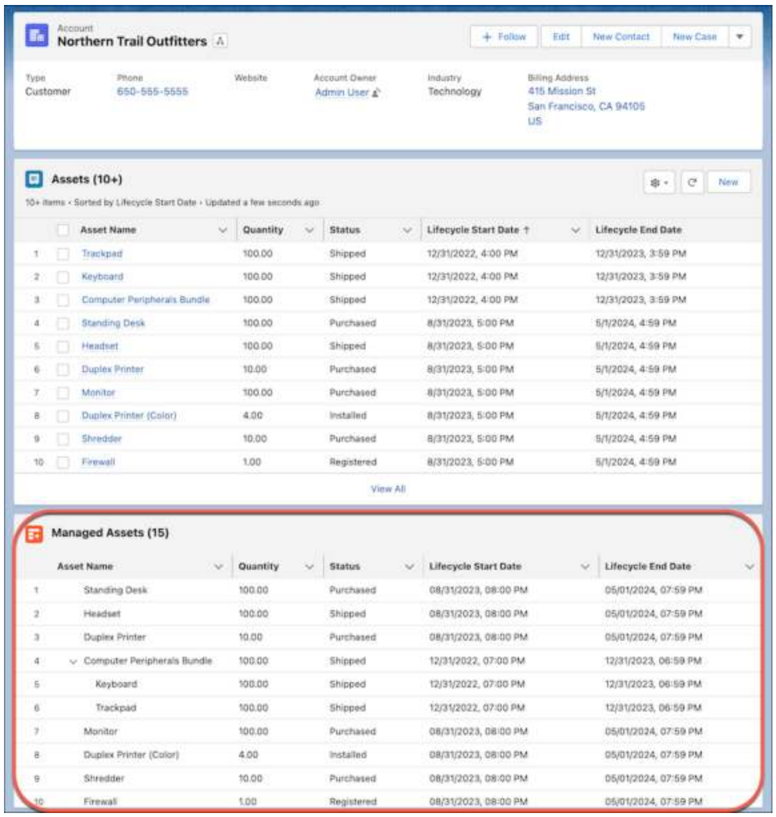
How: Assign the SubscriptionManagementUser permission to sales reps who need access to Subscription Management quoting features. Sales reps without the permission can continue using standard quotes.

Visualize Data for Both Standalone and Bundled Assets

Give salespeople a centralized and consolidated view of all customer lifecycle managed assets for an account. Add the Transaction Line Editor component to your Account page so users can see both standalone assets and the assets included in a bundle.

Where: This change applies to Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in the same editions.

Why: Previously, users couldn't see the hierarchy of bundled assets. Now users can see the products included in a bundle by expanding the asset.



How: Make sure that the Assets related list is on the Account record page. In Lightning App Builder, drag the Transaction Line Editor to the Account record page, select the columns that you want to display, and save your changes. The Managed Asset viewer appears on the page.

Control When Order Products Are Converted to Assets

When your company fulfills an order, some order products can be fulfilled or provisioned at different times. Generate assets when an order product is furnished to your customer, so you can track which products are completed and which haven't been completed yet.

Where: This change applies to Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in the same editions.

Why: Previously, when an order was converted to assets, all order products were converted to assets at one time. Now, you can specify when Subscription Management converts order products. You can convert only the products that were fulfilled or provisioned to the customer, instead of the entire order.

How: Use the Order Product to Asset API to individually convert order products to assets.

Price Adjustment Tier Object Tier Type Values Were Changed

For consistency with other objects, the labels for the values in the Tier Type picklist on the Price Adjustment Tier object were changed. The Tier Type picklist value Adjustment Percentage changed to Percentage and Adjustment Amount changed to Amount. Override was added as a new value.

Where: This change applies to Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license where Salesforce Pricing is enabled. This change also applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in the same editions.

How: To create a Price Adjustment Tier record, on the Price Adjustment Schedule's record page, go to the Price Adjustment Tiers tab, and click **New**.

Annual Label Is Now Years

The label for the Annual option was changed to Years for the Pricing Term Unit field on the Asset, Product Selling Model, and Quote Line Item objects. The Annual label was also changed on the Renewal Term Unit field on the Asset object and the Subscription Term Unit field on the Quote Line Item object.

Where: This change applies to Sales Cloud and Service Cloud in Lightning Experience in Enterprise, Unlimited, and Developer editions with a Subscription Management license. This change also applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in the same editions.

Increase Partner Engagement With Partner Discounting

Extend discounting features to Quote and Quote lines for Partner Sales related fields and apply discounts over and above the standard customer prices. Your sales representative can use Partner Account, Partner Discount, and Partner Unit Price to customize discounting on the quotes for customers.

Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions where Subscription Management, and Partner Community are enabled.

Who: Users need the RevenueSubscriptionManagementExperienceCloudUser and RevenueSubscriptionManagementExperienceCloudPartnerUser permission set licenses.

Why: These fields are added in the Quote Line.

- Partner Account: Partner account to a given quote that is a lookup field to Account.
- Partner Discount Percent: Percentage of discount given to the partner for the quote line.
- Partner Unit Price: Unit price after adding discount to the quote line.

How: By adding the fields to the Visual Page layouts, admins can enable partners to apply discounts to quote lines.

Accessibility of the Collections User Interface Was Enhanced

To provide meaningful assistive text for profile photos and improve the visual presentation of Invoices Collected, Cash Collected This Month, and Balance Outstanding This Month, we corrected the contrast ratio of the Collections icon and made the Action button keyboard-accessible.

Where: This change applies to Sales Cloud and Service Cloud in Lightning Experience in Developer, Enterprise, and Unlimited editions with a Subscription Management license. This change also applies to Aura, LWR, and Visualforce sites accessed through Lightning Experience in the same editions.

Why: Users with low vision can have difficulty perceiving graphics with insufficient contrast, and screen readers sometimes announce such graphics as blank.

Salesforce CPQ

Salesforce CPQ now supports only standard quotes, and the Lightning Web Component rich text editor replaced CKEditor.

IN THIS SECTION:

The Edit Web Quote and Generate Web Document Functionality Was Retired

You can no longer edit or generate documents from web quotes. Instead, use standard quotes with Salesforce CPQ. On standard quote records, you can edit the quote lines or generate documents.

Where: This change applies to Lightning Experience and Salesforce Classic in Salesforce CPQ.

Minimize Security Vulnerabilities in Quote Term Editor with LWC Rich Text Editor

The quote term editor page is now rewritten with the Lightning Web Component (LWC) rich text editor replacing CKEditor.

Where: This change applies to Lightning Experience and Salesforce Classic in Salesforce CPQ.

Why: The LWC rich text editor is a native Salesforce component that helps minimize security vulnerabilities and ensure smooth integration with the Salesforce platform. Here are some of the things that make the LWC quote term editor experience different from CKEditor.

- The text color is gray and doesn't change when editing.
- The icon and message when hovering over a term are lighter.
- Undo and redo buttons aren't available, but the functionality can still be achieved using keyboard shortcuts.
- Number lists render differently from the quote document generator. Nested levels display letters and roman numerals on sublevels in the LWC rich text editor, instead of displaying numbers at every level.
- The LWC rich text editor supports eight levels of indentation.
- Indentation and paragraph spacing can be lost or added when opening existing terms in the new editor. To fix this, add or remove the indentation and paragraph spacing back using the new editor before saving any changes.
- Save and Undo buttons no longer become inactive when all unsaved changes are deleted out of the editor.

Use OmniStudio Features with Salesforce CPQ+

Available since Summer '23, use OmniStudio FlexCards, DataRaptor, Integration Procedures, and OmniScripts with Salesforce CPQ+.

Where: This change applies to Lightning Experience in Salesforce CPQ+.

Sales

Supercharge your sales teams with fresh insights and enhanced productivity features in Winter '24. Einstein Conversation Insights users can now create call summaries with one click thanks to Einstein. In Pipeline Inspection, see if the right people are involved in deals to help sales reps win. Get a detailed history of changes to opportunity splits, opportunity product splits, and teams to ensure accuracy, and that sales team members are correctly compensated. In Enablement, jump-start your sales teams with all the product and process knowledge needed to quickly open opportunities, close deals, and help achieve your company's revenue outcomes.

IN THIS SECTION:

Sales Basics

Plan for meetings with customers and prospects based on geographic locations directly on a map using Salesforce Maps Lite. Get a detailed history of changes made to opportunity splits, opportunity product splits, and opportunity team members. See activity metrics and take action directly from Lead and Contact Home. And use the new filter, sort, and search capabilities in the To Do list to efficiently focus on what's most important.

Sales Engagement

Manage cadence targets automatically with Einstein insights, set up Sales Engagement more easily, work with quick cadences and Email Productivity in more editions, get more done directly from My Feed, and accelerate sales with a buyer assistant.

Einstein Conversation Insights

Create call summaries with one click! Powered by Einstein, Call Summaries support voice and video calls, including providing next steps and customer feedback. Einstein Conversation Insights (ECI) users can access helpful out-of-the-box list views for calls. Related record matching was improved, and users without ECI licenses can see insights and transcript information that's relevant to them. You also get more platform features for video calls and video call participants.

Revenue Intelligence

Track changes in your sales forecast in the Forecast Insights dashboard. Use the Commit Calculator to test different scenarios and understand how changes to your pipeline can affect your bottom line. Optimize your sales strategy using the Product Insights dashboard. Upload quota data using a CSV file. Try the optimized Einstein Account Management app. Track formula fields over time with historical trend reporting.

Pipeline Inspection

Know whether the right people are involved to help close a deal. A refreshed UI makes Pipeline Inspection more intuitive and easier to navigate. Users can save time and edit more fields inline, such as checkbox, lookup, and more.

Collaborative Forecasts

Forecast managers can now apply their judgment to the opportunities in their forecasts to help them make more accurate and informed forecast adjustments. Forecast users gain a deeper understanding about the opportunities that make up your sales forecasts with enhanced details and deal insights in the forecasts opportunity list. Design enhancements to the forecasts page make forecast data easier to read and the page simpler to navigate.

Enablement for Sales Teams

Jump-start your sales teams with all the product and process knowledge needed to quickly open opportunities, close deals, and help achieve your company's revenue outcomes. New capabilities for building, assigning, and managing programs help your Enablement teams deliver more robust, timely, and job-specific resources for your sales teams in their flow of work.

Salesforce Partner Relationship Management and PRM for Slack

Salesforce PRM now offers Pipeline Inspection, with preconfigured dashboards showing revenue, pipeline, opportunities, and scorecard reports. Unified setup streamlines PRM for Slack configuration. Expanded object support widens your search possibilities in Search and Post.

Sales Performance Management

Assign work by country instead of by postal codes, import supplemental customer data without matching fields manually, and update area names and centers in bulk in Territory Planning. And show sales reps customer addresses formatted for their locale in Salesforce Maps.

Sales Cloud Einstein

Let Einstein generative AI draft sales emails from a sales rep's inbox or anywhere in Salesforce, and optionally include product information. Assess forecasting trends and sales predictions at a glance. The Forecast Changes chart with the Einstein Forecasting prediction graph, previously available only on the forecasts page, is now also available on the home page.

Sales Cloud Everywhere

As sales reps search for prospects on the internet, the Sales Cloud Everywhere Chrome extension keeps up with their web investigations. Sales reps can use the grid-like view of their data in Workspace to manage deals. They can create their own Workspace tabs to customize the data they see. In the mini To Do list, new sorting options, additional filters, and enhanced search functionality ensure a rep is focused on their most important tasks.

Integration with Other Products

Report on activities such as emails and tasks with Activity 360. Sync recurring event series from Google to Salesforce. Learn about integration capabilities and upcoming product retirements.

Salesforce Meetings

Get ready for Meeting Studio retirement in Spring '24.

Email Experience

To add more value to Sales Cloud in Professional and Enterprise editions, you get features and functionality that previously required purchasing an add-on license. These features include email productivity tools such as send later, email tracking, text shortcuts, and email engagement.

Salesforce Inbox

Inbox Mobile is being retired on Feb 1, 2024. Check out the latest improvements to Salesforce Inbox.

Other Changes in the Sales Cloud

Learn about other changes we've made.

Sales Basics

Plan for meetings with customers and prospects based on geographic locations directly on a map using Salesforce Maps Lite. Get a detailed history of changes made to opportunity splits, opportunity product splits, and opportunity team members. See activity metrics and take action directly from Lead and Contact Home. And use the new filter, sort, and search capabilities in the To Do list to efficiently focus on what's most important.

IN THIS SECTION:

Visualize Customers and Prospects on a Map

Keep reps focused on meeting and exceeding sales targets as they plan for in-person and virtual visits with accounts, contacts, and leads in key geographic areas with Salesforce Maps Lite. Identifying customers and prospects on a map helps your reps better plan their routes with fewer miles and set up appointments with fewer gaps in their schedules.

Opportunities

Audit changes to opportunity splits, opportunity product splits, and teams to ensure that sales team members are correctly compensated for their contribution to closing deals. Show users custom fields on opportunity product splits layouts.

Contacts

See which contacts need attention and take action on the Contact Home page.

Leads

See which leads need attention and take action on the Contact Home page.

Activities

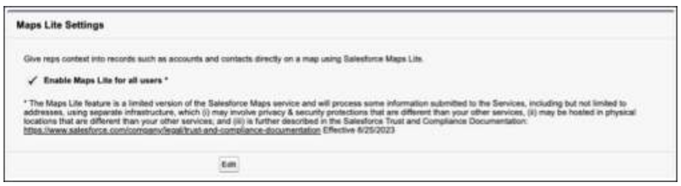
Sales reps can focus on their most important tasks with new filter, sort, and search capabilities in the To Do list.

Visualize Customers and Prospects on a Map

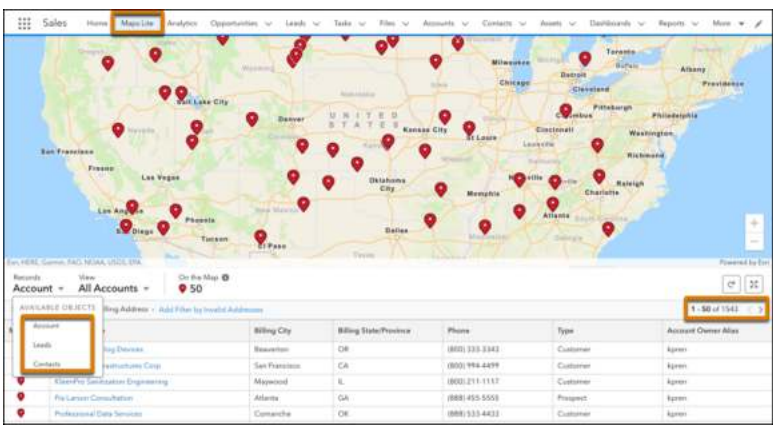
Keep reps focused on meeting and exceeding sales targets as they plan for in-person and virtual visits with accounts, contacts, and leads in key geographic areas with Salesforce Maps Lite. Identifying customers and prospects on a map helps your reps better plan their routes with fewer miles and set up appointments with fewer gaps in their schedules.

Where: This change applies to Lightning Experience in Unlimited Edition with Sales Cloud and Hyperforce, except if you're also using Government Cloud. Not available for customers complying with Hyperforce European Union Operating Zone data residency requirements nor for customers with first-party data agreements. Also not available in preview sandboxes.

How: From Maps and Location Settings in Setup, select the option that enables Maps Lite.



Then, your sales reps can plot as many as 50 accounts, contacts, or leads simultaneously on the map from the Maps Lite tab.



Reps select from available objects and their list views, scroll the list of records, and load different records on the map when they advance through pages. If reps want to further grow their business using route and schedule optimizations, they can ask their managers for a full Salesforce Maps license.

SEE ALSO:

Salesforce Help: Visualize Customers and Prospects on a Map (can be outdated or unavailable during release preview)

Opportunities

Audit changes to opportunity splits, opportunity product splits, and teams to ensure that sales team members are correctly compensated for their contribution to closing deals. Show users custom fields on opportunity product splits layouts.

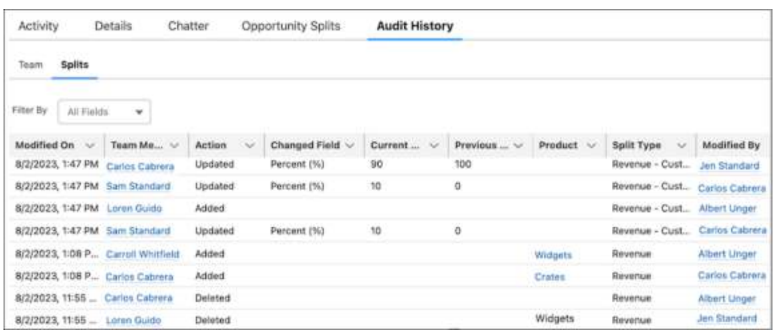
IN THIS SECTION:

Ensure Accurate Sales Compensation with Audit History for Splits and Opportunity Teams

Track changes to opportunity teams and splits to ensure that sales team members are correctly compensated for their contribution to closing deals. When a sales team shares access to opportunities, you need to see who made changes and when. With Audit History, you get the details of all changes to opportunity splits, opportunity product splits, and opportunity team members. We delivered this feature thanks to your ideas on IdeaExchange.

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

Why: Audit History shows each change to team members or splits, and details such as who made the change, the field that was changed, current and previous values. You can monitor changes and catch issues before compensation is processed.



How: Make sure opportunity splits and team selling are enabled in Setup. Then, set the fields you want to track. In Object Manager, go to the Opportunity Split, Opportunity Product Split, and Opportunity Team objects. In Fields & Relationships, go to Set History Tracking and select your fields.

To show Audit History on your opportunity record page, add the Audit History builder component.

SEE ALSO:

Salesforce Help: Set Up Audit History (can be outdated or unavailable during release preview)

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

Optimize Your Users' Opportunity Product Splits View with Custom Fields

Let users view and edit custom fields on opportunity product splits. For example, if you have a business unit or product field that corresponds to specific split percentages, sales teams can use the information to help them determine the split allocations.

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

SEE ALSO:

Salesforce Help: Edit Opportunity Splits Layouts (can be outdated or unavailable during release preview)

Contacts

See which contacts need attention and take action on the Contact Home page.

IN THIS SECTION:

See Which Contacts Need Attention and Take Action Directly from Contact Home

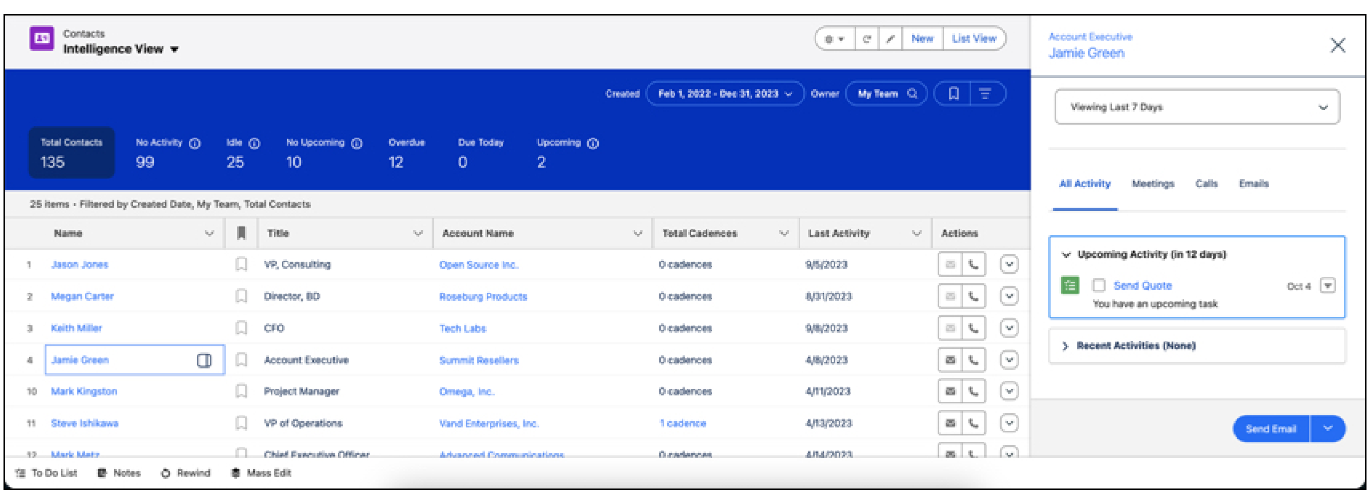
Users can view contact activities, take action, and update records, all in one place in the Contact Intelligence View. Previously, Contact Home provided only simple list views and required users to navigate to individual records to take action.

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

Why: In the Contact Intelligence View, users can quickly filter their contacts, see aggregate activity statistics for the resulting records, and take action to reach out, right from the contact home page. To see detailed activity for individual records, users can click the side panel icon next to the record name.

Contact activity metrics include:

- Total Contacts: The total number of contacts that meet your filter criteria.
- No Activity: Contacts with no completed activities.
- Idle: Contacts with past activity, but no completed activities in the last 30 days.
- No Upcoming: Contacts with recently completed activity but no future activities scheduled.
- Overdue: Contacts with activities that are overdue.
- Due Today: Contacts with activities due today.
- Upcoming: Contacts with activities due in the next 30 days.



How: Turn on **Contact Intelligence View** in Contact Intelligence View Setup and add the Intelligence View button to the Contact List View button layout.

To see the Intelligence View, users go to the Contact home page and click **Intelligence View**. To return to the original list view, users can click **List View**. New Salesforce customers see the Contact Intelligence View on the home page by default.

Leads

See which leads need attention and take action on the Contact Home page.

IN THIS SECTION:

Users can view lead activities, take action, and update records, all in one place in the Lead Intelligence View. Previously, Lead Home provided only simple list views and required users to navigate to individual records to take action.

See Which Leads Need Attention and Take Action Directly from Lead Home

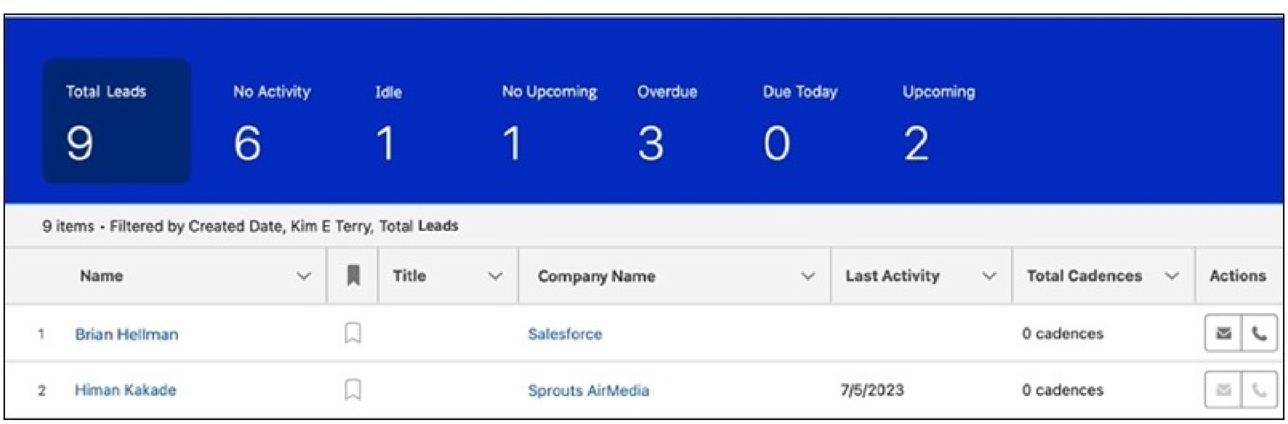
Users can view lead activities, take action, and update records, all in one place in the Lead Intelligence View. Previously, Lead Home provided only simple list views and required users to navigate to individual records to take action.

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

Why: In the Lead Intelligence View, users can quickly filter their leads, see aggregate activity statistics for the resulting records, and take action to reach out, right from the lead home page. To see detailed activity for individual records, users can click the side panel icon next to the record name.

Lead activity metrics include:

- Total Leads: The total number of leads that meet your filter criteria.
- No Activity: Leads with no completed activities.
- Idle: Leads with past activity, but no completed activities in the last 30 days.
- No Upcoming: Leads with recently completed activity but no future activities scheduled.
- Overdue: Leads with activities that are overdue.
- Due Today: Leads with activities due today.
- Upcoming: Leads with activities due in the next 30 days.



How: Turn on **Lead Intelligence View** in Lead Intelligence View Setup. You may also need to add the Intelligence View button to the Lead List View Button Layout in Setup.

To see the Intelligence View, users go to the Lead home page and click **Intelligence View**. To return to the original list view, users can click **List View**. New Salesforce customers see the Lead Intelligence View on the home page by default.

Activities

Sales reps can focus on their most important tasks with new filter, sort, and search capabilities in the To Do list.

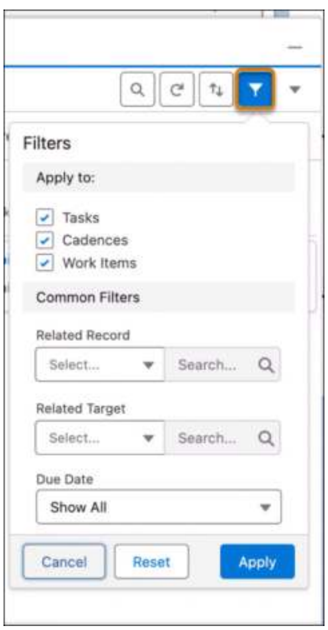
IN THIS SECTION:

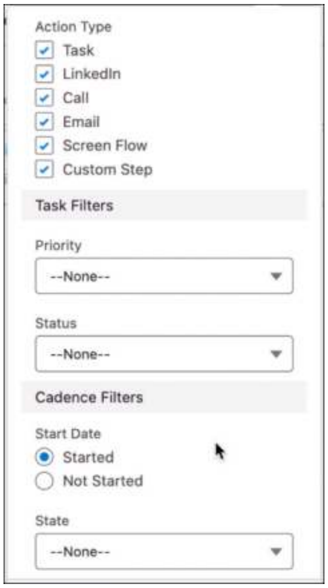
Do More in To Do Lists

Sales reps run their day from the To Do List, and now they can run it more efficiently. Reps can use additional filtering options to see only the most important tasks. Filtering by an account returns all to do items related to both that account and its contacts. Sorting options put the most important data at the top. And they can use new search options to find exactly what they're looking for. Context-sensitive actions for each task make getting it done easier.

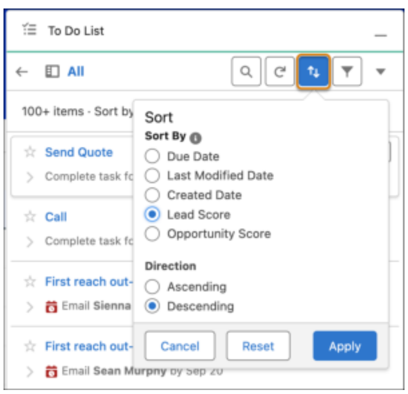
Where: This change applies to Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

How: In Lightning Experience or the Sales Cloud Everywhere Chrome extension, click the **Filter** icon.

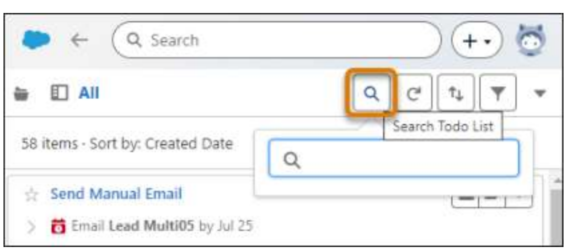




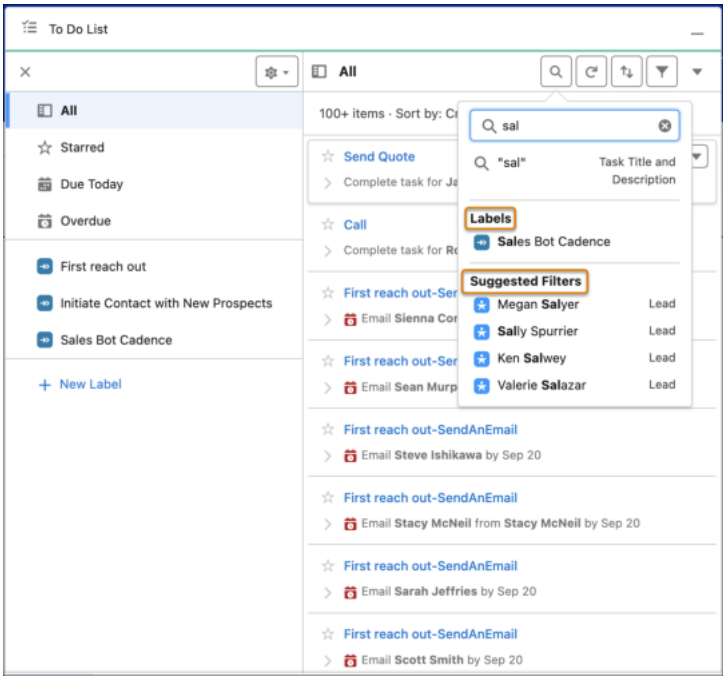
Sorting options help you find things quickly. Click the **Sort** icon to get started.



Click the **Search** icon to use the new search options.

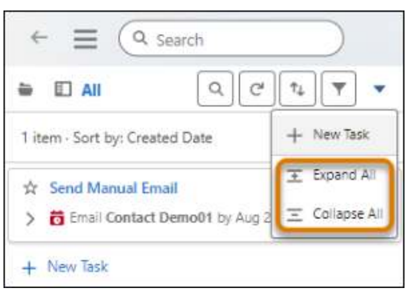


As you type in the Search field, Salesforce suggests labels and filter entries to search on.



In the To Do List, individual cards are condensed, with the option to expand them. As your cursor moves over the cards, a context-sensitive action icon appears.

You can expand and collapse all the cards at once.



SEE ALSO:

Salesforce Help: Organizing and Completing Your Tasks with the To Do List (can be outdated or unavailable during release preview)

Salesforce Help: Work on Your To Do List in the Sales Cloud Everywhere Chrome Extension (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Sales Engagement (can be outdated or unavailable during release preview)

Sales Engagement

Manage cadence targets automatically with Einstein insights, set up Sales Engagement more easily, work with quick cadences and Email Productivity in more editions, get more done directly from My Feed, and accelerate sales with a buyer assistant.

For pricing details, contact your Salesforce account executive. Sales Dialer is also available for an extra cost as an add-on license.

IN THIS SECTION:

Manage Cadence Targets When Einstein Insights Occur

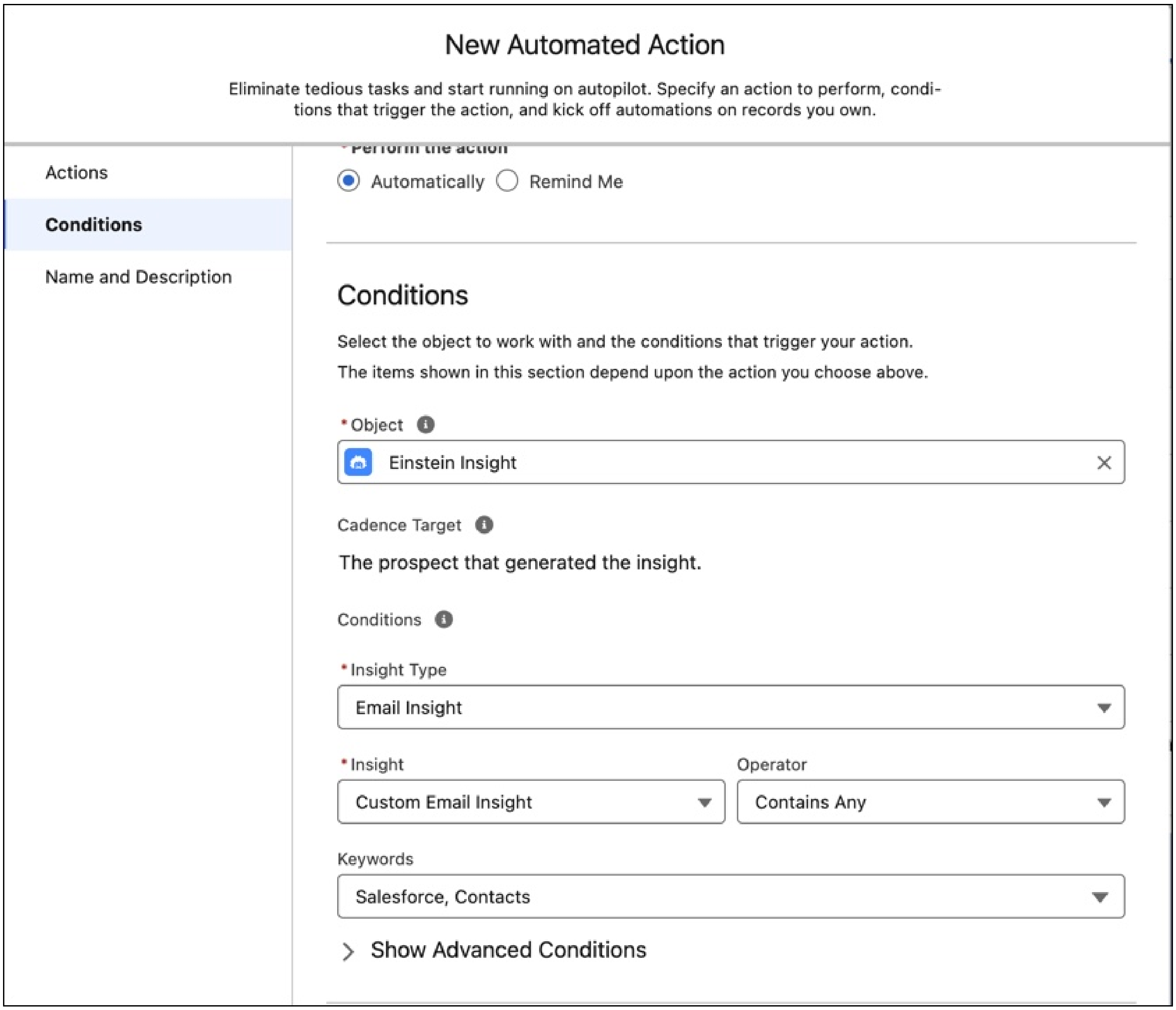
Now users have more flexibility in how they manage cadence targets. With cadence actions triggered by Einstein insights, users can leave even more work to Salesforce and focus on selling.

Where: This change applies to Sales Engagement in Lightning Experience. Sales Engagement is available in Performance and Unlimited editions and as an add-on in Enterprise Edition.

Who: This feature is available to users with the Sales Engagement User or Sales Engagement Cadence Creator and the Automated Action User permissions and access to Einstein Activity Capture.

Why: Users can now manage their prospects automatically with automated actions triggered by Einstein Insights from emails, phone calls, and meetings. Users can set up automated actions to add, remove, pause, or resume cadence targets when Einstein presents specific insights. Previously, cadence target management could only be automated based on record creation or updates.

How: When users create automated actions, they can choose the Einstein Insight object, an insight type, and the insight details they want to trigger the cadence action.



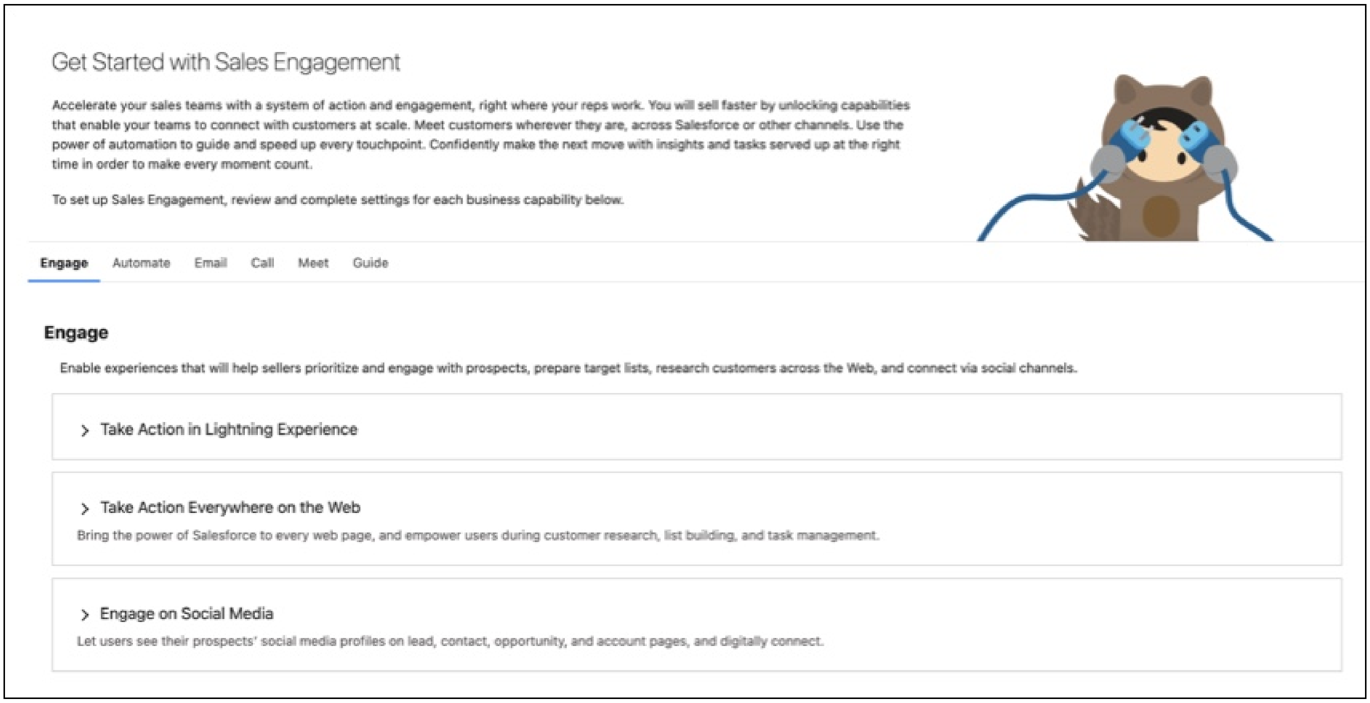
Triggering automated actions with insights requires that at least one of these Einstein features is enabled.

- Einstein Activity Capture with Activity 360 provides insights from emails.
- Einstein Conversation Insights provides insights from phone calls and meeting recordings.

Set Up Sales Engagement Features More Easily

Sales Engagement Setup helps you find and configure the settings you need for your business faster. Because Sales Engagement features have grown to include much more than cadences, the Setup page is now arranged into separate tabs containing settings that focus on different seller capabilities.

Why: Sales Engagement now includes automation, customer engagement tracking, chatbots, cadences, automated actions, and more. The new Setup page includes Sales Engagement features as well as links to related features that work together with Sales Engagement.



Discover Quick Cadences and Email Productivity Features in More Editions

To add more value to Sales Cloud, features and functionality that previously required purchasing an add-on license are now included. These features provide additional functions that make sellers' work easier and more efficient. These features include quick cadences and email productivity tools such as send later, email tracking, text shortcuts, and email engagement. Email engagement features include My Feed from the Outlook and Gmail integration panels, notifications from Sales Cloud Everywhere, and custom report types for engagement data.

Where: This change applies to Lightning Experience in Enterprise and Professional editions with the Sales Cloud.

When: This change appears on July 19, 2023.

How: Not all features included in Professional and Enterprise editions are enabled automatically. In Setup, enable the specific features you want for your business. To let new users access these features, assign them the appropriate permission. You can assign these new features to up to 100 users.

SEE ALSO:

Salesforce Help: Simplifying Outreach Tasks with Quick Cadences (can be outdated or unavailable during release preview)

Salesforce Help: Work With Salesforce's Email (can be outdated or unavailable during release preview)

Salesforce Help: Turn On Sales Engagement Features (can be outdated or unavailable during release preview)

Accelerate Sales Cycles with a Buyer Assistant (Generally Available)

Deliver personalized conversations and generate qualified leads by adding a customer-focused buyer assistant to your website. Buyer Assistant bots transform the web-to-lead experience and help you build customer relationships at scale. Each buyer assistant includes dialogs and automation flows designed to streamline sales conversations. For example, a buyer assistant can pitch your products' value to customers after business hours, gather customer information, and schedule customer meetings. And your reps can chat with leads in real-time. Get a buyer assistant for web up and running quickly with a guided onboarding experience. Then personalize it to reflect your brand and meet your business needs.

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

How: To create a buyer assistant, go to the Buyer Assistant page under Sales Engagement in Setup. Or go to the Einstein Bots setup page and then create an enhanced bot using the Buyer Assistant template.

SEE ALSO:

Salesforce Help: Automate Sales Outreach with a Buyer Assistant (can be outdated or unavailable during release preview)

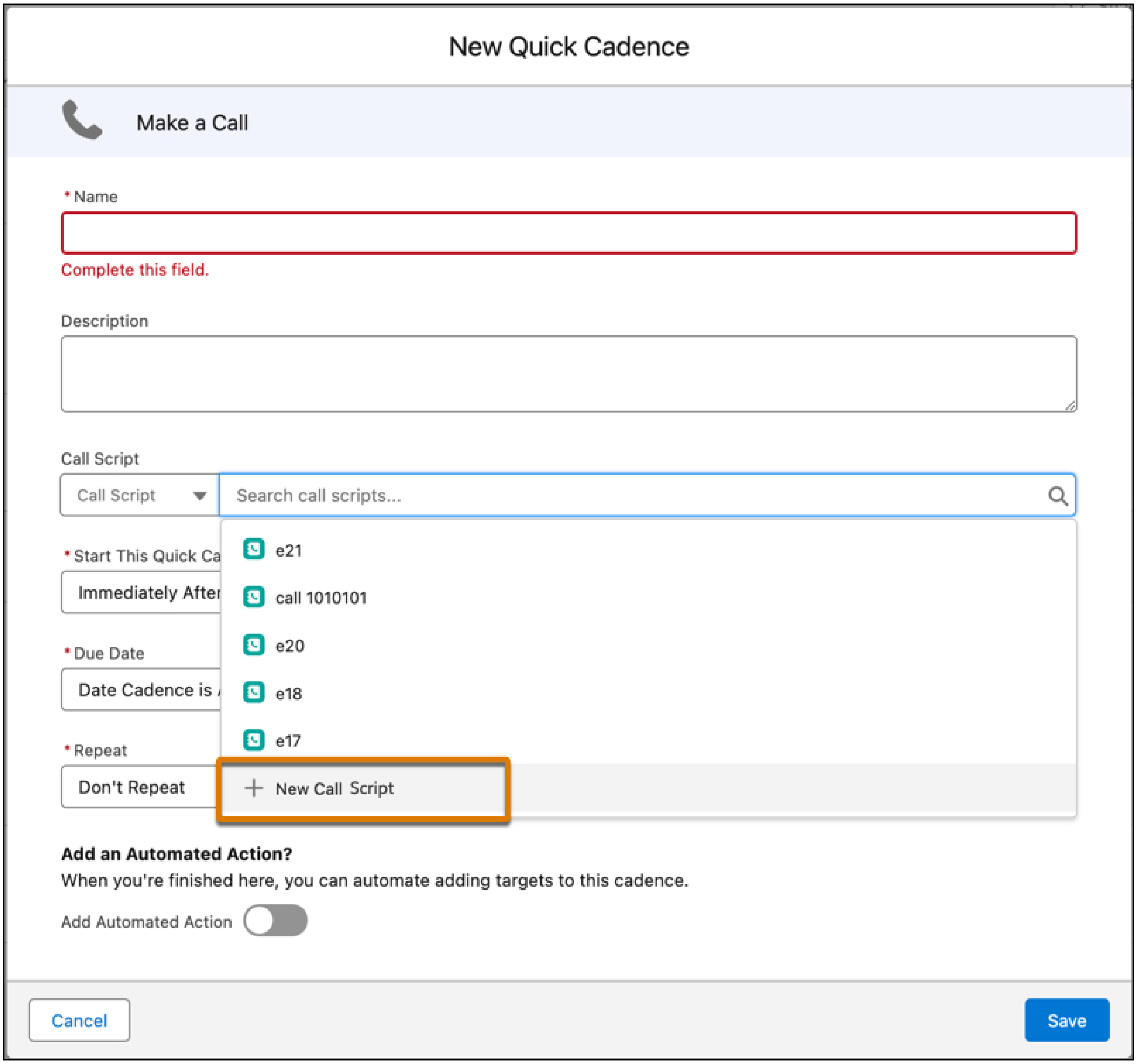
Save Time by Creating Call Scripts and Email Templates with Quick Cadences

When users create a quick cadence, they can now create a call script or email template directly within the quick cadence creation window. Previously, users had to create call scripts and email templates before adding a quick cadence.

Where: This change applies to Lightning Experience in Enterprise and Professional editions with the Sales Cloud.

Who: Quick cadences are available to users with the Sales Engagement Cadence Creator or Sales Engagement Quick Cadence Creator permission.

Why: Users can choose to create a new call script or email template right from the field dropdown list.



Save Time by Working with More Cadence Targets Simultaneously

Users can now add, remove, pause, or resume up to 50,000 targets with one action. Previously, users could work with up to only 200 targets at a time.

Where: This change applies to Lightning Experience in Enterprise and Professional editions with the Sales Cloud.

Cadence Wait Steps Are Being Retired

Because of the introduction of new step timing fields on cadence action and listener steps in Summer '23, users no longer need wait steps. In Winter '24, remaining wait steps will be automatically converted to use the Start This Step field on the action steps that follow each wait step. For example, in Winter '24 if a cadence includes a call step followed by a one-day wait step and then an email step, the wait step is removed and the wait period is added to the Start This Step field on the email step.

Where: This change applies to Lightning Experience in Enterprise and Professional editions with the Sales Cloud.

How: If you have custom code that relies on the presence of wait steps, you must update that code.

Einstein Conversation Insights

Create call summaries with one click! Powered by Einstein, Call Summaries support voice and video calls, including providing next steps and customer feedback. Einstein Conversation Insights (ECI) users can access helpful out-of-the-box list views for calls. Related record matching was improved, and users without ECI licenses can see insights and transcript information that's relevant to them. You also get more platform features for video calls and video call participants.

Einstein Conversation Insights doesn't record your calls. You connect it with your recording system such as Sales Dialer or other supported partners. It's a customer's responsibility to manage consent and comply with local privacy requirements in the way that calls are recorded.

IN THIS SECTION:

SEE ALSO:

Einstein Release Notes

Create Call Summaries Powered by Einstein

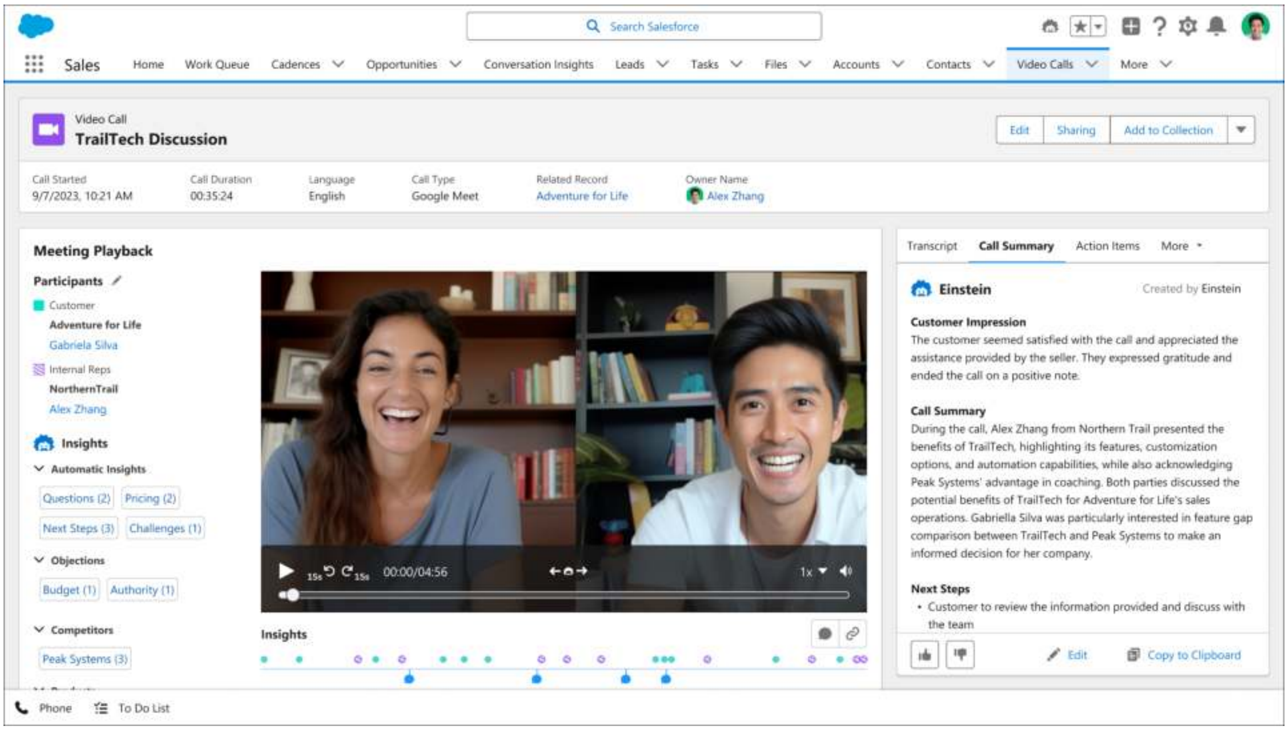
Want to harness the power of generative AI to create a snapshot of everything your teams need to know about a customer call? Einstein Conversation Insights users can create generative call summaries on voice and video calls. Powered by Einstein, the new Summary tab on call records allows users to create editable summaries that include next steps and customer feedback, and share summaries for easier team collaborations in the flow of work.

Where: This change applies to Einstein Conversation Insights and Einstein for Sales in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions and as an add-on in Enterprise Edition. Einstein generative AI is available in Lightning Experience.

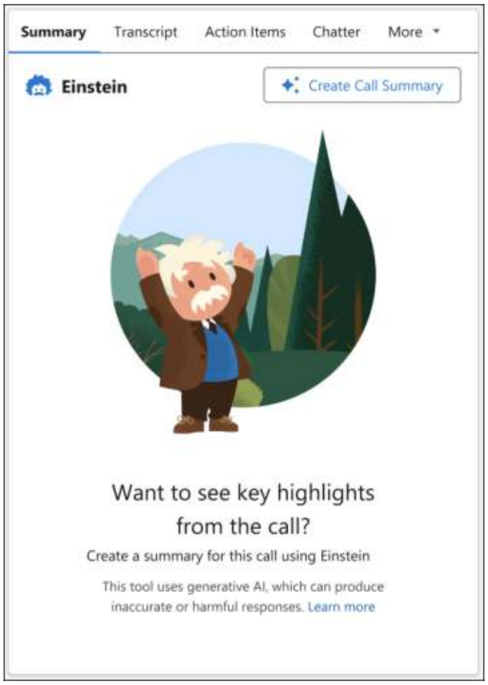
To purchase Einstein for Sales, contact your Salesforce account executive.

Who: This feature is available to users with the Einstein Sales Call Summaries permission set and access to a voice or video call record. Users without the permission set can see and copy summary data if they have access to the record, but they can't create or edit call summaries.

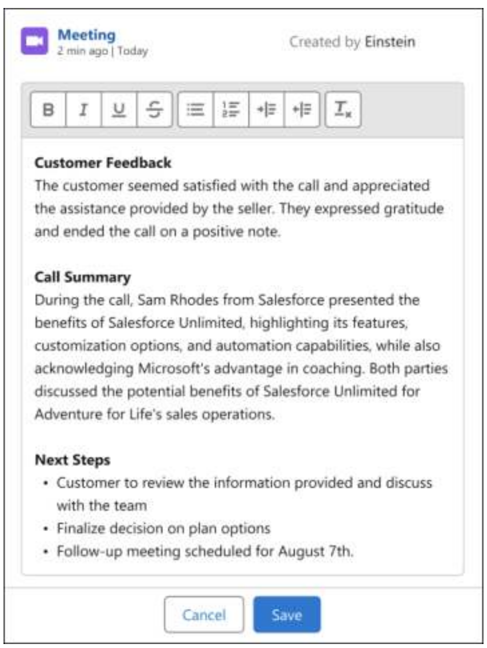
Why: Use the new Summary tab to create and access call summaries.



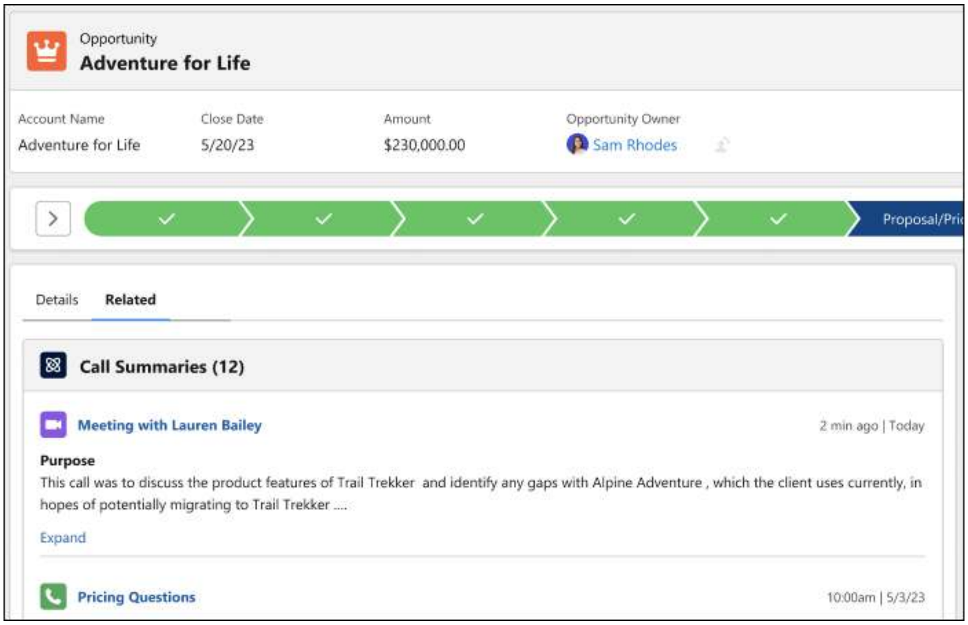
A standard call summary includes the summary itself, the customer impression, and any next steps. Click **Create Call Summary** to create a summary for a voice or video call.



Click the edit button to update the content in a call summary.



Users can see the calls and summaries related to a record with the Call Summaries Related List Lightning component. This component shows summaries for voice and video calls related to that specific record, using the same matching logic as the activity timeline.



Call summaries are currently limited to English-language calls that include a transcript. Summaries are sometimes not generated for lengthy calls.

How: Turn on the feature from the Einstein for Sales page in Setup.

The Summary tab is added by default to most voice call and video call page layouts, but you probably need to add it from the Lightning App Builder if you've edited default page layouts.

Add the Call Summary related list to records layouts that likely have related call summaries.

SEE ALSO:

Einstein Generative AI Features

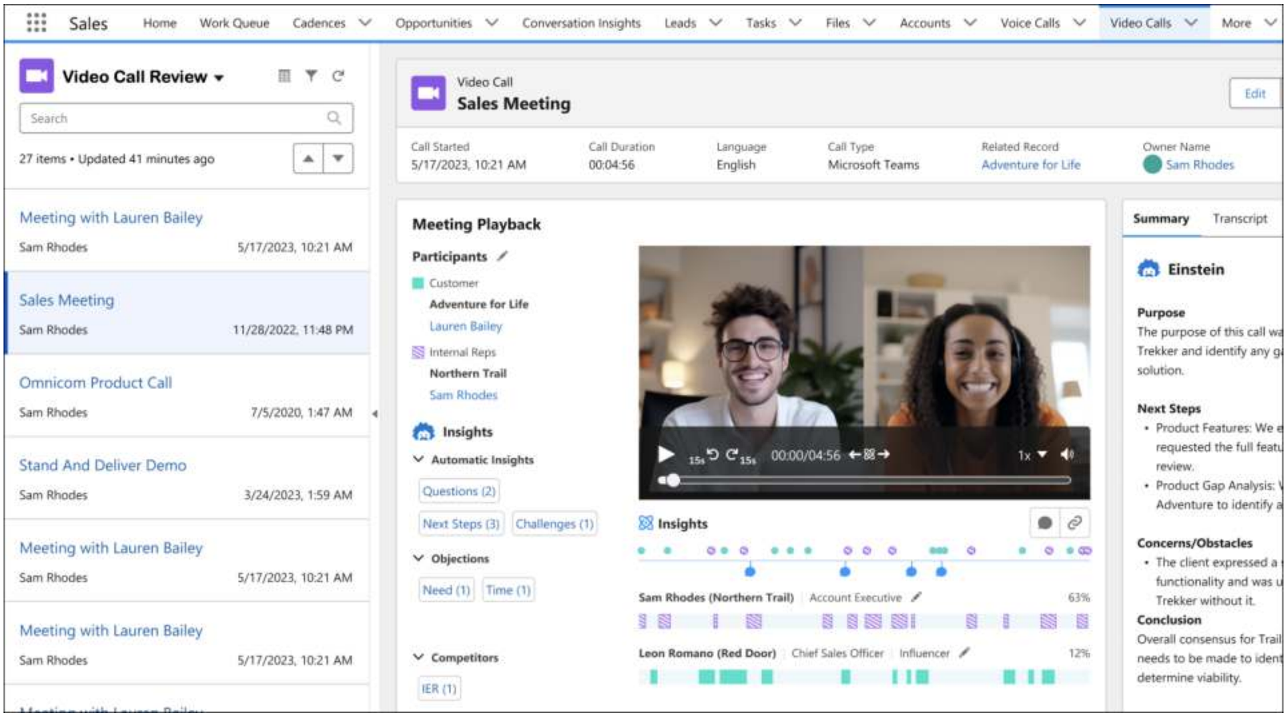
Salesforce Help: Add Call Summaries to Voice and Video Call Records (can be outdated or unavailable during release preview)

Review Calls with Ease

Sales managers and other Einstein Conversation Insights (ECI) users can quickly scan through a call list, viewing call details without needing to switch back-and-forth between a list view and a record detail view.

Where: This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions, and as an add-on in Enterprise Edition.

Why: Use out-of-the-box list views to review voice or video calls one after another. Call Review uses the split view and filters to allow users to go through a list of calls while still seeing the details on individual call records.



The out-of-the-box filters are adjusted for the most common use case.

How: The **Voice Call Review** and **Video Call Review** list views are now selected by default when selecting either object from the App Launcher or the **Latest Calls** links from the ECI dashboard. To use split view, make sure these tabs are pinned to your navigation bar.

Match More Related Records Automatically

Your sales teams can spend less time manually associating related records and more time selling. Related record matching has been improved to make better matches for video and voice calls. These improvements include several new measures to match and prioritize the opportunity, account, lead, or contact that's most relevant to a call.

Where: This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions and as an add-on in Enterprise Edition.

Why: The related record matching algorithm has been enhanced to identify more related records. These records are automatically added to the Related Record field on voice and video calls, and conversation data is automatically added to the corresponding record.

The identified records are prioritized in a more useful order. Relevant opportunities are matched first, followed by accounts.

We expanded the records types that users can manually add as a related record. For video and voice calls, the record types include accounts, cases, contacts, leads, opportunities, and custom objects.

How: Make sure the Related Record Matching feature is enabled in Setup. The setting was updated from Opportunity Matching.

Share Conversation Data with Users with Call Access

Einstein Conversation Insights (ECI) data, including insights and transcript snippets, were previously available only to users with ECI licenses. Users with access to voice and video calls can now access ECI data in call records, the activity timeline of related records, and reports even if they don't have ECI licenses. However, only users with ECI licenses can have their calls processed and access ECI analytics dashboards.

Where: This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions and as an add-on in Enterprise Edition.

Why: Users with permission to view voice and video call records but without ECI licenses previously saw call data in call records, activity timelines, and reports, but without any detailed conversation data.

Now those users have the same experience as users with ECI licenses, including access to call insights, next steps, the complete call transcript, and the media player with full call playback. This applies if they are shared on ECI data through sharing rules, role hierarchy, or direct sharing.

Call processing and access to analytics dashboards are limited to users with ECI licenses.

Use Improved Transcripts for Voice and Video Calls

Einstein Conversation Insights (ECI) users get access to a new and improved transcription engine to get more accurate transcripts for their voice and video calls.

Where: This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions and as an add-on in Enterprise Edition. Einstein is available in Lightning Experience.

Why: Einstein Conversation Insights now uses an in-house implementation of the Whisper Automatic Speech Recognition (ASR) engine by OpenAI. This engine was trained on over 600,000 hours of multilingual and multitask supervised data, and has improved the word error rate by 10-15% compared to the previous engine.

The Whisper ASR engine is available in English only. Keywords that were mistranscribed and not captured by the previous engine can now be captured with Whisper.

Other Changes to Einstein Conversation Insights

Use more platform features for video call and video call participants.

Where: These changes apply to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Performance and Unlimited editions and as an add-on in Enterprise Edition.

Use More Platform Features with Video Call Records

You can edit organization-wide sharing settings for video calls. Record types that have video calls associated as related records can add a related list to video calls. Video calls can be the target of a master-detail relationship with custom objects.

Use More Platform Features with Video Call Participant Records

Video call participant records are now surfaced in Salesforce and they have an available tab, object home, and record home. The video call participant object is available for customization in Object Manager. And custom report types can be created with video call participants as a top-level report object or joined with video calls.

Revenue Intelligence

Track changes in your sales forecast in the Forecast Insights dashboard. Use the Commit Calculator to test different scenarios and understand how changes to your pipeline can affect your bottom line. Optimize your sales strategy using the Product Insights dashboard. Upload quota data using a CSV file. Try the optimized Einstein Account Management app. Track formula fields over time with historical trend reporting.

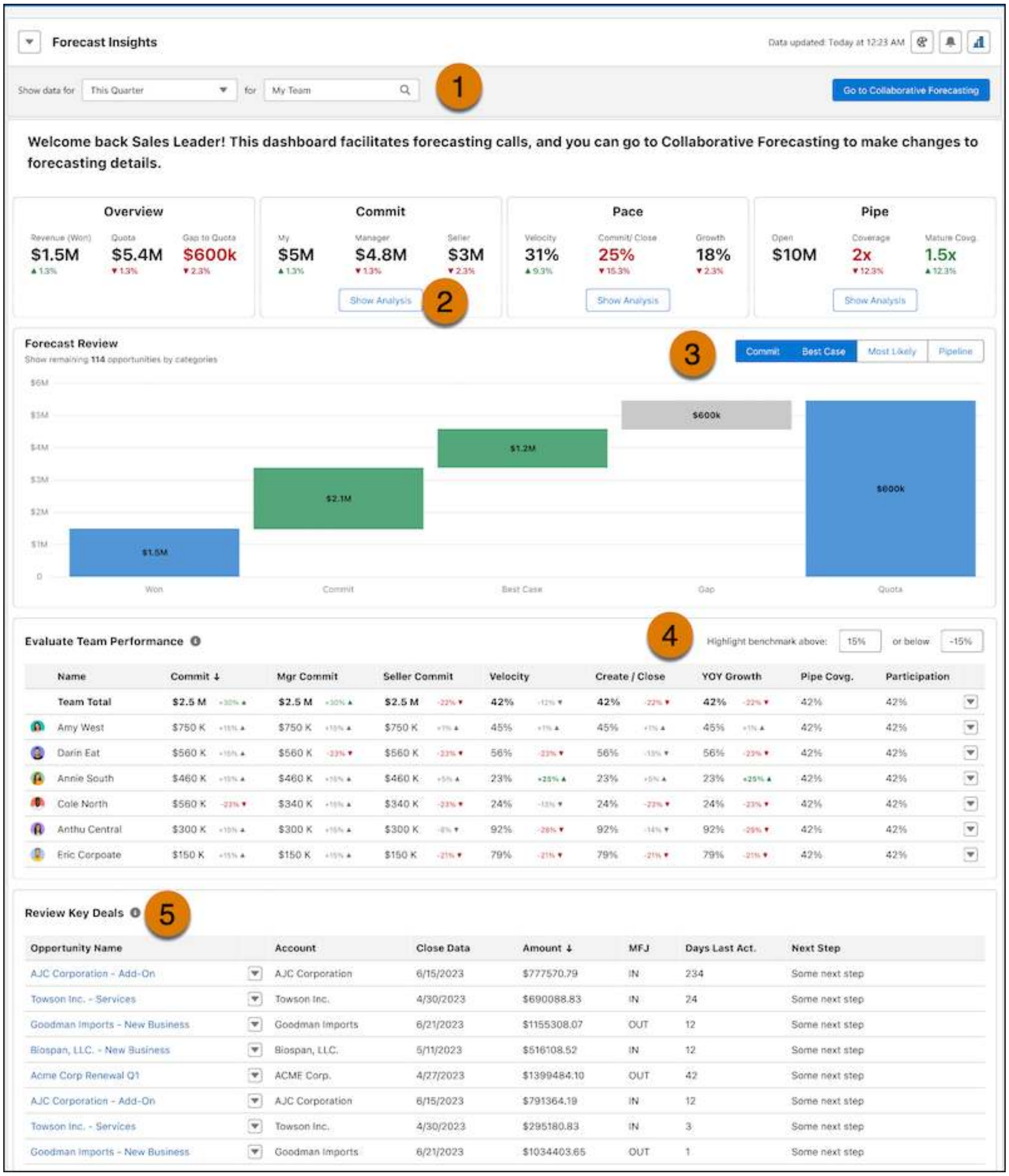
IN THIS SECTION:

Monitor the Health of your Sales Engine

Track changes in your sales forecast in the Forecast Insights dashboard. Monitor velocity, pipe coverage, and other KPIs with period-over-period analysis.

Where: This change applies to Revenue Intelligence in Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

How: When you enable Revenue Insights from the Setup menu, the app automatically creates the Forecast Insights dashboard. From the Revenue Insights app, open the Forecast Insights dashboard.



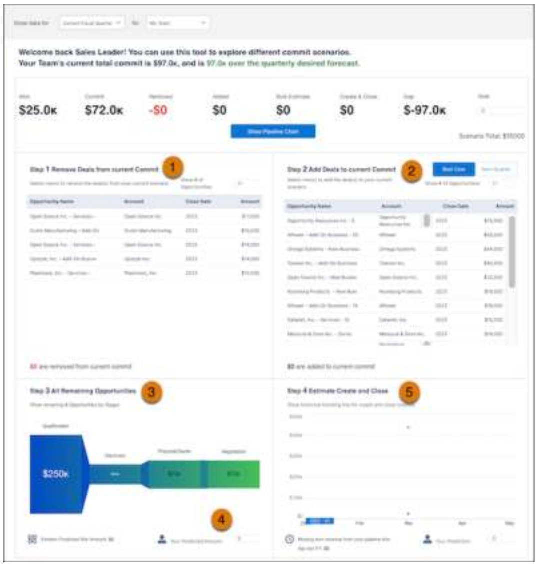
In the Forecast Insights dashboard, select the timeframe and team you want to analyze (1). You can see details for the managers and sellers that report to you. Click Show Analysis (2) to see how your metrics are trending over time. Looking across your sales, click Commit, Best Case, Most Likely or Pipeline (3) to remove that category from the pipeline and understand its overall impact. Set the benchmark values so that the high and low benchmarks display on the table (4). See the key details for your largest opportunities (5).

Explore Sales Scenarios with the Commit Calculator

Use the Commit Calculator to test different scenarios and understand how changes to your pipeline can affect your bottom line.

Where: This change applies to Revenue Intelligence in Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

How: The Revenue Intelligence app automatically creates the Commit Calculator dashboard. In the Commit Calculator, test scenarios to see their impact on your sales. Remove commits from your pipeline (1) or add deals to your pipeline (2). Test scenarios for remaining deals (3) and add the predicted amount for these deals not yet accounted for in the pipeline (4). Estimate deals created and closed (not accounted for in the pipeline) (5).

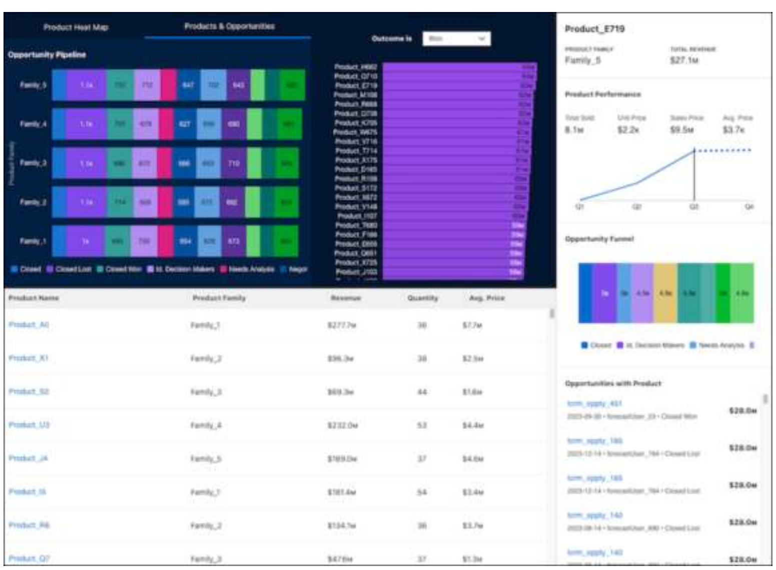


Understand How your Products Sell in Different Segments

Optimize your sales strategy using the Product Insights dashboard. Track customer purchases, opportunities to position products in new segments, and market trends. Quickly see how well your sales teams deliver new offerings to the market.

Where: This change applies to Revenue Intelligence in Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

How: When you enable Revenue Intelligence from the Setup menu, the app automatically creates the Product Insights dashboard.



Upload Quota Data to Revenue Intelligence

You can use your quota data in Revenue Intelligence no matter where you store it. To do this task, you can upload quota data using a CSV file. Previously, only quota data from Sales Cloud Collaborative Forecasts was displayed in Revenue Intelligence dashboards.

How: Create a CSV file with your quota data and save it. Then, navigate to the **CRMA Analytics Studio** > **quota** dataset. Edit the dataset by uploading your CSV file, which replaces the default quota dataset. Refresh the app to ensure the recipe runs again and pulls in your quota data.

Find Data More Quickly with the Updated Einstein Account Management App

Get your app set up more quickly, and find your data more easily in the updated Einstein Account Management app. When you set up Einstein Account Management, you can limit the data to the accounts and opportunities that you need. The dashboard is also streamlined with fewer columns to make it easier to find your relevant KPIs.

Where: This change applies to the Einstein Account Management app in Revenue Intelligence.

How: If you have an existing Einstein Account Management app, run the setup wizard again to enter the parameters that limit the scope of data.

Track Historical Changes in Formula Fields

Understand calculated values in your sales cycle by tracking formula fields over time with historical trend reporting. Previously, formula fields were unavailable in historical trend reporting.

Where: This change applies to Revenue Intelligence in Sales Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

How: When you enable Revenue Insights from the Setup menu, formula fields become available in Historical Trending Setup for admins with Revenue Insights access.

Pipeline Inspection

Know whether the right people are involved to help close a deal. A refreshed UI makes Pipeline Inspection more intuitive and easier to navigate. Users can save time and edit more fields inline, such as checkbox, lookup, and more.

IN THIS SECTION:

Get Pipeline Inspection Opportunity Detail and Insights in Collaborative Forecasts

Forecast owners and sales teams can now view Pipeline Inspection opportunity details and insights without leaving Collaborative Forecasts.

Track Performance with Pipeline Inspection in Salesforce Partner Relationship Management

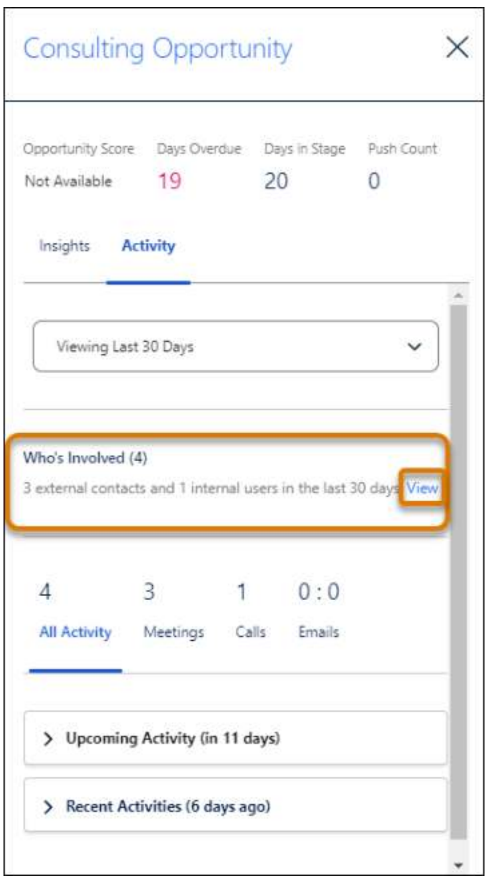
Use Pipeline Inspection in Partner Relationship Management to measure sales performance.

Keep Deals Moving by Involving the Right People

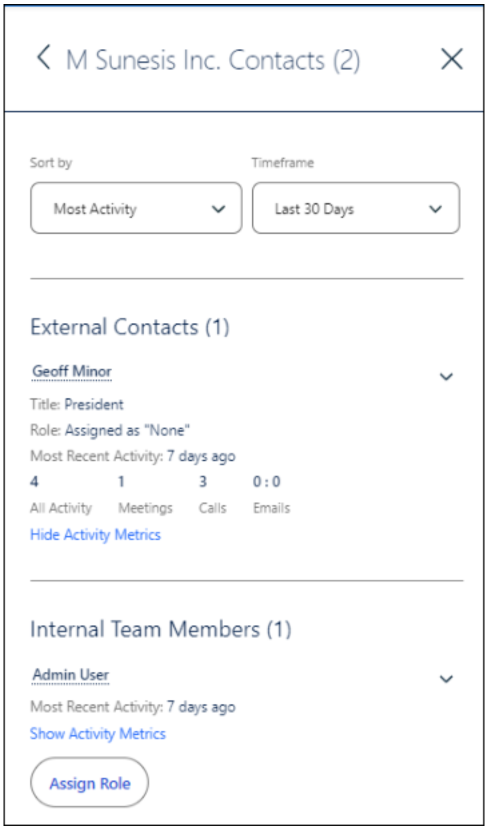
Sales managers and their sales reps want to understand deal health and risk, so they can increase their confidence that deals close on time and sales forecasts are accurate. Now you can tell at a glance who's part of a deal. Learn whether the right stakeholders are involved for deals in your pipeline and how engaged they are.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

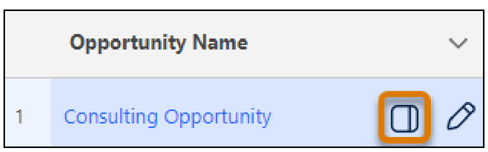
Why: In the Pipeline Inspection activity side panel, a summary of active contacts and users gives an overview of how many people have been engaging in the deal recently.



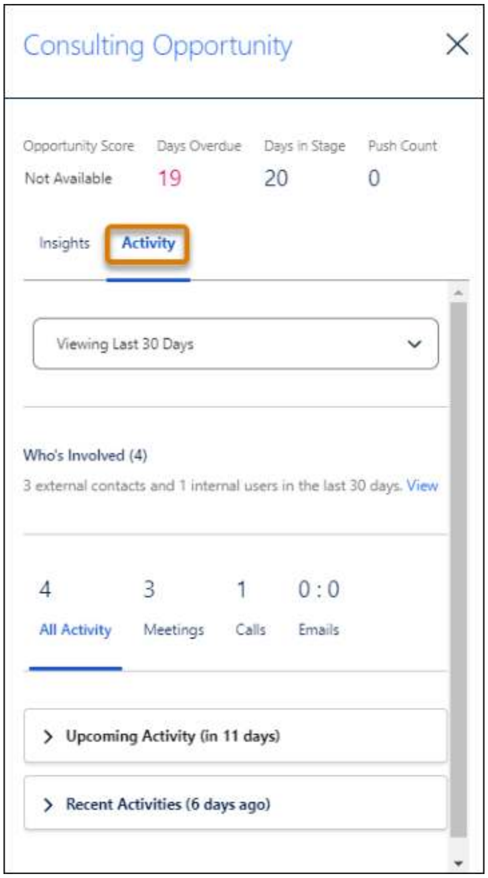
Click **View** to see the details of who's involved in a deal.



How: In Pipeline Inspection, hover over an opportunity name and select the side panel icon.



Click the **Activity** tab.



Note: To show in the side panel who's involved in opportunities, enable Activity 360 Reporting in Einstein Activity Capture settings.

SEE ALSO:

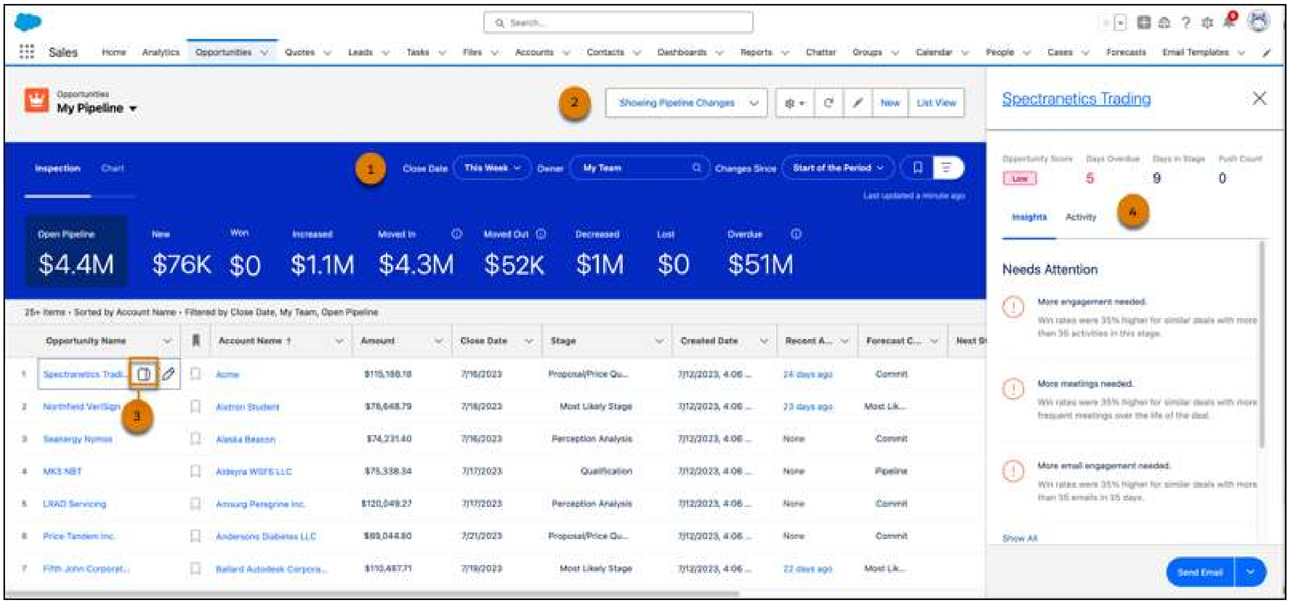
Salesforce Help: Considerations for Setting Up Pipeline Inspection (can be outdated or unavailable during release preview)

Speed Through Your Opportunities with a Revamped Pipeline Inspection Page

Get an improved experience with a refreshed Pipeline Inspection UI. A modern look makes Pipeline Inspection more intuitive and easier to navigate. Pipeline Inspection is automatically updated to the new version.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud.

Why: Get a clear view of your pipeline with these design enhancements.



The filter design is streamlined and repositioned (1), and an updated field clearly indicates which metrics you've selected (2). Accessing the insights panel is more intuitive. Hover over an opportunity name and click the side panel icon (3) to show the insights (4).

SEE ALSO:

Salesforce Help: Managing Pipelines with Pipeline Inspection (can be outdated or unavailable during release preview)

Edit More Fields Inline in Pipeline Inspection

Increase efficiency by updating more opportunity fields directly from the Pipeline Inspection list view. Now users can edit checkbox, multi-select picklist, lookup, and external lookup fields inline, saving time and improving collaboration with their teams.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Pipeline Inspection in the Sales Cloud.

How: On any Pipeline Inspection list view, hover over the field that you want to edit. If you see a pencil icon, click it, modify the value, and save. A lock icon means that the field isn't available for inline editing. You can edit opportunities of multiple record types inline in the same list view.

SEE ALSO:

Salesforce Help: Managing Pipelines with Pipeline Inspection (can be outdated or unavailable during release preview)

Salesforce Help: Considerations for Inline Editing in a List View in Lightning Experience (can be outdated or unavailable during release preview)

Get Pipeline Inspection Opportunity Detail and Insights in Collaborative Forecasts

Forecast owners and sales teams can now view Pipeline Inspection opportunity details and insights without leaving Collaborative Forecasts.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud. Limited features are available in Professional Edition and the Salesforce mobile app.

SEE ALSO:

Get More Insight About Opportunities in Sales Forecasts

Track Performance with Pipeline Inspection in Salesforce Partner Relationship Management

Use Pipeline Inspection in Partner Relationship Management to measure sales performance.

Where: This change applies to Aura sites in Lightning Experience in Enterprise and Unlimited editions.

SEE ALSO:

Focus on Key Sales Metrics, AI Insights, and Opportunities to Close More Deals

Collaborative Forecasts

Forecast managers can now apply their judgment to the opportunities in their forecasts to help them make more accurate and informed forecast adjustments. Forecast users gain a deeper understanding about the opportunities that make up your sales forecasts with enhanced details and deal insights in the forecasts opportunity list. Design enhancements to the forecasts page make forecast data easier to read and the page simpler to navigate.

IN THIS SECTION:

Improve Sales Forecast Accuracy with Manager Judgments

As part of forecast reviews and assessments, forecast managers can now apply their judgment to the opportunities in their forecasts to help them make more accurate and informed forecast adjustments. By applying judgment at the opportunity level, managers increase their visibility into which deals they have the highest confidence of closing. Previously, managers could adjust the committed forecast number only, and could see how their judgment influenced the adjusted forecast.

Where: This change applies to Lightning Experience in Professional, Performance, and Developer Editions and in Enterprise and Unlimited Editions with the Sales Cloud.

When: Full functionality for this feature is available on a rolling basis starting in Winter '24.

How: In Setup, ensure that the Manager Judgments option is enabled in Forecast Settings. Set the picklist values to indicate what is considered part of the forecast and what isn't. Then add the Manager Judgment column to the opportunity list in your forecast types that are based on the Opportunity, Opportunity Product, or Line Item Schedule objects.

For user role hierarchy forecast types, ensure that the opportunity list also includes the Owner Full Name column. For territory hierarchy forecast types, add the Territory Name column. To see the column in the Salesforce mobile app, make sure it's one of the first four columns in the opportunity list.

When forecast managers are reviewing the opportunities that their direct reports own, they can indicate whether they're confident that an opportunity is part of the forecast. Forecast managers can't apply judgment to opportunities that they own.

	Opportunity Name	Manager Judgment	Amount	Owner Full Name	Close Date	Stage	Forecast Category
1	Synutra Insignia Inc.	IN	USD 7,915.35	Lopez, Jenny	7/13/2023	Value Proposition	Closed
2	Spring Gilead	IN	USD 743.59	Lee, Alice	7/19/2023	Id. Decision Mak...	Pipeline
3	Scientific Versartis	OUT	USD 249.92	Lee, Alice	7/22/2023	Proposal/Price Q...	Commit

Then, forecast managers can see the total of the opportunities indicated as part of the forecast in the Committed forecast's comments.

Manager judgments aren't supported in forecast types based on Opportunity Splits or Product Splits.

SEE ALSO:

Salesforce Help: Allow Forecast Adjustments and Manager Judgments in Collaborative Forecasts (can be outdated or unavailable during release preview)

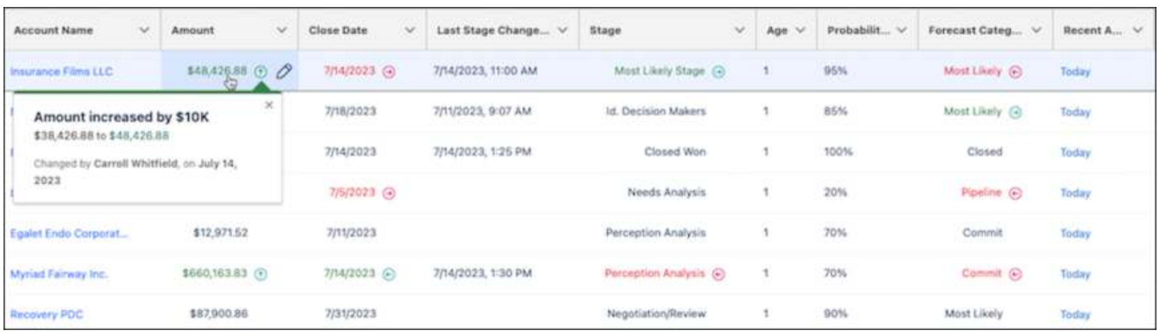
Get More Insight About Opportunities in Sales Forecasts

Gain a deeper understanding about the opportunities that make up your sales forecasts with enhanced details available when reviewing forecast rollup values. When viewing the grid view in the forecasts page, the opportunity list now includes the same information and the same edit capabilities that are available in Pipeline Inspection, without having to switch to the Pipeline Inspection page. Previously, forecast owners and sales managers opened Pipeline Inspection to dive deep into details about opportunities, such as activity updates and deal insights.

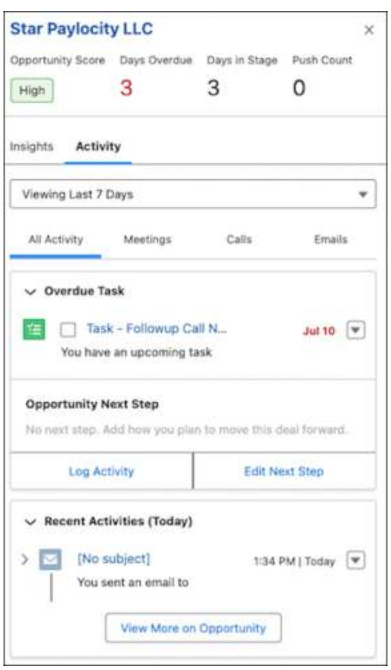
Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud. Limited features are available in Professional Edition and the Salesforce mobile app.

When: The updated opportunity list and all its features are available immediately for users who have access to Pipeline Inspection. For users without Pipeline Inspection, updates to the opportunity list are available on a rolling basis starting in Winter '24.

How: To get the most out of the new forecasts opportunity list, enable Pipeline Inspection and add any of these fields to the opportunity list for each active forecast type: Age, Last Stage Change, Days in Stage, Push Count, and Recent Activity. Then forecast users see visual indications about what's changed. They can also view opportunity metrics, review Einstein insights that indicate a deal's likelihood of closing, and access other details about the opportunity or its account. Forecast users can also take advantage of additional inline edit capabilities.



With the integrated list, add the Recent Activity field, and forecast users can access details about the latest happenings on a deal.



If you don't have Pipeline Inspection or use the Salesforce mobile app, you can still add the Push Count and Last Stage Change fields to the opportunity list. The additional inline edit capabilities are available by default.

SEE ALSO:

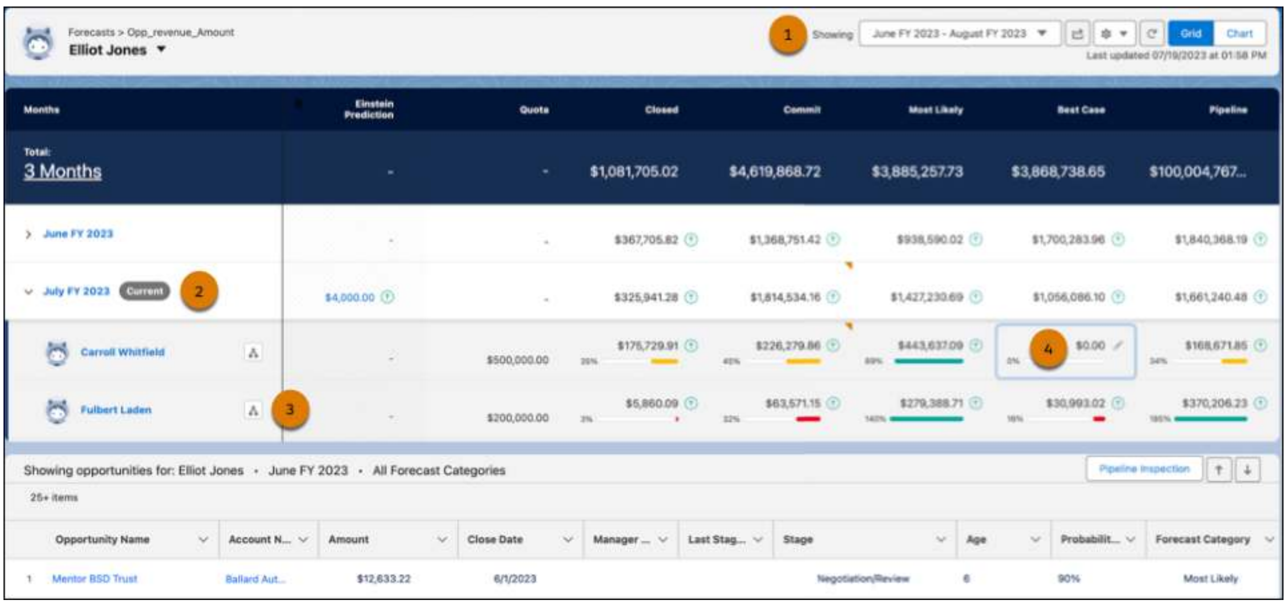
Salesforce Help: Guidelines for Viewing Opportunity Details in Collaborative Forecasts (can be outdated or unavailable during release preview)

Discover a Refreshed Forecasts Page

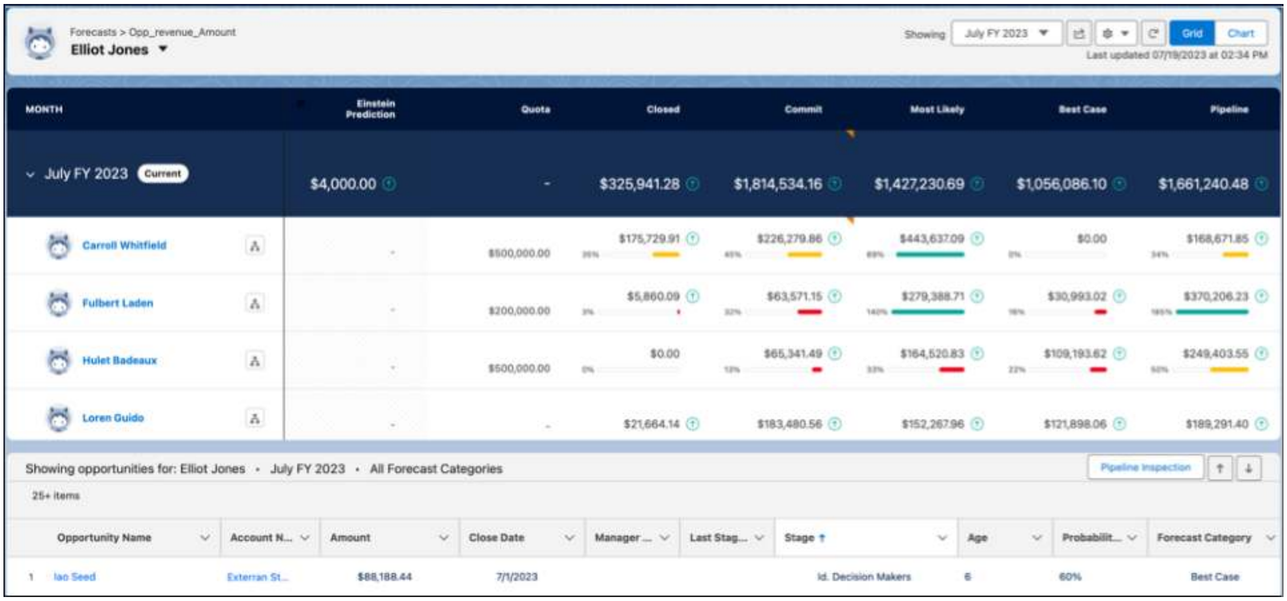
Unlock your sales potential with the updated forecasts page. Design enhancements make forecast data easier to read and the page simpler to navigate.

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

Why: Get a clearer view of your forecasts page with these design enhancements.



An updated label for the forecast range setting clearly indicates what you're viewing on the page (1). Select the field to choose a different range. The current period is indicated in the summary view (2). Updated icons make it easier for you to navigate the page (3), and highlighting indicates which fields are clickable for more information (4). Hover over a field to activate the highlighting.



And when you're viewing one month or quarter, we simplified the view and you no longer see duplicate forecast totals for the period.

SEE ALSO:

Salesforce Help: Project Sales with Collaborative Forecasts (can be outdated or unavailable during release preview)

Round Forecast Amounts for More Streamlined Forecasts

Forecast users can choose to show forecast amounts in the forecast summary without decimal places and rounded to the nearest whole number. Rounding forecast amounts can free up valuable real estate and provide a more streamlined view into forecast totals.

Where: This change applies to Lightning Experience in Professional, Performance, and Developer Editions and in Enterprise and Unlimited Editions with the Sales Cloud.

How: On the forecasts page, from the Display Settings menu, select **Show Rounded Amounts**. All amounts in the forecast summary grid, including amounts in custom calculated columns, are rounded to the nearest whole number. Full amounts that include the decimal places are still shown when viewing adjustment and change details.

Full amounts that include the decimal places are also still shown in the opportunity list header, and in amounts shown for each opportunity in the opportunity list.

Enablement for Sales Teams

Jump-start your sales teams with all the product and process knowledge needed to quickly open opportunities, close deals, and help achieve your company's revenue outcomes. New capabilities for building, assigning, and managing programs help your Enablement teams deliver more robust, timely, and job-specific resources for your sales teams in their flow of work.

IN THIS SECTION:

Multiply the value of your Enablement solution for sales reps by inviting your company's trusted, experienced staff to provide feedback directly within programs. Deliver more transparency for Enablement admins and users alike as sales reps progress through programs. And, find the right sales reps to assign to programs with new options for filtering and selecting users.

Find Out What's New for Enablement

Multiply the value of your Enablement solution for sales reps by inviting your company's trusted, experienced staff to provide feedback directly within programs. Deliver more transparency for Enablement admins and users alike as sales reps progress through programs. And, find the right sales reps to assign to programs with new options for filtering and selecting users.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Sales Cloud, Service Cloud, Financial Services Cloud, Health Cloud, or Salesforce Platform. An Enablement add-on license is required.

SEE ALSO:

Enablement

Salesforce Partner Relationship Management and PRM for Slack

Salesforce PRM now offers Pipeline Inspection, with preconfigured dashboards showing revenue, pipeline, opportunities, and scorecard reports. Unified setup streamlines PRM for Slack configuration. Expanded object support widens your search possibilities in Search and Post.

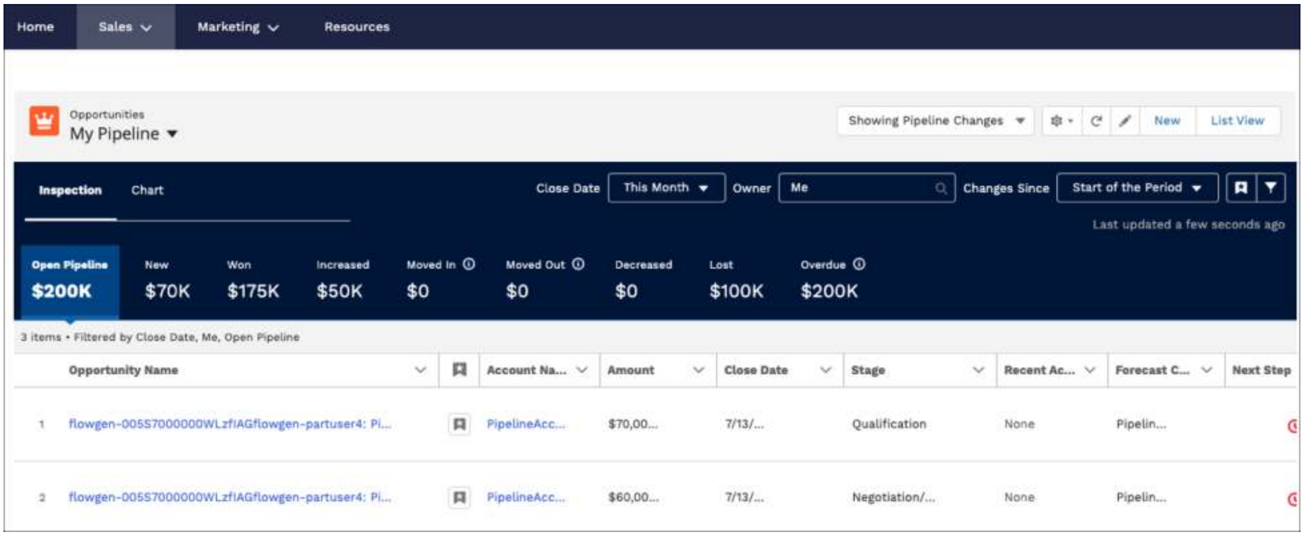
Where: This change applies to Aura sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

IN THIS SECTION:

Get Up and Running Fast with PRM for Slack Unified Setup

With the new unified setup for PRM for Slack you have three pages with guidance for you to learn all about PRM for Slack functions as you customize the app. Reduce configuration time by enabling and configuring features all in one place.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Slack customers must run Slack Enterprise Grid.



SEE ALSO:

Salesforce Help: Uniting Guidance and Configuration With Unified Setup(can be outdated or unavailable during release preview)

Unite Salesforce and Slack with Expanded Object Support

Reduce friction and increase collaboration now that more objects are supported for Search and Post in PRM for Slack. Previously only 4 objects were supported. Now you can select up to 10 objects.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Slack customers must run Slack Enterprise Grid.

SEE ALSO:

Salesforce Help: Boost Collaboration With Expanded Object Support(can be outdated or unavailable during release preview)

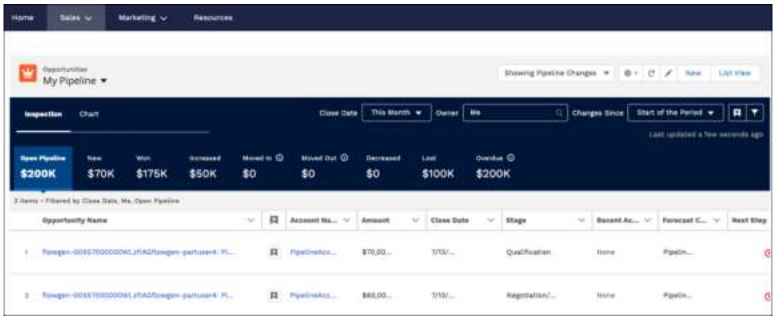
Focus on Key Sales Metrics, AI Insights, and Opportunities to Close More Deals

Gather all valuable metrics into one place with customizable reports and dashboards and track your partners' performance with Pipeline Inspection. Salesforce PRM now offers preconfigured dashboards in Lightning Experience, comprised of reports to view revenue, pipeline, opportunities, partner scorecard, and certifications.

Where: This change applies to Aura, sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Why:

Get a holistic view of your pipeline, including opportunity stages and forecast.



SEE ALSO:

Salesforce Help: Focus on Opportunities and Forecast Revenue with Pipeline Inspection in PRM(can be outdated or unavailable during release preview)

Salesforce Help: Capture Key Sales Metrics, AI Insights with Operational Dashboards in PRM(can be outdated or unavailable during release preview)

Sales Performance Management

Assign work by country instead of by postal codes, import supplemental customer data without matching fields manually, and update area names and centers in bulk in Territory Planning. And show sales reps customer addresses formatted for their locale in Salesforce Maps.

IN THIS SECTION:

Territory Planning

Cover territories by country, import supplemental data quickly with field matching, and update territory names in bulk.

Salesforce Maps

Work with tooltips on the map using addresses formatted for your locale.

Enhanced Domains and Salesforce Maps Products

Keep up with the latest security standards using enhanced domains, which Salesforce now requires and come enabled for you. Any of your customizations that include Salesforce URLs in Salesforce Maps products can require that you update those URLs to accommodate enhanced domains. That way you prevent interruptions resulting from broken links and comply with increased security standards.

Territory Planning

Cover territories by country, import supplemental data quickly with field matching, and update territory names in bulk.

IN THIS SECTION:

Plan Territories by Country

Enable reps to cover territories more efficiently when you assign them to individual countries in Territory Planning. Planning and optimizing territories by country, instead of by all the postal codes within a country, uses less data and can alleviate previously long load times.

Plan Territories by Country

Enable reps to cover territories more efficiently when you assign them to individual countries in Territory Planning. Planning and optimizing territories by country, instead of by all the postal codes within a country, uses less data and can alleviate previously long load times.

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

How: When you create datasets, select the countries you want to include in your plan. Then, open a focus in your alignment, assign the countries to reps, and publish as shape layers or to ETM.

Import Assignments Regardless of Boundary Versions

Import boundary assignments from past alignments even if their boundaries differ from the latest ones. If the past alignments include outdated boundaries, Territory Planning now imports the assignments and applies assignment logic using the latest boundaries.

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

Match Attribute Fields Automatically

Reduce the time it takes to create and update attribute fields when you import CSV files. Territory Planning matches fields such as area, boundary, and unit attributes for you with one click. New dynamic field counts let you review the number of fields to import, update, and create before completing the import.

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

How: When you create or update a dataset, or update an alignment through settings, select to import attributes from CSV. Select the CSV column headers you want to import and then click **Match Fields**. Territory Planning populates the mapped fields and indicates which fields are new.

Update Territory Names and Centers in Bulk

Eliminate repetitive updates and reduce loading times when adjusting area names and locations on a large scale in Territory Planning. Instead of updating one area at a time from the map, batch functionality helps you update regions, districts, and territories with one CSV file. Apply those changes when you export updated hierarchies to territory models or other systems.

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

How: Prepare the attributes in your CSV file. Include columns such as New Name, Center Latitude, and Center Longitude for any areas you want to update.

Area Name	Area Level	New Name	Center Latitude	Center Longitude
Region 1	Region	South East Region	33.7488	-84.3877
District 1	District	Southern District	32.0809	-81.0912
Territory 1	Territory	North Florida	30.3322	-81.6557
Territory 2	Territory	Georgia	32.1574	-82.9071
Territory 3	Territory	South Florida	26.1224	-80.1373

From an open alignment, go to Settings and select **Attributes**. Start your CSV import from the area level. After you confirm your column headers are mapped correctly, import your CSV. Territory Planning updates the area names and centers. View these changes on the map and in the legend. If an area is locked, its center doesn't change.

Salesforce Maps

Work with tooltips on the map using addresses formatted for your locale.

IN THIS SECTION:

Plan Visits Using Addresses Formatted for Your Locale

Manage accounts, leads, and contacts using addresses in a format you're familiar with. Salesforce Maps is now aligned with Salesforce supported locales and their International Components for Unicode (ICU) formats for numbers, name, and address. Salesforce uses the locale field from a user's Language & Time Zone setting. For example, a rep in Japan has US customers. That rep sees those customers' addresses in Japan's address format.

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

SEE ALSO:

Salesforce Help: Supported Number, Name, and Address Formats (ICU) (can be outdated or unavailable during release preview)

Enhanced Domains and Salesforce Maps Products

Keep up with the latest security standards using enhanced domains, which Salesforce now requires and come enabled for you. Any of your customizations that include Salesforce URLs in Salesforce Maps products can require that you update those URLs to accommodate enhanced domains. That way you prevent interruptions resulting from broken links and comply with increased security standards.

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

SEE ALSO:

Deploy Enhanced Domains (Release Update)

Salesforce Help: Update Your Org for My Domain Changes (can be outdated or unavailable during release preview)

Sales Cloud Einstein

Let Einstein generative AI draft sales emails from a sales rep's inbox or anywhere in Salesforce, and optionally include product information. Assess forecasting trends and sales predictions at a glance. The Forecast Changes chart with the Einstein Forecasting prediction graph, previously available only on the forecasts page, is now also available on the home page.

IN THIS SECTION:

SEE ALSO:

Einstein Release Notes

Personalize Sales Emails with Einstein Generative AI for Sales

Sales Emails empowers busy sales reps to move quickly and expand deals through personalized and informed email content that buyers love. Einstein uses your sales data to generate personalized emails for contacts and leads, a method known as grounding. Sales reps can draft common emails, like a follow-up or a meeting invite, by choosing from the preset email prompt types.

Where: This feature is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience.

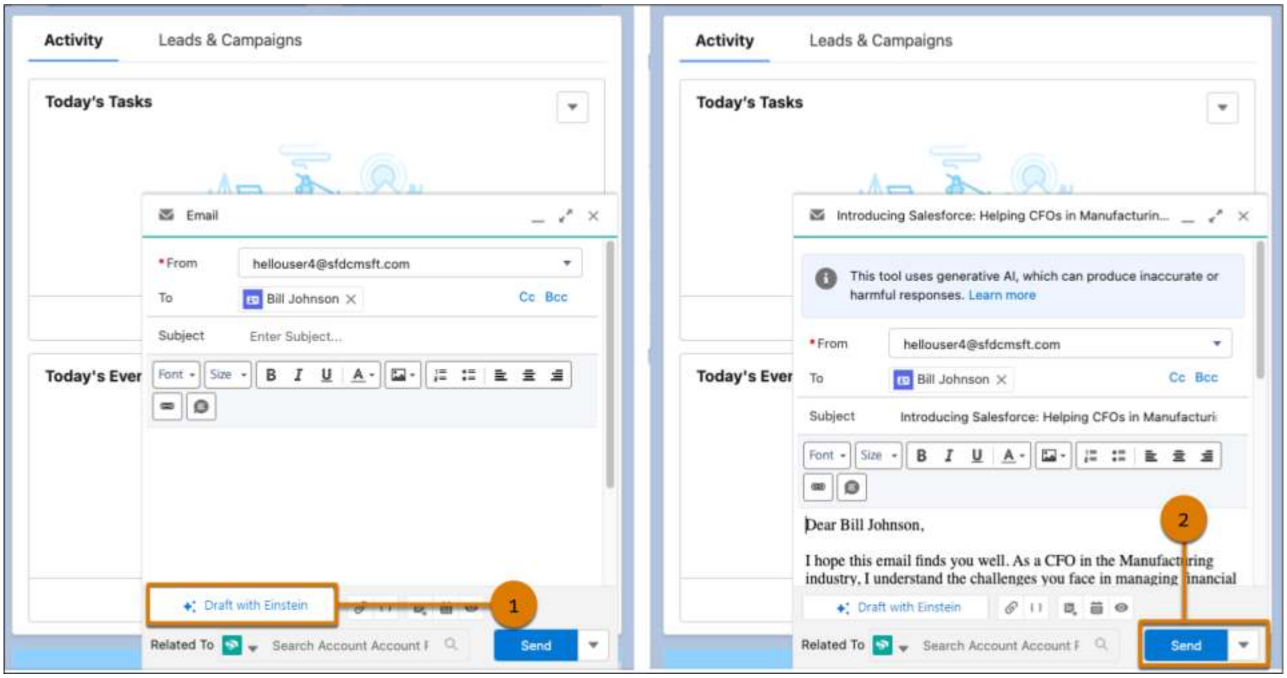
To purchase Einstein for Sales, contact your Salesforce account executive.

Who: To use Sales Emails, users need the Einstein Sales Emails permission set. To let reps access the feature in Gmail or Outlook, set up the Gmail or Outlook integration.

Why: Generative AI and large language models (LLMs) are the current talk of the town. But you need assurances that AI output is trustworthy and accurate. You can rely on Salesforce to uphold our #1 value, trust, and treat your data with care and security at the forefront.

How: In Lightning Experience, Einstein Sales Emails is built directly into the email composer. In Salesforce Outlook or Gmail integrations, users see Einstein generative AI in the email application pane.

Choose a prompt from the list (1). Review and edit the email, and then send it (2).



SEE ALSO:

Einstein Generative AI Features

Include Product Info in Sales Emails with Einstein Generative AI

Sales reps can draft emails by choosing from preset email prompts. Now some prompts are set up to allow reps to include product information for Einstein to use when crafting an email. Providing more information to a generative AI system results in fuller emails. Product info is key to most sales reps' communications, so including it is helpful.

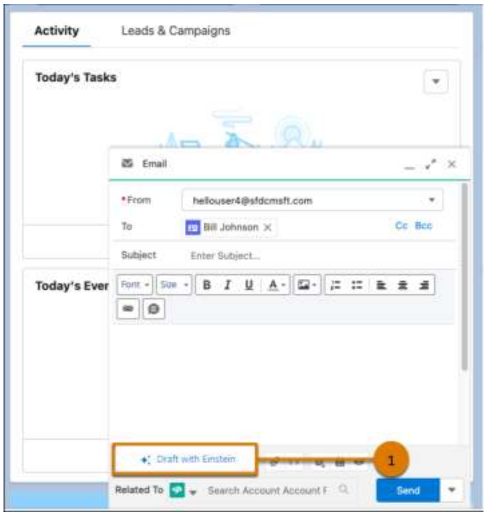
Where: This feature is available in Lightning Experience in Performance and Unlimited editions. Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, contact your Salesforce account executive.

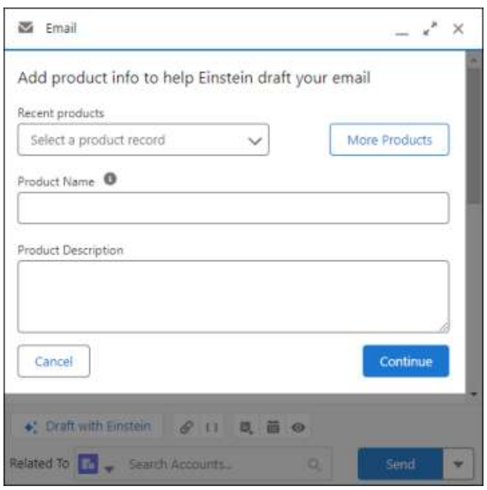
Who: To use Sales Emails, users need the Einstein Sales Emails permission set. To let reps access the feature in Gmail or Outlook, set up the Gmail or Outlook integration.

How: In Lightning Experience, Einstein Sales Emails is built directly into the email composer. In Salesforce Outlook or Gmail integrations, users can see Einstein generative AI in the email application pane.

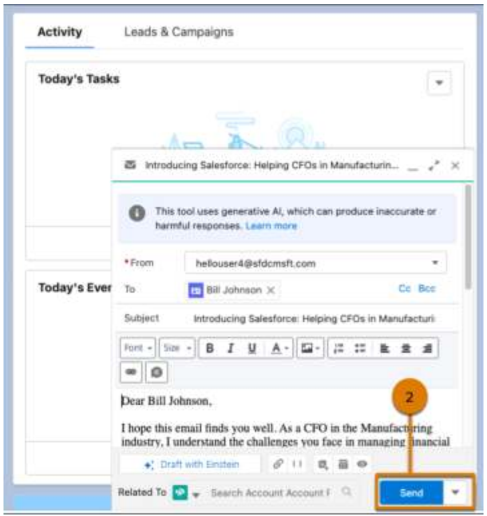
Choose a prompt from the list (1).



Select or search for an existing product, or leave this information empty and click **Continue**.



Review and edit the email, and then send it (2).



SEE ALSO:

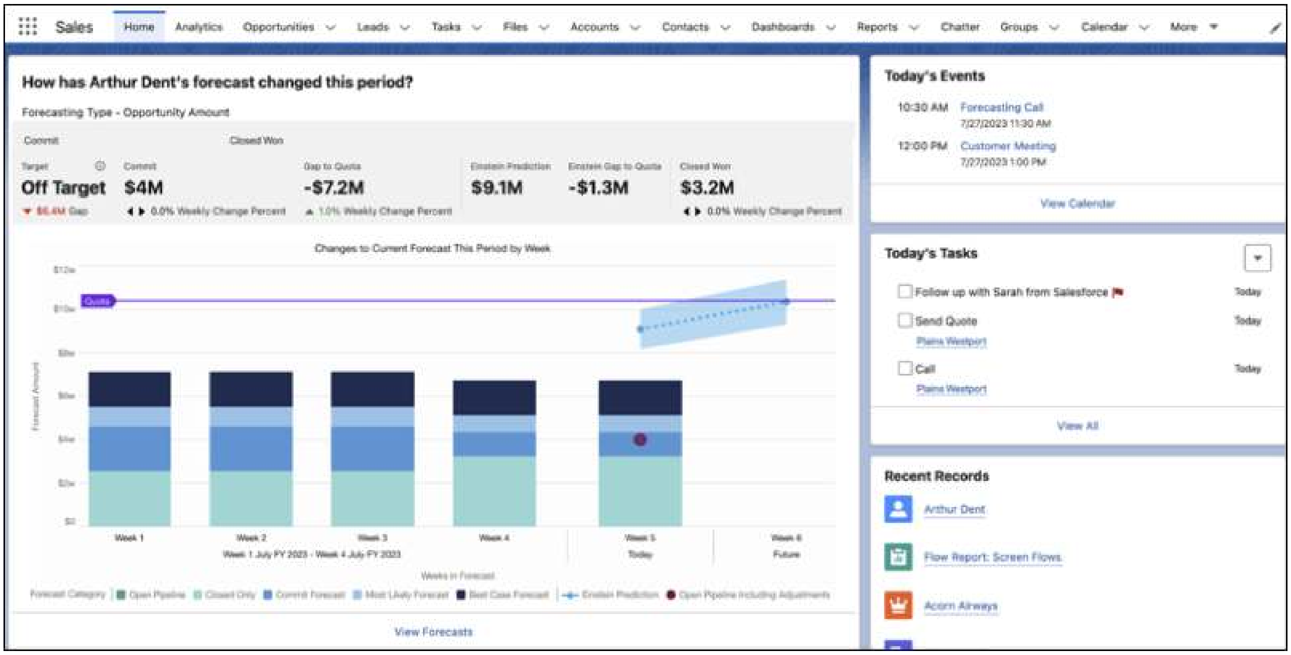
[Einstein Generative AI Features]

Spot Forecasting Trends Faster

The Forecast Changes chart with the Einstein Forecasting prediction graph, previously available only on the forecasts page, is now also available on the home page. See changes to the current period's forecasts and the Einstein prediction line to measure how this period's forecasts has changed this period.

Where: This change applies to Lightning Experience with Sales Cloud Einstein, which is available in Performance and Unlimited editions and for an extra cost in Enterprise Edition.

How: Users who have the Einstein Forecasting dashboard or the Quarterly Performance widget on the home page automatically see the new chart.



SEE ALSO:

Salesforce Help: Build a Smarter Pipeline with Einstein Forecasting (can be outdated or unavailable during release preview)

Einstein Account Insights and Opportunity Insights Are Being Retired

Einstein Account Insights and Einstein Opportunity Insights are being retired in all Salesforce orgs as of Winter ’24 on November 14, 2023. Salesforce is focusing development efforts on features such as Pipeline Inspection and Einstein Relationship Insights.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Performance editions with the Sales Cloud Einstein add-on.

After November 14, 2023, Einstein Opportunity Insights and Einstein Account Insights won’t be available. For more information, see Einstein Opportunity Insights Retirement and Einstein Account Insights Retirement.

Sales Cloud Everywhere

As sales reps search for prospects on the internet, the Sales Cloud Everywhere Chrome extension keeps up with their web investigations. Sales reps can use the grid-like view of their data in Workspace to manage deals. They can create their own Workspace tabs to customize the data they see. In the mini To Do list, new sorting options, additional filters, and enhanced search functionality ensure a rep is focused on their most important tasks.

IN THIS SECTION:

See Your Data Your Way in Workspace
Users can create and manage up to 10 personal workspace tabs to see data in a grid-like layout. In the list, users can sort, filter, and query the data, as well as update it. They have a choice of what type of data to show and how to show it in their workspace. After creating a tab, they can modify the workspace to show related data.

Follow Up on Companies of Interest with Contextual Insights

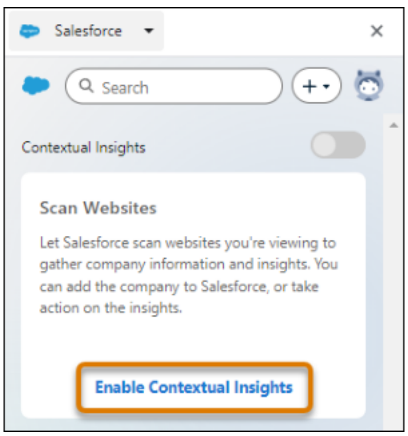
While looking for future customers, your sales reps research companies on the internet. Now your company's Salesforce database can keep up with the sales research by checking the website they're viewing and seeing if info on that company is available. When a match occurs with data in Salesforce, reps can view what's saved. If no match occurs, add the company as a new account to keep pursuing them as a potential customer.

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

How: Contextual insights are in the Sales Cloud Everywhere Chrome extension side panel.

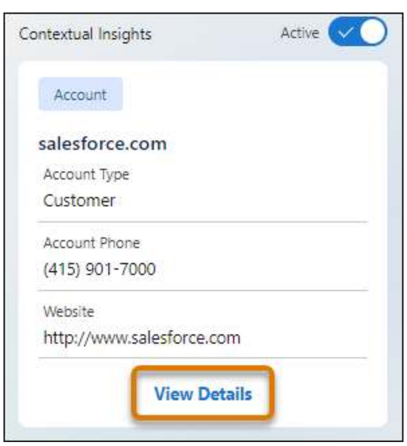
First, admins enable Gmail integration and turn on Use Salesforce Across the Web. Then admins ask the reps to install the extension.

The contextual insights feature appears automatically. To start contextual insights, reps enable it.

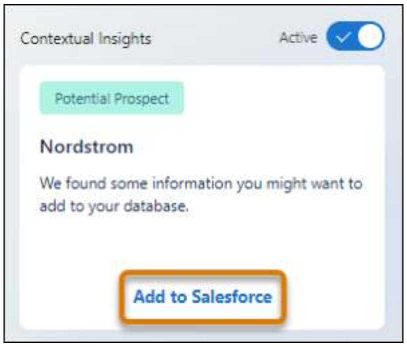


As soon as it's enabled, Salesforce examines the active website while the rep uses the internet.

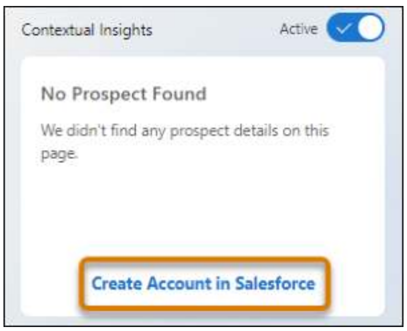
If the company matches a Salesforce account, the rep views the details in the Salesforce database.



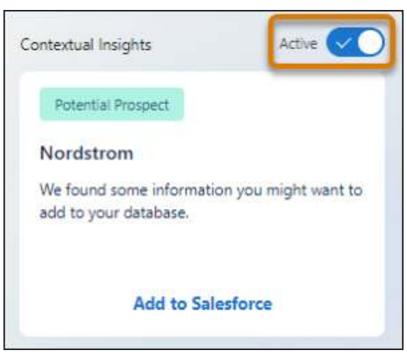
If information about a company is found, but doesn't match a Salesforce account, add it to Salesforce. Then reps can do further follow-up.



If no company information is found, the rep creates an account from scratch if they want to do further follow-up.



A rep can pause and resume contextual insights at any time.



Note: Contextual insights is supported in English only.

SEE ALSO:

Salesforce Help: Set Up the Sales Cloud Everywhere Chrome Extension (can be outdated or unavailable during release preview)

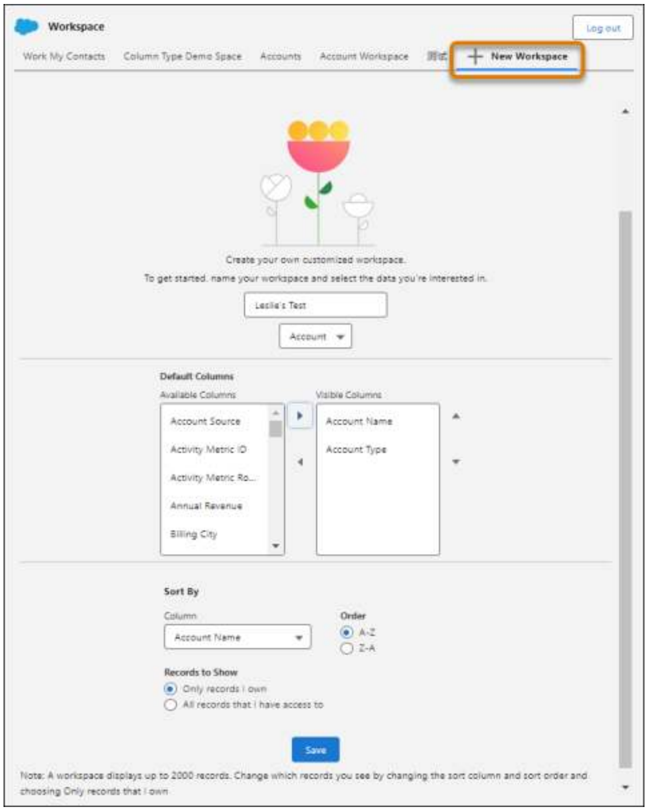
Salesforce Help: Follow Up on Companies of Interest with Contextual Insights in the Sales Cloud Everywhere Chrome Extension (can be outdated or unavailable during release preview)

See Your Data Your Way in Workspace

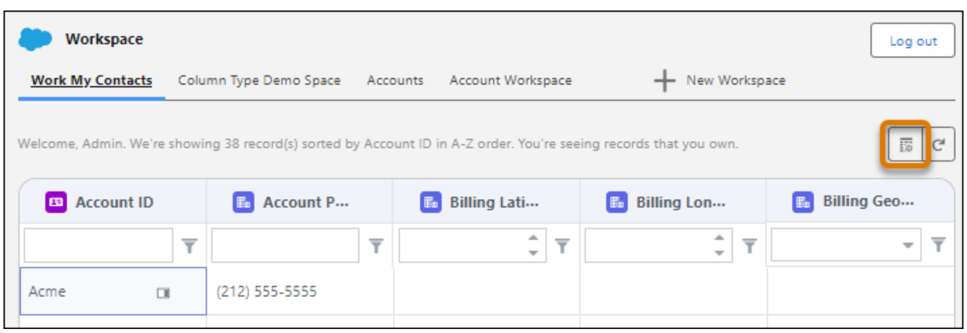
Users can create and manage up to 10 personal workspace tabs to see data in a grid-like layout. In the list, users can sort, filter, and query the data, as well as update it. They have a choice of what type of data to show and how to show it in their workspace. After creating a tab, they can modify the workspace to show related data.

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

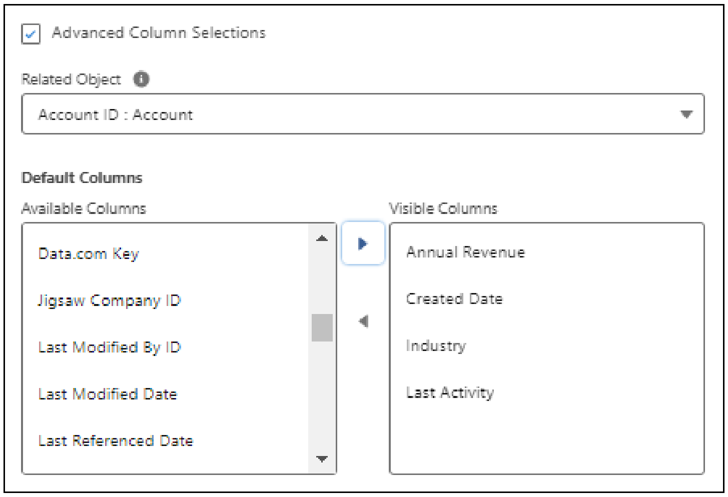
How: Click **New Workspace** to create your own workspace.



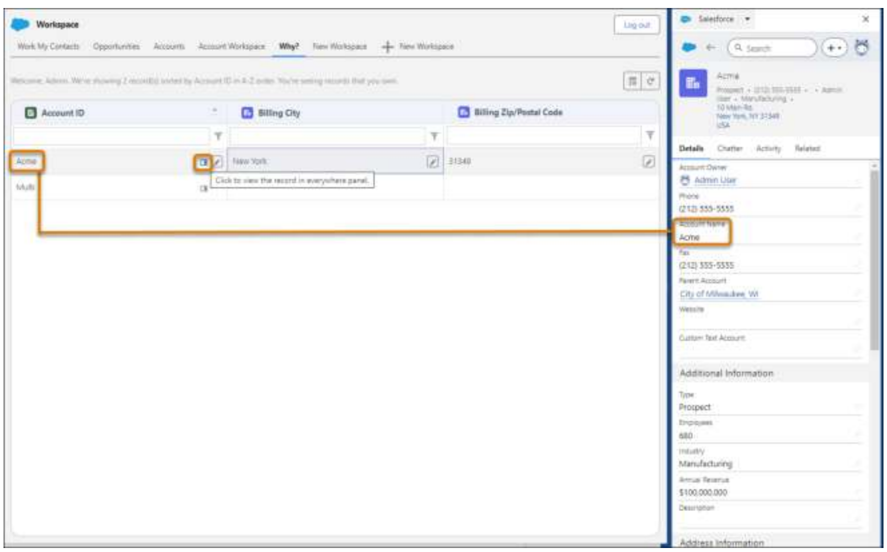
Click the Manage Workspace icon to update or delete your workspace.



When managing an existing workspace, you can add a related object. This related object has a column (or group of columns) used to link data between objects. You can add the columns from the related object to your workspace.



The workspace also interacts with the Sales Cloud Everywhere Chrome extension. Hover over the lookup field and click the side panel icon. That record then appears in the side panel.



SEE ALSO:

Salesforce Help: Set Up the Sales Cloud Everywhere Chrome Extension (can be outdated or unavailable during release preview)

Salesforce Help: Quickly Update Multiple Records with Workspace in the Sales Cloud Everywhere Chrome Extension (can be outdated or unavailable during release preview)

Integration with Other Products

Report on activities such as emails and tasks with Activity 360. Sync recurring event series from Google to Salesforce. Learn about integration capabilities and upcoming product retirements.

IN THIS SECTION:

Salesforce for Outlook (Retiring)

Full product retirement for Salesforce for Outlook is scheduled for June 2024. If you're sticking with Salesforce for Outlook for now, you can access past release notes about the current version from the Trailblazer Community.

IN THIS SECTION:

Salesforce for Outlook Is Retiring in June 2024

Full product retirement for Salesforce for Outlook is scheduled for June 2024. For the latest integration with Microsoft Outlook, we recommend moving to our next-generation products, the Outlook integration and Einstein Activity Capture. These products replace Salesforce for Outlook features and give users new capabilities. We continue to introduce enhancements for these products every release.

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

How: When Salesforce for Outlook retires, it will no longer sync contacts, events, or tasks. Admins and users also lose access to Salesforce for Outlook features, such as the side panel.

SEE ALSO:

Knowledge Article: Salesforce for Outlook Retirement

Salesforce Help: Move from Salesforce for Outlook to the Next-Generation Products (can be outdated or unavailable during release preview)

Trailblazer Community: Salesforce for Outlook Release Notes

Lightning Sync for Google

Streamline your move to Einstein Activity Capture using the Lightning Sync migration assistant.

Einstein Activity Capture

Monitor your team's activities with Activity 360 reporting capabilities. Quickly address status and connection issues for Einstein Activity Capture users, and find status metrics in the revamped Status & Metrics page. Start syncing recurring events from Google to Salesforce.

IN THIS SECTION:

Emails captured by Einstein Activity Capture are now available in standard reports. Use the new Activity 360 Reporting objects to get the panoramic view of your team's activities across every channel. Previously, automatically captured records weren't available in standard reports. We delivered this feature thanks to your ideas on IdeaExchange.

Get notified when your users' connected accounts are disabled or need attention. That way, you can address connection issues as soon as they occur.

You can now include recurring events from Google in event sync configurations. Only events created after you select the Sync event series checkbox in the sync configuration are synced from Google to Salesforce. We delivered this feature thanks to your ideas on IdeaExchange.

To review your users' onboarding status and your Einstein Activity Capture connection metrics, you now go to the Status & Metrics page. You can check your connected accounts in the User Status tab and see your connection data and recommendations in the Connection Status tab. New columns in the User Status tab show the number of contacts synced for the current day, the number of events synced for the current day, and the date and time of the most recent sync. Previously, user onboarding status and connection metrics were displayed on the User Status page.

You can now control whether users see the Microsoft Exchange™ and Google™ calendar checkbox on the Calendars tab. For new users, the setting is off by default so that they only see events that are synced to Salesforce. With the setting turned on, users can select the checkbox to overlay their integrated calendar on the Calendars tab.

See Activities Captured by Einstein in Standard Reports

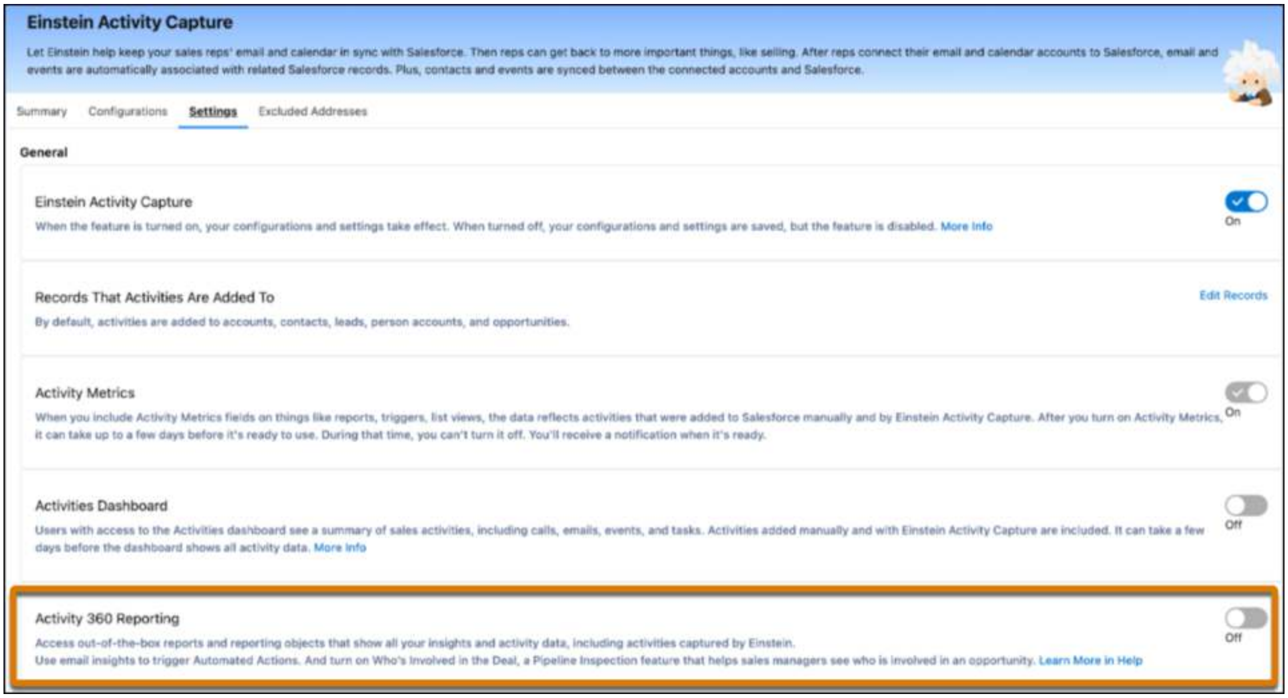
Emails captured by Einstein Activity Capture are now available in standard reports. Use the new Activity 360 Reporting objects to get the panoramic view of your team's activities across every channel. Previously, automatically captured records weren't available in standard reports. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This change applies to Lightning Experience in Unlimited Edition. Available in Professional and Enterprise editions with one of these add-on licenses: Sales Cloud Einstein, Sales Engagement, or Revenue Intelligence.

Why: Because Activity 360 enables new reporting objects, you also get access to these other features.

- With Pipeline Inspection, sales teams can see who's participating in a deal right from the side panel.
- With Sales Engagement, you can use insights in Automated Actions.

How: From the Einstein Activity Capture page in Setup, turn on Activity 360 Reporting on the Settings tab. After you turn on Activity 360, a report folder and a new dashboard are available. You can report on activities created after this feature is turned on.



SEE ALSO:

- Keep Deals Moving by Involving the Right People
- Manage Cadence Targets When Einstein Insights Occur
- *IdeaExchange*: Expose Automated Activity Capture Activities in Reports
- *Salesforce Help*: Report on Logged and Captured Activities From Einstein Activity Capture (can be outdated or unavailable during release preview)

Address Connection Issues Quickly with Notifications

Get notified when your users' connected accounts are disabled or need attention. That way, you can address connection issues as soon as they occur.

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

How: To check your notification settings, go to the Connection Status Notifications page in Setup. You can set a notification threshold so that you're notified when a percentage of connected accounts are disabled or needs attention. The default is 15% of accounts that require attention, but you can enter a percentage value between 0 and 100.

SEE ALSO:

- *Salesforce Help*: Check Connection Status and Metrics for Einstein Activity Capture Users (can be outdated or unavailable during release preview)

Sync Recurring Events from Google to Salesforce

You can now include recurring events from Google in event sync configurations. Only events created after you select the Sync event series checkbox in the sync configuration are synced from Google to Salesforce. We delivered this feature thanks to your ideas on IdeaExchange.

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

SEE ALSO:

Salesforce Help: How Event Series Sync with Einstein Activity Capture (can be outdated or unavailable during release preview)

Find Users' Onboarding Status and Connection Metrics in One Place

To review your users' onboarding status and your Einstein Activity Capture connection metrics, you now go to the Status & Metrics page. You can check your connected accounts in the User Status tab and see your connection data and recommendations in the Connection Status tab. New columns in the User Status tab show the number of contacts synced for the current day, the number of events synced for the current day, and the date and time of the most recent sync. Previously, user onboarding status and connection metrics were displayed on the User Status page.

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

SEE ALSO:

Find Users' Onboarding Status and Connection Metrics in One Place

Salesforce Help: Check Connection Status and Metrics for Einstein Activity Capture Users (can be outdated or unavailable during release preview)

Salesforce Help: Considerations for Setting Up Einstein Activity Capture (can be outdated or unavailable during release preview)

Hide Integrated Calendars From the Calendars Tab

You can now control whether users see the Microsoft Exchange™ and Google™ calendar checkbox on the Calendars tab. For new users, the setting is off by default so that they only see events that are synced to Salesforce. With the setting turned on, users can select the checkbox to overlay their integrated calendar on the Calendars tab.

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

SEE ALSO:

Salesforce Help: How Event Series Sync with Einstein Activity Capture (can be outdated or unavailable during release preview)

Salesforce Meetings

Get ready for Meeting Studio retirement in Spring '24.

IN THIS SECTION:

Meeting Studio Is Being Retired

Meeting Studio is being retired with Spring '24.

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

When: Full product retirement for Meeting Studio is scheduled for Spring '24.

How: With Spring '24, you can't access or use Meeting Studio. Replace Meeting Studio with other video conferencing tools, such as Google Meet, Microsoft Teams, Zoom, and WebEx.

Your Salesforce data isn't impacted because it's not stored or captured in Meeting Studio. Meeting Digest is still supported.

SEE ALSO:

Salesforce Help: Engage with Customers and Prospects Using Meeting Studio (can be outdated or unavailable during release preview)

Knowledge Article: Meeting Studio Retirement

Email Experience

To add more value to Sales Cloud in Professional and Enterprise editions, you get features and functionality that previously required purchasing an add-on license. These features include email productivity tools such as send later, email tracking, text shortcuts, and email engagement.

IN THIS SECTION:

Discover Email Productivity Features in More Editions

To add more value to Sales Cloud, features and functionality that previously required purchasing an add-on license are now included. These features provide additional functions that make sellers' work easier and more efficient. These features include email productivity tools such as send later, email tracking, text shortcuts, and email engagement. Email engagement features include My Feed from the Outlook and Gmail integration panels, notifications from Sales Cloud Everywhere, and custom report types for engagement data.

Where: This change applies to Lightning Experience in Enterprise and Professional editions with the Sales Cloud.

When: This change appears on July 19, 2023.

How: Not all features included in Professional and Enterprise editions are enabled automatically. In Setup, enable the specific features you want for your business. To let new users access these features, assign them the appropriate permission. You can assign these new features to up to 100 users.

SEE ALSO:

Discover Quick Cadences and Email Productivity Features in More Editions

Salesforce Help: Work With Salesforce's Email (can be outdated or unavailable during release preview)

Salesforce Help: Turn On Sales Engagement Features (can be outdated or unavailable during release preview)

Retrieve Inbound or Outbound Email Logs

Request Salesforce email logs based on the direction of travel through Salesforce email servers. Use the email direction to filter results from email logs that contain outbound emails, inbound emails, or both.

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

SEE ALSO:

Salesforce Help: Email Log Reference (can be outdated or unavailable during release preview)

Retrieve Email Logs Based on the Mail Event

Filter for Reception, Delivery, Transient Failure, or Permanent Failure events. Use these results during troubleshooting to get smaller logs and pinpoint permission failures.

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

SEE ALSO:

Salesforce Help: Request an Email Log (can be outdated or unavailable during release preview)

Capture More Details of Email Deliverability

Stay informed, troubleshoot, or evaluate the performance of your email easily with enhanced deliverability information in email log reference files. Use the 11 new field values R through AB to learn more about the health of emails that originate from external senders and emails that are sent from Salesforce servers.

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

SEE ALSO:

Salesforce Help: Email Log Reference (can be outdated or unavailable during release preview)

Salesforce Inbox

Inbox Mobile is being retired on Feb 1, 2024. Check out the latest improvements to Salesforce Inbox.

IN THIS SECTION:

Inbox Mobile is Being Retired

Inbox mobile is being retired on Feb 1, 2024.

Salesforce Inbox Mobile

Learn about the latest features and enhancements to Inbox mobile in Salesforce Help.

- Inbox Mobile for iOS
- Inbox Mobile for Android

Inbox Mobile is Being Retired

Inbox mobile is being retired on Feb 1, 2024.

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

When: Full product retirement for Inbox mobile is scheduled for Feb 1, 2024.

Why: Replace Inbox mobile with Outlook and Gmail integration with inbox on desktop to access most of the Salesforce Inbox features. On mobile, use the Salesforce mobile application to access Salesforce records, with more exciting functionality coming in a future release. For automatic email tracking, Einstein Activity Capture can also be used.

How: As of Feb 1, 2024, you can't access or use Inbox mobile.

SEE ALSO:

Knowledge Article: Salesforce Inbox Mobile App Retirement

Other Changes in the Sales Cloud

Learn about other changes we've made.

IN THIS SECTION:

Enable New Order Save Behavior (Release Update)

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

Social Accounts, Contacts, and Leads Is Being Retired

Social Accounts, Contacts, and Leads is scheduled for retirement as of Spring '24. To continue showing social profiles in Salesforce, find apps on AppExchange.

Enable New Order Save Behavior (Release Update)

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

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

When: This update was first available in Winter '20 and is enforced in Summer '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**.

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Custom application logic consists of validation rules, Apex triggers and classes, workflow rules, and flows. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

Packages with orders created before Winter '21 don't support the New Order Save Behavior release update by default. If you use a package involving orders, wait for confirmation from your package provider before enabling the release update.

SEE ALSO:

Release Updates

Social Accounts, Contacts, and Leads Is Being Retired

Social Accounts, Contacts, and Leads is scheduled for retirement as of Spring '24. To continue showing social profiles in Salesforce, find apps on AppExchange.

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

SEE ALSO:

Knowledge Article: Twitter/X Public API Access

AppExchange

Salesforce CMS

Find details for CMS content and translation export and import on the new Export & Import status tab. Publish content from CMS workspaces to enhanced sites and public channels. In enhanced CMS workspaces, prevent users from unpublishing content with dependencies. Assign workflows by content type, and automatically publish or unpublish content.

IN THIS SECTION:

Assign Workflows by Content Type and Automatically Publish or Unpublish Content

We're taking CMS Workflows and Approvals, available in enhanced CMS workspaces, up a notch with more features and better usability. Each workflow can be assigned to specific content types, making your process flexible and extensible. And with new step types you can automatically publish or unpublish content variants from a workflow.

View File Type and Size in CMS Content Details Summary

The CMS content detail page now shows metadata for files that are associated with a managed content variant. The metadata appears in new fields called File Type and File Size.

Change Permission Sets for a Restricted CMS Channel

In enhanced CMS channels, use permission sets to serve content that's restricted to specific users with permission sets.

Navigate to Enhanced CMS Content Folders from the Content Detail Page

When CMS content is stored in an enhanced CMS workspace folder, the content detail page now shows the folder location for the content item. To open the folder and manage the content within it, click the folder name. Content that isn't stored in a folder continues to appear at the workspace level.

Find Enhanced CMS Content Seamlessly with Search Suggestions

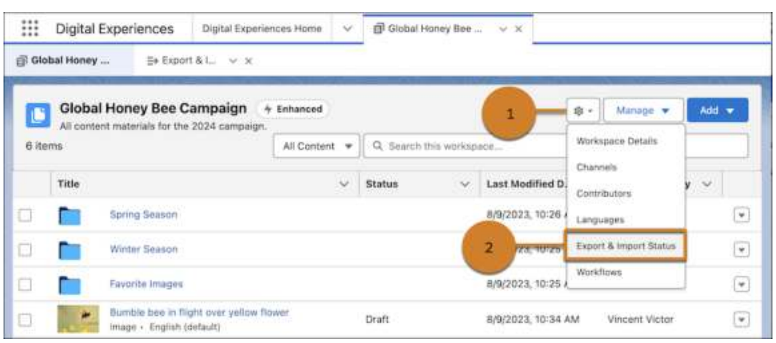
Locate content in your enhanced CMS workspaces faster and more easily, even if you don't remember a content item's exact name or description. When you enter characters in the Search this workspace field, a new search suggestion dropdown appears below the field. As you type, the suggestions list automatically updates with the most relevant content matches.

Find Export and Import Content and Translation Details on the New Status Tab

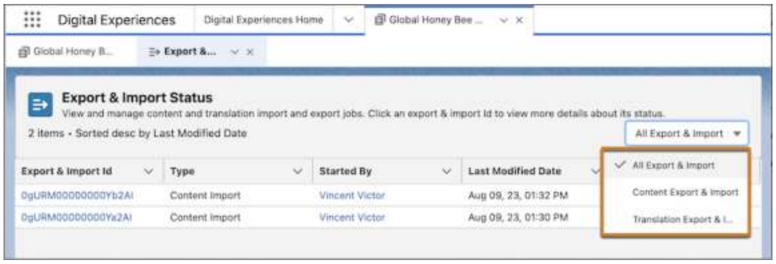
Export and import statuses are visible to multiple users of your enhanced CMS workspace in the new Export & Import Status tab. Now, multiple content admins and content managers can see who initiated an export and import, and when. They can also download files for exported content, details about export and import status, and success and error output. This new UI captures content and translation export and import statuses. Previously, error, success, and detail logs were provided only to a single user through a link in an email.

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

How: From the enhanced CMS workspace settings menu, click (1) and then click **Export & Import Status** (2).



To sort the Export & Import status information by type, select **Content Export & Import** or **Translation Export & Import** from the menu. To see all Export & Import statuses at once, select **All Export & Import**. To access the detail files, click an Export & Import ID and download the available files.



Publish Content from CMS Workspaces to Enhanced LWR Sites

Now, you can add enhanced LWR site channels to CMS workspaces and publish content. Previously, you could only publish content from an enhanced CMS workspace to enhanced LWR sites and enhanced public channels.

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

Prevent Users from Unpublishing Content with Dependencies in Enhanced CMS Workspaces

When one prominent piece of content, such as a news article, incorporates CMS content, a user can't unpublish that CMS content because of this dependency. Similarly, CRM content can have dependencies to CMS content that prevent unpublish. Now, the unpublish window shows which records reference the content, and a link icon identifies those records with prominent dependencies. The Content Usage card on the content detail page also provides this information.This change prevents users from unpublishing content that could appear as an error or a broken page in other content.

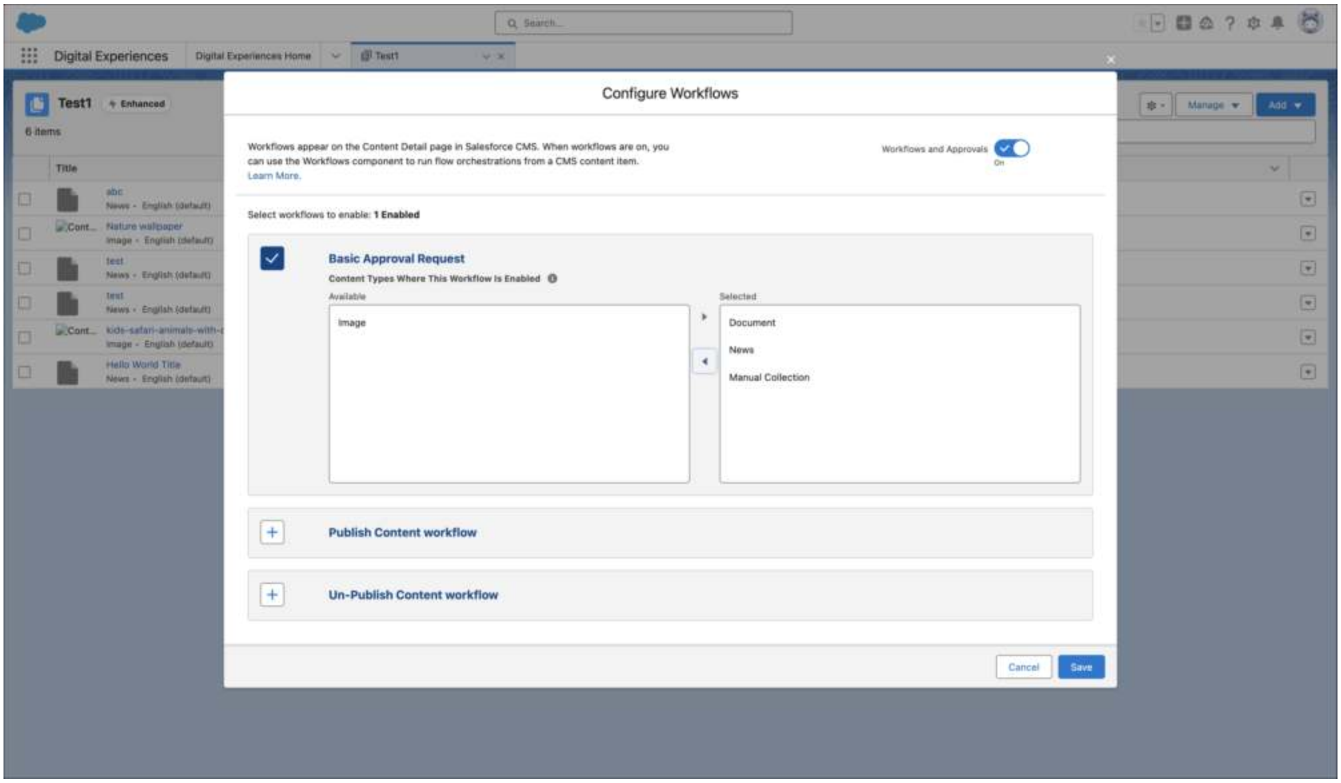
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, Developer, and Starter editions.

Assign Workflows by Content Type and Automatically Publish or Unpublish Content

We're taking CMS Workflows and Approvals, available in enhanced CMS workspaces, up a notch with more features and better usability. Each workflow can be assigned to specific content types, making your process flexible and extensible. And with new step types you can automatically publish or unpublish content variants from a workflow.

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

Why: Do you need separate approval processes for news and images? What about documents? With the ability to assign workflows by content type, it's easy to create separate workflows and assign them to suit your needs.



And speaking of flexibility, what if you want to automatically unpublish content when it goes for review or publish when it gets approved? It's all possible with the new CMS Publish Variant and CMS Unpublish Variant step types. Add the new step types to your CMS-specific Flow Orchestrations.

How: The Workflows and Approvals feature is automatically added to all enhanced CMS workspaces and appears on the content details page of your content items. From the Digital Experiences app, go to an enhanced CMS workspace. Click the settings dropdown, and then select **Workflows**. On the Manage Workflow Status window, turn on Workflows and Approvals, and then enable each workflow by content type.

View File Type and Size in CMS Content Details Summary

The CMS content detail page now shows metadata for files that are associated with a managed content variant. The metadata appears in new fields called File Type and File Size.

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

Change Permission Sets for a Restricted CMS Channel

In enhanced CMS channels, use permission sets to serve content that's restricted to specific users with permission sets.

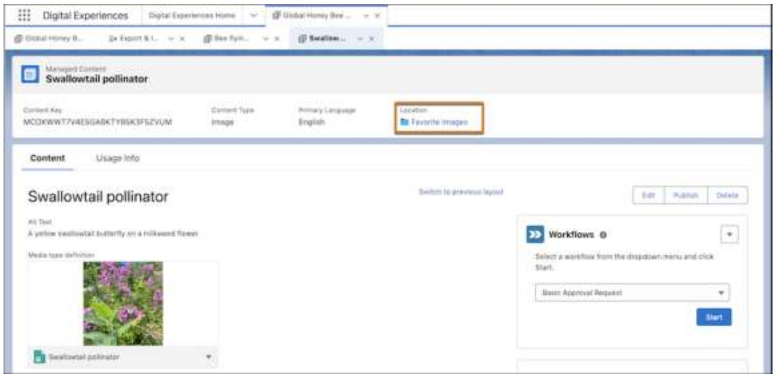
Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

How: To change permission sets, in the Digital Experiences app, open a restricted CMS channel for edit from the CMS Channels tab. Then select a permission set.

Navigate to Enhanced CMS Content Folders from the Content Detail Page

When CMS content is stored in an enhanced CMS workspace folder, the content detail page now shows the folder location for the content item. To open the folder and manage the content within it, click the folder name. Content that isn't stored in a folder continues to appear at the workspace level.

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

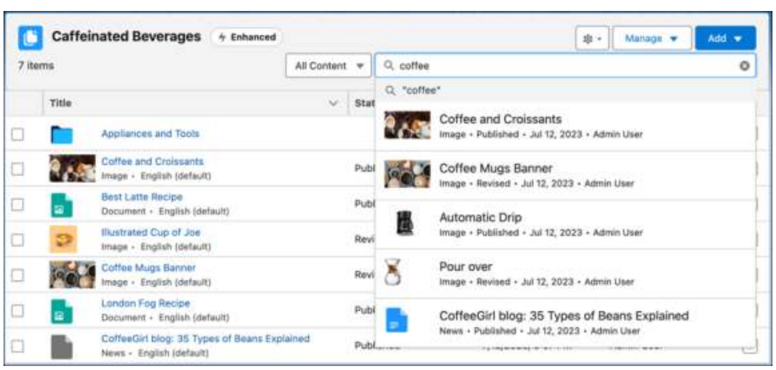


Find Enhanced CMS Content Seamlessly with Search Suggestions

Locate content in your enhanced CMS workspaces faster and more easily, even if you don't remember a content item's exact name or description. When you enter characters in the Search this workspace field, a new search suggestion dropdown appears below the field. As you type, the suggestions list automatically updates with the most relevant content matches.

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

How: To go directly to a content item's Details page, click the suggested content item in the dropdown. To see the full list of search results, tap your enter key or click the search button.



SEE ALSO:

Salesforce Help: Search CMS Content in Enhanced Workspaces (can be outdated or unavailable during release preview)

Salesforce Flow

Compose intelligent workflows with Flow Builder, OmniStudio, and Flow Orchestration. Integrate across any system with Flow Integration.

IN THIS SECTION:

Flow Integration

MuleSoft Composer for Salesforce, also called Flow Integration, is now part of Salesforce Flow. Flow Integration makes it easy to integrate data from any system with clicks, and invoke processes in any flow. When you create a secure process to connect the information stored in different systems, you build a real-time, integrated view of your customers and business.

Where: Flow Integration for Salesforce is available for an extra cost in Enterprise, Performance, and Unlimited editions that have enabled Lightning Experience.

For Composer release notes and help, see MuleSoft Composer for Salesforce.

Flow Builder

Build screens that feel like single-page applications with reactive flow screen components, now generally available. Send Salesforce data to external servers with HTTP Callout, now generally available. Transform collections of data with the Transform element (beta). Write and display custom error messages in record-triggered flows. Trigger flows off of Data Cloud data changes. Migrate more kinds of workflow rules to flows with the Migrate to Flow tool.

IN THIS SECTION:

Flow and Process Management

Convert more workflow rules to flows with the Migrate to Flow tool. Migrate more workflow rules with increased flow limits. Find user permissions more easily in Setup.

Flow Extensions

Invoking Slack actions through Flow can now be done only with action elements.

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

Flow Builder Updates

Build screens that feel like single-page applications with reactive flow screen components, now generally available. Create custom error messages for your users in record-triggered flows. Send Salesforce data to an external server with HTTP Callout, now generally available. Transform collections of data with the new Transform element (beta). Use the power of Data Cloud to trigger flows off of Data Cloud data changes.

IN THIS SECTION:

Build Screen Flows with Reactive Components (Generally Available)

Reduce the number of screens that your users click through, and build screens that feel like single-page applications with reactive flow screen components. Configure supported standard components or custom Lightning web components to react to changes in other components on the same screen in real time. For example, create a Data Table component that lists Opportunity records. On the same screen, add a Radio Buttons component, and set the default value of the component to the stage of the first Opportunity that the user selects. Previously, if you needed a component to react to changes in another component, you placed the components on separate screens.

IdeaExchange Delivered: Create Custom Error Messages in Record-Triggered Flows

Use the new Custom Error Message element to create targeted error messages for your end users to explain what went wrong or how to correct it. The error messages display in a window on the overall record page or as an inline error on a specific field. The associated record change is rolled back. Error messages can be created for before-save and after-save flows. We delivered this feature thanks to your ideas on IdeaExchange.

Send Salesforce Data to an External Server Without Code via HTTP Callout (Generally Available)

If you can't GET enough with HTTP Callout, now you can use the POST method to send Salesforce data to an external server in Flow Builder. This feature, now generally available, includes some changes since the Summer '23 release. More easily integrate external data with the new PUT, PATCH, and DELETE methods. Give more context about HTTP callout parameters, validate JSON samples faster, and get more information about the external service registration with more organized sections of parameters.

Transform Your Data in Flows (Beta)

Transform collections of data between flow resources with the new Transform element in Flow Builder. Combined with the Action element that makes an HTTP callout, you can build a flow that fully integrates data outside Salesforce with no code. Previously, you built a flow that included the Loop element and the Assignment element. Now you can do it all with the Transform element when transforming data in screen flows, autolaunched flows with no triggers, and record-triggered flows.

Create Autolaunched Flows Based on Data Changes in Data Cloud

You can now start a Data Cloud-Triggered Flow based on changes in a data model object or calculated insight object. For example, you can update a Unified Individual's loyalty status based on changes to their loyalty balance.

Save the Progress of Your Flow as You Build

Configure flows faster by saving before some elements are fully configured. You can save flows without fully configuring the Start elements in record-triggered flows and Create Records elements in all flows. Errors that previously prevented saving are now just warnings. To facilitate this change, some element properties windows now slide open next to the flow in the canvas so that you can see and interact with your flow while you configure the element. Previously, all element properties windows blocked the view of the flow while open. You can also undo individual changes with the undo button, which replaces the cancel button functionality in the element properties.

Screen Flow Components Retain Values After State Changes

Screen flows now retain values when a user resumes a paused flow, experiences an input validation error, or returns to an earlier screen. Previously, if you didn't provide a default value when you configured the Name, Address, Data Table, Email, or other components, the flow removed user-specified values when these events occurred. This change applies only to flows that are running on API version 59.0 or later.

Refresh Values Between Screens for More Components

You can now refresh the values of choice, Date, Date & Time, Number, Currency, Text, and Long Text Area components when a user navigates to a previous screen and then forward again. For example, a user enters the cost of three services on the first screen. When the user navigates to the next screen, the screen flow displays the total cost. If the user returns to the first screen and changes a value, you can refresh the total cost on the next screen or leave it unchanged. However, if a user navigates to a previous or later screen and then returns to the current screen a second time, the flow doesn't update the reactive components again.

Get Data Cloud Records More Easily in Flow Builder

Salesforce objects and Data Cloud objects are now organized into separate sections in Flow Builder. When you select a Data Cloud object, an object card provides more details.

Find Flow Resources More Easily in Create Records Elements

Now it's easier to find and select a record or record collection in Create Records elements in Auto-Layout. With this update, Flow Builder takes the first step toward an improved resource selection experience.

Use Wait Elements in More Types of Flows

The Wait for Amount of Time element and the Wait Until Date element are now available in schedule-triggered flows, autolaunched flows, and orchestrations. Previously, these wait elements were available only for journeys.

Advanced Pause Element Is Now Named Wait for Conditions

Advanced Pause has been renamed to Wait for Conditions so that all wait elements have similar terminology. The functionality of the element is unchanged.

Build Screen Flows with Reactive Components (Generally Available)

Reduce the number of screens that your users click through, and build screens that feel like single-page applications with reactive flow screen components. Configure supported standard components or custom Lightning web components to react to changes in other components on the same screen in real time. For example, create a Data Table component that lists Opportunity records. On the same screen, add a Radio Buttons component, and set the default value of the component to the stage of the first Opportunity that the user selects. Previously, if you needed a component to react to changes in another component, you placed the components on separate screens.

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

How: For screen flows that are configured to run on API version 59.0 and later, you don't need to take any extra steps to access reactive components.

For screen flows that are configured to run on API versions 57.0 and 58.0, on the Process Automation Settings page, select **Enable Reactive Components for Screen Flows running API Version 57.0 and 58.0**. Add components to your screen, and save and run your flows as usual.

The Enable Reactive Components for Screen Flows running API Version 57.0 and 58.0 setting expires in Winter '25. Before that release, upgrade your flows to run on API version 59.0 or later to take advantage of reactive components.

IN THIS SECTION:

Build Screen Flows with Reactive Global Variables

Save time by referencing global variables in reactive formulas on flow screens. And use custom labels in reactive formulas to display translatable text to your users. For example, if you create a custom setting called DiscountPercentage, which specifies org, profile, and user discount percentages, you can reference the variable in reactive formulas across a screen flow. The screen flow applies the correct discount value for the user running the flow and recalculates the value as the user makes changes. Previously, reactive formulas didn't support global variables.

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

Build Screen Flows with Reactive Selections

Use choice components to respond to user selections elsewhere on the same screen. For example, if you have a flow screen that lists opportunities in a Data Table, you can include a reactive Choice Lookup component that specifies an opportunity stage. As the user selects and deselects opportunities, the value of the Choice Lookup component changes to reflect the selected opportunity's stage. Or let's say you have a flow screen used for returning merchandise. Create a Picklist component with reasons for the return such as *`Don't Want`*, and add a Radio Buttons component to automatically select how the customer funds are returned, for example, *`Store Credit`*.

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

Use More Formula Functions in Reactive Screens

If your flows run on API version 59.0 or later, you can now configure a flow screen component to perform real-time logic with the SUBSTITUTE, ADDMONTHS, and ^ formula functions. When the flow detects a change to a value referenced in the formula, it immediately recalculates and updates the value of the corresponding screen component. Previously, these formulas didn't react to changes elsewhere in the flow until the user navigated to a different screen.

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

React to Changes on the Same Screen Using Display Text Components (Beta)

Configure a Display Text component to react to changes in other components on the same screen. For example, you have a Currency component, where a user enters the wholesale cost of an item, and a Display Text component that shows the retail price of the item, which is three times the wholesale price. Each time the user updates the wholesale cost, the flow updates the displayed retail cost.

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

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at View Agreements.

How: In Setup, on the Process Automation Settings page, select **Opt In to Reactive Display Text Beta**. Then, add the Display Text output component to your screen, and configure it to react to changes in other components on the same screen. Save and run your flow as usual.

If you configure a Date, Date & Time, Currency, or Number field in a Display Text output component to respond to changes on the same screen, the flow renders those fields differently than when responding to changes on other screens. For example, the flow renders currency values without a currency sign.

Reactive Components Update the First Time a Screen Loads

A flow now updates the value of a field when the screen loads if the field is configured to react to changes in another field on the same screen. If you navigate to a previous or later screen and then return to the current screen, the flow doesn't update the reactive components again. Previously, fields didn't update unless the user performed an additional action, such as changing a value in a field. This change applies only to flows that are running on API version 59.0 or later.

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

How: For example, if you set default values for two fields and you use a formula to add those values in a third field, the flow calculates the third field when the screen loads. Or, if a custom Lightning web component (LWC) on a screen includes a recordId input, and the recordId is set in another component on the same screen, the flow updates the recordId in the LWC when the screen loads.

Inform Screen Reader Users of Reactive Changes on a Flow Screen

Upgrade your flows to run on API version 59.0 or later to let screen reader users know when flow screen components change due to their actions on other components on the same screen. For example, if a user changes a field on a screen that results in a component on the screen becoming visible, the screen reader announces, "Due to your recent changes, the content on the screen has changed."

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

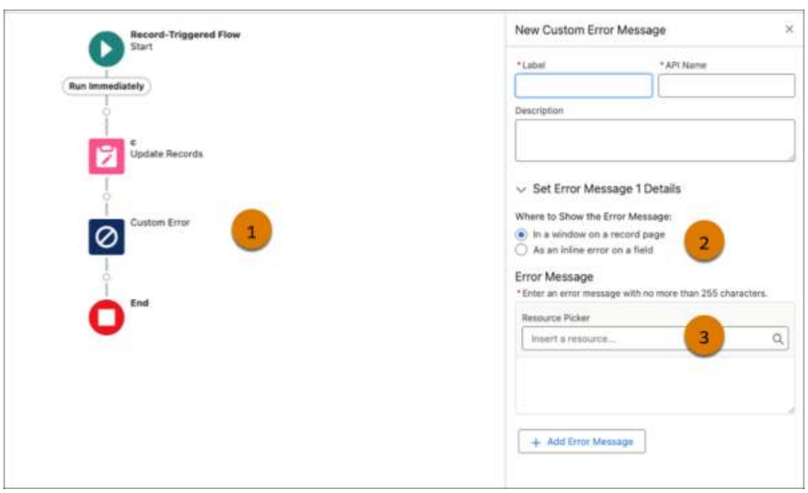
Create Custom Error Messages in Record-Triggered Flows

Use the new Custom Error Message element to create targeted error messages for your end users to explain what went wrong or how to correct it. The error messages display in a window on the overall record page or as an inline error on a specific field. The associated record change is rolled back. Error messages can be created for before-save and after-save flows. We delivered this feature thanks to your ideas on IdeaExchange.

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

Why: When a user performs an action like deleting a record that triggers a flow, sometimes the flow runs into an error. Before, when the flow failed, it wasn't possible to display a specific error message to the user. Now you can inform the user exactly what caused their operation to fail, so they can fix the problem and try again.

How: Add a Custom Error Message element (1), choose where to display the error message (2), and enter the error message text (3).

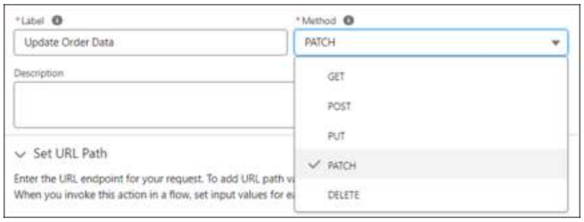


Send Salesforce Data to an External Server Without Code via HTTP Callout (Generally Available)

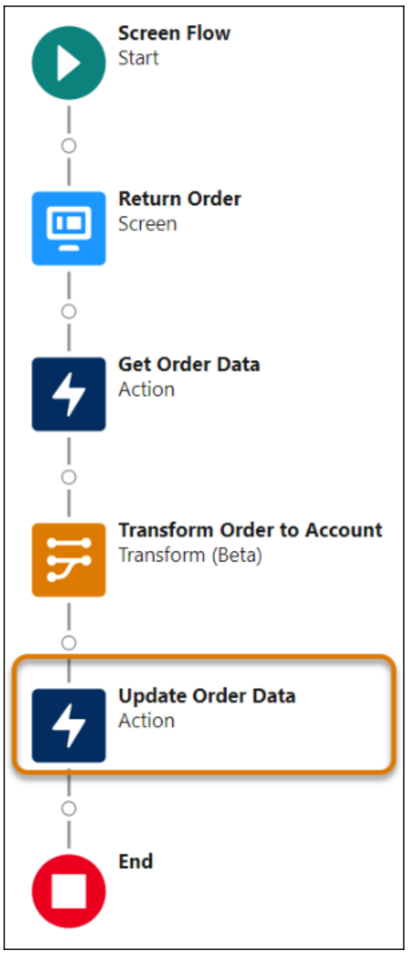
If you can't GET enough with HTTP Callout, now you can use the POST method to send Salesforce data to an external server in Flow Builder. This feature, now generally available, includes some changes since the Summer '23 release. More easily integrate external data with the new PUT, PATCH, and DELETE methods. Give more context about HTTP callout parameters, validate JSON samples faster, and get more information about the external service registration with more organized sections of parameters.

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

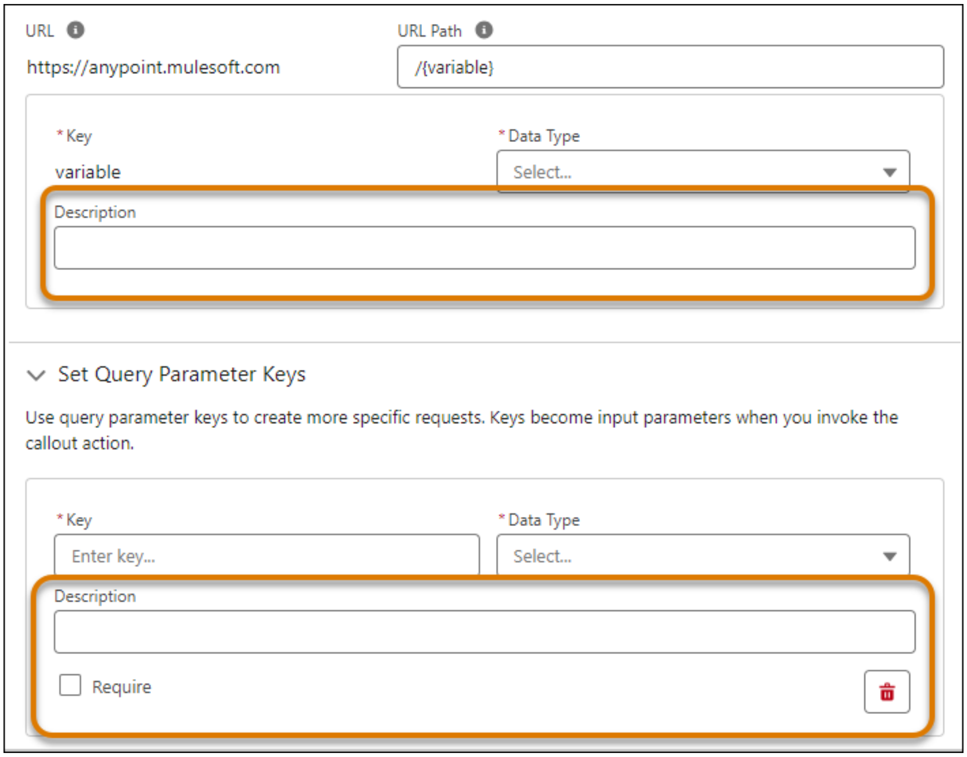
How: Now you can integrate data in other ways, like using the PATCH method to update records in an external system. Previously, you used the POST method to create data in a system that's outside Salesforce.



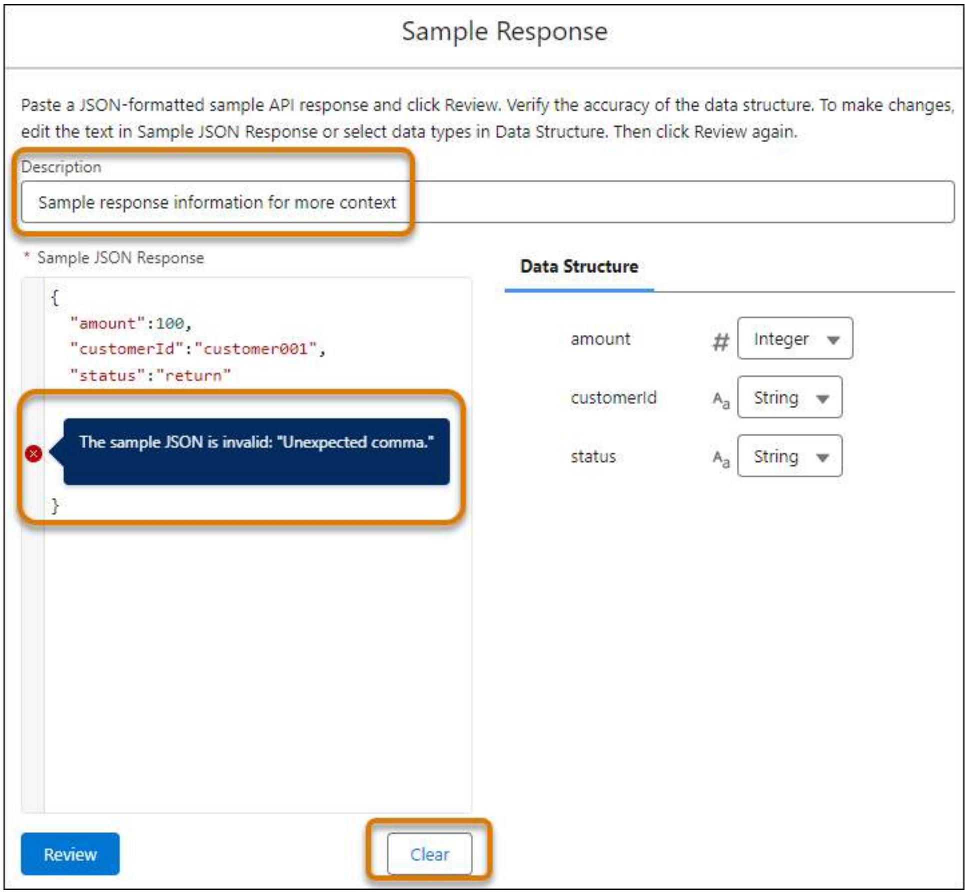
For example, a sales agent starts a screen flow to return an order for store credit. The agent's customer has an account in Salesforce, and the customer's order data is stored in a system outside Salesforce.



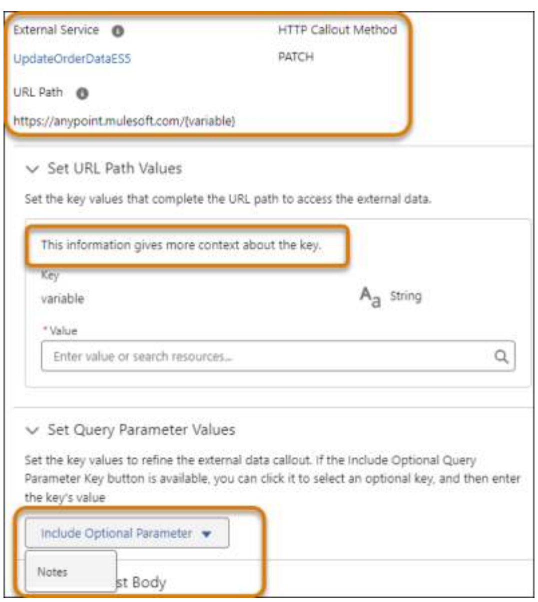
With the improved HTTP Callout experience, you get new Description fields, so you can explain each key for the URL path and query parameters. And delete keys quickly with a new button.



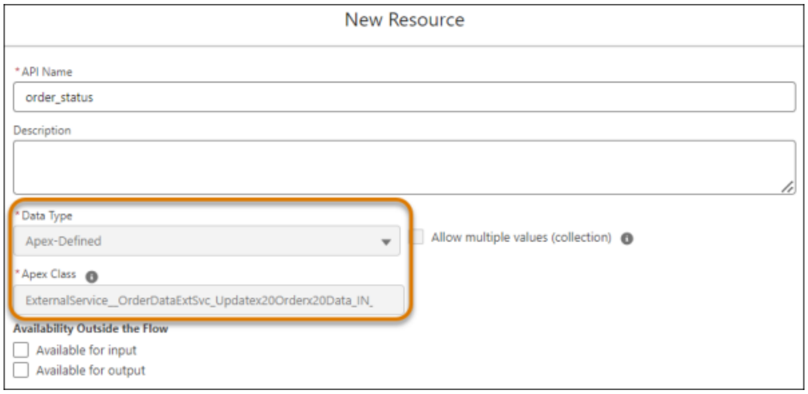
The new Description field also shows on the enhanced Sample Response and Sample Request pages. Validate JSON samples faster with formatted JSON samples, in-line error messages, and the Clear button, which you use to clear the sample on the page. You also get an inferred data structure that matches the hierarchical order of your sample JSON.



After you create the HTTP callout action, the provided descriptions show for each key. You see the full URL path to the external API source and a link to the External Service page in Setup. If you're unfamiliar with the HTTP callout action, you can view the HTTP method that it uses. To include optional query parameters, you can click a parameter key. The new experience also organizes the values for the URL path, query parameters, and request body into sections.



When you create a resource for the request body, you get the values set for the data type and Apex class automatically. Previously, you selected the data type and navigated a long list of Apex classes.



In Flow Builder, add the Action element, then click **Create HTTP Callout**.

SEE ALSO:

Transform Your Data in Flows (Beta)

Edit POST, PUT, PATCH, and DELETE in HTTP Callout

Salesforce Help: HTTP Callout (can be outdated or unavailable during release preview)

Transform Your Data in Flows (Beta)

Transform collections of data between flow resources with the new Transform element in Flow Builder. Combined with the Action element that makes an HTTP callout, you can build a flow that fully integrates data outside Salesforce with no code. Previously, you built a flow that included the Loop element and the Assignment element. Now you can do it all with the Transform element when transforming data in screen flows, autolaunched flows with no triggers, and record-triggered flows.

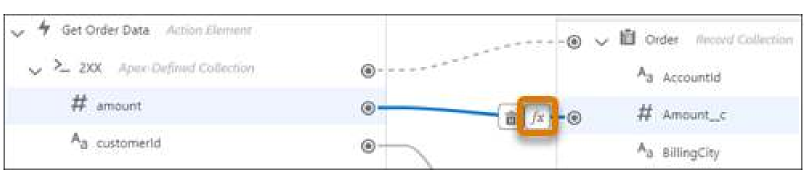
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Here's an example screen flow for a sales agent who returns two orders for store credit. The agent's customer has an account in Salesforce. The customer's order data is stored in a system outside Salesforce. To update the Order record in Salesforce, the flow gets the latest order data from the external system and transforms the data, so the flow can save the changes in Salesforce.

The Transform element maps the amount, customerId, and status fields from the source data to the fields for the target data. Based on the mappings, the Transform element automatically creates a dotted line to identify the collections that contain the mapped fields, so you can view the identified collections in both resource data structures more easily. An item in a source collection must be mapped to an item in a target collection, where both collections are at the same hierarchical location in their respective resource. For example, the 2XX collection and the Order collection are the first collections in their respective resources. The source data shows only one resource.

The mapping between the source data's amount field and the target data's Amount__c field uses a formula to transform the data.



The formula subtracts a fixed amount from the source data's amount field for a restocking fee. The result of the formula is the transformed value for the target data's Amount__c field. The formula shows the new merge field syntax, where [$EachItem] represents each item in a collection. In this example, the merge field references a collection of 2XX, and each 2XX item has an amount field. For each amount field, the formula subtracts 5. A formula expression must reference the source data.

Note: A source or target data field can reference up to 2 collections, for example: {!Orders[$EachItem].Customers[$EachItem].Name}

Next in the flow, the Update Records element saves the changes to the database. And finally, the Action element makes another HTTP callout to update the order status in the external system.

When debugging the Transform element in an autolaunched flow with no trigger or a record-triggered flow, you can now work with the source and target data in a rich and interactive format.

SEE ALSO:

Send Salesforce Data to an External Server Without Code via HTTP Callout (Generally Available)

Salesforce Help: Transform Data in a Flow (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Flow Element: Transform (Beta) (can be outdated or unavailable during release preview)

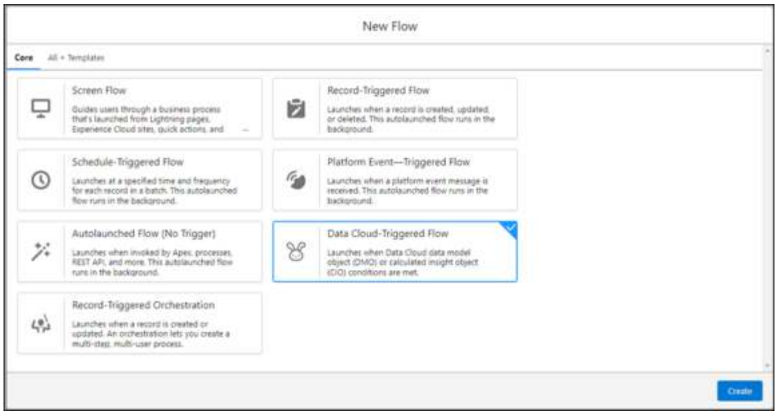
Create Autolaunched Flows Based on Data Changes in Data Cloud

You can now start a Data Cloud-Triggered Flow based on changes in a data model object or calculated insight object. For example, you can update a Unified Individual's loyalty status based on changes to their loyalty balance.

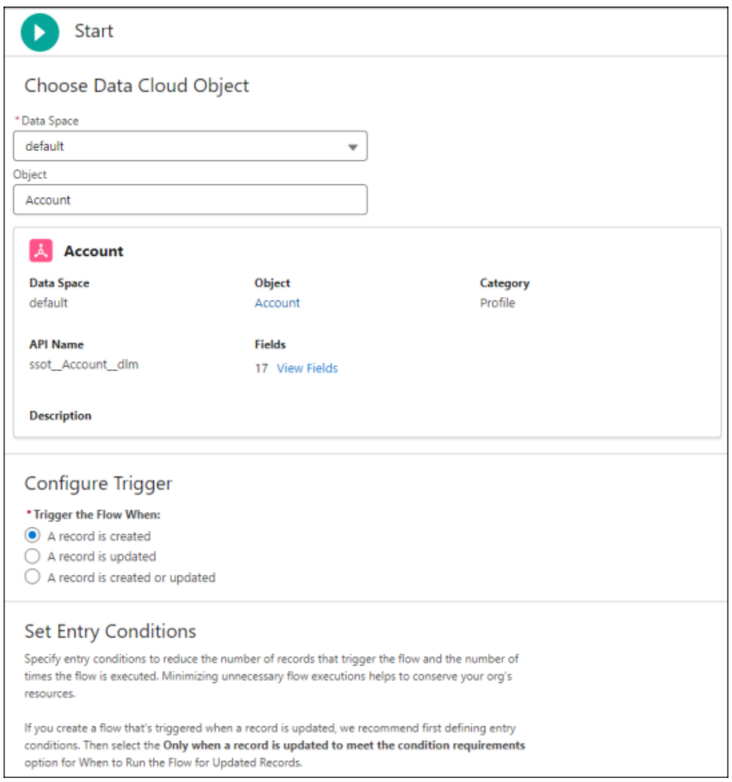
Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

Who: To use Data Cloud objects, users need Read object permissions for the data model object and Manage Flows permissions.

How: From Setup, in the Quick Find box, enter `Flow`, and then select **Flows**. Click **New Flow**, and then select **Data Cloud-Triggered Flow**.



In the flow's Start element, select the data space, the object, and define the conditions that trigger the flow.



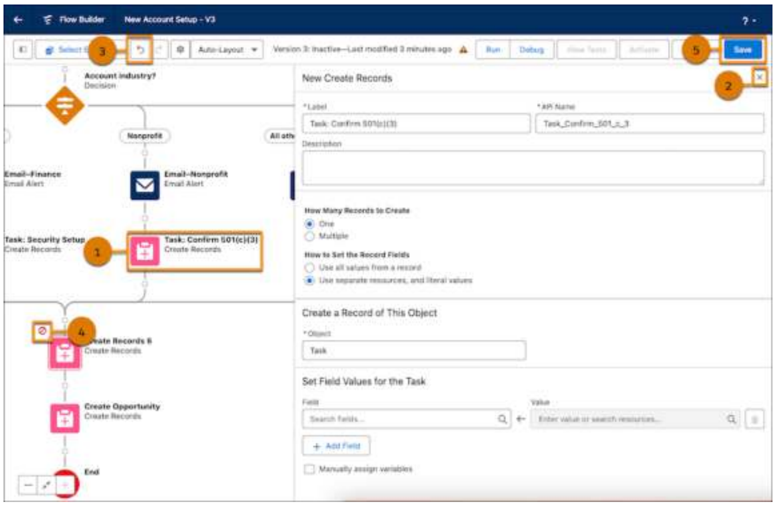
Save the Progress of Your Flow as You Build

Configure flows faster by saving before some elements are fully configured. You can save flows without fully configuring the Start elements in record-triggered flows and Create Records elements in all flows. Errors that previously prevented saving are now just warnings. To facilitate this change, some element properties windows now slide open next to the flow in the canvas so that you can see and interact with your flow while you configure the element. Previously, all element properties windows blocked the view of the flow while open. You can also undo individual changes with the undo button, which replaces the cancel button functionality in the element properties.

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

Why: With this update, Flow Builder is taking its first steps to support saving a draft of a flow at any point in the building process. You avoid losing work or having to resolve errors before saving. Field changes can be performed individually rather than in bulk.

How: In Flow Builder, open a Start, Create Records, Delete Records, Get Records, Update Records, or Pause element. Or edit an existing Subflow element. Reposition the flow by clicking and dragging the canvas. Also, see the element you're working on in the context of the flow (1). To keep your changes, hide the window, and return to the canvas, click ✕ (2). To undo changes one at a time, click ↶ (3). Identify elements that haven't been fully configured (4). Save your work before fully configuring Start elements in record-triggered flows and Create Records elements (5). Move from one updated element to another without completing the element's configuration.



Screen Flow Components Retain Values After State Changes

Screen flows now retain values when a user resumes a paused flow, experiences an input validation error, or returns to an earlier screen. Previously, if you didn't provide a default value when you configured the Name, Address, Data Table, Email, or other components, the flow removed user-specified values when these events occurred. This change applies only to flows that are running on API version 59.0 or later.

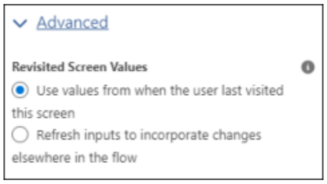
Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Refresh Values Between Screens for More Components

You can now refresh the values of choice, Date, Date & Time, Number, Currency, Text, and Long Text Area components when a user navigates to a previous screen and then forward again. For example, a user enters the cost of three services on the first screen. When the user navigates to the next screen, the screen flow displays the total cost. If the user returns to the first screen and changes a value, you can refresh the total cost on the next screen or leave it unchanged. However, if a user navigates to a previous or later screen and then returns to the current screen a second time, the flow doesn't update the reactive components again.

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

How: Drag a component to a screen. In the component's properties pane, under Advanced, select an option for Revisited Screen Values.

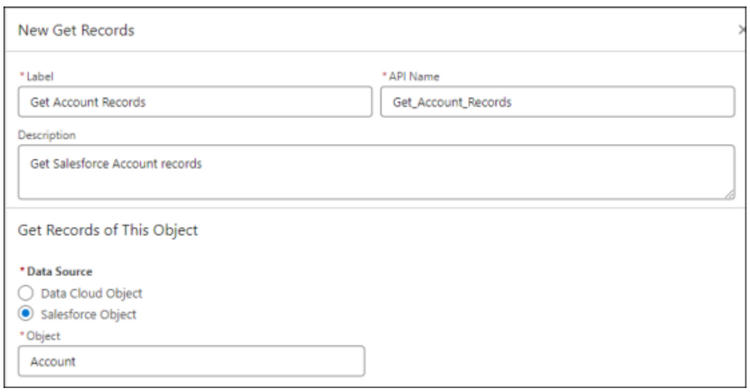


Get Data Cloud Records More Easily in Flow Builder

Salesforce objects and Data Cloud objects are now organized into separate sections in Flow Builder. When you select a Data Cloud object, an object card provides more details.

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

How: In the Get Records element, select whether to get records from a Data Cloud object or a Salesforce object, and then select the object.



Find Flow Resources More Easily in Create Records Elements

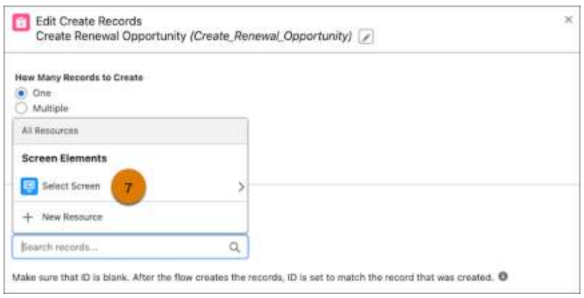
Now it's easier to find and select a record or record collection in Create Records elements in Auto-Layout. With this update, Flow Builder takes the first step toward an improved resource selection experience.

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

How: In a Create Records element, select **Use all values from a record**. Then, click in the Record or Record Collection field. Identify where you are in your resource selection with a new clickable breadcrumb path (1). Recognize resource types quickly with more intuitive icons (2), and create a resource faster with the New Resource option that's been moved to always show in the footer of the menu (3). Get helpful information about a resource without leaving the menu by hovering over the resource, then hovering over (4).

Easily identify menu items with their user-friendly labels (5) and descriptions (6).

Find screen components and their outputs faster by going to the screen where they appear, instead of searching the list of all screen components (7).



Use Wait Elements in More Types of Flows

The Wait for Amount of Time element and the Wait Until Date element are now available in schedule-triggered flows, autolaunched flows, and orchestrations. Previously, these wait elements were available only for journeys.

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

Advanced Pause Element Is Now Named Wait for Conditions

Advanced Pause has been renamed to Wait for Conditions so that all wait elements have similar terminology. The functionality of the element is unchanged.

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

Flow Trigger Explorer

Filter through your record-triggered flows in Flow Trigger Explorer.

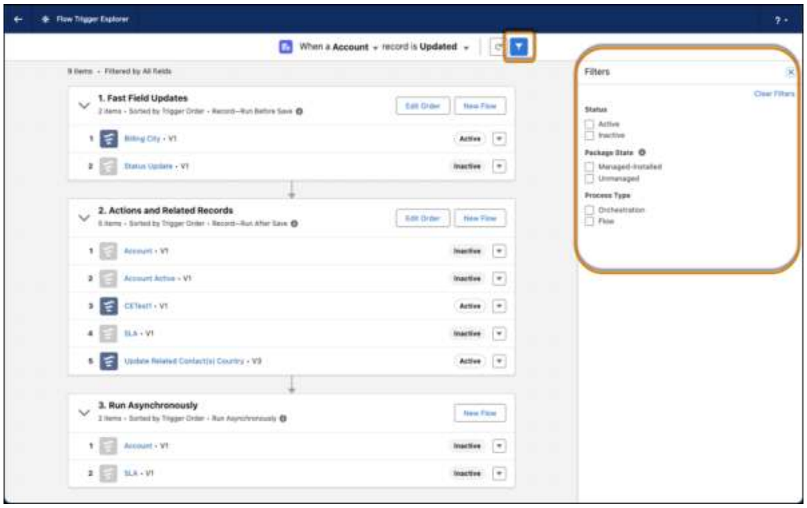
IN THIS SECTION:

Use Filters to Find Record-Triggered Flows Quickly

Use filters to narrow your results when viewing record-triggered flows in Flow Trigger Explorer. You can filter your results by status, package state, or process type.

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

How: From Setup, on the Flows page, click **Flow Trigger Explorer**. Select an object, and then select created, updated, or deleted. Click the filter icon, and select your filters.



Flow Runtime

Versioned updates are available for flows and processes that are configured to run on API version 59.0.

IN THIS SECTION:

Flow and Process Run-Time Changes in API Version 59.0

These updates affect only flows and processes that are configured to run on API version 59.0 or later.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: With versioned updates you can test and adopt run-time behavior changes for individual flows and processes at your convenience. To change the run-time API version of a flow, open it in Flow Builder and edit the flow version properties. To change the run-time API version of a process, open it in Process Builder and edit its properties.

Restrict user access to run all flows

This versioned update enables the Restrict User Access to Run Flows release update for flows that run in API version 59.0. After the release update is enforced, the versioned update is enforced for all flows regardless of their run-time API version. For more information, see Restrict User Access to Run Flows (Release Update).

Get More Accurate Dates

This versioned update changes the way that `DateOnly` values are converted for flows that run in API version 59.0. The GMT time zone is now added directly to the DateOnly value. In API version 58.0 and earlier, DateOnly values added the server local time and then converted it to the GMT time zone, sometimes resulting in an incorrect date.

Build screen flows with reactive components

This versioned update enables you to create interactions between screen components based on user actions.

For screen flows that are configured to run on API version 59.0 and later, you don't need to take any extra steps to access reactive components. For screen flows that are configured to run on API versions 57.0 and 58.0, on the Process Automation Settings page, select **Enable Reactive Components for Screen Flows running API Version 57.0 and 58.0**. The Enable Reactive Components for Screen Flows running API Version 57.0 and 58.0 setting expires in Winter '25. For more information, see Build Screen Flows with Reactive Components (Generally Available).

Lightning web components retain values after state changes

This versioned update enables screen flows that run in API version 59.0 to retain values when a user resumes a paused flow, experiences an input validation error, or returns to an earlier screen. For more information, see Screen Flow Components Retain Values After State Changes.

Flow and Process Management

Convert more workflow rules to flows with the Migrate to Flow tool. Migrate more workflow rules with increased flow limits. Find user permissions more easily in Setup.

IN THIS SECTION:

Migrate Workflow Rules with Pending Time-Based Actions to Flow

Use the updated Migrate to Flow tool to migrate your workflow rules with pending time-based actions. Previously, migrated at-rest time-based actions were inactive and deleted when the associated record changed. Now when the associated record is changed, the actions are migrated to scheduled paths.

Migrate Process Builder Processes with Custom Metadata in Formulas to Flows

Now you can migrate a Process Builder process that uses custom metadata references in formulas with the updated Migrate to Flow tool. After the migration, the custom metadata reference is used in flow formulas but you can't configure it using the resource picker. After migrating a process, you can test the flow in Flow Builder. If everything works as expected, activate the flow and deactivate the process that you converted.

Migrate More Workflow Rules to Flow with Increased Flow Limits

To facilitate migrating Workflow Rules to Flow Builder, some customers who are using Essentials or Professional editions are being granted an increase on the number of active and total flows. The impacted organizations will receive individual communications with more details. If you expected this limit increase and don't see it, contact customer support.

Some Graphs Are No Longer Available in Automation Home

The Total Completed Screen Flows by Name graph, Average Completion Time by Flow Name graph, and the Total Errors by Flow Name graph have been removed from Automation Home.

Migrate Workflow Rules with Pending Time-Based Actions to Flow

Use the updated Migrate to Flow tool to migrate your workflow rules with pending time-based actions. Previously, migrated at-rest time-based actions were inactive and deleted when the associated record changed. Now when the associated record is changed, the actions are migrated to scheduled paths.

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

How: From Setup, in the Quick Find box, enter `Migrate to Flow`, and then select Migrate to Flow. Select the workflow rule that you want to convert into a flow, click **Migrate to Flow**, and select the criteria that you want to migrate.

Migrate Process Builder Processes with Custom Metadata in Formulas to Flows

Now you can migrate a Process Builder process that uses custom metadata references in formulas with the updated Migrate to Flow tool. After the migration, the custom metadata reference is used in flow formulas but you can't configure it using the resource picker. After migrating a process, you can test the flow in Flow Builder. If everything works as expected, activate the flow and deactivate the process that you converted.

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

How: From Setup, in the Quick Find box, enter `Migrate to Flow`, and then select Migrate to Flow. Select the process to convert, click **Migrate to Flow**, and select the criteria that you want to migrate.

Migrate More Workflow Rules to Flow with Increased Flow Limits

To facilitate migrating Workflow Rules to Flow Builder, some customers who are using Essentials or Professional editions are being granted an increase on the number of active and total flows. The impacted organizations will receive individual communications with more details. If you expected this limit increase and don't see it, contact customer support.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials and Professional editions.

Some Graphs Are No Longer Available in Automation Home

The Total Completed Screen Flows by Name graph, Average Completion Time by Flow Name graph, and the Total Errors by Flow Name graph have been removed from Automation Home.

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

Flow Extensions

Invoking Slack actions through Flow can now be done only with action elements.

Flow and Process Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

IN THIS SECTION:

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

After Prevent Guest User from Editing or Deleting Approval Requests is enabled, guest users can approve or reject an approval request. Guest users are no longer able to edit, reassign, or delete approval requests. This update was first made available in Winter '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Spring '24.

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

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

Disable Access to Session IDs in Flows (Release Update)

To improve security, this update prevents flow interviews from resolving the $Api.Session_ID variable at run time. Previously, when a flow screen included the $Api.Session_ID variable, the browser session ID of the user that ran the flow appeared on the page. A user was able to employ the session ID to bypass security controls. This update was first made available in Winter '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)

With this update enabled, the EmailSimple invocable action adheres to organization-wide email address profile settings.

Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)

This update preserves data integrity by rolling back transactions that end in an exception. When you execute an Apex action using REST API, the API doesn't change Salesforce data if that exception occurs. This update, originally named Enforce Rollbacks for Custom Invocable Action Exceptions in Connect REST API, was first made available in Spring '23 and was scheduled to be enforced in Winter '24, but we postponed the enforcement date to Spring '24.

Make Paused Flow Interviews Resume in the Same Context (Release Update)

With this update enabled, paused autolaunched flows resume in the same context as when they were paused. Also, for each flow that runs in API version 57.0 or later, user permission to run the flow is verified before an interview resumes. If your Process Builder processes launch flows that contain Pause elements, we recommend configuring those flows to run in API version 57.0 or later. Otherwise, this update can change the context of resumed interviews. Instead of resuming in system context without sharing, the process-launched flows resume in the context specified in the flow version properties. This update was first available in Winter '21 and enforcement was scheduled for Winter '22. We then postponed the enforcement date to Spring '23 and postponed again to Winter '24.

Restrict User Access to Run Flows (Release Update)

With this update enabled, Salesforce restricts a user's ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites license. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows.

SEE ALSO:

Release Updates

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

After Prevent Guest User from Editing or Deleting Approval Requests is enabled, guest users can approve or reject an approval request. Guest users are no longer able to edit, reassign, or delete approval requests. This update was first made available in Winter '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Spring '24.

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

When: Salesforce enforces this update in Spring '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: To apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Prevent Guest User from Editing or Deleting Approval Requests, follow the testing and activation steps.

SEE ALSO:

Release Updates

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

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

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

When: Salesforce enforces this update in Summer '25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: To apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Evaluate Criteria Based on Original Record Values in Process Builder, follow the testing and activation steps.

If you have a process with the **Do you want to execute the actions only when specified changes are made to the record?** option selected, or it uses the `ISCHANGED()` function in your criteria, this update can cause the process to behave differently.

SEE ALSO:

Release Updates

Disable Access to Session IDs in Flows (Release Update)

To improve security, this update prevents flow interviews from resolving the $Api.Session_ID variable at run time. Previously, when a flow screen included the $Api.Session_ID variable, the browser session ID of the user that ran the flow appeared on the page. A user was able to employ the session ID to bypass security controls. This update was first made available in Winter '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

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

When: Salesforce enforces this update in Winter '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: Before you apply this update, remove all dependencies on the $Api.Session_ID variable from your flows. Then, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. To get the Disable Access to Browser Session IDs in Flows release update, follow the testing and activation steps.

SEE ALSO:

Release Updates

Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)

With this update enabled, the EmailSimple invocable action adheres to organization-wide email address profile settings.

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

When: Salesforce enforces this update in Spring '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: Before you apply this update, review your EmailSimple invocable actions and ensure that they don't generate exceptions when executed. Then, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. To get the Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings release update, follow the testing and activation steps.

SEE ALSO:

Release Updates

Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)

This update preserves data integrity by rolling back transactions that end in an exception. When you execute an Apex action using REST API, the API doesn't change Salesforce data if that exception occurs. This update, originally named Enforce Rollbacks for Custom Invocable Action Exceptions in Connect REST API, was first made available in Spring '23 and was scheduled to be enforced in Winter '24, but we postponed the enforcement date to Spring '24.

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

When: Salesforce enforces this update in Spring '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: Before you apply this update, review your Apex-defined invocable actions and ensure that they don't generate exceptions when executed. If the output isn't void, ensure that inputs and outputs match on both the size and order. Then, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. To get the Enforce Rollback for Apex Action Exceptions in REST API release update, follow the testing and activation steps.

SEE ALSO:

Release Updates

Make Paused Flow Interviews Resume in the Same Context (Release Update)

With this update enabled, paused autolaunched flows resume in the same context as when they were paused. Also, for each flow that runs in API version 57.0 or later, user permission to run the flow is verified before an interview resumes. If your Process Builder processes launch flows that contain Pause elements, we recommend configuring those flows to run in API version 57.0 or later. Otherwise, this update can change the context of resumed interviews. Instead of resuming in system context without sharing, the process-launched flows resume in the context specified in the flow version properties. This update was first available in Winter '21 and enforcement was scheduled for Winter '22. We then postponed the enforcement date to Spring '23 and postponed again to Winter '24.

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

When: Salesforce enforces this update in Winter '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: When an autolaunched flow resumes after a time-based resume event, the flow runs in system context without sharing. The flow resumes this way regardless of the context and user access that it had before it was paused.

With this update enabled, the flow resumes in the same context as when it was paused. Also, if the flow runs in API version 57.0 or later, user access to the flow is verified before resuming it.

For example, a user clicks a custom button to run an autolaunched flow, and that user doesn't have permission to edit Record A. At first, the flow runs in user context. But after it's paused and resumed, the flow runs in system context and can edit Record A. Enabling this update prevents such flows from editing records that the running user doesn't have permission to edit.

If the user loses access to the flow after the interview is paused, the interview fails to resume if the flow runs in API version 57.0 or later.

This update affects only autolaunched flows with Pause elements that are configured to resume at a specific time.

This update improves security in Salesforce by preventing you from unintentionally allowing users to create or edit records that they don't have access to.

For flows that run in API version 57.0 or later, the update prevents you from unintentionally allowing users to run flows that they no longer have access to.

How: With this update enabled, autolaunched flow interviews can fail if they're paused and then resumed after a time-based resume event. To avoid failed flow interviews, ensure that running users have the permissions required to execute all flow elements after each

Pause element. Alternatively, you can configure autolaunched flows to always run in system context. For flows that run in API version 57.0 or later, avoid removing a user's access to the flows until the user's interviews finish.

With this update enabled, flows that are launched by Process Builder processes can resume in a different context. To continue to resume them in system context without sharing, configure the flows to run in API version 57.0 or later. Otherwise, process-launched flows resume in the context specified in the flow version properties.

With this update enabled, autolaunched flow interviews resume in the same context as when they were paused. Also, each interview running in API version 57.0 or later can resume only if the running user has access to the flow at the resume time.

To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Make Paused Flow Interviews Resume in the Same Context, follow the testing and activation steps.

SEE ALSO:

Release Updates

Restrict User Access to Run Flows (Release Update)

With this update enabled, Salesforce restricts a user's ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites license. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce enforces this update in Winter '25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: Previously, in some cases, all users could run all flows without profiles or permission sets. Enabling this update restricts user access to users who are granted the profile or permission set to run the flow.

How: To apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Restrict User Access to Run Flows, follow the testing and activation steps.

After you enable Restrict User Access to Run Flows, all users must be granted access to run a flow. Add the Manage Flow or the Run Flows permission to a profile or permission set. Or, for more granular control, restrict specific flow access to an available profile.

SEE ALSO:

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

Salesforce Help: How Does Flow Security Work? (can be outdated or unavailable during release preview)

Flow and Process Release Updates

Flow Orchestration

Use up to 3 requirements instead of evaluation flows to control the execution of stages and steps. Add custom fields and custom relationships to Flow Orchestration objects.

IN THIS SECTION:

Control Execution of Orchestration Stages and Steps with Requirements

Each orchestration step uses a selected condition that determines when it can start. And each orchestration stage and interactive orchestration step uses a condition to determine its completion. Previously, when you had complex criteria, you created an evaluation flow to determine when a step can start or a stage or an interactive step can end. Now you can define up to 3 requirements in the Properties panel to control stage and step execution.

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

How: In the Properties panel for the stage, select **When the specified requirements are met, the stage is marked Completed**.

In the Properties panel for the step, select **When the specified requirements are met, the step starts**.

In the Properties panel for the interactive step, select **When the specified requirements are met, the step is marked Completed**.

After selecting the condition, define up to 3 requirements.

Extend Flow Orchestration Objects

Flow Orchestration objects are now available in Object Manager in Setup. Customize Flow Orchestration Run, Flow Orchestration Stage Run, Flow Orchestration Step Run, and Flow Orchestration Work Item objects for your needs by adding custom fields and custom relationships.

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

Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

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

More Easily Find Orchestrations in Setup

Having trouble finding orchestrations in Setup? Now, in the Quick Find box, enter *orch*, and select **Flows**. Orchestrations are shown in the Flows list view.

Pause Background Step Flows for Minutes

Tired of waiting? In addition to pausing a flow for hours, days, or months, you can now use the Wait for Duration element in an asynchronous background step's autolaunched flow to pause the orchestration for minutes.

SEE ALSO:

Use Wait Elements in More Types of Flows

OmniStudio and OmniStudio for Vlocity

Find out about bug fixes, minor updates, and known issues. If you're using the standard objects model, see the OmniStudio release notes and minor release updates. If you're using the custom objects model and have the OmniStudio permission set license, see the OmniStudio for Vlocity release notes.

See Does Your Org Use Custom or Standard Objects? for more information.

IN THIS SECTION:

OmniStudio

Benefit from security enhancements and improved accessibility.

Where: Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

Who: OmniStudio customers who use the standard objects model.

Why:

- Create records for OmniScripts that don't count against the storage limits for standard metadata objects. Existing records still count against storage limits. To create space, manually delete custom objects.
- OmniStudio Lightning web components have several color contrast fixes in the type ahead, Google Maps autocomplete, and OmniScript Knowledge components for low-vision users.
- All packages are on supported versions that reference API version 56.0.

SEE ALSO:

Salesforce Help: OmniStudio Minor Release Updates (can be outdated or unavailable during release preview)

OmniStudio Minor Release Updates

Find out about bug fixes, minor updates, and known issues made in Winter '24 and before Spring '25.

Where: Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where OmniStudio is enabled.

Who: OmniStudio customers who use the standard objects model.

OmniStudio Winter '24 Minor Release Updates

How: For the OmniStudio package links to install minor releases, see OmniStudio Release Summary for Installation and Upgrade.

OmniStudio for Vlocity

Benefit from security enhancements and improved usability for migration and accessibility.

Where: Lightning Experience, Experience Cloud sites, and all versions of the Enterprise, Performance, and Unlimited editions.

Who: Customers on the custom objects (managed package) model who have the OmniStudio permission set license.

Why:

- Vlocity Public Sector Solutions package provides an easier path for migrating from custom to standard Lightning web components.
- All Vlocity packages are on supported versions that reference API version 56.0.
- OmniStudio Lightning web components have several color contrast fixes in the type ahead, Google Maps autocomplete, and OmniScript Knowledge components for low-vision users.

SEE ALSO:

Salesforce Help: OmniStudio Managed Package Releases (can be outdated or unavailable during release preview)

Salesforce for Slack Integrations

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

See the release notes for the latest updates: Salesforce for Slack Integrations Release Notes.

Security, Identity, and Privacy

Enhanced domains are enforced. Help your users move to your new URLs and prepare for the end of some redirections. Multi-factor authentication auto-enablement is in effect for the third phase of orgs. Develop local or 2GP packageable external client apps. Expand your Headless Identity implementation with passwordless login, identity for guest users, and improvements to headless registration. Monitor login IP ranges and tenant license usage details with more metrics. View what instance your tenants are running on. Get to know the new Privacy Center app. Configure external credentials for server-to-server integration using OAuth 2.0 client credentials or JWT authentication protocols. Assign the new Manage Named Credentials permission so that users can modify named credentials and external credentials. And manage group membership changes and insufficient access attempts with the new Group Membership Event and Insufficient Access Event types.

IN THIS SECTION:

Other Security Changes

A new release update limits redirections to other Salesforce orgs. Protect your users by restricting access to their camera and microphone and by expanding clickjack protections.

Salesforce Backup

The Backup and Restore managed package is now called Salesforce Backup. More improvements make it easier to safeguard data from loss and corruption. In version 2.6 you can now export data backups with the click of a button. Improved in-app messaging and documentation help you spot issues that block restoring data directly in the app. In these cases, export backups and then restore data using a data import tool of your choice.

IN THIS SECTION:

Backup and Restore Is Now Salesforce Backup

The Backup and Restore managed package is now renamed Salesforce Backup. All backup and restore functionality remains the same. Product documentation is updated to reflect the new name. During the branding transition, the previous brand name still appears in a few places.

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

Who: This change applies to editions that have the Backup and Restore add-on subscription.

SEE ALSO:

Salesforce Help: Protect Your Data with Salesforce Backup (can be outdated or unavailable during release preview)

Back Up and Restore More Data

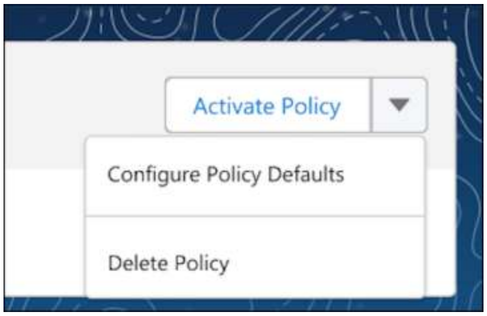
Version 2.7 of the Salesforce Backup managed package now supports share object data so that you can roll back share settings as needed. You can also back up formula field values for easy access to important historical calculated values. Improved global policy controls help you apply policy-level defaults to all of the objects in your policy with a single click.

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

Who: This change applies to editions that have the Backup and Restore add-on subscription.

How: You can enable formula field backups on an object-by-object basis. On the Backup page, select any object and then turn on **Formula Fields in Backups**. After selecting related records for backup, enable the object in your policy.

The new global policy settings menu gives you an easy way to add formula field backups to all objects in your policy. Click the arrow next to the policy activation button, and select **Configure Policy Settings**. Then select **Formula Field Backups**, and confirm your change.



SEE ALSO:

Salesforce Help: Protect Your Data with Salesforce Backup (can be outdated or unavailable during release preview)

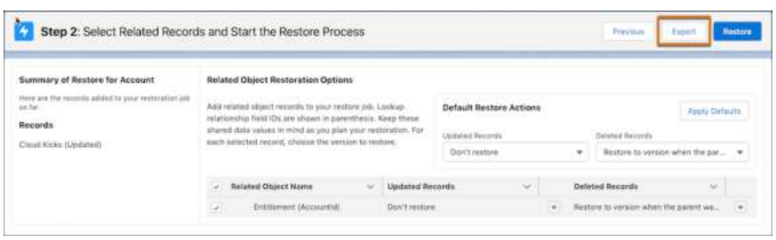
Export Data from a Backup

Some schema changes, such as a new or removed field, prevent complete data restoration jobs. If you run into problems restoring records in the Salesforce Backup app, you can now download your backup and import the data using another tool. Think of it as a backup method for restoring data. New icons on the Restore page indicate which records you can only restore from a download.

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

Who: This change applies to editions that have the Backup and Restore add-on subscription.

How: In the Salesforce Backup app, on the Restore page, select a record and click **Export**. A file downloads to your Documents folder. You can then import the data with a tool like Data Loader or Data Import Wizard.



SEE ALSO:

Salesforce Help: Restore Data from a Backup (can be outdated or unavailable during release preview)

Domains

Enhanced domains are enforced. Help your users move to your new URLs and prepare for the end of some redirections. Get more help to set up custom domains, and partitioned domains are available in more orgs.

IN THIS SECTION:

Deploy Enhanced Domains (Release Update)

To comply with the latest browser and security standards, enable and deploy enhanced domains. With enhanced domains, your company-specific My Domain name is included in the URLs that Salesforce hosts for your org. Consistent domain formats improve the user experience and standardize URLs for use in custom code and API calls. Also, with enhanced domains, your users can access Salesforce from browsers that block third-party cookies. Because this update affects application and login URLs, including Experience Cloud sites, Salesforce Sites, and Visualforce pages, if you haven't deployed enhanced domains, we recommend that you do so before your org gets this release. This update, originally named Enable Enhanced Domains, was first available in Summer '21 and is enforced in Winter '24.

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

When: This update, originally named Enable Enhanced Domains, was first available in Summer '21 and is enforced in Winter '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: Before you update production, we recommend testing all My Domain changes in a sandbox.

To complete this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Deploy Enhanced Domains, follow the testing and activation steps.

SEE ALSO:

Salesforce Help: Enhanced Domains (can be outdated or unavailable during release preview)

Salesforce Help: Plan for a My Domain Change (can be outdated or unavailable during release preview)

Trailblazer Community Group: My Domain and Enhanced Domains

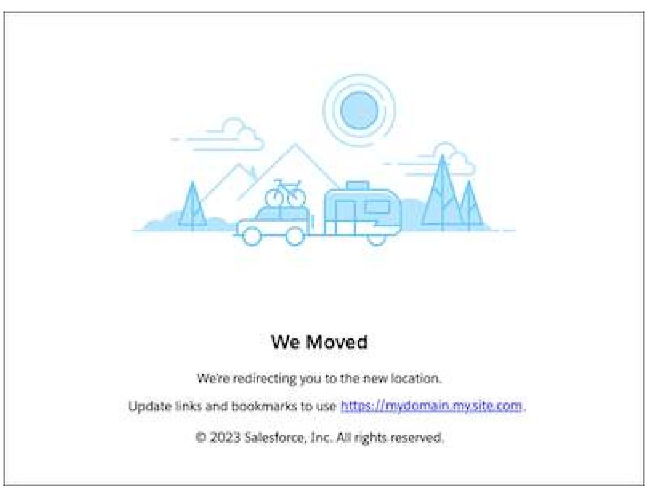
Release Updates

Notify Users During My Domain Redirections

After you change your My Domain, including enabling enhanced domains, users are redirected to your new URLs by default. To help your users update their outdated bookmarks and links, enable a message to let them know about the new URL before they're redirected.

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

Why: Here's an example message that's displayed before a user is redirected from an old *.force.com site URL.



How: From Setup, in the Quick Find box, enter `My Domain`, and then select **My Domain**. In the Redirections section, click **Edit**. Then select **Notify users before redirecting to the current My Domain URL** or **Notify users before redirecting to the current site URL**. These options are only available when the previous URLs exist and the corresponding redirections are enabled.

SEE ALSO:

Salesforce Help: Manage My Domain Redirections (can be outdated or unavailable during release preview)

Prepare for the End of Some My Domain Redirections

After enhanced domains are deployed, Salesforce temporarily redirects your previous non-enhanced hostnames, including your *.force.com site hostnames. If your org was created before October 2020, Salesforce also temporarily redirects some hostnames that contain your Salesforce instance but not your My Domain name. Review the affected hostnames and how you can prepare to disable the redirections before Salesforce disables them.

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

When: Salesforce stops the redirections for these hostnames in Winter '25. The deployment of that release is scheduled to start in August 2024 for sandboxes and in September 2024 for production.

SEE ALSO:

Salesforce Help: Prepare for the End of Redirections for Non-Enhanced Domains (can be outdated or unavailable during release preview)

Salesforce Help: Enhanced Domains Timeline (can be outdated or unavailable during release preview)

Deploy Enhanced Domains (Release Update)

Manage My Domain Redirections

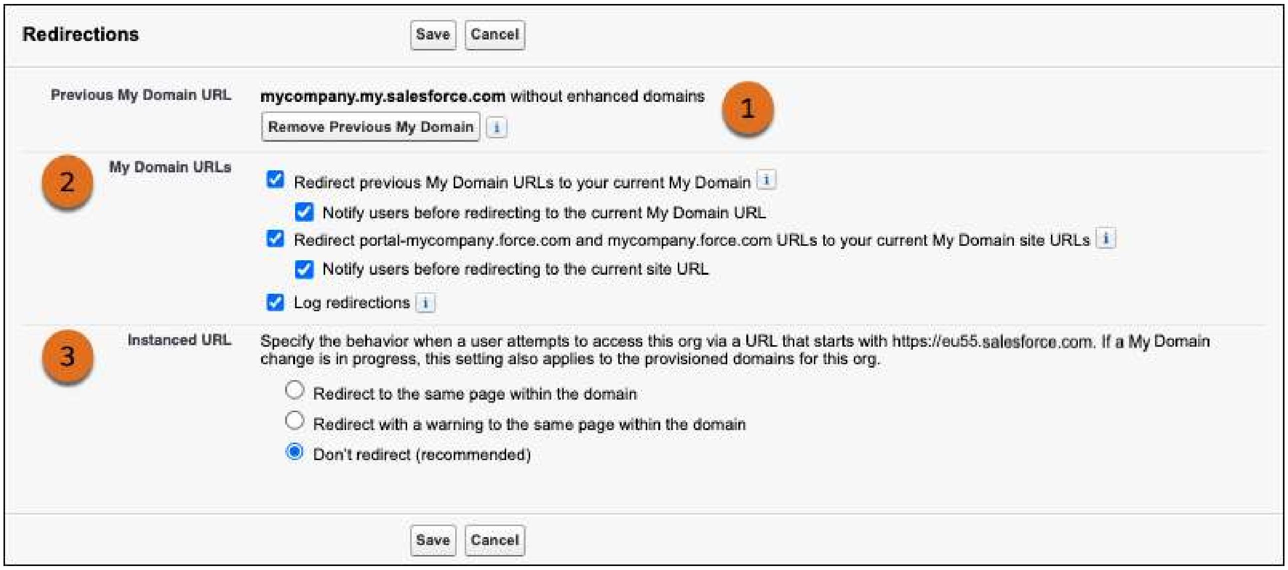
Control My Domain settings for redirections from your outdated and instanced-based URLs from one section on the My Domain Setup page. Also, the Routing and Policies sections are combined for simplicity.

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

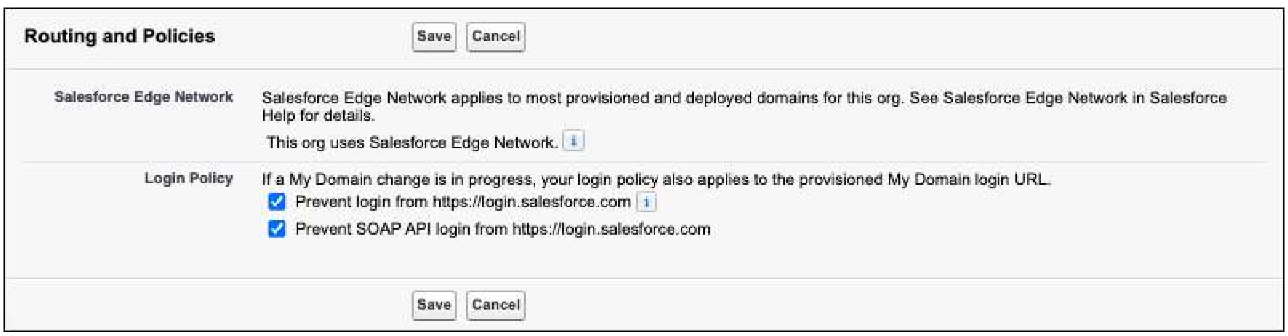
Why: Here's the new Redirections section of the My Domain Setup page.

Before this change, you managed your previous My Domain URL (1) and redirection settings for your My Domain URLs (2) in the Routing section of the My Domain Setup page.

The Instanced URL redirection setting (3) was renamed and moved from the Policies section of the My Domain Setup page. Previously, this setting was named Redirect Policy. To help you understand the impact of this setting, the description now specifies the affected instanced URL, such as https://eu55.salesforce.com.



With this change, you manage the My Domain login policy in the Routing and Policies section of the My Domain Setup page, a combination of the previous separate Routing and Policies sections.



In Government Cloud Plus orgs, this section also includes the option to opt out of the Salesforce CDN for your system-managed *.my.site.com domain.

SEE ALSO:

Salesforce Help: Manage My Domain Redirections (can be outdated or unavailable during release preview)

Salesforce Help: Set the My Domain Login Policy (can be outdated or unavailable during release preview)

Use Partitioned Domains in More Orgs

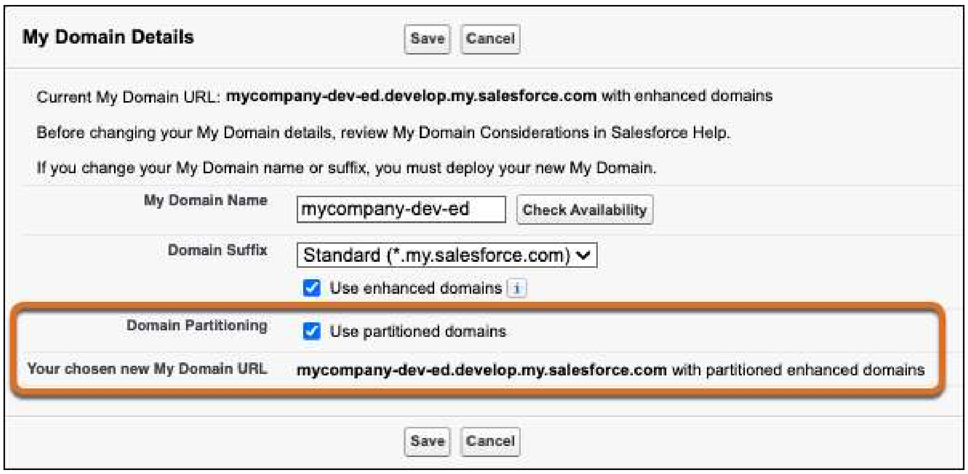
To maximize the availability of your orgs, My Domain uses partitioned domains for new sandboxes, Developer Edition orgs, patch orgs, scratch orgs, and Trailhead Playgrounds. Partitioned domains include a word related to the org type, which allows Salesforce to gradually roll out service delivery changes. This feature is newly available in most Hyperforce orgs, and the patch partition is newly available. Previously, qualifying patch orgs used the develop partition. To ensure continued access to all your orgs, update your allowlists for the new domains. To include your existing org in the Salesforce deployment schedule for that org type, enable and deploy partitioned domains.

Where: This change applies to non-production orgs with enhanced domains in Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. This feature is newly available in Developer Edition orgs, scratch orgs, and Trailhead Playgrounds on Hyperforce without Salesforce Edge Network, excluding the GIA Hyperforce instance. The patch partition is newly available in patch orgs on Hyperforce instances except GIA and in all patch orgs on Salesforce Edge Network. Existing patch orgs that use the develop partition are unaffected by this change. Only the sandbox partition is available in Hyperforce orgs on the GIA instance and in Public Cloud.

When: Partitioned domains are enabled by default in new qualifying orgs. Sandboxes with enhanced domains are always partitioned. For updates about the availability of this feature, join the My Domain and Enhanced Domains group in the Trailblazer Community.

How: To ensure that your users can connect to partitioned domains, update your allowlists.

In existing Developer Edition orgs, patch orgs, scratch orgs, and Trailhead Playgrounds with enhanced domains, you can enable or disable this feature from the My Domain Setup page. When you change the Use partitioned domains option in the My Domain Details section, you can preview your new My Domain login URL at the bottom of the screen.



SEE ALSO:

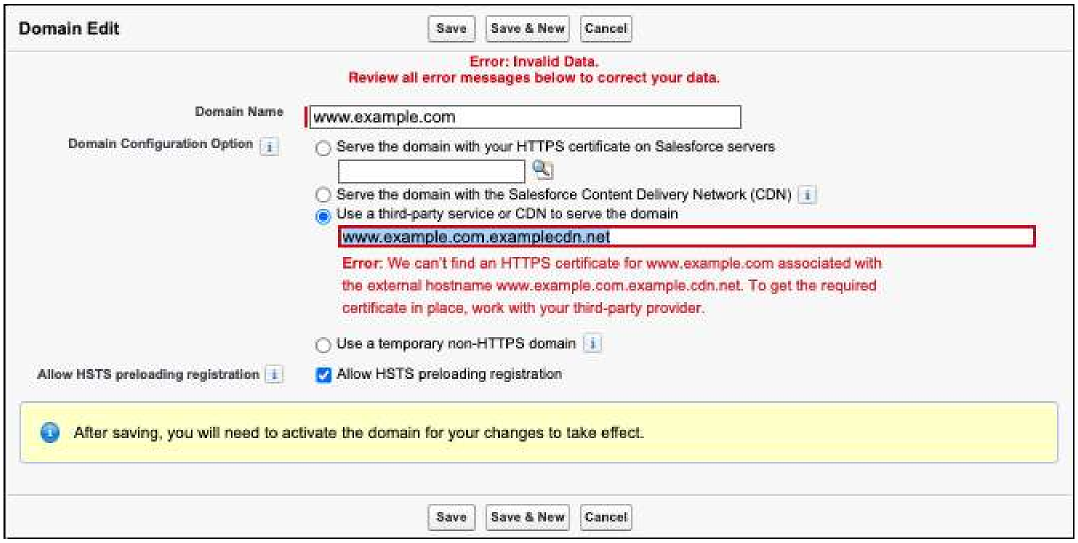
Salesforce Help: Partitioned Domains (can be outdated or unavailable during release preview)

Verify Custom Domain Configuration During Setup

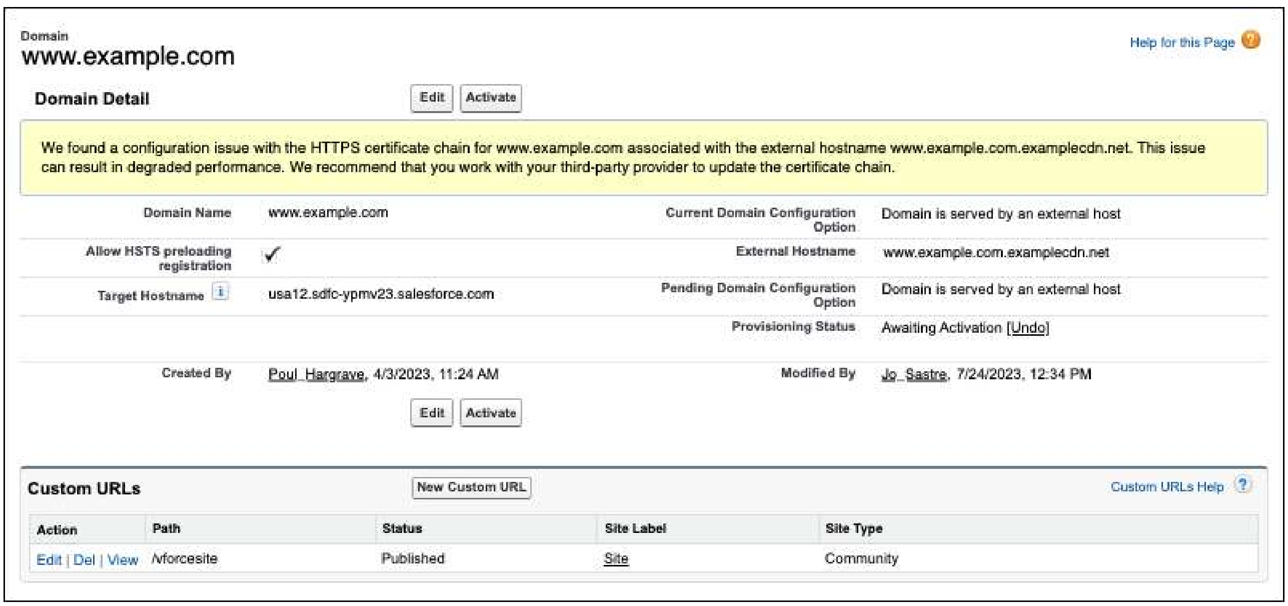
With a custom domain, you can serve your Experience Cloud sites or Salesforce Sites on a domain that you own, such as https://www.example.com. This feature requires configuration outside Salesforce. To help you set up a custom domain with confidence, Salesforce performs more verification checks when you save a custom domain. If those checks uncover an issue, a detailed error message includes the required adjustments in Salesforce, DNS, or your third-party service. You can't save the domain until you resolve issues that prevent the domain from serving your site. For less critical issues, Salesforce directs you to the Domain Detail page to review the related messages.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Custom domains are also available in Professional Edition with Marketing Cloud Account Engagement (Pardot).

Why: For example, when you save a custom domain that uses a third-party server or content delivery network (CDN), Salesforce verifies the HTTPS certificate that your third-party provider serves for your domain. Here's an example of the error message when we can't find that certificate. You can't save the domain until you resolve this issue.



If the verification check uncovers a less critical issue, you see a warning message when you save the domain. Here's an example of the message on the Domain Detail page when Salesforce uncovers an issue with the HTTPS certificate chain.



SEE ALSO:

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

Determine Your Recommended Custom Domain Configuration Option

When you set up a custom domain, you can use the Salesforce content delivery network (CDN), a third-party service or CDN, or your HTTPS certificate. With newly published guidance, you can determine the recommended option for your domain, including when to set up a temporary non-HTTPS domain to reduce downtime. Also, to help you understand the option to use a third-party service or CDN, we updated the corresponding connectivity diagram and instructions.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, and Unlimited editions. Domains that use the Salesforce CDN are also available with Marketing Cloud Account Engagement (Pardot) in Professional Edition.

SEE ALSO:

Salesforce Help: Determine How to Serve Your Custom Domain (can be outdated or unavailable during release preview)

Other Domain Changes

Because HTTPS is required for custom domains, we renamed the HTTPS Option field on the Domain Setup page to Domain Configuration Option. And with the enforcement of enhanced domains, we removed the related options from the My Domain Setup page.

Where: This change applies to Lightning and Salesforce Classic in Professional, Enterprise, Performance, and Unlimited editions. The changes to the My Domain Setup page also apply in Group, Essentials, and Developer editions.

SEE ALSO:

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

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

Identity and Access Management

MFA auto-enablement is in effect for the third phase of orgs. Develop local or 2GP packageable external client apps. Expand your Headless Identity implementation with passwordless login, identity for guest users, and improvements to headless registration. Update U2F security keys to support WebAuthn authentication.

IN THIS SECTION:

MFA Auto-Enablement Continues: Find Out When and How Your Org Is Affected (Release Update)

As of February 1, 2022, Salesforce requires all customers to use multi-factor authentication (MFA) when accessing Salesforce products. To help customers meet this requirement, Salesforce is automatically enabling MFA for production orgs in several phases via the MFA Auto-Enablement Release Update. With Winter '24, MFA is auto-enabled for the third phase of orgs. The final phase in Spring '24 includes all orgs that weren't previously auto-enabled.

Update U2F Security Keys to Support WebAuthn Authentication

To work with Salesforce, U2F security keys must be updated to use WebAuthn authentication. The update process works seamlessly behind the scenes. For new security keys, the update occurs automatically when a user registers it for their Salesforce account. For U2F security keys that were registered prior to Summer '22, users simply need to log in with their key before Winter '24. Doing so automatically updates the key. If a user misses this window, they can still update their key after Winter '24 by re-registering it for their Salesforce account.

SMS Identity Verification Is No Longer Available in Free Salesforce Orgs

One-time passcodes sent via text messages (SMS) are no longer available as an identity verification method in free Salesforce orgs. Mobile number registration, a step users take before they can start receiving SMS one-time passcodes, is also disabled in free orgs. Other identity verification methods are still available, such as Salesforce Authenticator, security keys, and built-in authenticators.

Verify Email Addresses to Send Email Through Salesforce

Salesforce requires that users have a verified email address to continue sending emails through Salesforce, such as sends to contacts or leads. Most users verify their email address as part of the sign-up process. However, some users continue to use email addresses that were added to Salesforce before the current verification process was established. If a user sends an email from an unverified email address, Salesforce rejects this email message and doesn't complete the send. Unverified email addresses can't be used for sends until the user verifies their email address or resets their password.

Create and Distribute External Client Apps

Develop and package external client apps to integrate third-party applications. External client apps are the next generation of connected apps. Don't worry about distribution, because the External Client Apps feature is designed for second-generation (2GP) managed packaging.

Identity Connect 3.0.1.2 Security Patch Is Being Removed

Because Identity Connect 3.0.1.2 isn't supported, the Identity Connect 3.0.1.2 Security Patch is no longer available as of Winter '24. The Implementation Guides for Identity Connect versions 3.0.1.2 and 2.1.0 will be removed at the same time.

Streamline the Login Experience in Headless Apps

Make it easier for your customers and partners to log in to your off-platform apps with the Headless Passwordless Login Flow. Users enter their email address or phone number and receive a one-time password (OTP), which they use to log in. Like other Headless Identity features, this flow gives you a way to authenticate users while maintaining full control of the user experience in your apps.

Understand What Makes Your Users Tick with Guest User Identity

Trace your users' journeys from unknown visitors to fully registered users, and collect valuable insights on the experiences that they prefer. With a new headless flow for guest users, you can build your apps to issue a unique visitor (UVID) when an unknown user first visits your app. If the user logs in or registers, you can pass the UVID into a named user authorization flow. The UVID gives you context for who the user is and how they've interacted with your app, so you can design your apps to remember details like a user's cookie preferences. And with the help of an analytics tool, you can use the UVID to understand what experiences drive guest users to sign up.

Simplify Your Setup with a Headless Registration Handler Template

To make the headless registration setup process easier, you can auto-generate a registration handler Apex class from the Experience Cloud Login & Registration page. When you're ready, customize the default content for your company's needs.

Secure Your Headless Identity Implementation with reCAPTCHA Enterprise

When you configure a Headless Identity flow to require Google reCAPTCHA, you can now use reCAPTCHA Enterprise. Previously, Salesforce supported only reCAPTCHA v2 and v3 for Headless Identity. To reflect this new option, we also updated the text for the reCAPTCHA configuration on the Experience Cloud Login & Registration page.

Customize the Email Template for Headless Registration

Take control of the one-time password email sent to users during headless registration. With a new email template and merge fields, you can quickly tailor the email to match the branding in your off-platform apps.

JSON Web Token (JWT)-Based Access Tokens Are Now Generally Available

To improve compatibility with external systems, enable your connected apps to issue JSON Web Token (JWT)-based access tokens instead of opaque tokens. JWT-based access tokens are now supported for access to Salesforce REST APIs. Unlike opaque access tokens, JWT-based access tokens have a format that your apps can understand. With a transparent format, you can parse and validate tokens on your app instead of calling a Salesforce endpoint.

Improve Authorization Security with the Proof Key for Code Exchange (PKCE) Extension

Enhance security for your orgs, Experience Cloud sites, and off-platform apps by cementing the OAuth 2.0 PKCE extension into your identity implementations. Require PKCE at an org-wide level or for a connected app, so that all authorization code flow variations that don't include the PKCE extension fail. And when you configure authentication providers, automatically enable the PKCE extension with just a single click. Implementing PKCE helps you prevent attacks with stolen authorization codes by protecting an app with parameters that only you and Salesforce have access to.

Enjoy Improved Guidance for Headless Identity and OAuth Settings

To improve the usability of the setup experience for Headless Identity and OAuth settings, we added several labels.

Session Timeout Popup Is Updated

To account for small variations in session timeout, we updated the popup that appears when a user's session is about to end. Previously, the popup told users that they're logged out if they don't click Continue Working within 30 seconds. We changed the text to clarify that this 30-second period is approximate. The actual amount of time can change based on the page or the user's activity, so it's not always exactly 30 seconds.

Updated Hover Text Label for Client Credentials Flow Is Available in Japanese

In Summer '23, we removed an inaccurate statement in the hover text for the client credentials flow execution user on the Manage Connected Apps page. The incorrect text stated that the execution user must have the API Only User permission. Due to major planned style changes in Japanese, the Japanese translation was delayed at the time, but this change is now available in all supported languages.

Mutual Authentication Is Now Enforced For API Login Requests

For users with the Enforce SSL/TLS Mutual Authentication user permission, we now enforce mutual authentication for API login requests that obtain new user sessions. Previously, we enforced mutual authentication only on API requests after the user logged in. This change applies to both the SOAP API login action and the OAuth 2.0 username-password flow. For better security, we always recommend that you don't use the OAuth username-password flow.

MFA Auto-Enablement Continues: Find Out When and How Your Org Is Affected (Release Update)

As of February 1, 2022, Salesforce requires all customers to use multi-factor authentication (MFA) when accessing Salesforce products. To help customers meet this requirement, Salesforce is automatically enabling MFA for production orgs in several phases via the MFA Auto-Enablement Release Update. With Winter '24, MFA is auto-enabled for the third phase of orgs. The final phase in Spring '24 includes all orgs that weren't previously auto-enabled.

Where: This change applies to Lightning Experience, Salesforce Classic, and all Salesforce mobile apps in all editions.

When: To know when your production org is affected, monitor the Release Update node in Setup for the MFA Auto-Enablement Release Update.

- **Phase 3:** The release update for this phase was made available in Summer '23 and goes into effect with Winter '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab. The MFA release update usually takes effect when your org is updated to Winter '24. In some cases, a delay of several hours to a few days is possible before MFA is auto-enabled for your users.
- **Final phase:** If you see the release update after Winter '24 finishes rolling out, your org is scheduled to be auto-enabled in Spring '24. In rare cases, it can take several weeks for the update to appear after the Winter '24 rollout is complete.

How: The release update automatically turns on this setting: Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org. MFA isn't enforced at this stage, so you can turn off the setting if your users aren't ready yet. Users who have the Multi-Factor Authentication for User Interface Logins user permission experience no changes when the setting is enabled.

When MFA is turned on for your org, the process for logging in to the UI changes. After a user enters their username and password, they must verify their identity with an MFA verification method such as an authenticator app, security key, or built-in authenticator. If users haven't done so already, they're prompted to register a verification method the next time that they log in after this release update goes into effect.

To prepare for this update, we recommend taking these steps.

- Verify whether your org has exempt user types that must be manually excluded from MFA before MFA auto-enablement occurs. See Exclude Exempt Users from MFA (can be outdated or unavailable during release preview) in Salesforce Help.
- Train your users on how to acquire, register, and log in with MFA verification methods. For guidance and customizable templates, see Change Management for a Successful MFA Rollout.

If your users aren't prepared to start using MFA when Salesforce auto-enables it, you have two options.

- Your users can skip MFA registration for 30 days and log in as usual. This grace period begins on the day the org is auto-enabled, and the same 30-day window applies to all users in the org. For example, if a user logs in 5 days after their org was auto-enabled, 25 days remain before they're required to register for MFA.
- In the unlikely event that users experience issues with MFA, you can temporarily disable it. But keep in mind that when your org reaches the MFA enforcement milestone in the future, Salesforce will re-enable MFA and remove the option to disable it.

  To disable MFA, deselect **Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org** on the Identity Verification page in Setup.

SEE ALSO:

MFA Auto-Enablement Continues and MFA Enforcement Begins with Summer '24

Knowledge Article: Everything You Need to Know About MFA Auto-Enablement and Enforcement (for Products Built on the Salesforce Platform)

Knowledge Article: Salesforce MFA FAQ

Update U2F Security Keys to Support WebAuthn Authentication

To work with Salesforce, U2F security keys must be updated to use WebAuthn authentication. The update process works seamlessly behind the scenes. For new security keys, the update occurs automatically when a user registers it for their Salesforce account. For U2F security keys that were registered prior to Summer '22, users simply need to log in with their key before Winter '24. Doing so automatically updates the key. If a user misses this window, they can still update their key after Winter '24 by re-registering it for their Salesforce account.

How: If any of your users miss the window to update their U2F key before Winter '24, use these access recovery tips. In both cases, the process of re-registering a U2F key completes the WebAuthn update.

- Instruct the user to disconnect and re-register their key from the Advanced User Details page. If the user hasn't registered an additional verification method that they can use to log in, give them a temporary verification code for access to their account.
- Alternatively, remove the security key from the user's account. Then the user can log in and re-register their key. If the user doesn't have another verification method, Salesforce automatically prompts them to add one before they can finish logging in. If they log in with a different verification method or a temporary verification code, they can re-register their key from the Advanced User Details page.

SEE ALSO:

Salesforce Help: Remove a User's Security Key Registration (can be outdated or unavailable during release preview)

Salesforce Help: Register a U2F or WebAuthn Security Key for Identity Verification (can be outdated or unavailable during release preview)

Salesforce Help: Generate a Temporary Identity Verification Code (can be outdated or unavailable during release preview)

SMS Identity Verification Is No Longer Available in Free Salesforce Orgs

One-time passcodes sent via text messages (SMS) are no longer available as an identity verification method in free Salesforce orgs. Mobile number registration, a step users take before they can start receiving SMS one-time passcodes, is also disabled in free orgs. Other identity verification methods are still available, such as Salesforce Authenticator, security keys, and built-in authenticators.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in trial, demo, and Developer Edition orgs. This change doesn't apply to any Salesforce org with a paid subscription.

SEE ALSO:

Salesforce Help: SMS Identity Verification (can be outdated or unavailable during release preview)

Salesforce Help: Identity Verification Overview (can be outdated or unavailable during release preview)

Verify Email Addresses to Send Email Through Salesforce

Salesforce requires that users have a verified email address to continue sending emails through Salesforce, such as sends to contacts or leads. Most users verify their email address as part of the sign-up process. However, some users continue to use email addresses that were added to Salesforce before the current verification process was established. If a user sends an email from an unverified email address, Salesforce rejects this email message and doesn't complete the send. Unverified email addresses can't be used for sends until the user verifies their email address or resets their password.

Who: Currently, this requirement only affects production orgs that don't include single sign-on (SSO) users. Email verification for org-wide email addresses was already and continues to be required. Any features that use org-wide email address functionality, such as Service Email, are included in this category and already meet email verification requirements. In Spring '24, this requirement will also affect production orgs with SSO users. The requirement applies on an org-wide basis, not a user-by-user basis. For example, if some of your users log in with SSO, all users in your org are exempt until Spring '24.

How: As a Salesforce admin, you can check a user's email verification status by viewing the user's details in Setup. From the Users Setup page, select a user and check the Email field. When the user completes verification, the Verify link changes to Verified. Your users can also see their own email verification status from the Advanced User Details page.

You have several ways to initiate email verification for a user. In all cases, the user receives a verification link at their unverified email address. The verification link expires after 72 hours. If a user misses the window to click the link, you can send them a new one.

Note: Email addresses that belong to a domain that's verified with DomainKeys Identified Mail (DKIM) in your org are considered verified. When a user sends an email from an unverified email address, Salesforce checks whether the email address belongs to a domain that's already verified with DKIM. If the domain is verified, the user's email address is considered verified by extension.

- To start verification for a single user, select the user from the Users Setup page. Next to the user's email address, click **Verify**.
- To start verification for multiple users at once, use the async email API method (can be outdated or unavailable during release preview).
- Your users can start verification for themselves from the Advanced User Details page by clicking Verify next to their email address.

Alternatively, if a user resets their password, their email address is automatically verified during that process. By clicking the password reset link emailed to them, the user confirms ownership of their email address.

SEE ALSO:

Salesforce Help: Set Up Secure DKIM Keys (can be outdated or unavailable during release preview)

Create and Distribute External Client Apps

Develop and package external client apps to integrate third-party applications. External client apps are the next generation of connected apps. Don't worry about distribution, because the External Client Apps feature is designed for second-generation (2GP) managed packaging.

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

Who: This feature is available to developers in orgs where external client apps are enabled and who have the View External Client App Consumer Secrets in Metadata permission.

Why: Distribute external client apps for use on other orgs, and maintain the security of your external client apps with a subset of OAuth capabilities. These distributed external client apps can maintain an association with your external client app to receive updates, or they can generate their own OAuth consumer credentials for further customization.

How: Enable External Client Apps by enabling Opt In to External Client Apps in Setup.

Enabling the external client apps OAuth plugin involves allowing access to OAuth consumer information. This information is sensitive and confidential. Never commit OAuth consumer data to source control. Assign the View External Client App Consumer Secrets in Metadata user permission to a permission set.

After the permissions are assigned, configure a Salesforce DX project to develop external client apps. If you plan to create packageable external client apps, all developments must take place in a developer hub org.

Identity Connect 3.0.1.2 Security Patch Is Being Removed

Because Identity Connect 3.0.1.2 isn't supported, the Identity Connect 3.0.1.2 Security Patch is no longer available as of Winter '24. The Implementation Guides for Identity Connect versions 3.0.1.2 and 2.1.0 will be removed at the same time.

Where: This change applies to Lightning Experience and Salesforce Classic and is available for an additional cost in Enterprise, Performance, and Unlimited editions. Developer edition includes 10 Identity Connect permission set licenses.

When: This change takes effect in Winter '24.

Streamline the Login Experience in Headless Apps

Make it easier for your customers and partners to log in to your off-platform apps with the Headless Passwordless Login Flow. Users enter their email address or phone number and receive a one-time password (OTP), which they use to log in. Like other Headless Identity features, this flow gives you a way to authenticate users while maintaining full control of the user experience in your apps.

Where: This change applies to LWR, Aura, and Visualforce sites accessed Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions. Because Headless Identity APIs are exposed through Experience Cloud, you create and manage your implementation using an Experience Cloud site even though users don't interact with the site directly.

How: This flow is a variation of the Authorization Code and Credentials Flow. During the flow, your app calls Headless Passwordless Login API to get a request identifier. It then calls the authorization endpoint to exchange the request ID and the user's OTP for an authorization code. In a final call to the token endpoint, your app exchanges the code for an access token. At the end of the flow, the user is logged in and can access Salesforce data.

As part of this feature, we also updated an error message on the Experience Cloud Login & Registration page, where you configure this flow. The error message previously stated that you must require either authentication or reCAPTCHA for the Headless Registration Flow and Headless Forgot Password Flow. Now, it more generally states that you must require these security measures for all headless identity configurations.

SEE ALSO:

Salesforce Help: Headless Identity APIs for Customers and Partners (can be outdated or unavailable during release preview)

Salesforce Help: Headless Passwordless Login Flow for Public Clients (can be outdated or unavailable during release preview)

Salesforce Help: Headless Passwordless Login Flow for Private Clients (can be outdated or unavailable during release preview)

Understand What Makes Your Users Tick with Guest User Identity

Trace your users' journeys from unknown visitors to fully registered users, and collect valuable insights on the experiences that they prefer. With a new headless flow for guest users, you can build your apps to issue a unique visitor (UVID) when an unknown user first visits your app. If the user logs in or registers, you can pass the UVID into a named user authorization flow. The UVID gives you context for who the user is and how they've interacted with your app, so you can design your apps to remember details like a user's cookie preferences. And with the help of an analytics tool, you can use the UVID to understand what experiences drive guest users to sign up.

Where: This change applies to LWR, Aura, and Visualforce sites accessed Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions. Because Headless Identity APIs are exposed through Experience Cloud, you create and manage your implementation using an Experience Cloud site even though users don't interact with the site directly.

How: This flow is a variation of the Authorization Code and Credentials Flow. During the guest flow, your app generates a UVID and passes it to Salesforce to ultimately get a guest access token with the UVID minted into it. When a user logs in or registers, you can pass the UVID into a named user authorization flow, carrying the guest user context into a logged-in state.

The guest user flow issues a JSON Web Token (JWT)-based access token. To expose the UVID to a named user flow, the named user flow must also issue a JWT-based access token. You can pass the UVID into these named user authorization flows.

- All variations of the OAuth 2.0 web server flow, including the hybrid web server flow and the hybrid app refresh token flow
- All variations of the Authorization Code and Credentials Flow, including the Headless Registration Flow and the Headless Passwordless Login Flow

SEE ALSO:

Salesforce Help: Headless Guest Flow for Public Clients (can be outdated or unavailable during release preview)

Salesforce Help: Headless Guest Flow for Private Clients (can be outdated or unavailable during release preview)

Salesforce Help: Extending the Guest User Flow into a Named User Flow (can be outdated or unavailable during release preview)

Simplify Your Setup with a Headless Registration Handler Template

To make the headless registration setup process easier, you can auto-generate a registration handler Apex class from the Experience Cloud Login & Registration page. When you're ready, customize the default content for your company's needs.

Where: This change applies to LWR, Aura, and Visualforce sites accessed Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions. Because Headless Identity APIs are exposed through Experience Cloud, you create and manage your implementation using an Experience Cloud site even though users don't interact with the site directly.

SEE ALSO:

Salesforce Help: Configure Experience Cloud Settings for Headless Registration (can be outdated or unavailable during release preview)

Secure Your Headless Identity Implementation with reCAPTCHA Enterprise

When you configure a Headless Identity flow to require Google reCAPTCHA, you can now use reCAPTCHA Enterprise. Previously, Salesforce supported only reCAPTCHA v2 and v3 for Headless Identity. To reflect this new option, we also updated the text for the reCAPTCHA configuration on the Experience Cloud Login & Registration page.

Where: This change applies to LWR, Aura, and Visualforce sites accessed Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions. Because Headless Identity APIs are exposed through Experience Cloud, you create and manage your implementation using an Experience Cloud site even though users don't interact with the site directly.

SEE ALSO:

Salesforce Help: Headless Identity APIs for Customers and Partners (can be outdated or unavailable during release preview)

Customize the Email Template for Headless Registration

Take control of the one-time password email sent to users during headless registration. With a new email template and merge fields, you can quickly tailor the email to match the branding in your off-platform apps.

Where: This change applies to LWR, Aura, and Visualforce sites accessed Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions. Because Headless Identity APIs are exposed through Experience Cloud, you create and manage your implementation using an Experience Cloud site even though users don't interact with the site directly.

SEE ALSO:

Salesforce Help: Customize the Headless Registration Email Template (can be outdated or unavailable during release preview)

Salesforce Help: Configure Experience Cloud Settings for Headless Registration (can be outdated or unavailable during release preview)

JSON Web Token (JWT)-Based Access Tokens Are Now Generally Available

To improve compatibility with external systems, enable your connected apps to issue JSON Web Token (JWT)-based access tokens instead of opaque tokens. JWT-based access tokens are now supported for access to Salesforce REST APIs. Unlike opaque access tokens, JWT-based access tokens have a format that your apps can understand. With a transparent format, you can parse and validate tokens on your app instead of calling a Salesforce endpoint.

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

How: If you're a connected app developer, enable JWT-based access tokens in your connected app OAuth settings. You must then enable this feature in your connected app policies. Both settings are required to opt in. If you installed the connected app as part of a managed package, this feature is available only if the connected app developer enabled it. If so, you must explicitly opt in from your connected app policies to avoid service disruptions.

Compared to opaque tokens, JWT-based access tokens have different functionality and limitations. Make sure you understand these differences before you implement JWT-based access tokens.

SEE ALSO:

Salesforce Help: JWT-Based Access Tokens (can be outdated or unavailable during release preview)

Salesforce Help: Access Tokens (can be outdated or unavailable during release preview)

Improve Authorization Security with the Proof Key for Code Exchange (PKCE) Extension

Enhance security for your orgs, Experience Cloud sites, and off-platform apps by cementing the OAuth 2.0 PKCE extension into your identity implementations. Require PKCE at an org-wide level or for a connected app, so that all authorization code flow variations that don't include the PKCE extension fail. And when you configure authentication providers, automatically enable the PKCE extension with just a single click. Implementing PKCE helps you prevent attacks with stolen authorization codes by protecting an app with parameters that only you and Salesforce have access to.

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

SEE ALSO:

Salesforce Help: Build PKCE into Your Implementations (can be outdated or unavailable during release preview)

Enjoy Improved Guidance for Headless Identity and OAuth Settings

To improve the usability of the setup experience for Headless Identity and OAuth settings, we added several labels.

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

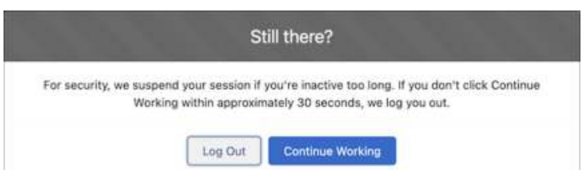
Why: We added labels in these places.

- On the Experience Cloud Login & Registration page, we added hover text for headless registration and headless forgot password settings. The new text explains how and when to use the Require authentication to access this API and Require reCAPTCHA to access this API settings.
- On the OAuth and OpenID Connect Settings page in Setup, we added descriptions for the settings that allow the username-password flow, user-agent flow, and Authorization Code and Credentials Flow.

Session Timeout Popup Is Updated

To account for small variations in session timeout, we updated the popup that appears when a user's session is about to end. Previously, the popup told users that they're logged out if they don't click Continue Working within 30 seconds. We changed the text to clarify that this 30-second period is approximate. The actual amount of time can change based on the page or the user's activity, so it's not always exactly 30 seconds.

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



Updated Hover Text Label for Client Credentials Flow Is Available in Japanese

In Summer '23, we removed an inaccurate statement in the hover text for the client credentials flow execution user on the Manage Connected Apps page. The incorrect text stated that the execution user must have the API Only User permission. Due to major planned style changes in Japanese, the Japanese translation was delayed at the time, but this change is now available in all supported languages.

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

SEE ALSO:

Salesforce Help: OAuth 2.0 Client Credentials Flow for Server-to-Server Integrations (can be outdated or unavailable during release preview)

Mutual Authentication Is Now Enforced For API Login Requests

For users with the Enforce SSL/TLS Mutual Authentication user permission, we now enforce mutual authentication for API login requests that obtain new user sessions. Previously, we enforced mutual authentication only on API requests after the user logged in. This change applies to both the SOAP API login action and the OAuth 2.0 username-password flow. For better security, we always recommend that you don't use the OAuth username-password flow.

Where: This change applies to Salesforce Classic and Lightning Experience in Enterprise, Performance, Personal, Unlimited, Developer, and Database.com editions.

SEE ALSO:

Salesforce Help: Configure Your API Client to Use Mutual Authentication

Known Issue: Mutual authentication (2-way SSL) is not enforced when doing a SOAP Partner API Login

Salesforce Help: OAuth 2.0 Username-Password Flow for Special Scenarios

Named Credentials

Configure external credentials for server-to-server integration using OAuth 2.0 client credentials or JWT authentication protocols. Assign the new Manage Named Credentials permission so that users can modify named credentials and external credentials. Control how guest users can make callouts with named credentials. Give users the ability to make callouts with named credentials without authenticating.

IN THIS SECTION:

Authenticate Named Credential Callouts with Client Credentials Flow

You can now configure named credentials to use OAuth 2.0 client credentials flow for server-to-server integration. If you want to directly share information between two applications and eliminate the need for explicit user interaction, use the OAuth 2.0 client credentials flow. In this flow, the client app exchanges its client credentials defined in a client secret or JWT assertion.

Use JWT Authentication Protocol with Named Credentials

Configure external credentials to use JWT authentication protocol for server-to-server integration. JWT supports authenticating a wide range of integration use cases and offers lower costs by making fewer trips across the network. You can choose from RS256 and RS512 JWT signing algorithms, define custom claims, and specify an expiration time for the JWT-based access tokens.

Grant Permission to Manage Named Credentials and External Credentials

Assign the new Manage Named Credentials administrative permission so that users can create, edit, or delete named credentials and external credentials. Previously, you assigned the Customize Applications permission.

Grant Guest Users Access to Make Callouts Using Named Credentials

You now have better control of how to configure access to guest users who are unauthenticated so that they can make callouts with named credentials. Give guest user profiles access to the principals of the external credentials, and authorize these users to perform authenticated callouts.

Access Public Information with No Authentication Protocol

You can now make callouts to endpoints without any authentication configuration using named credentials. When you create an external credential from the Salesforce UI, select No Authentication as the authentication protocol and access endpoints that require no authentication.

Authenticate Named Credential Callouts with Client Credentials Flow

You can now configure named credentials to use OAuth 2.0 client credentials flow for server-to-server integration. If you want to directly share information between two applications and eliminate the need for explicit user interaction, use the OAuth 2.0 client credentials flow. In this flow, the client app exchanges its client credentials defined in a client secret or JWT assertion.

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

How: When you create an external credential from the Salesforce UI, select OAuth 2.0 as the authentication protocol, and then select **Client Credentials with Client Secret Flow** or **Client Credentials with JWT Assertion Flow**. You can also use the Metadata, Tooling, and Apex ConnectApi APIs to create and edit external credentials.

SEE ALSO:

Salesforce Help: Create and Edit an OAuth External Credential (can be outdated or unavailable during release preview)

Use JWT Authentication Protocol with Named Credentials

Configure external credentials to use JWT authentication protocol for server-to-server integration. JWT supports authenticating a wide range of integration use cases and offers lower costs by making fewer trips across the network. You can choose from RS256 and RS512 JWT signing algorithms, define custom claims, and specify an expiration time for the JWT-based access tokens.

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

How: When you create an external credential from the Salesforce UI, select **JWT** as the authentication protocol, and then specify the JWT signing certificate and signing algorithm. You can also use the Metadata, Tooling, and Apex ConnectApi APIs to create and edit external credentials.

Grant Permission to Manage Named Credentials and External Credentials

Assign the new Manage Named Credentials administrative permission so that users can create, edit, or delete named credentials and external credentials. Previously, you assigned the Customize Applications permission.

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

How: You can assign the Manage Named Credentials administrative permission via user profiles or permission sets. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**. Select the profile for whom you want to assign the perm, scroll to Administrative Permissions, and then select **Allows users to modify Named Credentials and External Credentials**.

Grant Guest Users Access to Make Callouts Using Named Credentials

You now have better control of how to configure access to guest users who are unauthenticated so that they can make callouts with named credentials. Give guest user profiles access to the principals of the external credentials, and authorize these users to perform authenticated callouts.

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

How: From Setup, in the Quick Find box, enter `Profile`, and then select **Profiles**. Select the guest user profile for whom you want to enable user external credentials, and scroll to the User External Credentials permission. You can only grant read and create access to the user external credential object for guest users.

Access Public Information with No Authentication Protocol

You can now make callouts to endpoints without any authentication configuration using named credentials. When you create an external credential from the Salesforce UI, select No Authentication as the authentication protocol and access endpoints that require no authentication.

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

Health Check

Evaluate your Experience Cloud site security by viewing the number of objects to which guest user profiles have read and edit access.

IN THIS SECTION:

Evaluate Your Experience Cloud Site Security

With new Health Check settings, you can view the number of objects to which guest user profiles have read and edit access.

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

How: From Setup, in the Quick Find box, enter *`Health Check`*, and scroll to Informational Security Settings. Then view the Number of Objects to which Guest User Profiles have Read Access setting and the Number of Objects to which Guest User Profiles have Edit Access setting.

SEE ALSO:

Salesforce Help: How Is the Health Check Score Calculated? (can be outdated or unavailable during release preview)

Salesforce Help: Security Health Check (can be outdated or unavailable during release preview)

Privacy Center

Step away from the managed package and get to know the new Privacy Center app. Use the app homepage to navigate to every Privacy Center feature from one place, including incoming requests and policy run logs. Use the new and improved Data Management and Right to Be Forgotten policies to address customer requests. You can also preserve records from deletion with Privacy Hold.

IN THIS SECTION:

[Encrypt Sensitive Data from Consent Forms](#)

Add an extra layer of security to personally identifiable information while honoring your customers' consent and privacy preferences. You can now encrypt the Name field on authorization form objects with Shield Platform Encryption.

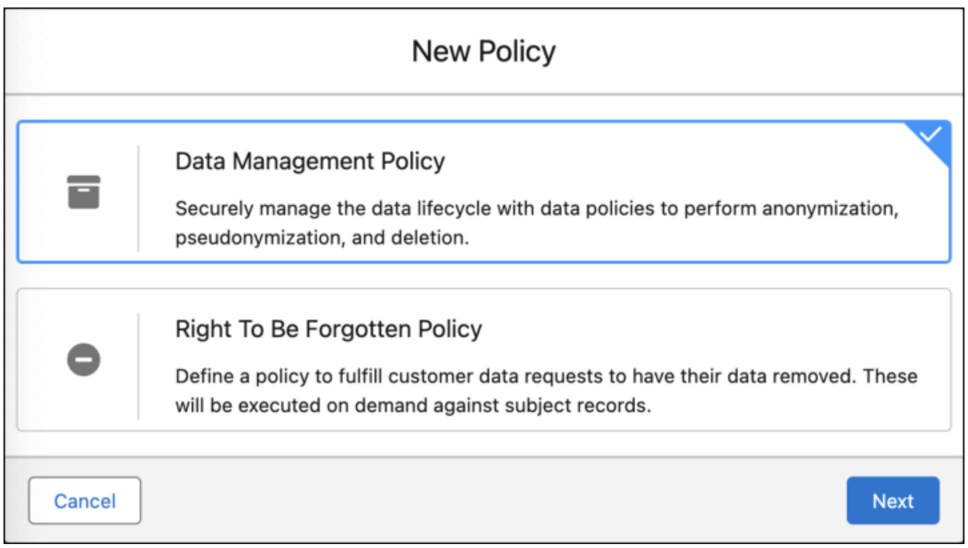
Create Privacy Center Policies on Core

Create Data Management and Right to Be Forgotten policies directly from the new Privacy Center app. We improved the policies from the managed package, which is now Legacy Privacy Center, and gave them a new home in Salesforce.

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

Who: This change is available to users with the Privacy Center add-on subscription. Use the Privacy Center app if you don't need retention storage or don't want to use Heroku. Otherwise stick with the Legacy Privacy Center managed package that you already use.

How: From the App Launcher, find and select **Privacy Policies**. From the Privacy Policies page, click **New**. Choose the type of policy that you want to create, then follow the prompts to create your Data Management Policy or Right to Be Forgotten Policy. Data Management Policy improvements include cross-object queries, mask and delete capabilities, and file and attachment processing.



SEE ALSO:

Salesforce Help: Delete Data with Right to Be Forgotten Policies (can be outdated or unavailable during release preview)

Access Privacy Center Features from the App Homepage

A new landing page for a new app—see every feature in your Privacy Center setup from the app homepage. Use this page to navigate to privacy policies, data subject access requests, Preference Manager, and more.

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

Who: This change is available to users with the Privacy Center add-on subscription. Use the Privacy Center app if you don't need retention storage or don't want to use Heroku. Otherwise stick with the Legacy Privacy Center managed package you already use.

How: From the App Launcher, find and select **Privacy Center**. You're taken to the app homepage, where you can navigate to every Privacy Center feature.

SEE ALSO:

Salesforce Help: Privacy Center: Satisfy Customer Requests and Data Privacy Laws (can be outdated or unavailable during release preview)

Save Records from Processing with Privacy Hold

For legal or business purposes, designate a record to be preserved from masking or deletion by Data Management policies in Privacy Center.

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

Who: This change is available to users with the Privacy Center add-on subscription.

How: From the App Launcher, find and select **Privacy Hold Reasons**. Click **New** to create a Privacy Hold Reason. To add a related Privacy Hold record, select the Related tab. Under Privacy Holds, click **New**. Enter information about the hold such as a name, end date, and the object record. Check the box under Is Active, and save your work.

Include a condition in your Data Management policy where records with an active Privacy Hold aren't deleted or masked.

SEE ALSO:

Salesforce Help: Use Privacy Hold to Preserve Records from Processing (can be outdated or unavailable during release preview)

Encrypt Sensitive Data from Consent Forms

Add an extra layer of security to personally identifiable information while honoring your customers' consent and privacy preferences. You can now encrypt the Name field on authorization form objects with Shield Platform Encryption.

SEE ALSO:

Encrypt Consent Data

Salesforce Shield

Manage group membership changes and insufficient access attempts with the new Group Membership Event and Insufficient Access Event types. The Event Monitoring Analytics App configuration that adds new data incrementally to datasets is generally available. Encrypt data with keys stored outside of Salesforce with the new External Key Management feature and exercise more direct control over your key management.

IN THIS SECTION:

Event Monitoring

Audit group membership changes with the Group Membership event type. Use the new Insufficient Access event to enforce the principle of least privilege and track insufficient access attempts. Visualize Knowledge Article View event data in the Event Monitoring Analytics App. And the configuration for adding only new data to Event Monitoring Analytics app datasets is generally available.

Shield Platform Encryption

Encrypt the Name field on consent preference forms, Health Cloud, and Flow Orchestration data. View and manage key material more easily with an improved Key Management page design. And use the new External Key Management to encrypt data with keys stored in AWS. With a streamlined UI, create a secure connection to AWS and exercise more granular control over your keys.

Event Monitoring

Audit group membership changes with the Group Membership event type. Use the new Insufficient Access event to enforce the principle of least privilege and track insufficient access attempts. Visualize Knowledge Article View event data in the Event Monitoring Analytics App. And the configuration for adding only new data to Event Monitoring Analytics app datasets is generally available.

IN THIS SECTION:

Get Information About Public Group and Queue Membership Changes

Use the new Group Membership event type in the EventLogFile object to monitor when members are added to or removed from public groups or queues.

IdeaExchange Delivered: Get Information About Insufficient Access Errors

Use the new Insufficient Access event type in the EventLogFile object to analyze and troubleshoot account, case, contact, and opportunity record access errors for your users. These events contain information about the record the user attempted to access or transfer, the access level required for this action, and the related error message. We delivered this feature thanks to your ideas on IdeaExchange.

See More Informative Column Header Log Data

The ColumnHeader field on the ReportEvent and ReportEventStream real-time objects now contains API object names, field names, and values instead of preset aliases. It also captures column header information for standard reports. Previously, the field listed only preset aliases for column headers on custom reports. Some aliases are still used for certain values, such as derived values like AGE. Use these API names to make it easier to find specific data that users look at in reports.

Spot Event Monitoring Analytics App Datasets with User Ids

Datasets that contain user IDs now have the suffix WithUsers added to the end of the dataset name. Tying events to specific users is a helpful way to understand user patterns and assist investigations. This change applies to the Console, ConcurrentLongRunningApex, Search, and SearchClick datasets.

Enjoy Efficient Dataset Updates in the Event Monitoring Analytics App (Generally Available)

Incremental dataset updates in the Event Monitoring Analytics app append only new data to your datasets. This configuration, now generally available, helps prevent apps with large datasets from hitting your data limit. If you have multiple apps, you can limit your chances of hitting the limit by applying this configuration to all of your apps.

View Knowledge Article Event Data in Event Monitoring Analytics Apps

You can now use the Event Monitoring Analytics app to visualize event data about knowledge article usage. Build or enhance dashboards that show key information such as who's viewing knowledge articles, which article version they open, and when they view it. Use the new USER_ID_DERIVED field on the Knowledge Article View event type to better understand specific users' interactions with your knowledge content.

Get Information About Public Group and Queue Membership Changes

Use the new Group Membership event type in the EventLogFile object to monitor when members are added to or removed from public groups or queues.

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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

Object Reference for Salesforce Platform: Group Membership Event Type (can be outdated or unavailable during release preview)

Salesforce Help: What Is a Group? (can be outdated or unavailable during release preview)

Salesforce Help: Create Queues (can be outdated or unavailable during release preview)

Get Information About Insufficient Access Errors

Use the new Insufficient Access event type in the EventLogFile object to analyze and troubleshoot account, case, contact, and opportunity record access errors for your users. These events contain information about the record the user attempted to access or transfer, the access level required for this action, and the related error message. We delivered this feature thanks to your ideas on IdeaExchange.

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Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

IdeaExchange: Full Description of "Invalid Cross Reference Id" Error Required

Object Reference for Salesforce Platform: Insufficient Access Event Type (can be outdated or unavailable during release preview)

Knowledge Article: Interpret Insufficient Access Event Logs

Salesforce Help: Resolving Insufficient Privileges Errors (can be outdated or unavailable during release preview)

See More Informative Column Header Log Data

The ColumnHeader field on the ReportEvent and ReportEventStream real-time objects now contains API object names, field names, and values instead of preset aliases. It also captures column header information for standard reports. Previously, the field listed only preset aliases for column headers on custom reports. Some aliases are still used for certain values, such as derived values like AGE. Use these API names to make it easier to find specific data that users look at in reports.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: When you use ColumnHeaders in Condition Builder with the CONTAINS operator plus the keyword for an old alias, you can reference the old aliases and actual API names for objects, fields, and values. However, only the API names are saved when you add them to a policy. Existing Transaction Security policies that reference the old aliases still work. We recommend that you update your policies to use the actual field names instead.

SEE ALSO:

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

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

Spot Event Monitoring Analytics App Datasets with User Ids

Datasets that contain user IDs now have the suffix WithUsers added to the end of the dataset name. Tying events to specific users is a helpful way to understand user patterns and assist investigations. This change applies to the Console, ConcurrentLongRunningApex, Search, and SearchClick datasets.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

Enjoy Efficient Dataset Updates in the Event Monitoring Analytics App (Generally Available)

Incremental dataset updates in the Event Monitoring Analytics app append only new data to your datasets. This configuration, now generally available, helps prevent apps with large datasets from hitting your data limit. If you have multiple apps, you can limit your chances of hitting the limit by applying this configuration to all of your apps.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: When creating an app, in the configuration wizard, select **Add only new event log file data to existing apps?** The app then adds new data incrementally with each dataset update.

SEE ALSO:

Salesforce Help: Create and Share the Event Monitoring Analytics App (can be outdated or unavailable during release preview)

View Knowledge Article Event Data in Event Monitoring Analytics Apps

You can now use the Event Monitoring Analytics app to visualize event data about knowledge article usage. Build or enhance dashboards that show key information such as who's viewing knowledge articles, which article version they open, and when they view it. Use the new USER_ID_DERIVED field on the Knowledge Article View event type to better understand specific users' interactions with your knowledge content.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled.

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

SEE ALSO:

Object Reference for Salesforce Platform: Knowledge Article View Event Type (can be outdated or unavailable during release preview)

Shield Platform Encryption

Encrypt the Name field on consent preference forms, Health Cloud, and Flow Orchestration data. View and manage key material more easily with an improved Key Management page design. And use the new External Key Management to encrypt data with keys stored in AWS. With a streamlined UI, create a secure connection to AWS and exercise more granular control over your keys.

IN THIS SECTION:

Connect to Third-Party Key Stores with External Key Management

Encrypt data with keys stored outside of Salesforce and exercise more direct control over keys. With the new External Key Management (EKM) service, use easy on-screen guidance to create a secure connection to AWS Key Management Service (KMS). Salesforce then uses your key stored in AWS KMS to encrypt and decrypt Salesforce data. Key material is only stored as long as is necessary to complete encrypt and decrypt operations.

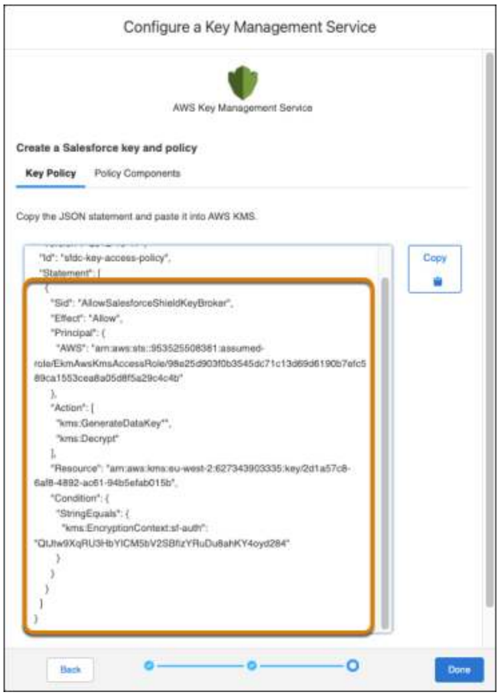
Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Who: Available to customers in the EU Operating Zone who purchased the Cache-Only Key Service add-on subscription. For product availability and purchasing information, contact your account executive.

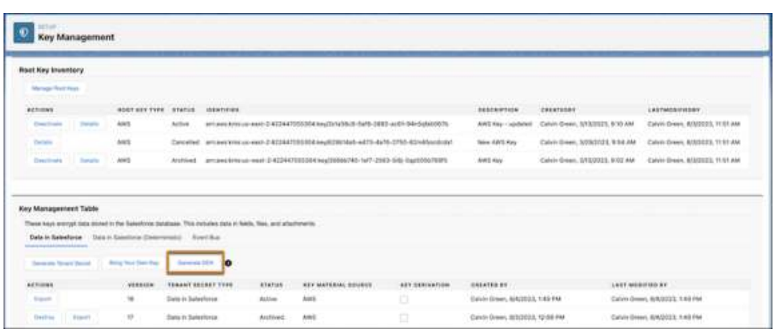
Why: Compliance and regulatory requirements can add extra scrutiny over encryption key ownership, control, and storage. For customers who must store key material outside of Salesforce but want to use an established third-party key management service, EKM offers flexible control. You have more options for confidently complying with regulatory requirements and contractual obligations for handling key material.

How: Before you start, make sure that you have a key in AWS KMS. Salesforce uses your external key as a root key. In Salesforce Setup, on the Advanced Settings page, turn on External Key Management. On the Key Management page, click **Manage Root Keys**.

A guided wizard opens to walk you through the process of connecting Salesforce to AWS. Add information about your AWS key, including your identifier, region, and a unique description. EKM generates a code snippet, or statement, that you can easily copy into your key policy in AWS.



Save your updated key policy in AWS, return to Salesforce, and save your work. You can now generate a data encryption key (DEK) in Salesforce and apply it to fields, files and attachments, and any other data you can encrypt with Shield Platform Encryption.



Salesforce uses your root key in AWS to generate a DEK and wrap it for temporary storage in the encrypted key cache. You can review and audit historical key information on the root key Detail view. And as with the Cache-Only Key Service, you can check your connection to AWS for easy troubleshooting and connection maintenance.

Encrypt Consent Data

Forms that capture customer consent preferences contain sensitive and personally identifiable information (PII). Organizations sometimes have requirements to provide extra layers of protection for this kind of data. Shield Platform Encryption now supports encryption at-rest for the Name field on a range of authorization form objects.

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

Who: This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption.

How: From Setup, on the Encryption Policy page, click **Encrypt Fields**. Then click **Edit**. You can encrypt the Name field with the probabilistic, case-sensitive deterministic, or case-insensitive deterministic encryption schemes on these objects.

- AuthorizationForm
- AuthorizationFormConsent
- AuthorizationFormDataUse
- AuthorizationFormText

Encrypt Healthcare Provider Data

Users can inadvertently enter protected health information (PHI) in the Name field of certain Health Cloud objects. These fields don't expose information directly, but they can include patient information in the naming scheme. Shield Platform Encryption now supports encryption at-rest for the Name field on the Healthcare Provider Treated Condition object.

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

Who: This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption and the add-on subscriptions for Health Cloud or Health Cloud for Life Sciences.

How: On the Encryption Policy page, click **Encrypt Fields**. Then click **Edit**. You can encrypt the Name field on the HlthCareProvTreatedCondition object with the probabilistic, case-sensitive deterministic, or case-insensitive deterministic encryption schemes.

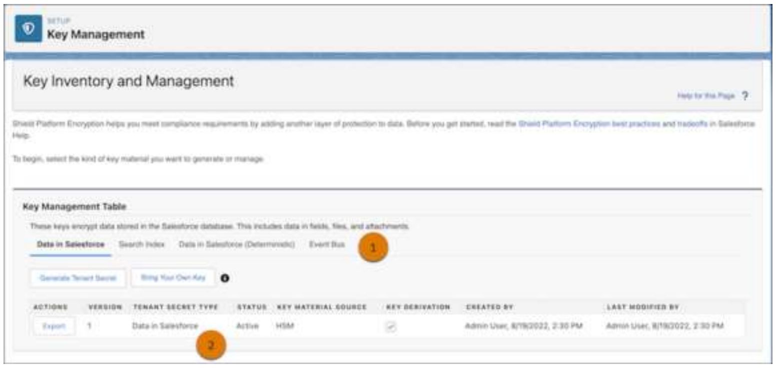
Manage Keys More Easily with an Improved UI

Shield Platform Encryption key management pages in Setup are modernized to make managing Shield Platform Encryption keys easier, more intuitive, and accessible to users who rely on screen readers and keyboard controls. Key management controls are now consolidated in the Key Management Table. Use new tabs to select the type of key that you want to generate, rotate, export, or destroy. Other accessibility improvements on Advanced Settings, Encryption Policy, Encrypt Fields, and Key Destroy pages include informative labels on interactive page elements, better visual contrast between elements, and improved scrolling for keyboard users.

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

Who: Available to customers who purchased a Salesforce Shield or Shield Platform Encryption add-on subscription.

How: On the Key Management page, in the Key Management Table, select a key type (1). The table updates to display keys of that type (2). You can then generate, manage, and rotate key material of that type.



Encrypt Inputs for Flow Orchestration Work Items

Flow Orchestration Work Item records sometimes contain sensitive or personally identifiable information (PII). You can now encrypt the Screen Flow Inputs field on the Flow Orchestration Work Item object. This field supports probabilistic, case-sensitive deterministic encryption, and case-insensitive deterministic schemes.

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

Who: This change is available to customers who purchased Salesforce Shield or Shield Platform Encryption add-on subscriptions.

How: On the Encryption Policy page, click **Encrypt Fields**. Then click **Edit**, and select the Screen Flow Inputs field of the Flow Orchestration Work Item object.

SEE ALSO:

Salesforce Help: Which Standard Fields Can I Encrypt? (can be outdated or unavailable during release preview)

Security Center

Monitor login IP ranges and tenant license usage details with more metrics. View what instance your tenants are running on. Customize your tenant names to fit the needs of your company.

IN THIS SECTION:

Customize Security Center Tenant Name
Security Center users can now edit the `Tenant Name` field to fit the needs of their company.

View Tenant Instance Names in Security Center
View what instance your tenants are running on. You can use this information to check the status of an instance or triage a service incident, as clicking the instance directs you to the status page on Salesforce Trust.

Get Insight Into License Usage Information for Tenants
View license usage details to see how licenses change over time and compare between tenants.

Monitor Login IP Ranges
Understand user restrictions by monitoring login IP ranges, including when they were created and updated.

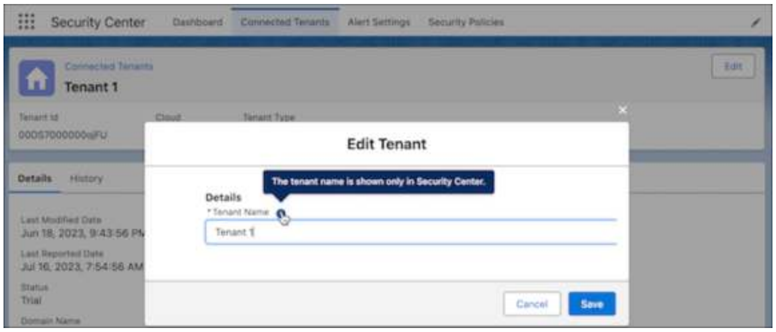
Customize Security Center Tenant Name

Security Center users can now edit the `Tenant Name` field to fit the needs of their company.

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

Who: This change is available to users with the Security Center add-on subscription.

How: From the Connected Tenants tab in Security Center, click the dropdown arrow to the right of the tenant name that you want to customize, and click **Edit**. You can also click **Edit** on the tenant details page.



SEE ALSO:

Salesforce Help: Take Charge of Your Security Goals with Security Center (can be outdated or unavailable during release preview)

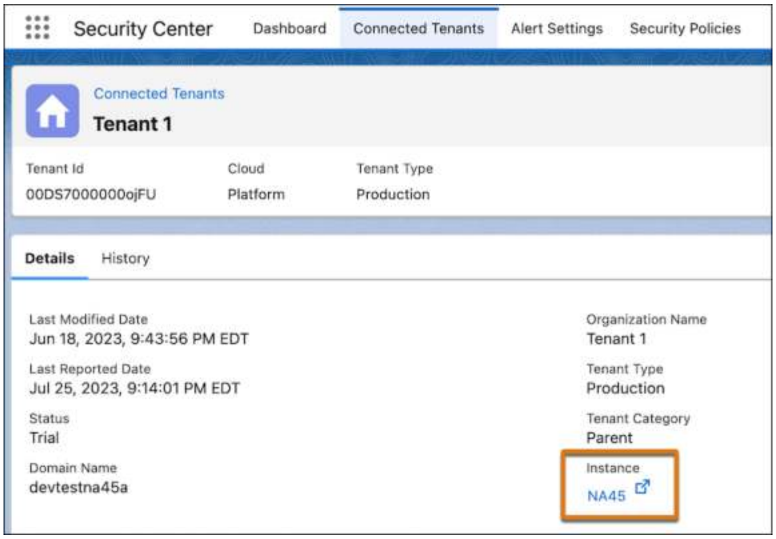
View Tenant Instance Names in Security Center

View what instance your tenants are running on. You can use this information to check the status of an instance or triage a service incident, as clicking the instance directs you to the status page on Salesforce Trust.

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

Who: This change is available to users with the Security Center add-on subscription.

How: You can view the instance name from the Connected Tenants tab in Security Center and from the tenant details page.



SEE ALSO:

Salesforce Help: Take Charge of Your Security Goals with Security Center (can be outdated or unavailable during release preview)

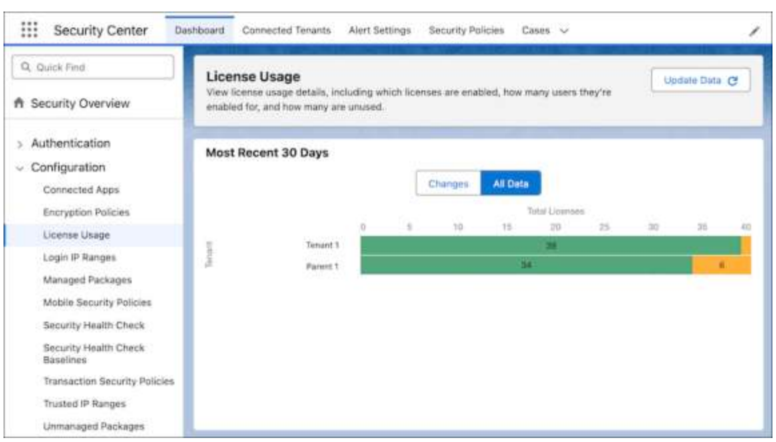
Get Insight Into License Usage Information for Tenants

View license usage details to see how licenses change over time and compare between tenants.

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

Who: This change is available to users with the Security Center add-on subscription.

How: Monitor the License Usage metric from your Security Center dashboard via the Configuration category in Security Overview.



SEE ALSO:

Salesforce Help: Security Center Metrics (can be outdated or unavailable during release preview)

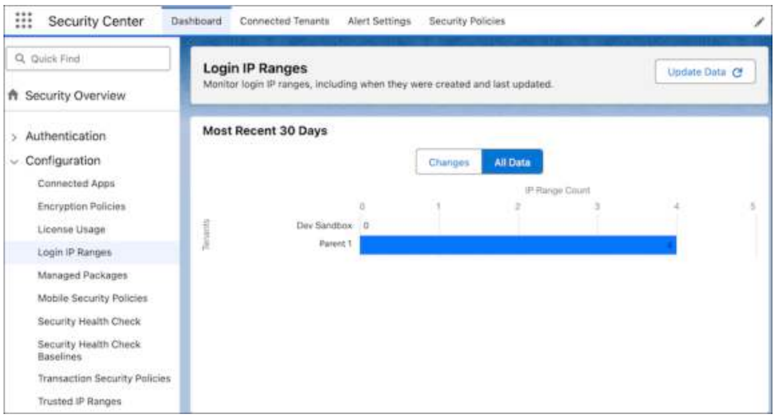
Monitor Login IP Ranges

Understand user restrictions by monitoring login IP ranges, including when they were created and updated.

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

Who: This change is available to users with the Security Center add-on subscription.

How: Monitor the Login IP Ranges metric from your Security Center dashboard via the Configuration category in Security Overview.



SEE ALSO:

Salesforce Help: Security Center Metrics (can be outdated or unavailable during release preview)

Other Security Changes

A new release update limits redirections to other Salesforce orgs. Protect your users by restricting access to their camera and microphone and by expanding clickjack protections.

IN THIS SECTION:

Allow Only Trusted Cross-Org Redirections (Release Update)

To protect your users and network, add the specific Salesforce org URLs that you trust to the Trusted URLs for Redirects allowlist. Users can't access a different Salesforce org, including its publicly served pages and content, from your Salesforce org unless the URL is on the allowlist. This update is available starting in Winter '24.

Secure Access to Your Users' Camera and Microphone

Protect your users' privacy by limiting microphone and camera access to the external URLs that you trust. You manage these options along with your trusted URLs' Content Security Policy (CSP) settings on the Trusted URLs Setup page. Previously, that Setup page was named CSP Trusted Sites.

Protect More Users from Clickjacking

Clickjacking uses a trusted domain or site to trick users into clicking a malicious link. To help protect your users against this kind of attack, Salesforce uses the Content-Security-Policy: frame-ancestors HTTP header directive when Salesforce can confirm support for that directive. To extend clickjack protection to more users, include that directive in the rare cases when Salesforce can't identify whether the requesting app or browser supports the directive.

Secure Cross-Cloud Integrations with Private Connect Across the Globe

As part of expanding the AWS partnership with Salesforce, Private Connect support for AWS integrations is available in new regions in Europe and Asia.

Enjoy a Modernized CA-Signed Certificate Page

The Setup page for creating certificate authority-signed (CA-signed) certificates now uses the modern Salesforce Lightning Experience user interface. With this update, the certificate creation process is more accessible to assistive technologies and user-friendly for all users.

Allow Only Trusted Cross-Org Redirections (Release Update)

To protect your users and network, add the specific Salesforce org URLs that you trust to the Trusted URLs for Redirects allowlist. Users can't access a different Salesforce org, including its publicly served pages and content, from your Salesforce org unless the URL is on the allowlist. This update is available starting in Winter '24.

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

When: Salesforce enforces this update in Summer '24. In orgs that get Winter '24 before October 2023, this release update is enabled for testing by default. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: From Trusted URLs for Redirects in Setup, disable **Allow untrusted cross-org redirections** (available in Lightning only). Or you can set the `enableCrossOrgRedirects` field on the SecuritySettings metadata API type to `false`.

To review this update, from Setup, in the Quick Find box, enter *`Release Updates`*, and then select **Release Updates**. For Allow Only Trusted Cross-Org Redirections, follow the testing and activation steps.

SEE ALSO:

Salesforce Help: Trust Redirections to Your Other Salesforce Orgs (can be outdated or unavailable during release preview)

Release Updates

Secure Access to Your Users' Camera and Microphone

Protect your users' privacy by limiting microphone and camera access to the external URLs that you trust. You manage these options along with your trusted URLs' Content Security Policy (CSP) settings on the Trusted URLs Setup page. Previously, that Setup page was named CSP Trusted Sites.

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

How: On the Session Settings Setup page, in the Browser Feature Permissions section, select **Include Permissions-Policy HTTP header**. For Camera and Microphone, select **Trusted URLs Only**. Then specify the URLs that you trust and the browser features that each URL can access from the Trusted URLs Setup page.

SEE ALSO:

Salesforce Help: Control Access to Browser Features (can be outdated or unavailable during release preview)

Salesforce Help: Manage Trusted URLs (can be outdated or unavailable during release preview)

Protect More Users from Clickjacking

Clickjacking uses a trusted domain or site to trick users into clicking a malicious link. To help protect your users against this kind of attack, Salesforce uses the Content-Security-Policy: frame-ancestors HTTP header directive when Salesforce can confirm support for that directive. To extend clickjack protection to more users, include that directive in the rare cases when Salesforce can't identify whether the requesting app or browser supports the directive.

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

How: When this option is enabled, users who access Salesforce via an app or browser that doesn't support the Content-Security-Policy: frame-ancestors directive can experience errors if that lack of support is unclear. We encourage you to weigh the benefits of the expanded clickjack protection against the errors that users can experience.

From Setup, in the Quick Find box, enter `Session Settings`, and then select **Session Settings**. In the Content Security Policy (CSP) Directive Rendering section, select **Apply CSP directives for less common browsers**, and then save your changes.

SEE ALSO:

Salesforce Help: Apply Clickjack Protection to Less Common Browsers (can be outdated or unavailable during release preview)

Secure Cross-Cloud Integrations with Private Connect Across the Globe

As part of expanding the AWS partnership with Salesforce, Private Connect support for AWS integrations is available in new regions in Europe and Asia.

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

How: To create a private connection between Salesforce and your data hosted within AWS, go to the Private Connect page in Setup and click AWS Regions.

The latest AWS regions that have direct connectivity to Salesforce data centers are:

- Jakarta, Indonesia (`ap-southeast-3`)
- Milan, Italy (`eu-south-1`)

SEE ALSO:

Salesforce Help: Private Connect with AWS (can be outdated or unavailable during release preview)

Enjoy a Modernized CA-Signed Certificate Page

The Setup page for creating certificate authority-signed (CA-signed) certificates now uses the modern Salesforce Lightning Experience user interface. With this update, the certificate creation process is more accessible to assistive technologies and user-friendly for all users.

Where: This change applies to Lightning Experience and Salesforce Classic.

Service

Check out new features that enable customer service agents to work faster and more productively across customer service channels.

IN THIS SECTION:

Einstein for Service

Draw on the power of generative AI with new Einstein for Service features. Save agents time and improve service quality with Work Summaries, contextual and Knowledge grounded Service Replies, and Knowledge Grounded Email Response (Pilot). In Einstein Bots, use Article Answers is now generally available. Build a more accurate intent model with fewer utterances with the cross-lingual intent model (beta), and enjoy setup improvements to enhanced bots and bot templates and blocks.

IN THIS SECTION:

SEE ALSO:

Einstein

Einstein Article Recommendations

Get custom AI-generated email drafts with Einstein for Service: Knowledge Grounded Email Response.

IN THIS SECTION:

SEE ALSO:

Einstein Release Notes

Get AI-Drafted Email Responses Based on a Knowledge Article (Pilot)

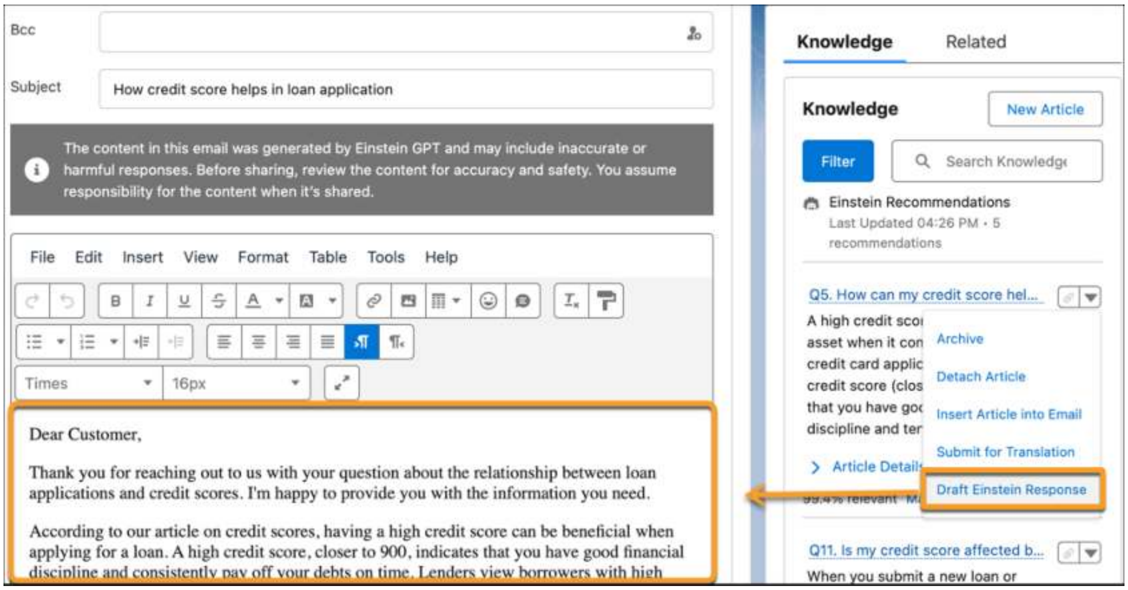
Increase customer satisfaction and reduce handling time using Einstein for Service with generative AI. Einstein quickly drafts an email response to customer inquiries based on your company's trusted knowledge articles. With Knowledge-Grounded Email Response now generally available, agents can review, edit, and send AI-generated articles from the Lightning Email Composer, or copy and paste drafted text into an outside email provider.

Where: This change applies to Unlimited editions with Service Cloud Einstein and the Einstein GPT for Service add-on. Einstein GPT is available in Lightning Experience.

This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

To purchase the Einstein GPT for Service add-on, contact your Salesforce Account Executive.

How: Add the Draft Einstein Response action to your knowledge component. Then, to draft a response based on a Knowledge article, select Draft Einstein Response from the relevant article's drop down menu.



Agents can review, edit, and send responses from the lightning email composer, or copy and paste drafted text into an outside email provider.

SEE ALSO:

Einstein Generative AI Features

Einstein Bots

Use Article Answers, now generally available, to answer your customers' FAQs with your knowledge base. Build an intent model in multiple languages with fewer utterances with the cross-lingual intent model (beta). Add an inbound Omni-Channel flow to an enhanced channel without leaving the Bot Overview page for your enhanced bot. Quickly build and launch bots with access to the resources they need with the enhanced bot audit and optional permission sets for custom bot templates and blocks.

IN THIS SECTION:

Answer FAQs with Article Answers AI (Generally Available)

Article Answers is now generally available in English, French, German, Italian, Portuguese, and Spanish. Article Answers combines machine learning and traditional search to process your customers' free text inputs and serve up relevant fields from your knowledge articles directly in the bot conversation. Set up Article Answers to quickly build an FAQ bot, or connect a bot to your knowledge base with one bot dialog. Tailor your bot's responses to your customer segments with knowledge data categories. Easily view customer feedback on Article Answers responses with included feedback collection dialogs, event logging, and standard reports.

Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model (Beta)

Upgrade to the cross-lingual intent model, available beginning in Summer '23, to get improved bot performance and make adding new languages to your NLP bot a breeze. Previously, Einstein Bots offered only one intent model, which requires 20 utterances per language per intent to test or build the model. The cross-lingual intent model can be trained on as little as one utterance per language per intent, and you can test utterances in a new language without rebuilding the model. When you add 20 utterances to an intent, the cross-lingual intent model generates a more accurate F1 score, because it uses all utterances for testing and training. Plus, you can easily switch between the cross-lingual and original intent models, as long as you meet the minimum requirements. You can use the cross-lingual intent model with single- or multi-language bots.

Route Conversations to an Enhanced Bot with Fewer Clicks

Go from zero to bot in less time and fewer clicks by adding an inbound Omni-Channel flow to your channel from the Bot Overview page. Previously, when you created an enhanced bot, you had to complete the channel setup on the Messaging Settings page before an inbound flow could send conversations to your bot. Now you can modify your channel's routing settings, including the flow definition and fallback queue, from the same page where you manage your bot's settings and Omni-Channel flows.

Get Your Bot Ready for Launch with the Enhanced Bot Audit

Use the new enhanced bot audit to take some of the guesswork out of enhanced bot setup. The audit reviews key configuration details specific to your bot and alerts you to missing requirements, such as required access to actions, objects, or fields. When your bot passes the audit, you can be confident that your enhanced bot has access to the resources it needs to handle complex customer interactions.

Ask Questions with Static Options with an Enhanced Bot

Enhanced bots now support the question messaging component with static options, so your bot can collect customer information quickly. For example, create a question that asks customers to select a reason for reaching out to the bot. Then present your customers with predefined options in rich messaging formats that can include custom text, images, and buttons. For a plain text experience, you can still use the Static question dialog step with enhanced and standard bots.

Customize an Enhanced Link with Dynamic Input

The Bot Builder now supports parameters in enhanced link messaging components, so you can customize an enhanced link dynamically from the enhanced bot conversation. For example, based on your customer's response to an earlier question, show them a different image or send them to a different URL. Previously, you could add parameters to an enhanced link messaging component, but you couldn't fill them from a bot conversation.

Create and Share Your Own Custom Bot Templates (Generally Available)

Create your own custom bot templates from scratch or from existing bots. With custom templates, now generally available, you can even package and share your template between orgs or on AppExchange, so everyone can use your bot customized for your industry or use case. Bot template packages include stored intent data, flows, and Apex.

Build Bots Faster with Bot Blocks (Generally Available)

Bot blocks are now generally available. Blocks help you use and share great bot functions without building a whole bot, saving you time and effort. You can build a bot block to add a dialog group to multiple bots, or you can add an out-of-the-box bot block to your bot from our library.

Add Permission Sets to Your Custom Templates and Blocks

Bot templates and blocks make it easy to share complex bot functions with powerful actions, such as Apex, external service, and flow. But what good is a custom-built flow if your bot can't run it? Now when you create a template or block, you can add a permission set that grants access to the required resources. When someone creates a bot from your template or imports your block, they add the permission set to their bot user profile so they can go live with their bot's new functionality quickly and easily.

Reach More Customers with Multi-Language Support for Custom Templates and Blocks

Now you can create and share bot templates and blocks with full multi-language support, so anyone who uses your templates or blocks can reach more customers in less time. When you create a template or block, you can include support for some or all of the primary and secondary languages supported in the original bot. Previously, custom templates and blocks supported only one language.

Grow Your Einstein Bot Portfolio with New Templates and Blocks

Build and launch bots customized to your use case with new out-of-the-box bot templates. Add functionality to your existing bots in just a few clicks with new bot blocks. Plus, an update to the Intro template.

Read in Right-to-Left Languages in the Bot Builder

The Bot Builder UI now supports right-to-left (RTL) languages, so you can build, launch, and monitor your bot using the language you specify in your personal settings. RTL languages aren't supported in bot conversations.

View Standard Bot Reports in the Winter '24 Folder

Each release, Einstein Bots adds a folder that contains the latest versions of all standard bot reports. In Winter '24, no changes affect standard bot metric types or individual reports from Summer '23, but you can access fresh versions of all reports in the Einstein Bot Reports Winter '24 folder.

AnalyticsBotSession Object Was Removed

The AnalyticsBotSession object was used to populate session-related data in API queries. Beginning in Winter '23, you can no longer access AnalyticsBotSession records. Instead, use the newer Session Metrics object (ConversationDefinitionSession) to retrieve the same data. You can also use the ConversationDefinitionSessionEngagement junction object to link ConversationDefinitionSession records and LiveChatTranscript or MessagingSession records.

Run Flows in Bot User Context (Release Update)

With this update enabled, a flow initiated by a bot uses the user profile and permission sets associated with the bot to determine the object permissions and field-level access of the flow. This update was first made available in Summer '23.

SEE ALSO:

Einstein Release Notes

Answer FAQs with Article Answers AI (Generally Available)

Article Answers is now generally available in English, French, German, Italian, Portuguese, and Spanish. Article Answers combines machine learning and traditional search to process your customers' free text inputs and serve up relevant fields from your knowledge articles directly in the bot conversation. Set up Article Answers to quickly build an FAQ bot, or connect a bot to your knowledge base with one bot dialog. Tailor your bot's responses to your customer segments with knowledge data categories. Easily view customer feedback on Article Answers responses with included feedback collection dialogs, event logging, and standard reports.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: From the Einstein Bots Setup page, go to the Smart Features tab. Under Article Answers, select **Get Started**.

SEE ALSO:

Salesforce Help: Deliver Knowledge Articles with Article Answers (can be outdated or unavailable during release preview)

Teach Your Bot New Languages More Easily with the Cross-Lingual Intent Model (Beta)

Upgrade to the cross-lingual intent model, available beginning in Summer '23, to get improved bot performance and make adding new languages to your NLP bot a breeze. Previously, Einstein Bots offered only one intent model, which requires 20 utterances per language per intent to test or build the model. The cross-lingual intent model can be trained on as little as one utterance per language per intent, and you can test utterances in a new language without rebuilding the model. When you add 20 utterances to an intent, the cross-lingual intent model generates a more accurate F1 score, because it uses all utterances for testing and training. Plus, you can easily switch between the cross-lingual and original intent models, as long as you meet the minimum requirements. You can use the cross-lingual intent model with single- or multi-language bots.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

> Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: If it's your first time building an intent model, enable natural language processing for your bot. Add one or more utterances to at least two dialogs, and then enable intent and turn on Einstein for the dialogs.

To turn on the cross-lingual intent model, in the Settings section of the Bot Overview page, go to the Intent Enhancements setting and select **Use the Cross-Lingual Intent Model with this bot**. Then save your changes.

SEE ALSO:

Salesforce Help: Turn on the Cross-Lingual Intent Model (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Use Intents to Understand Your Customers (can be outdated or unavailable during release preview)

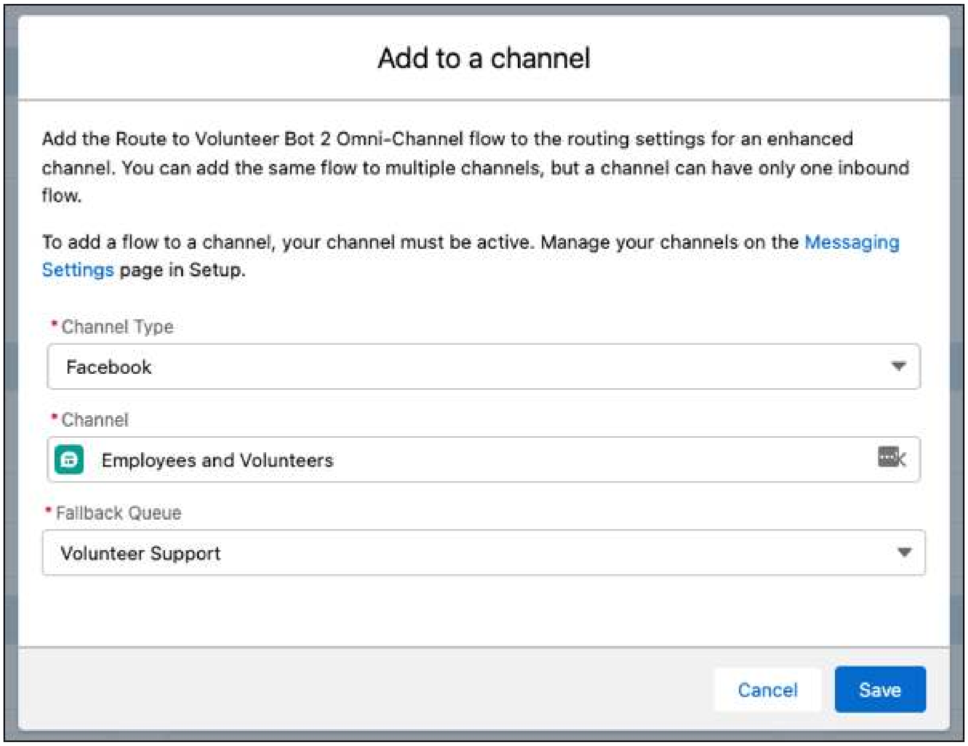
Route Conversations to an Enhanced Bot with Fewer Clicks

Go from zero to bot in less time and fewer clicks by adding an inbound Omni-Channel flow to your channel from the Bot Overview page. Previously, when you created an enhanced bot, you had to complete the channel setup on the Messaging Settings page before an inbound flow could send conversations to your bot. Now you can modify your channel's routing settings, including the flow definition and fallback queue, from the same page where you manage your bot's settings and Omni-Channel flows.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: To add an inbound flow to a channel, on the Bot Overview page for your enhanced bot, go to the Inbound Omni-Channel Flows section. From the dropdown menu for the flow you'd like to add to a channel, select **Add to a Channel**.

Specify the channel you want to modify and a fallback queue, and then save your changes.



SEE ALSO:

Salesforce Help: Route Conversations to an Enhanced Bot (can be outdated or unavailable during release preview)

Get Your Bot Ready for Launch with the Enhanced Bot Audit

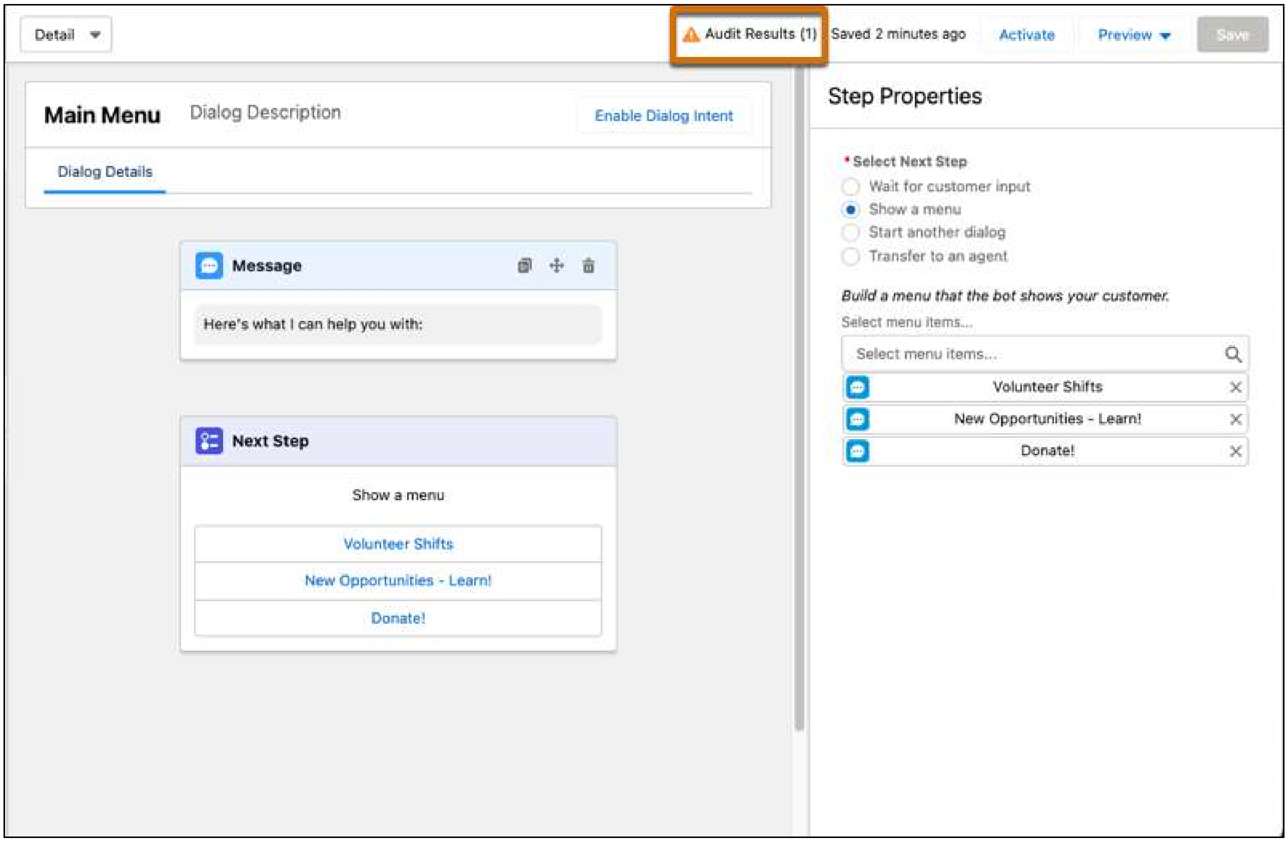
Use the new enhanced bot audit to take some of the guesswork out of enhanced bot setup. The audit reviews key configuration details specific to your bot and alerts you to missing requirements, such as required access to actions, objects, or fields. When your bot passes the audit, you can be confident that your enhanced bot has access to the resources it needs to handle complex customer interactions.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Why: The enhanced bot audit verifies your configuration based on the functionality included in your enhanced bot design.

What's in the Bot	What the Audit Checks
Object Search (beta)	The bot user has read access to the objects and object fields referenced in the search.
Transfer to Agent Next Step (including the Transfer to Agent system dialog)	The bot has an active Omni-Channel flow specified in the Outbound Omni-Channel Flow setting.
Flow	The bot user has the Run Flows permission.
Apex action, standard action, and external service action	The bot user has access to the actions included in the bot.

How: The audit runs automatically each time you enter the Dialogs page of the Bot Builder and each time you save your bot. View the audit results for your bot at the top of the page.



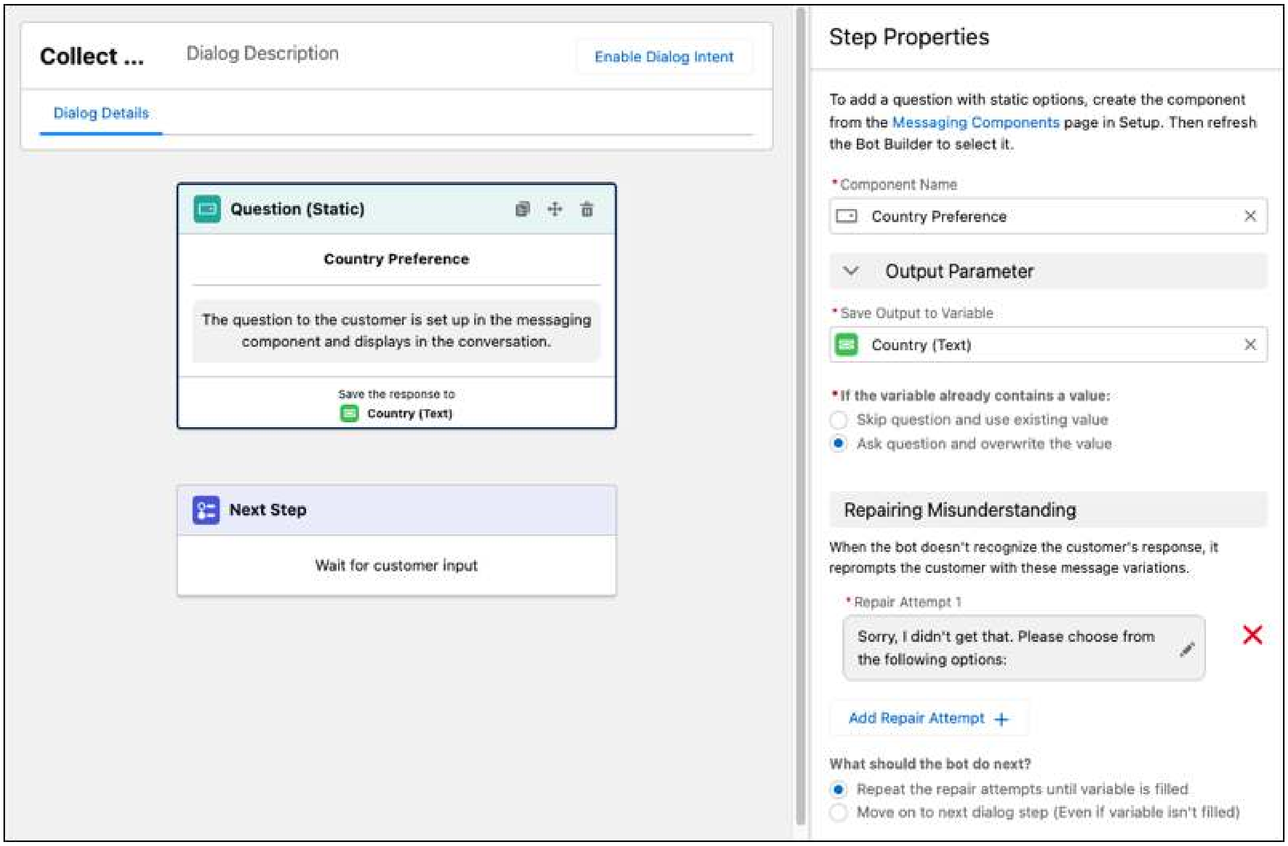
Ask Questions with Static Options with an Enhanced Bot

Enhanced bots now support the question messaging component with static options, so your bot can collect customer information quickly. For example, create a question that asks customers to select a reason for reaching out to the bot. Then present your customers with predefined options in rich messaging formats that can include custom text, images, and buttons. For a plain text experience, you can still use the Static question dialog step with enhanced and standard bots.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: Create and manage question components on the Messaging Components page in Setup.

To use a question with static options with an enhanced bot, on the Dialogs page of the Bot Builder, add the **Question (Static)** dialog step to a dialog to reference the associated messaging component.



SEE ALSO:

Salesforce Help: Ask a Question with Static Options with an Enhanced Bot (can be outdated or unavailable during release preview)

Salesforce Help: Create a Messaging Component: Questions with Static Options (can be outdated or unavailable during release preview)

Salesforce Help: Messaging Component Types and Formats (can be outdated or unavailable during release preview)

Customize an Enhanced Link with Dynamic Input

The Bot Builder now supports parameters in enhanced link messaging components, so you can customize an enhanced link dynamically from the enhanced bot conversation. For example, based on your customer's response to an earlier question, show them a different image or send them to a different URL. Previously, you could add parameters to an enhanced link messaging component, but you couldn't fill them from a bot conversation.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: Create an enhanced link and add custom parameters on the Messaging Components page in Setup.

To use an enhanced link with custom parameters in an enhanced bot, in the Bot Builder, add a dialog step to reference the Apex class or flow that dynamically customizes the link. Then add the **Enhanced Link** dialog step to reference the associated enhanced link messaging component, and configure any inputs.

SEE ALSO:

Salesforce Help: Display an Enhanced Link in an Enhanced Bot

Salesforce Help: Create a Messaging Component: Enhanced Links

Create and Share Your Own Custom Bot Templates (Generally Available)

Create your own custom bot templates from scratch or from existing bots. With custom templates, now generally available, you can even package and share your template between orgs or on AppExchange, so everyone can use your bot customized for your industry or use case. Bot template packages include stored intent data, flows, and Apex.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: On the Bots Setup page, click the templates tab. Then click **New** to create a template.

SEE ALSO:

Salesforce Help: Create an Einstein Bot Template

Build Bots Faster with Bot Blocks (Generally Available)

Bot blocks are now generally available. Blocks help you use and share great bot functions without building a whole bot, saving you time and effort. You can build a bot block to add a dialog group to multiple bots, or you can add an out-of-the-box bot block to your bot from our library.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: On the Bots Setup page, click the Bot Blocks tab. Click **New Block** to create a block. To create a block from a dialog group, click the dropdown next to the dialog group and select **Export as Block**.

To import a bot block, open the bot you want to use as the destination for the block. On the Dialogs menu, click the plus icon, and then select **Import a Block**.

SEE ALSO:

Salesforce Help: Einstein Bot Blocks

Add Permission Sets to Your Custom Templates and Blocks

Bot templates and blocks make it easy to share complex bot functions with powerful actions, such as Apex, external service, and flow. But what good is a custom-built flow if your bot can't run it? Now when you create a template or block, you can add a permission set that grants access to the required resources. When someone creates a bot from your template or imports your block, they add the permission set to their bot user profile so they can go live with their bot's new functionality quickly and easily.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: To get started, create a permission set that grants access to the resources required to use your template or block. When you create a template or block, in the Permission Set field, search for and select the permission set you want to add.

When someone creates a bot from your template or imports your block, they're prompted to add the permission set to their bot user profile.

SEE ALSO:

Salesforce Help: Create an Einstein Bot Template (can be outdated or unavailable during release preview)

Salesforce Help: Create an Einstein Bot Block (can be outdated or unavailable during release preview)

Reach More Customers with Multi-Language Support for Custom Templates and Blocks

Now you can create and share bot templates and blocks with full multi-language support, so anyone who uses your templates or blocks can reach more customers in less time. When you create a template or block, you can include support for some or all of the primary and secondary languages supported in the original bot. Previously, custom templates and blocks supported only one language.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

How: In the Bot Builder, when you create a template or block, you're prompted to select a primary language and any secondary languages you want to support, based on the languages supported by the original bot.

When someone creates a bot from your template, they can specify any language supported by your template as a primary or secondary language for their bot.

When someone imports your block, the block is automatically supported in all languages supported by the block and the destination bot.

SEE ALSO:

Salesforce Help: Create an Einstein Bot Template (can be outdated or unavailable during release preview)

Salesforce Help: Create an Einstein Bot Block (can be outdated or unavailable during release preview)

Grow Your Einstein Bot Portfolio with New Templates and Blocks

Build and launch bots customized to your use case with new out-of-the-box bot templates. Add functionality to your existing bots in just a few clicks with new bot blocks. Plus, an update to the Intro template.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Why: These new system templates are available.

- Buyer Assistant Sales Template (Generally Available)

  Create enhanced bots designed to transform the web-to-lead experience and streamline sales. Spin up a bot quickly from the Einstein Bots guided setup or with custom Sales onboarding.

These new system blocks are available for standard or enhanced bots.

- Add a Case Comment: Collects a case comment and adds it to an existing case.
- Close Case: Closes a matched case.
- Create Case: Checks a variable for existing cases and creates a case for a new issue.
- CSAT Survey: Collects a user's rating of their satisfaction with the conversational experience.

We've made changes to the Intro Bot - Get Pre-Chat Context flow, which comes with the Intro system template. The flow has been updated to get customer context from standard and enhanced Messaging channels, not just the Chat channel, and renamed to Einstein

Bots - Get Customer Context. This update applies automatically to new and existing bots created from the Intro template, with no change in behavior for existing bots.

Note: The Intro template isn’t available out-of-the-box for enhanced bots. You can’t create an enhanced bot from the Intro template, but you can clone a standard bot created from the Intro Template as an enhanced bot.

SEE ALSO:

Salesforce Help: Explore Einstein Bot System Templates (can be outdated or unavailable during release preview)

Salesforce Help: Explore the Einstein Bot Block Library (can be outdated or unavailable during release preview)

Salesforce Help: Get Started with the Intro Template Bot

Read in Right-to-Left Languages in the Bot Builder

The Bot Builder UI now supports right-to-left (RTL) languages, so you can build, launch, and monitor your bot using the language you specify in your personal settings. RTL languages aren’t supported in bot conversations.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

SEE ALSO:

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

Salesforce Help: Language, Locale, and Currency Settings (can be outdated or unavailable during release preview)

View Standard Bot Reports in the Winter ’24 Folder

Each release, Einstein Bots adds a folder that contains the latest versions of all standard bot reports. In Winter ’24, no changes affect standard bot metric types or individual reports from Summer ’23, but you can access fresh versions of all reports in the Einstein Bot Reports Winter ’24 folder.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

SEE ALSO:

Salesforce Help: Navigate Einstein Bot Standard Reports (can be outdated or unavailable during release preview)

AnalyticsBotSession Object Was Removed

The AnalyticsBotSession object was used to populate session-related data in API queries. Beginning in Winter ’23, you can no longer access AnalyticsBotSession records. Instead, use the newer Session Metrics object (ConversationDefinitionSession) to retrieve the same data. You can also use the ConversationDefinitionSessionEngagement junction object to link ConversationDefinitionSession records and LiveChatTranscript or MessagingSession records.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

Run Flows in Bot User Context (Release Update)

With this update enabled, a flow initiated by a bot uses the user profile and permission sets associated with the bot to determine the object permissions and field-level access of the flow. This update was first made available in Summer ’23.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

When: Salesforce enforces this update in Summer '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: Previously, a flow initiated in a bot ran in system context. A flow that runs in system context has permission to access and modify all data.

With this update, flows initiated by a bot run in user context. When the bot initiates a flow, the user profile and permission sets associated with the bot, as well as any sharing rules, determine the object permissions and field-level access of the flow.

This update improves security in Salesforce by preventing you from unintentionally allowing bots to create or modify records they don't have access to.

How: Enabling this update prevents flows that are initiated by a bot from creating, reading, updating, or deleting records that the bot doesn't have permission to access or modify.

Before you enable this update in your production org, we recommend that you test your bots that run flows with this update enabled in a sandbox or developer org. Test that the flows initiated from your bot can perform all flow operations.

If a flow fails, identify the missing permissions and add them to the user profile or permission sets associated with your bot.

SEE ALSO:

Release Updates

Einstein Classification

Close cases faster using Einstein for Service: Work Summaries with generative AI, now generally available.

IN THIS SECTION:

SEE ALSO:

Einstein Release Notes

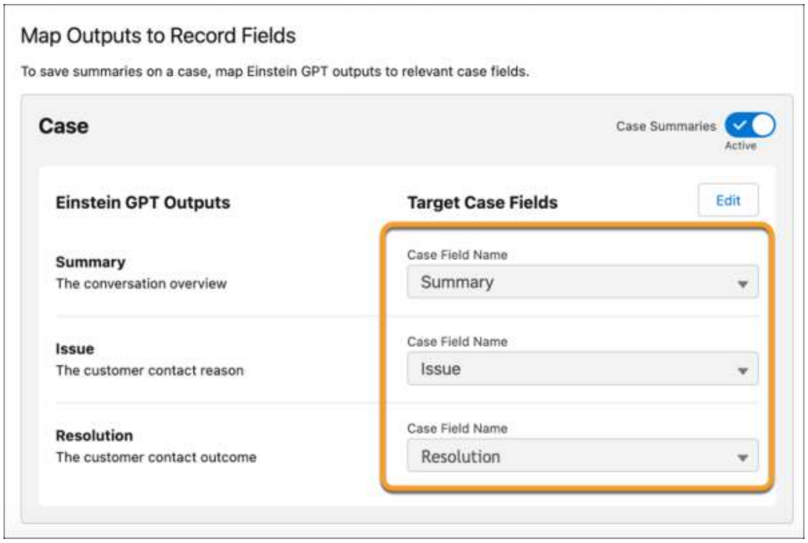
Close Cases Faster using Einstein Work Summaries with Generative AI(Generally Available)

Save agents time with AI-generated case summaries, now generally available. Based on a Chat conversation between an agent and customer, Einstein predicts and fills a summary, issue, and resolution. Agents can then review, edit, and save these summaries.

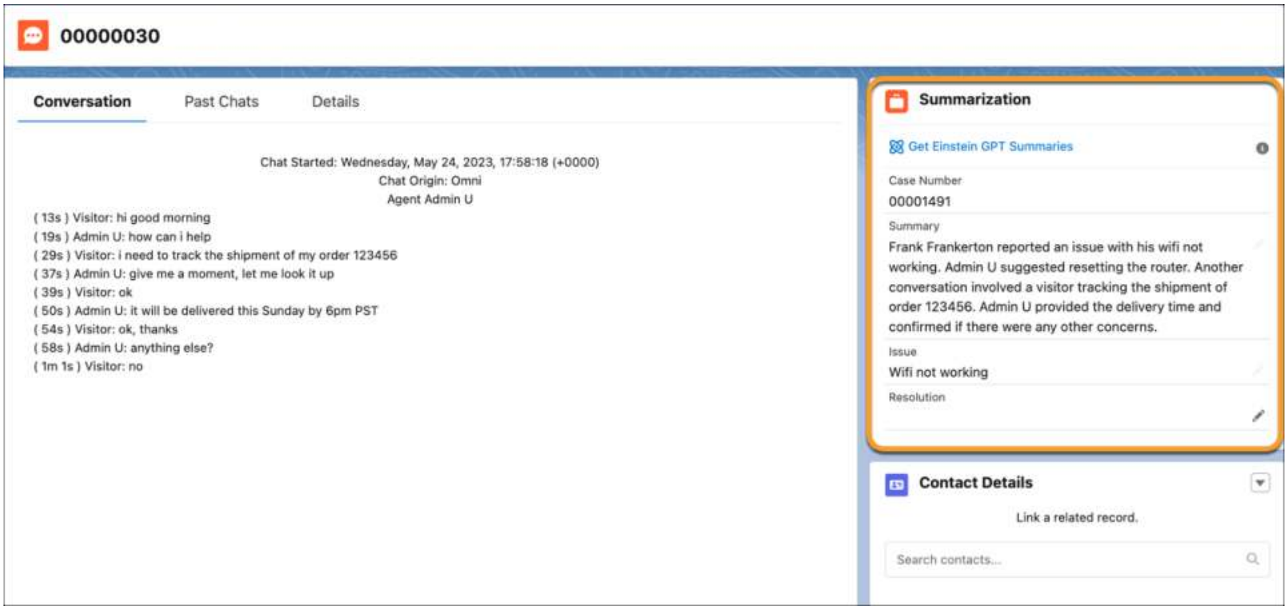
Where: This change applies to Unlimited editions with Service Cloud Einstein and the Einstein GPT for Service add-on. Einstein for Service is available in Lightning Experience. To purchase the Einstein GPT for Service add-on, contact your Salesforce account executive. Work Summaries is available only in English (US).

How: Work Summaries requires Live Agent and the Service Console app.

To get started with Work Summaries, from the Einstein for Service: Work Summaries Setup page, enable Work Summaries. In the Map Outputs to Record Fields section, select the case fields where you want to map Einstein outputs.



To show agents summaries, add the Wrap Up component to the chat transcript page. When agents click Get Einstein Recommendations, Einstein predicts and fills values for the Summary, Issue, and Resolution fields.



Agents can get predictions both during and after the conversation. Einstein generates predictions only with existing conversation context, so summaries have more detail and accuracy at the end of a chat session. When an agent clicks **End Chat**, Einstein generates a new Summary, Issue and Resolution from the completed conversation.

Agents can then review, edit and save these summaries.

SEE ALSO:

Einstein Generative AI Features

Salesforce Help: Einstein for Service: Work Summaries

Salesforce Help: About Einstein Generative AI

Trailhead: Einstein Generative AI: Quick Look

Bring Agents and Supervisors Up to Speed with Mid-Conversation Summaries

When an agent or supervisor joins an active voice call or messaging session, give them context quickly with a real-time AI-generated summary of the conversation.

Where: This change applies to enhanced WhatsApp, enhanced Facebook Messenger, Messaging for In-App and Web, and Service Cloud Voice in Unlimited editions with Service Cloud Einstein and the Einstein GPT for Service add-on. Einstein GPT is available in Lightning Experience. To purchase the Einstein GPT for Service add-on, contact your Salesforce account executive.

Who: To use Conversation Catch-Up, you need the Service Cloud Einstein and Einstein GPT Service add-on licenses. This feature is available only in English.

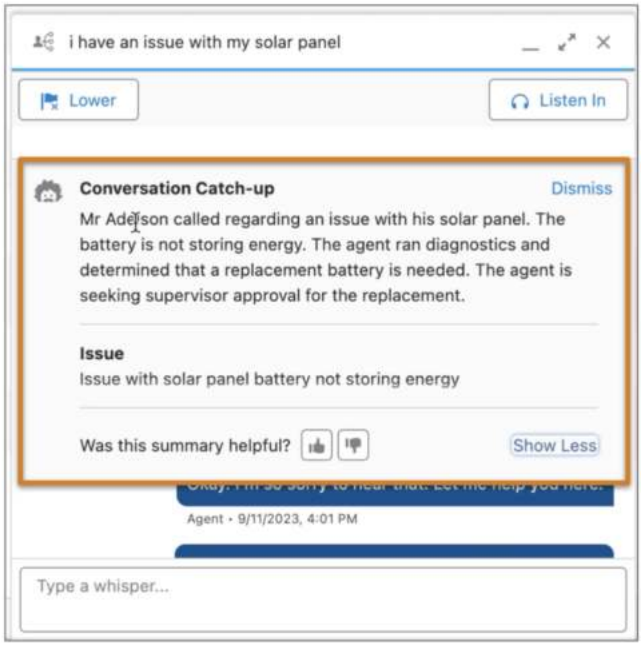
How: With Conversation Catch-up, real-time summaries appear at several key moments:

- When an agent accepts a transferred voice call or messaging session from another agent or bot
- When a supervisor clicks **Monitor** from the Omni Supervisor dashboard to respond to an escalation or agent flag raise

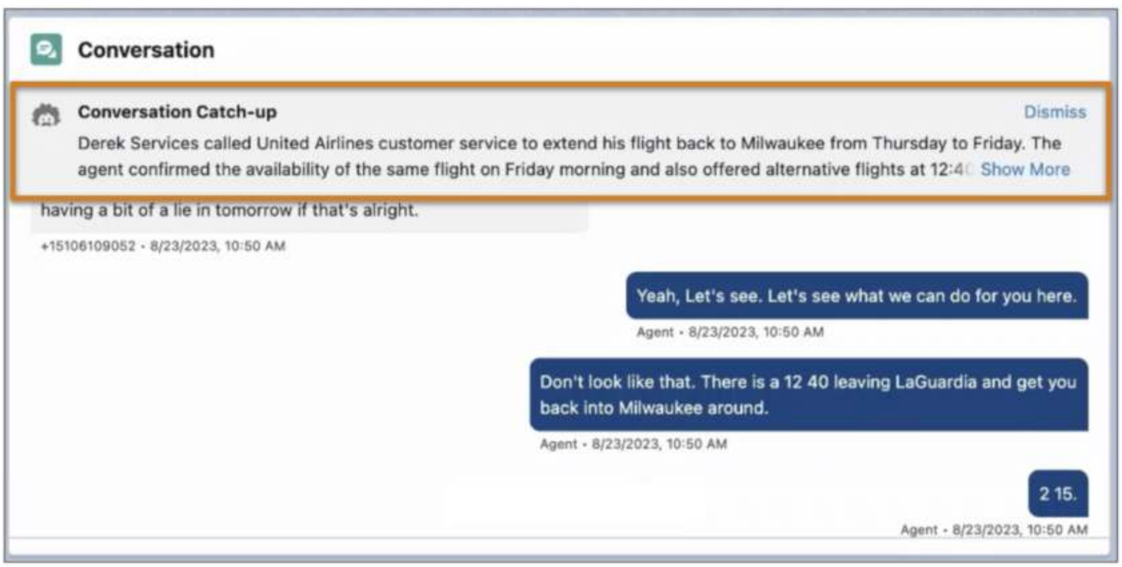
The summary appears in the Conversation Catch-up window at the top of the conversation. There, users can:

- View a one-line summary of the issue and a longer, more detailed description.
- Dismiss the summary when they no longer need it. After it's dismissed, a summary can't be retrieved, though refreshing the browser page reveals a new summary.
- Rate the summary's accuracy and usefulness by giving it a thumbs-up or thumbs-down.

Here's how it appears to supervisors:



Here's how it appears to agents:



To turn on Conversation Catch-Up, go to the Einstein Work Summaries page in Setup. Turn on Work Summaries, click the **Conversation Catch-Up** tab, and then turn on summaries for agents, supervisors, or both.

SEE ALSO:

Salesforce Help: Show Agents and Supervisors Mid-Conversation Summaries

Einstein Conversation Mining

Transform conversation data into service insights and build bot intents with Einstein Conversation Mining. Use email conversations or related transcripts to build reports.

IN THIS SECTION:

SEE ALSO:

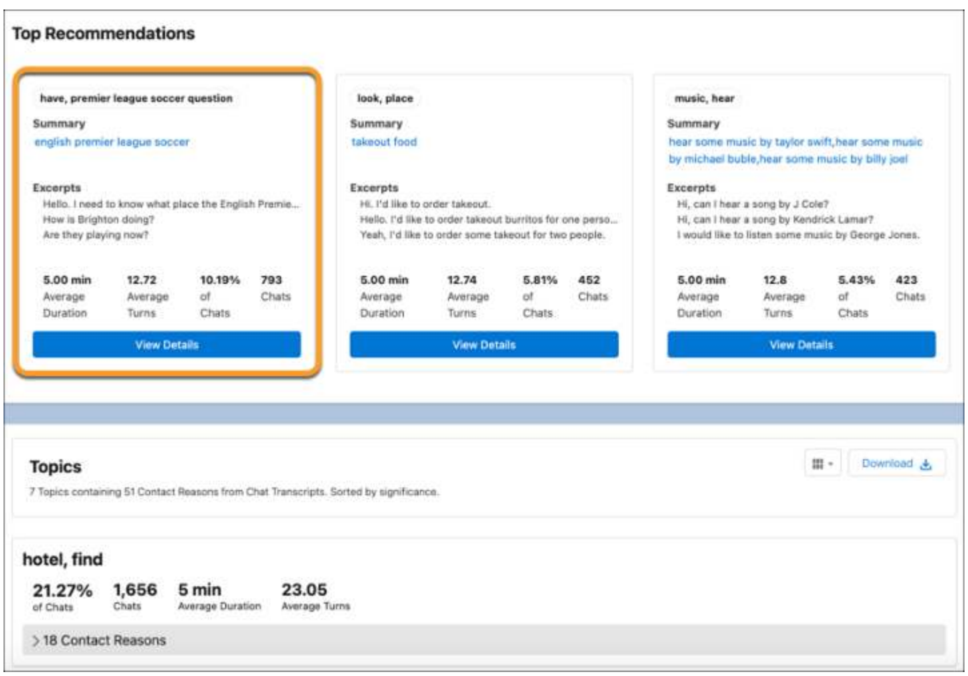
Einstein Release Notes

Get Service Insights and Build Bot Intents with Einstein Conversation Mining (Generally Available)

Use Einstein Conversation Mining, now generally available, to transform conversation data into service insights and build bot intents. Einstein Conversation Mining replaces time-consuming transcript analysis that otherwise takes weeks.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Service Intelligence add-on. Setup for Einstein Conversation Mining is available only in Lightning Experience.

Why: Create reports based on specific audience details, using any field on your live chat transcript or associated case record. The ability to create multiple reports based on filters of the same dataset helps you customize bots for different customers' needs. Einstein then groups and ranks the requests, identifying the contact reasons that are most frequent and easiest to automate. Then, you can send the chat data from the contact reason over to Einstein Bots or create an intent set.



How: Go to Einstein Conversation Mining in setup. Then turn on Einstein Conversation Mining to opt in.

Einstein Conversation Mining requires at least 2,500 records with an identifiable contact reason. Einstein Conversation Mining excludes conversations without an identifiable contact reason, such as partial conversations with no business use case. Einstein Conversation Mining must have 2,500 records after any filters are applied to create a report.

SEE ALSO:

Salesforce Help: Einstein Conversation Mining

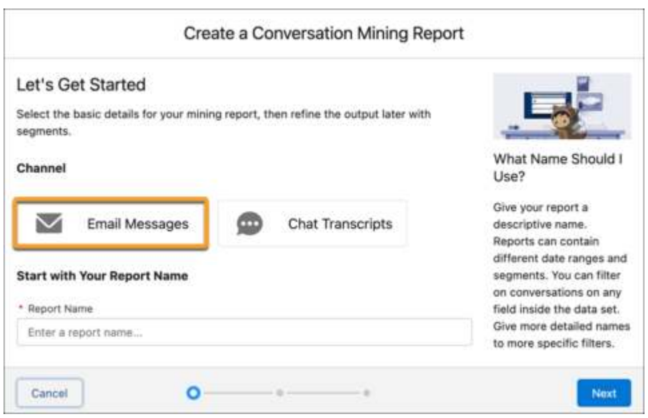
Salesforce Help: Create a Bot from Your Data

Include Email Conversations When You Build Your Conversation Mining Reports (Generally Available)

Use email conversations to build reports with Einstein Conversation Mining, now generally available. These reports help you better understand and identify common cases or customer issues. Previously, Einstein Conversation Mining looked only at your live chat transcripts.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with the Service Intelligence add-on. Setup for Einstein Conversation Mining is available only in Lightning Experience.

How: Go to Einstein Conversation Mining in Setup and turn on the email channel pilot. Then, when you create a report, select Email Messages for the channel.



SEE ALSO:

Salesforce Help: Build an Einstein Conversation Mining Report

Einstein Reply Recommendations

Supercharge agent productivity using generative AI with Einstein for Service: Service Replies and Service Replies with Knowledge grounding, now generally available.

IN THIS SECTION:

Optimize Agent Productivity and Response Quality with Einstein Service Replies (Generally Available)

Get real-time response recommendations for your agents. Now generally available, Einstein generative AI follows a chat conversation as it unfolds, then drafts and recommends fluent, courteous, and relevant, replies for your agents to review, edit and post.

Save Agents Time and Improve Accuracy with Grounded Einstein Service Replies (Generally Available)

Get real-time AI-generated responses for your agents grounded in your unique Knowledge base. With Grounding, Einstein retrieves articles relevant to your current conversation and then drafts recommended replies with that information. Previously, Service Replies were based only on context.

SEE ALSO:

Einstein Release Notes

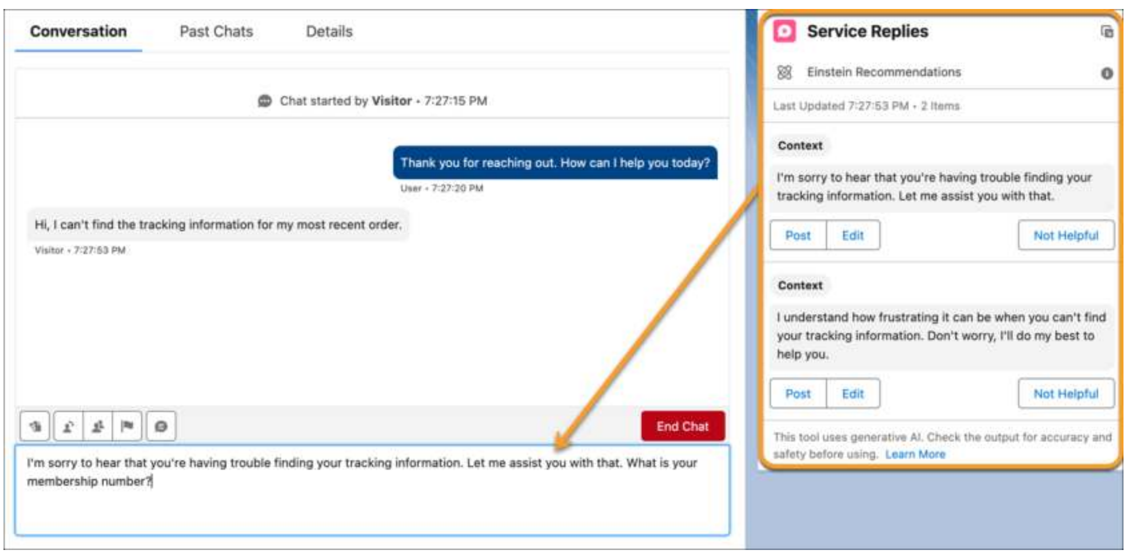
Optimize Agent Productivity and Response Quality with Einstein Service Replies (Generally Available)

Get real-time response recommendations for your agents. Now generally available, Einstein generative AI follows a chat conversation as it unfolds, then drafts and recommends fluent, courteous, and relevant, replies for your agents to review, edit and post.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud Einstein and the Einstein GPT for Service add-on. Service Replies is available only in English (US).

To purchase the Einstein GPT for Service add-on, contact your Salesforce account executive.

How: Turn on Service Replies from the Einstein Reply Recommendations page in Setup. To give agents access to Service Replies, in the Einstein Reply Recommendations Component, assign them the Service Replies User permission set.



From the recommendations component, agents can review, edit and post replies.

SEE ALSO:

Einstein Generative AI Features

Salesforce Help: About Einstein Generative AI

Trailhead: Einstein Generative AI: Quick Look

Salesforce Help: Einstein for Service: Service Replies

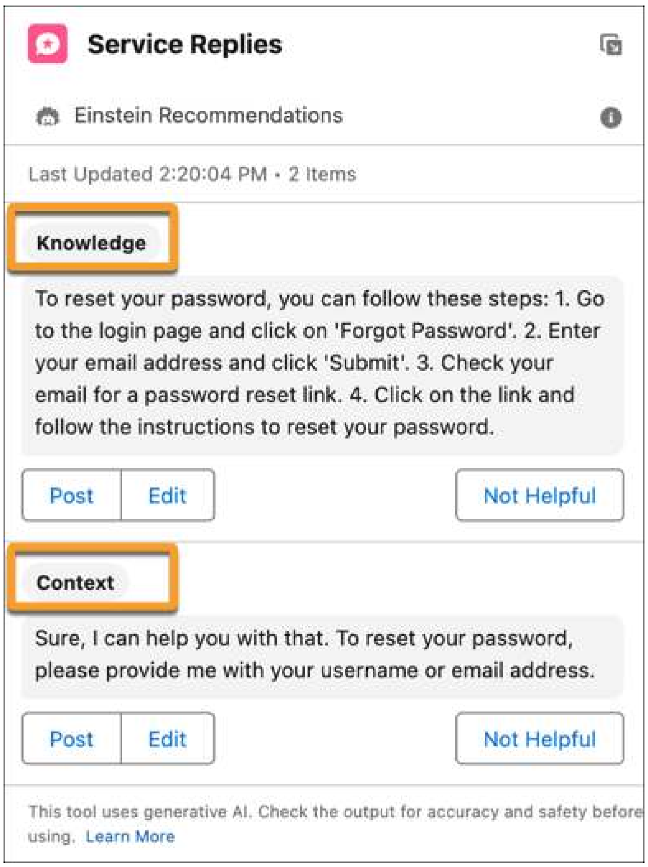
Save Agents Time and Improve Accuracy with Grounded Einstein Service Replies (Generally Available)

Get real-time AI-generated responses for your agents grounded in your unique Knowledge base. With Grounding, Einstein retrieves articles relevant to your current conversation and then drafts recommended replies with that information. Previously, Service Replies were based only on context.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud Einstein and the Einstein GPT for Service add-on. Service Replies is available only in English (US).

To purchase the Einstein GPT for Service add-on, contact your Salesforce account executive.

How: Turn on Grounding from the Einstein for Service: Grounding page in Setup. Then Service Replies automatically begins to show grounded replies to agents. Einstein shows which replies are based on conversation context or knowledge above each reply in the recommendations component.



SEE ALSO:

Einstein Generative AI Features

Salesforce Help: About Einstein Generative AI

Trailhead: Einstein: Quick Look

Salesforce Help: Einstein for Service: Service Replies

Salesforce Help: Einstein for Service: Grounding

Einstein for Service Grounding

Get AI-generated responses that are grounded in your company's Case and Knowledge data, now generally available.

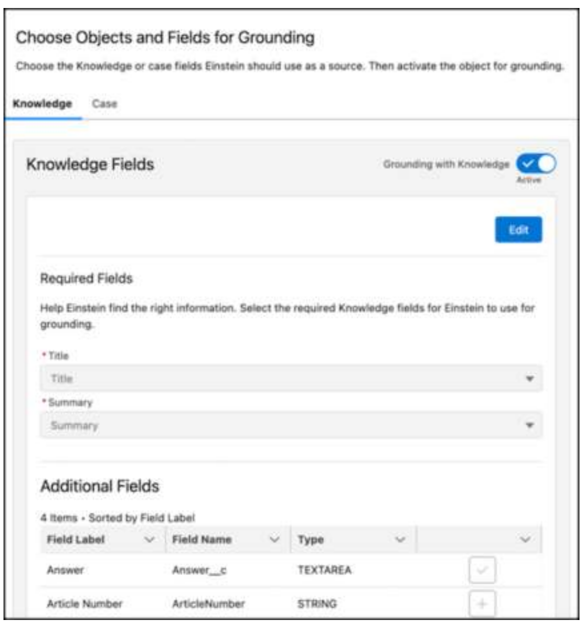
IN THIS SECTION:

Ground Einstein for Service in Your Company's Data (Generally Available)

Retrieve the most relevant articles and draft responses based on your company's trusted data. With Einstein for Service: Grounding, you can base the Einstein for Service generative responses in your Knowledge and Case fields.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud Einstein and the Einstein GPT for Service add-on. Einstein GPT is available in Lightning Experience. Setup for Einstein GPT is available in Lightning Experience. To purchase the Einstein GPT for Service add-on, contact your Salesforce account executive.

How: From the Einstein for Service: Grounding page in Setup, turn on grounding for Knowledge and cases. Then select Knowledge objects and Case fields for Einstein to focus on.



Service Intelligence

Service Intelligence is a data-driven solution that displays key contact center performance metrics. Determine whether you're meeting your customer service goals with easy-to-understand data visualizations.

Service Intelligence includes Data Cloud, CRM Analytics, and Einstein Conversation Mining. The combination of customer data, key performance indicators (KPIs), and artificial intelligence (AI) helps your service team improve operations and reduce costs.

Service Intelligence and its features are available for an extra cost. For pricing details, contact your Salesforce account executive.

IN THIS SECTION:

Reduce Costs and Improve Operations with Service Intelligence

Use insights from your customer data to understand service trends, agent behaviors, and customer satisfaction scores across your service channels. Access ready-made dashboards, and view your service data in one place to make better service decisions. Embed service insights from Data Cloud directly in the flow of agent work with the CRM Analytics.

Where: This change applies to Service Cloud in Lightning Experience in Enterprise and Unlimited editions for an additional cost.

When: Later in the Winter '24 release.

Who: To use the Service Intelligence dashboards, you need the Service Intelligence User permission set. To manage the Service Intelligence dashboards, you need the Service Intelligence Admin permission set.

How: To enable Service Intelligence, from Setup, in the Quick Find box, enter `Service Intelligence`, and then select **Service Intelligence Setup**. Complete the required setup steps. Enable CRM Analytics, and turn on Service Intelligence. Assign the Service Intelligence permission sets to the users who you want to have access to Service Intelligence.

IN THIS SECTION:

SEE ALSO:

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

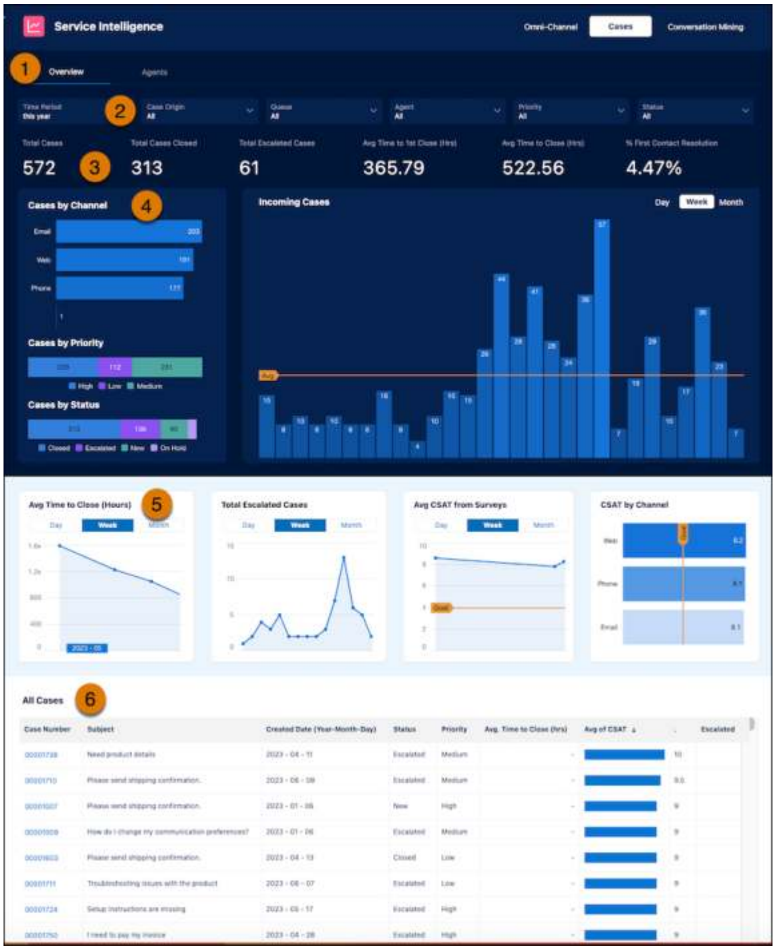
Salesforce Help: Service Intelligence Setup (can be outdated or unavailable during release preview)

Trailhead: Service Intelligence: Quick Look (can be outdated or unavailable during release preview)

Monitor Your Service Operations with Case Dashboards

Get a comprehensive view of your service team's caseload. Spot high-level stats, such as total escalated cases, average time to close, percentage of first contact resolution, customer satisfaction scores (CSAT) by channel, and more.

How: In the Overview tab, you can see the high-level details by clicking **Overview** (1).



Use filters to identify cases with poor handle times or first contact resolutions so you can find opportunities to improve service operations (2), and review high-level statistics (3). In the charts, you can see cases by channel, priority, and status, along with incoming cases (4). Understand the average time to close, escalated cases and CSAT by surveys and channels (5). Lastly, drill into details for each case you're interested in (6).

SEE ALSO:

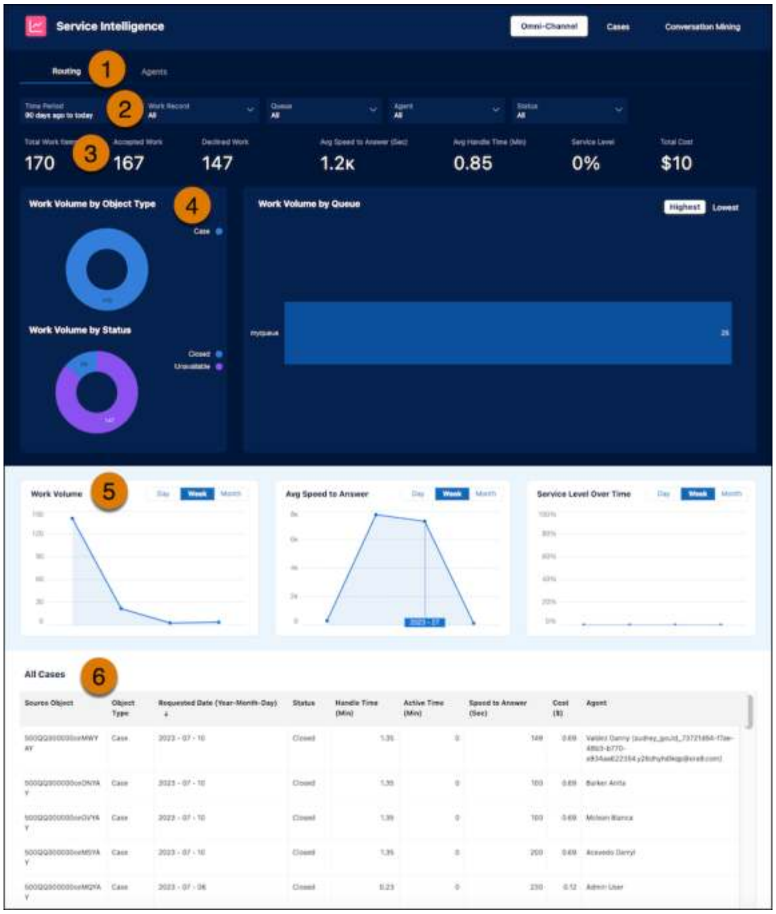
Salesforce Help: Service Intelligence (can be outdated or unavailable during release preview)

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

Improve Agent Performance with Omni-Channel Dashboards

Quickly identify the routing efficiency and agent performance across Omni-Channel routing and queues. Check on work volumes, accepted or declined work, average handle times, average speed to answer, percentage of service levels met, and more.

How: In the Routing tab, you can see the high-level details by clicking **Routing** (1).



Select from the filters to refine your view (2), and review the high-level statistics (3). In the charts, you can see work volume by object type, status, and queue (4). You can see the overall work volume, average speed to answer, and service level over time (5). Lastly, drill into details for each case you're interested in (6).

SEE ALSO:

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

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

See Top Customer Requests with Einstein Conversation Mining Dashboards

Review key reasons why your customers reach out for help with Einstein AI. See top topics or contact reasons by volume, duration of conversations, times conversations pass from a bot to an agent, average cost per interaction, and more.

How: In Conversation Mining, you can see the details for the report (1).

Open Conversation Mining from the dashboard (2), and view the high-level details about Conversation Mining (3). See top topics and contact reasons by volume (4). See topics by average duration, turns, and volume (5).

SEE ALSO:

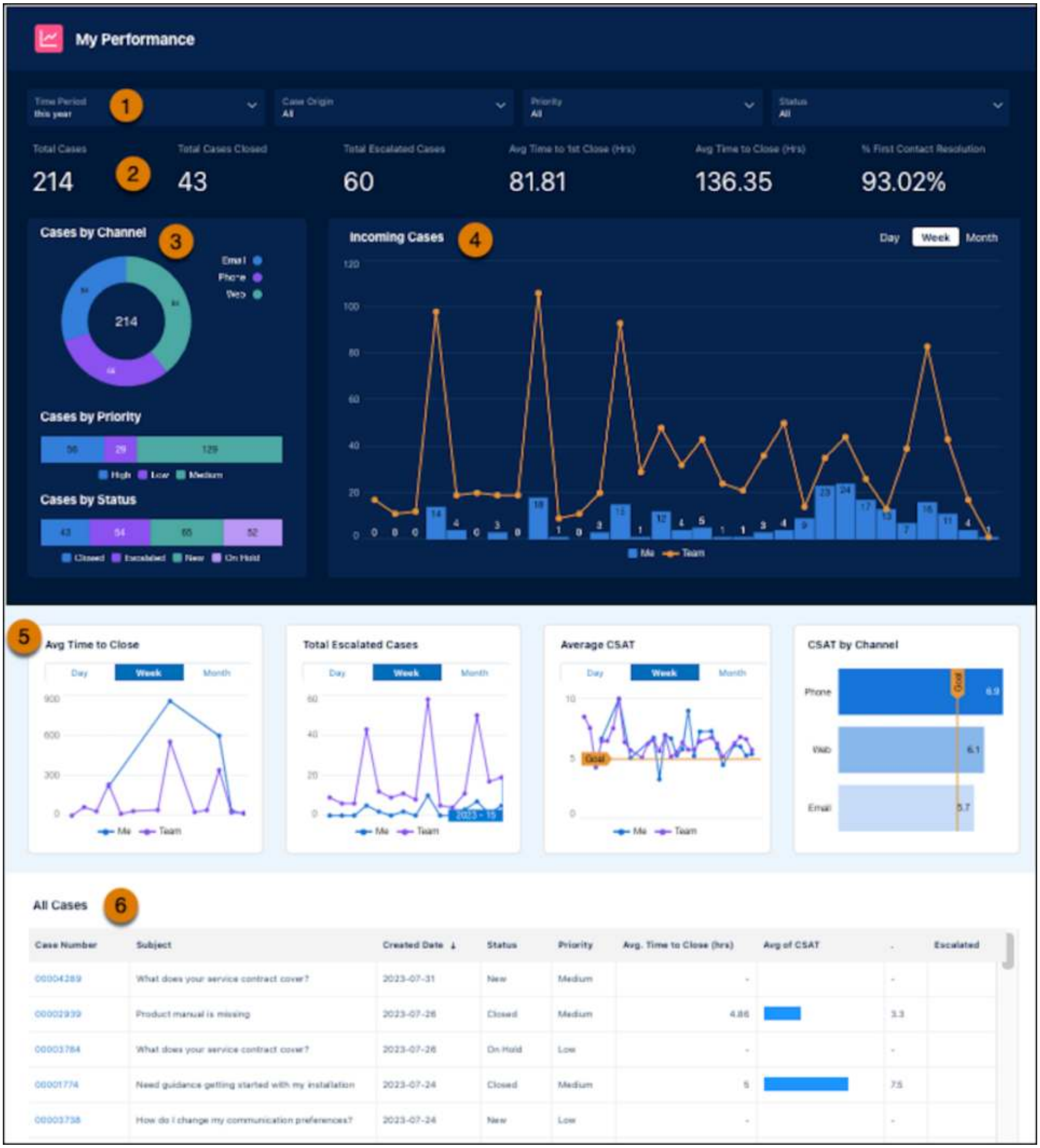
Salesforce Help: Service Intelligence (can be outdated or unavailable during release preview)

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

Let Agents See Their Caseloads with My Performance Dashboards

As an agent, you can use this dashboard to get a comprehensive view of your caseload. Spot high-level stats, such as total escalated cases, average time to close, percentage of first contact resolution, customer satisfaction scores (CSAT) by channel, and more.

How: In My Performance, use filters to identify the cases you'd like to review, such as high-priority, most recent, or case origin (1).



Review the high-level statistics (2). In the charts, you can see your cases sorted by channel, priority, and status (3), along with incoming cases (4). Understand the average time to close, escalated cases average CSAT and CSAT by channels (5). Lastly, drill into details for work you're interested in (6).

SEE ALSO:

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

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

Feedback Management

Create or update records based on survey responses using data from survey invitation fields. Take timely actions with custom notifications to survey invitation, account, and case owners. Measure customer engagement better with new rating icons. Send longer, more engaging survey invitation emails.

IN THIS SECTION:

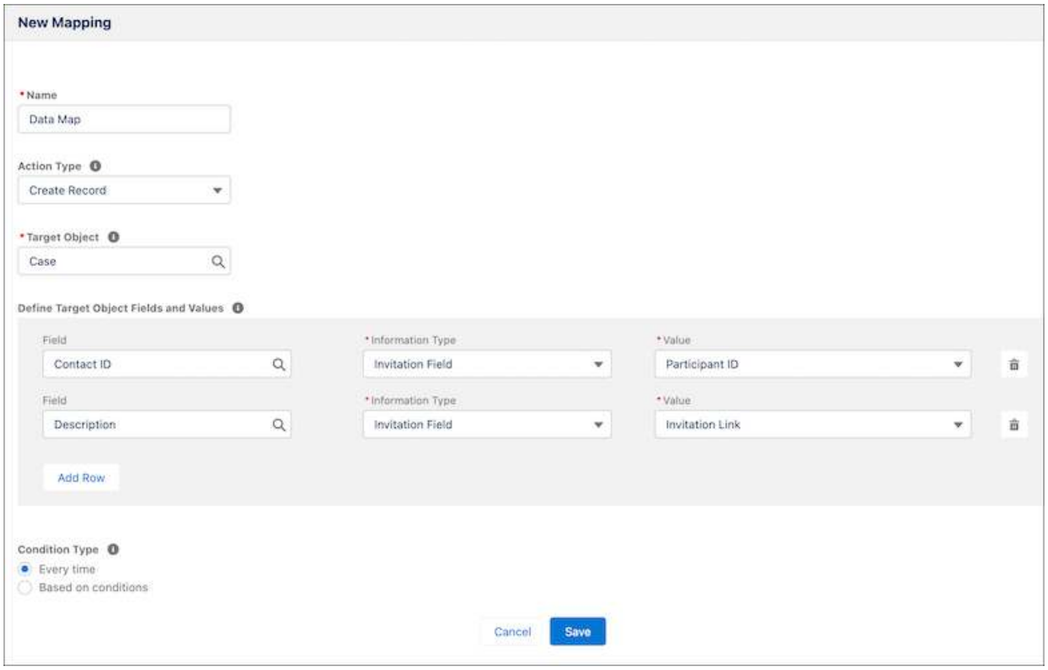
Capture Feedback as Records with Survey Invitation Field Data

Create or update records with survey invitation field values by using data maps. Define the target object field values by passing the survey invitation field values on submission of a response.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled.

Who: To use survey invitation fields in a data map, users need the Salesforce Advanced Features Starter permission or the Salesforce Surveys Advanced Features permission.

Why: For example, you can use a data map to create a follow-up Case record every time a customer provides a particular score. You can use the invitation field record to map the Participant record ID to the case Contact record ID. You can also map the survey invitation link to the case description field.



SEE ALSO:

Salesforce Help: Create Survey Data Maps to Create or Update Records (can be outdated or unavailable during release preview)

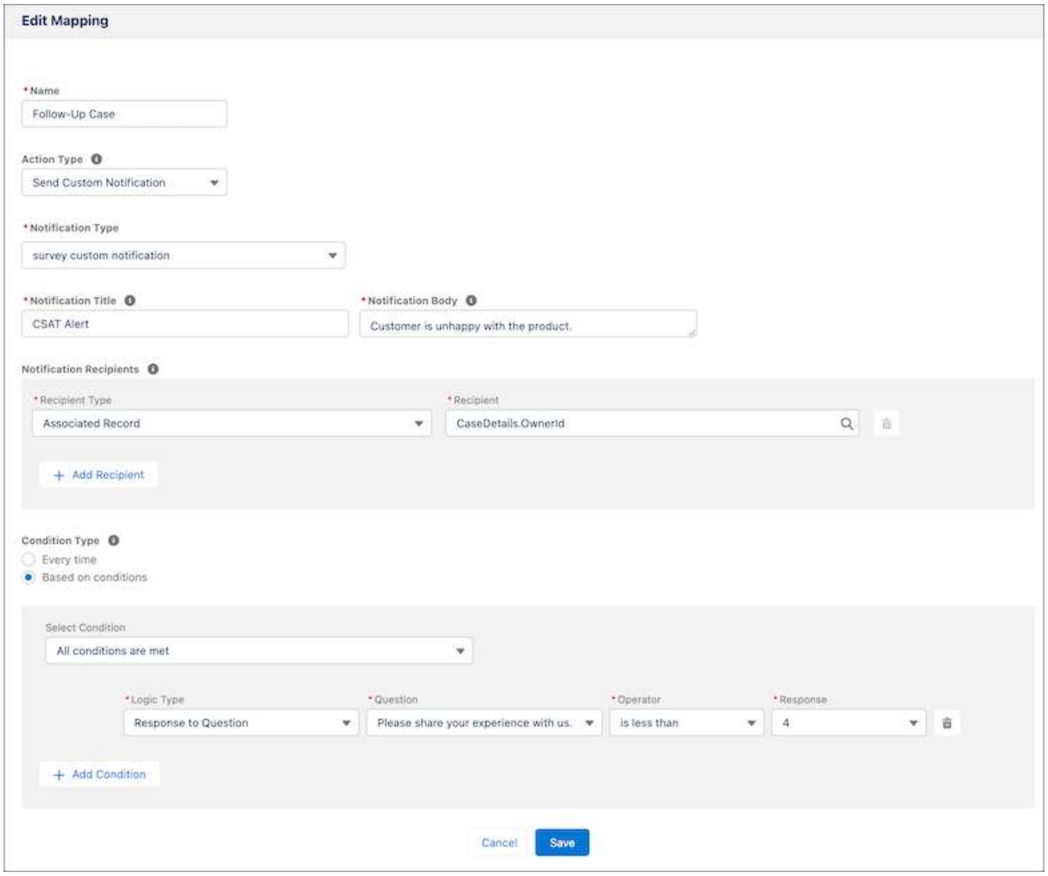
Stay on Top of Survey Responses by Receiving Custom Notifications

Get custom notifications based on invitation and merge field data for timely actions. Specify notification recipients using invitation data, participant data, or other data in a data map.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Feedback Management - Starter or Feedback Management - Growth is enabled.

Who: To create custom notifications in data maps, users need the Salesforce Advanced Features Starter permission or the Salesforce Surveys Advanced Features permission.

Why: For example, you can create notifications to alert the case owner every time a customer responds to a survey and the response meets certain defined criteria.



SEE ALSO:

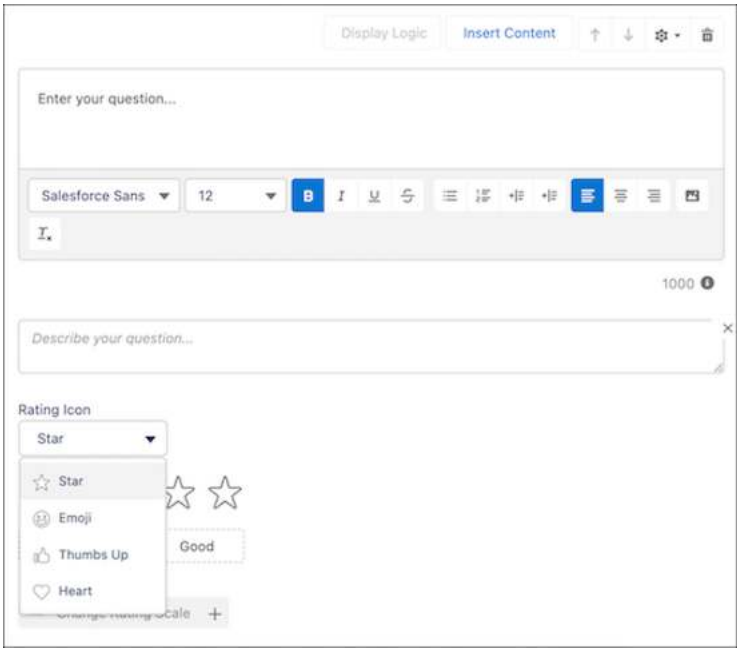
Salesforce Help: Create Data Maps to Send Custom Notifications Based on Survey Responses(can be outdated or unavailable during release preview)

Enhance Rating Surveys with New Icons

Personalize your rating questions with new icons, including emoji, thumbs up, and heart, in addition to the existing star icon. Use the rating icons to effectively measure participants' experience with your product or service.

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

How: In Survey Builder, click **Add Question**, and then select **Rating**. Add a question and choose a rating such as star, heart, thumbs up, or emoji.



Increase Engagement with More Detailed Survey Invitation Emails

Help boost survey response rates by writing and sending personalized survey invitation emails that are longer than 4,000 characters.

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

Create a Salesforce Feedback Management Pre-Release Trial Org

Admins, architects, and developers can get a hands-on experience and take a sneak peek into the features in this release.

How: To sign up for a pre-release trial org, go to https://www.salesforce.com/form/services/sfm-prerelease-trial/. When your org is created, you receive an email with the login details.

Note:

- Winter '24 pre-release trial orgs are available until October 15, 2024.
- Trial orgs are intended for proof of concept and guided self-exploration. The trial org expires in 15 days.

Service Catalog

Service Catalog helps you turn requests for your company's products and services into approved and documented orders through self-service automation.

IN THIS SECTION:

Use the Catalog Settings Setup page to quickly review and set your preferred catalog categorization method of data categories or catalog categories. This page provides an intuitive UI to easily set your categorization method. Previously, Service Catalog supported only catalog categories.

View and Manage Your Catalog Easily in a Central Hub

Use the Service Management Setup page to view and manage all your catalog items and categories in one place. This page makes your catalog management easy because you can assign items as featured or assign them to a category. You can also view the indexing of all your catalog items, categories, and their hierarchies as they appear to customers. Previously, Service Catalog was managed through the catalog item builder.

Learn How to Manage Your Catalog

Use the in-app guidance walkthrough to learn how to use the Catalog Management page for the seamless management of your catalog items and categories. Previously, catalog management occurred in the catalog item builder and you had to switch to Help for setup guidance.

Learn How to Use Catalog Fulfillments

Use the in-app guidance in the Catalog Fulfillments page to learn how fulfillments enhance your Flow Builder automations and quickly initiate catalog item processing. Previously, you had to switch to Help for fulfillments guidance.

Open Your Service Catalog to Partners and Customers

Create a Service Catalog site using the Lightning Web Runtime (LWR) framework from Experience Cloud. With the Service Catalog site, you provide an intuitive self-service experience for your customers to browse and request catalog items in your Service Catalog. Build, style, and launch your site effortlessly with point-and-click LWR components built for Service Catalog. Previously, Service Catalog supported only Aura.

Provide Customers Quick Access to Your Featured Catalog Items (Beta)

Add the LWR Service Catalog Grid component to your Service Catalog site pages to provide your customers and partners quick access to your top catalog items. Previously, only Aura Service Catalog sites supported this component.

Show Your Customers the Details of a Catalog Item

Use the LWR Service Catalog Record Detail component to provide the details of your catalog items, such as the name and image, to customers and partners browsing the catalog. Previously, only Aura Service Catalog sites supported this component.

Add Data Categories to Your Service Catalog Site

Let your customers browse a hierarchical collection of your business' self-service groups and categories with data categories. Add catalog items and data categories to your LWR Service Catalog site to help your customers quickly find answers and resolve issues. Previously, Service Catalog didn't support Data Categories.

Enhance Your Customers' Service Catalog Experience with Item Search

Provide customers and partners with a streamlined and automated search experience. A federated search shows dynamic results across your Service Catalog based on catalog item names and description, and search auto-suggestion helps drive self-service case deflection.

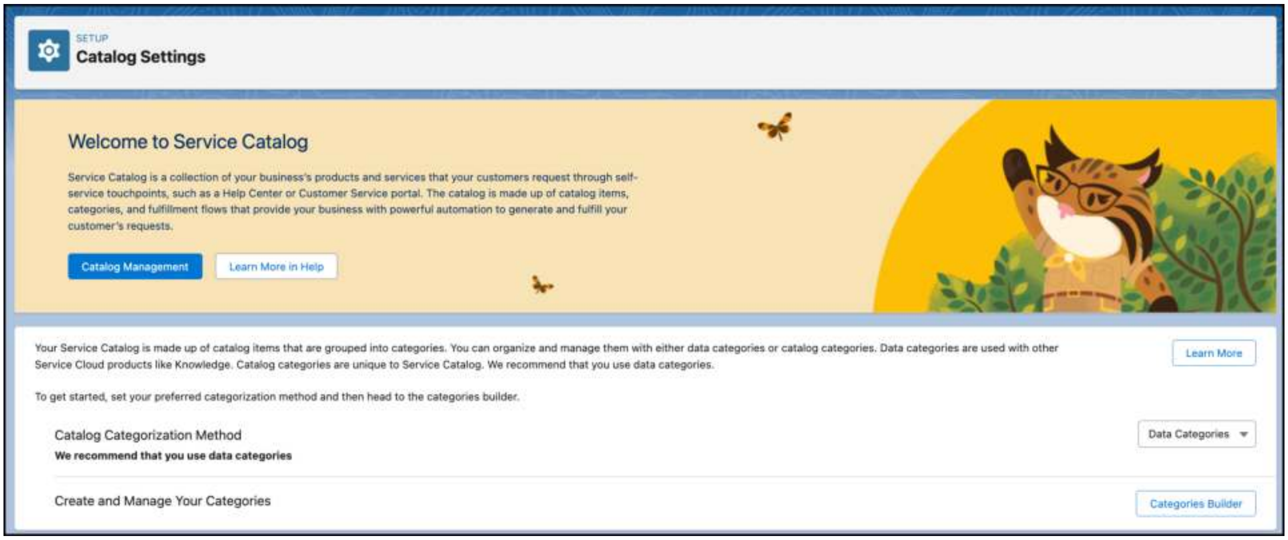
Set Your Catalog Settings Effortlessly

Use the Catalog Settings Setup page to quickly review and set your preferred catalog categorization method of data categories or catalog categories. This page provides an intuitive UI to easily set your categorization method. Previously, Service Catalog supported only catalog categories.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud.

Who: To use this feature, you must have the Service Catalog Access permission set license.

Why: Here's how the Catalog Management page makes setting your categorization method effortless.



How: Head to the Catalog Settings page in Setup, and then use the Catalog Categorization Method dropdown to set your preferred method.

SEE ALSO:

Learn How to Manage Your Catalog

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

Salesforce Help: Catalog Categories (can be outdated or unavailable during release preview)

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

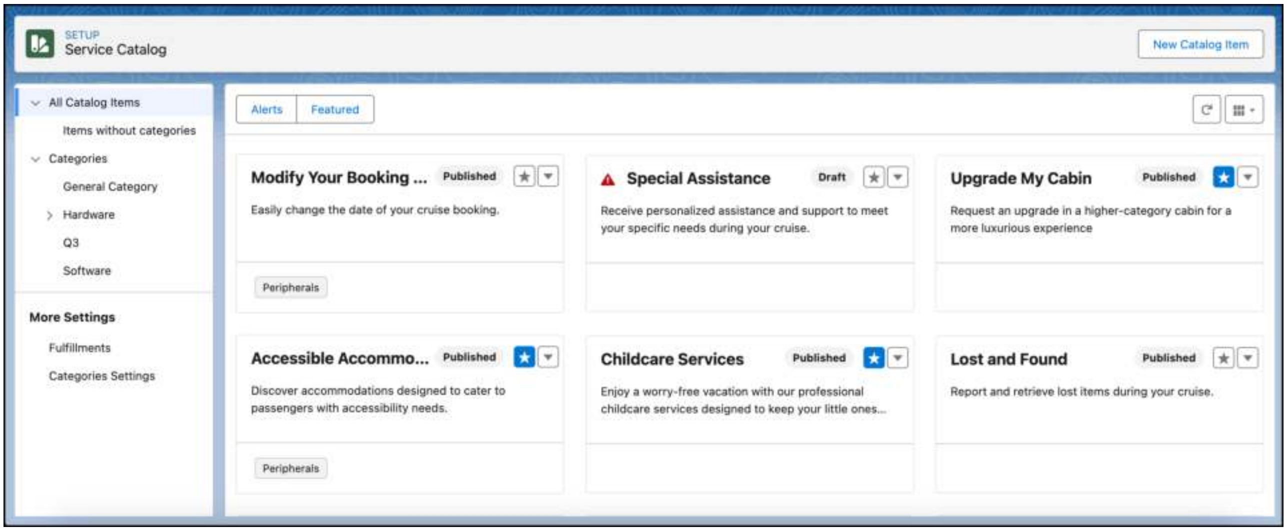
View and Manage Your Catalog Easily in a Central Hub

Use the Service Management Setup page to view and manage all your catalog items and categories in one place. This page makes your catalog management easy because you can assign items as featured or assign them to a category. You can also view the indexing of all your catalog items, categories, and their hierarchies as they appear to customers. Previously, Service Catalog was managed through the catalog item builder.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud.

Who: To use this feature, you must have the Service Catalog Access permission set license.

Why: Here's how the Catalog Management page provides you an all-in-one page to manage your catalog items and categories.



How: Head to the Catalog Management page in Setup, and then use the page's quick actions to view, manage, and organize your Service Catalog.

SEE ALSO:

Learn How to Manage Your Catalog

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

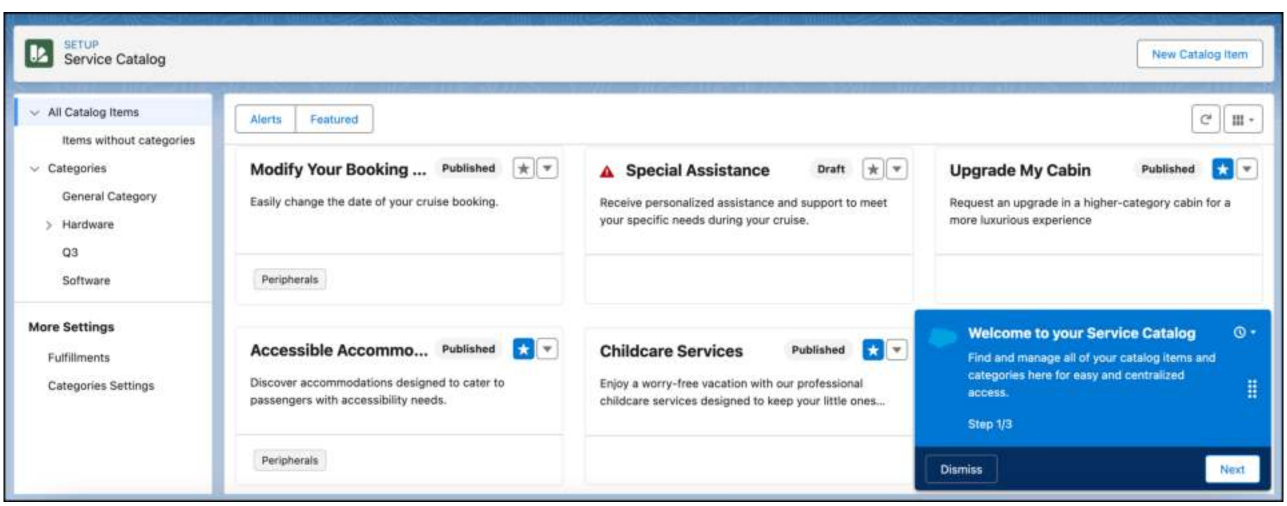
Learn How to Manage Your Catalog

Use the in-app guidance walkthrough to learn how to use the Catalog Management page for the seamless management of your catalog items and categories. Previously, catalog management occurred in the catalog item builder and you had to switch to Help for setup guidance.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud.

Who: To use this feature, you must have the Service Catalog Access permission set license and the Service Catalog Builder permission set.

Why: Here's how the in-app guidance greets you and helps you learn how to navigate and use the Catalog Management page.



How: Head to the Catalog Management page in Setup, and then use the in-app walkthrough to guide you through the page. The in-app walkthrough shows the first time you open the page. After you dismiss it, the walkthrough shows again once daily for the next three days.

SEE ALSO:

View and Manage Your Catalog Easily in a Central Hub

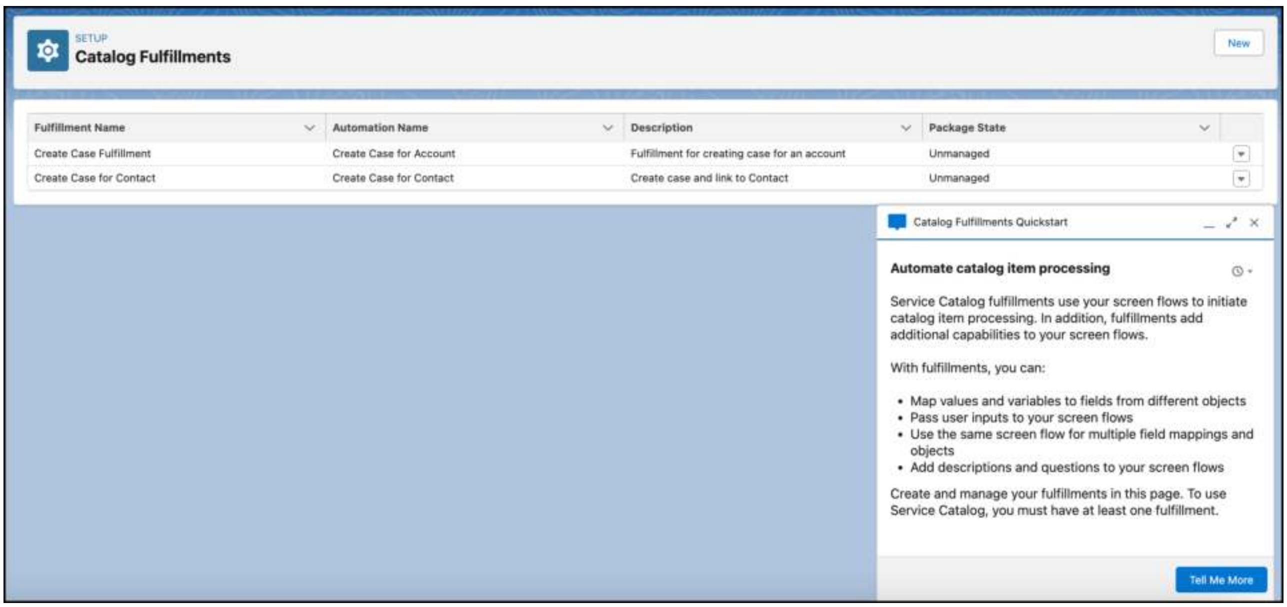
Learn How to Use Catalog Fulfillments

Use the in-app guidance in the Catalog Fulfillments page to learn how fulfillments enhance your Flow Builder automations and quickly initiate catalog item processing. Previously, you had to switch to Help for fulfillments guidance.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud.

Who: To use this feature, you must have the Service Catalog Access permission set license and the Service Catalog Builder permission set.

Why: Here's how the in-app guidance helps you learn about using catalog fulfillments.



How: Head to the Catalog Fulfillments page in Setup, and then review the docked prompt. After you dismiss it, the walkthrough shows again once daily for the next three days.

SEE ALSO:

Salesforce Help: Catalog Fulfillments (can be outdated or unavailable during release preview)

Open Your Service Catalog to Partners and Customers

Create a Service Catalog site using the Lightning Web Runtime (LWR) framework from Experience Cloud. With the Service Catalog site, you provide an intuitive self-service experience for your customers to browse and request catalog items in your Service Catalog. Build, style, and launch your site effortlessly with point-and-click LWR components built for Service Catalog. Previously, Service Catalog supported only Aura.

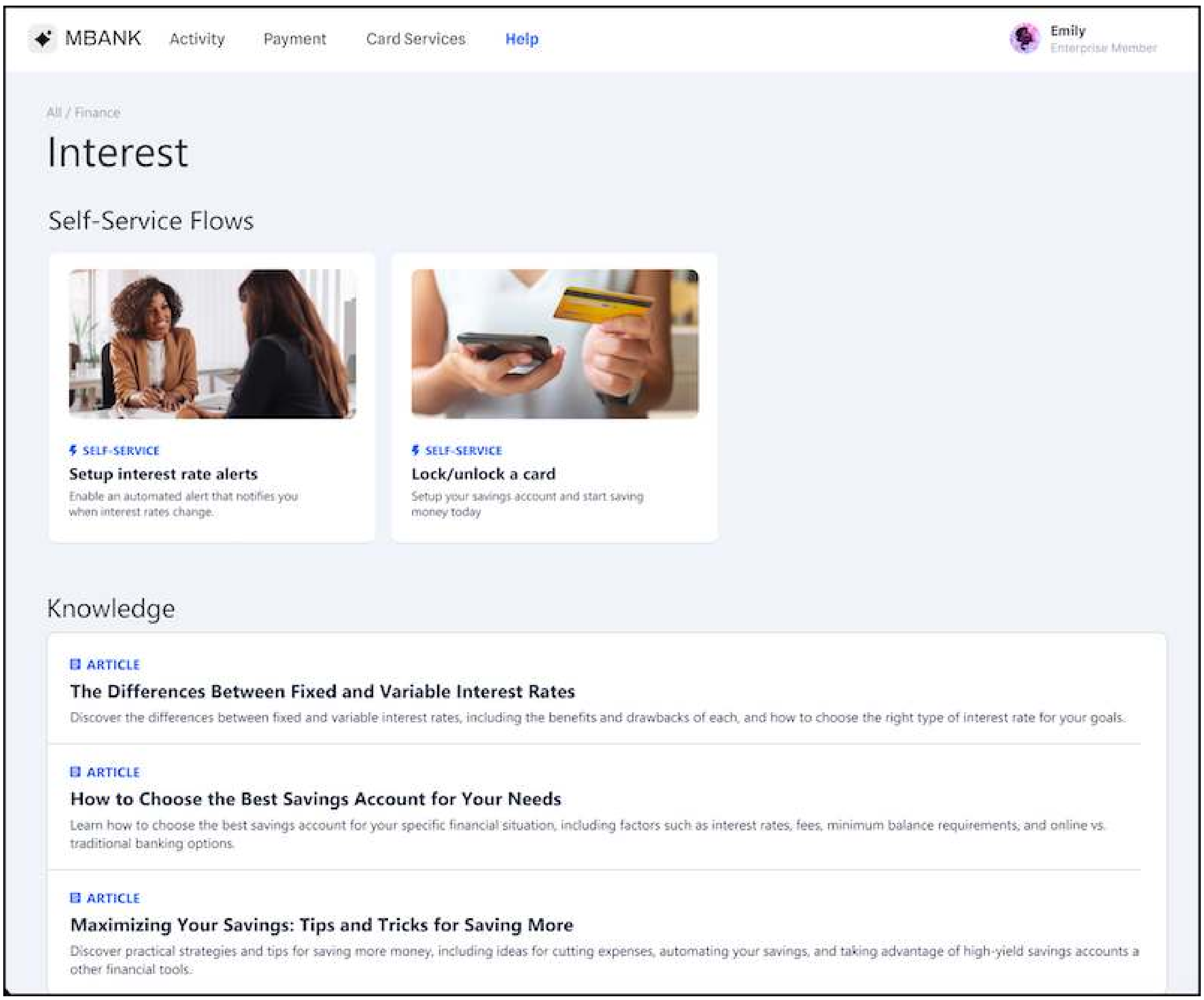
Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud for LWR Service Catalog sites.

Who: To use this feature, you must have the Service Catalog Access permission set license and one community license.

- Channel Community
- Customer Community
- Customer Community Login
- Customer Community Plus
- Customer Community Plus Login
- External Apps
- Partner Community
- Partner Community Login

Why: The Service Catalog site uses several custom, no-code LWR components that provide you with an easy setup experience to quickly open your Service Catalog to your customers and partners. Use the Build Your Own (LWR) template from Experience Cloud to drag the Service Catalog components onto the customizable site pages. Then, style each component to match your branding preferences, such as providing your custom CSS in the Style tab.

Here's an example of a Service Catalog site that uses the custom LWR components.



How: Head to Setup to prep your Service Catalog to become a customer or partner-facing site. Then, use Experience Builder to quickly build the pages and configure the components that comprise your Service Catalog site.

SEE ALSO:

Add Data Categories to Your Service Catalog Site

Enhance Your Customers' Service Catalog Experience with Item Search

Provide Customers Quick Access to Your Featured Catalog Items (Beta)

Show Your Customers the Details of a Catalog Item

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

Salesforce Help: What Is the Service Catalog Site?(can be outdated or unavailable during release preview)

Salesforce Help: Setting Up Your Service Catalog Site (can be outdated or unavailable during release preview)

Salesforce Help: Preparing to Build Your Service Catalog Site (can be outdated or unavailable during release preview)

Salesforce Help: Building Your Service Catalog Site (can be outdated or unavailable during release preview)

Salesforce Help: Learn About Experience Cloud Frameworks and Templates (can be outdated or unavailable during release preview)

Provide Customers Quick Access to Your Featured Catalog Items (Beta)

Add the LWR Service Catalog Grid component to your Service Catalog site pages to provide your customers and partners quick access to your top catalog items. Previously, only Aura Service Catalog sites supported this component.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud for LWR Service Catalog sites.

Note: This feature is a Beta Service. Customers may opt to try such Beta Service at its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Who: To use this feature, you must have the Service Catalog Access permission set license and one community license.

- Channel Community
- Customer Community
- Customer Community Login
- Customer Community Plus
- Customer Community Plus Login
- External Apps
- Partner Community
- Partner Community Login

How: Head to Setup to prep your Service Catalog to become a customer or partner-facing site. Use Experience Builder to build the Service Catalog site pages, and then style these pages with the Service Catalog Grid component.

SEE ALSO:

Salesforce Help: What Is the Service Catalog Site? (can be outdated or unavailable during release preview)

Salesforce Help: Preparing to Build Your Service Catalog Site (can be outdated or unavailable during release preview)

Salesforce Help: Building Your Service Catalog Site (can be outdated or unavailable during release preview)

Show Your Customers the Details of a Catalog Item

Use the LWR Service Catalog Record Detail component to provide the details of your catalog items, such as the name and image, to customers and partners browsing the catalog. Previously, only Aura Service Catalog sites supported this component.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud for LWR Service Catalog sites.

Who: To use this feature, you must have the Service Catalog Access permission set license and one community license.

- Channel Community
- Customer Community
- Customer Community Login
- Customer Community Plus
- Customer Community Plus Login
- External Apps
- Partner Community
- Partner Community Login

How: Head to Setup to prep your Service Catalog to become a customer or partner-facing site. Use Experience Builder to build the Service Catalog site pages, and then style these pages with the Service Catalog Record Detail.

SEE ALSO:

Salesforce Help: What Is the Service Catalog Site? (can be outdated or unavailable during release preview)

Salesforce Help: Preparing to Build Your Service Catalog Site (can be outdated or unavailable during release preview)

Salesforce Help: Building Your Service Catalog Site (can be outdated or unavailable during release preview)

Add Data Categories to Your Service Catalog Site

Let your customers browse a hierarchical collection of your business' self-service groups and categories with data categories. Add catalog items and data categories to your LWR Service Catalog site to help your customers quickly find answers and resolve issues. Previously, Service Catalog didn't support Data Categories.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud for LWR Service Catalog sites.

Who: To use this feature, you must have the Service Catalog Access permission set license and one community license.

- Channel Community
- Customer Community
- Customer Community Login
- Customer Community Plus
- Customer Community Plus Login
- External Apps
- Partner Community
- Partner Community Login

How: Head to Setup to prep your Service Catalog to become a customer or partner-facing self-service site. Then use Experience Builder workspaces to make your data available in your Service Catalog site.

SEE ALSO:

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

Salesforce Help: What Is the Service Catalog Site? (can be outdated or unavailable during release preview)

Salesforce Help: Preparing to Build Your Service Catalog Site (can be outdated or unavailable during release preview)

Salesforce Help: Building Your Service Catalog Site (can be outdated or unavailable during release preview)

Enhance Your Customers' Service Catalog Experience with Item Search

Provide customers and partners with a streamlined and automated search experience. A federated search shows dynamic results across your Service Catalog based on catalog item names and description, and search auto-suggestion helps drive self-service case deflection.

Where: This change applies to Lightning Experience in Unlimited Edition with Service Cloud for both Aura and LWR Service Catalog sites.

Who: To use this feature, you must have the Service Catalog Access permission set license and one community license.

- Channel Community
- Customer Community
- Customer Community Login
- Customer Community Plus
- Customer Community Plus Login
- External Apps
- Partner Community
- Partner Community Login

How: Head to Setup to prep your Service Catalog to become a customer or partner-facing site. Use Experience Builder to build a standard Search page using the standard Search component to support Service Catalog.

SEE ALSO:

Salesforce Help: What Is the Service Catalog Site? (can be outdated or unavailable during release preview)

Salesforce Help: Preparing to Build Your Service Catalog Site (can be outdated or unavailable during release preview)

Salesforce Help: Building Your Service Catalog Site (can be outdated or unavailable during release preview)

Customer Service Incident Management

Send proactive communications to impacted customers when a product-related incident occurs. Keep your internal stakeholders up to date as an incident evolves with updates to a broadcast Slack message's fields. And with improvements to the Customer Service Incident Management setup page, finding the integrations you need to resolve incidents faster is easier than ever.

IN THIS SECTION:

Share Incident Updates Based on a Product

Send targeted broadcast emails for product incidents to impacted customers. Incident teams can send proactive emails to customers, even before they experience an issue, to deflect new cases and increase customer trust. Previously, broadcast emails were available only for predefined contact lists and case-related contacts.

Share Incident Updates Based on a Product

Send targeted broadcast emails for product incidents to impacted customers. Incident teams can send proactive emails to customers, even before they experience an issue, to deflect new cases and increase customer trust. Previously, broadcast emails were available only for predefined contact lists and case-related contacts.

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

Why: Warn a broader audience with product-related broadcast emails. For example, if an incident occurs where a X1050 water heater is found to be defective, an incident manager can send a widespread broadcast email to all customers with the X1050 water heater product.

How: From an incident, relate a product. Then, create a broadcast email, and select **Create a Contact List** from Related Products.

SEE ALSO:

Salesforce Help: Identify Incident-Related Issues (can be outdated or unavailable during release preview)

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

Keep Broadcast Slack Messages Data Up to Date

Keep stakeholders informed without sending a new broadcast Slack message. Now you can update a broadcast Slack message's incident fields to reflect the latest changes. When an incident is resolved or no longer relevant, incident teams can delete the broadcast Slack message from the Slack channel, without leaving the Service Console. Previously, you sent a new broadcast Slack message to share the latest data.

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

How: From an incident's Broadcast Communications related list, find the broadcast Slack message record, and select **Update Broadcast Slack Message** or **Delete Broadcast Slack Message**.

SEE ALSO:

Salesforce Help: Update a Broadcast Slack Message (can be outdated or unavailable during release preview)

Salesforce Help: Delete a Broadcast Slack Message (can be outdated or unavailable during release preview)

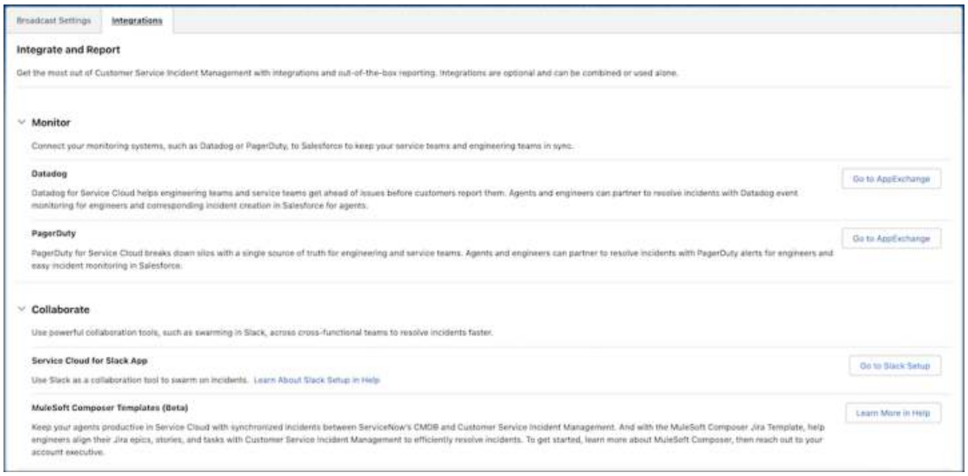
Get the Improved Incident Management Experience

Simplify your Customer Service Incident Management setup, unlock case-related reporting functionality, and improve your broadcast site banner experience.

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

How:

- Easily identify which AppExchange packages are most relevant to your business with a streamlined Integrations section on the Customer Service Incident Management setup page. Now you can easily choose which apps to install based on collapsible sections sorted by the job to be done.



- Include case-related issues in your incident management postmortem reporting.
- Deactivate broadcast site banners on a site-by-site level, instead of deactivating all active site banners.

Swarming

Swarming with the power of Service Cloud gives service organizations the tools they require to collaborate at scale with experts, solve customer issues, and reduce swivel chair pains. Collaborate in Salesforce with the look, feel, and fun of Slack. Share and download files from the Slack Conversations component. And start swarming faster with other enhancements.

IN THIS SECTION:

Catch Up on Service Cloud for Slack App Features

Use the Service Cloud for Slack app to attach knowledge article drafts to Salesforce records, more easily create Salesforce records from Slack, and more.

See the release notes for the latest updates: Service Cloud for Slack App Release Notes.

Channels

Initiate messaging sessions in Messaging, make calls faster in Service Cloud Voice with agent-to-agent calls, display your Terms and Conditions before chats, and more.

IN THIS SECTION:

[Email](#)

Service Email continues its transition to the Lightning Editor. Ref ID formats are changing.

[Messaging](#)

Proactively initiate messaging sessions, display right-to-left languages in the conversation window, collect sensitive customer information with secure forms, use Lightning web components to change the look and feel of pre-chat, and more.

[Voice](#)

Increase agent productivity by viewing conversation sentiments, listening-in to calls, keeping your business running during outages or maintenance, receiving simplified customer support for Service Cloud Voice with Amazon Connect, and more.

[Chat](#)

Ask your customers to accept your Terms and Conditions before chatting, and more.

[Channel Tools](#)

Individual-Object Linking replaces Channel-Object Linking with expanded capabilities in flows, and Conversation Transcript Export data can now be downloaded more than one time in both active and expired Salesforce orgs.

Email

Service Email continues its transition to the Lightning Editor. Ref ID formats are changing.

IN THIS SECTION:

[Transition to the Lightning Editor for Email Composers in Email-to-Case (Beta) (Release Update)](#)

When enabled, this release update replaces the email editor in the docked and case feed email composers. The new email editor is available in Lightning Experience as a beta feature.

[Use Enhanced Quick Text with Service Email](#)

Quick text has been upgraded for Winter '24. The enhanced quick text works in new channels and supports large repositories of quick texts with performance and agent experience improvements.

[The Ref ID Format for Email-to-Case Changed](#)

The format for Ref ID threading in emails changed. If your org has custom code that uses Ref ID, test the code in sandboxes and update your code as needed. Ref ID is supported, including backwards compatibility with the previous format, but Lightning Threading is the preferred way to do email threading.

[The Message-ID Format for Email Alerts Changed](#)

With the new format, `newUniqueMessageIdentifier` makes sure the Message-ID is unique. `threadingToken` uses the unique Message-ID to ensure that replies to email alerts get threaded correctly.

[Multiple Links to a Single Email Attachment Are No Longer Shown](#)

Before Winter '23, the Case Files and Attachment related lists showed multiple links to the same attachment. In Winter '23, Salesforce introduced the Eliminate Duplicate Email setting. With the new setting, Email-to-Case creates a link to the file instead of creating a duplicate file, but the related list still showed multiple links. Now, with Eliminate Duplicate Email set, Email-to-Case shows only the latest link for each unique attached file.

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

When enabled, this release update replaces the email editor in the docked and case feed email composers. The new email editor is available in Lightning Experience as a beta feature.

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

Note: This feature is a Beta Service. Customers can opt to try this Beta Service in their sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

The editor was also available in Summer '23 as a beta version.

When: Salesforce enforces this update in Summer '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: Salesforce is replacing the email editor in the docked and case feed email composers and switching to an editor that's based on the open-source TinyMCE editor. The new editor provides similar functionality in Lightning Experience. New features include:

- Full-screen mode
- Printing
- Undo and Redo buttons
- Format painting
- Emoji picker
- Resizability
- A more responsive toolbar
- Smart copy-paste functionality

You can drag, as well as copy and paste, file attachments and inline images into the editor.

The embed media action was removed because most email clients don't allow iframed content.

How: Salesforce admins enable this release update. After the release update is enabled, users see similar functionality when they compose and edit emails. For some plugins and complex features such as tables, beta limitations apply. To revert to the previous editor, disable the release update.

SEE ALSO:

Release Updates

Use Enhanced Quick Text with Service Email

Quick text has been upgraded for Winter '24. The enhanced quick text works in new channels and supports large repositories of quick texts with performance and agent experience improvements.

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

How: To access this enhancement, you will need to enable both the Lightning email-to-case editor and the quick text picker in Setup.

SEE ALSO:

Navigate a High Volume of Quick Texts
Enable Quick Text
Transition to the Lightning Editor for Email Composers in Email-to-Case (Beta) (Release Update)

The Ref ID Format for Email-to-Case Changed

The format for Ref ID threading in emails changed. If your org has custom code that uses Ref ID, test the code in sandboxes and update your code as needed. Ref ID is supported, including backwards compatibility with the previous format, but Lightning Threading is the preferred way to do email threading.

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

Why: Salesforce record IDs contain the ID of the server the record was created on. As additional servers come online, the format of compressed record IDs must change to accommodate larger server IDs.

How: This table shows the old and new formats.

Old Format	New Format
`ref:_00Dxx1gEW._500xxYktl:ref`	`ref:!00Dxx01gEW.!500xx0Yktl:ref`

SEE ALSO:

- The Message-ID Format for Email Alerts Changed
- *Salesforce Help*: Configure Email to Case (can be outdated or unavailable during release preview)
- *Salesforce Help*: Email-to-Case Threading Limitations and Considerations (can be outdated or unavailable during release preview)

The Message-ID Format for Email Alerts Changed

With the new format, `newUniqueMessageIdentifier` makes sure the Message-ID is unique. `threadingToken` uses the unique Message-ID to ensure that replies to email alerts get threaded correctly.

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

How: The format changed from
<EntityId.newUniqueMessageIdentifier.HashedText.SecretIdWithoutPrefix@sfdc.net> to
<newUniqueMessageIdentifier.threadingToken@sfdc.net>.

New email alerts have Message-ID with the new format, regardless of whether you're using new Lightning Threading. Replies for email alerts with the old format Message-ID are also threaded properly.

Calling `generateThreadingMessageId(caseId)` in Apex code returns the Message-ID in the new format. If you have code based on the old format of Message-ID, change that code and adopt the new format.

SEE ALSO:

- The Ref ID Format for Email-to-Case Changed
- *Salesforce Help*: Configure Email to Case (can be outdated or unavailable during release preview)
- *Salesforce Help*: Email-to-Case Threading Limitations and Considerations (can be outdated or unavailable during release preview)

Multiple Links to a Single Email Attachment Are No Longer Shown

Before Winter '23, the Case Files and Attachment related lists showed multiple links to the same attachment. In Winter '23, Salesforce introduced the Eliminate Duplicate Email setting. With the new setting, Email-to-Case creates a link to the file instead of creating a duplicate file, but the related list still showed multiple links. Now, with Eliminate Duplicate Email set, Email-to-Case shows only the latest link for each unique attached file.

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

How: Turn on the Email-to-Case setting to save attachments as Salesforce files. Then turn on the Eliminate Duplicate Email setting.

Messaging

Proactively initiate messaging sessions, display right-to-left languages in the conversation window, collect sensitive customer information with secure forms, use Lightning web components to change the look and feel of pre-chat, and more.

IN THIS SECTION:

Customize Your Pre-Chat Form with Lightning Web Components

To change the look and feel of your pre-chat form without writing an entire messaging application from scratch, create and add Lightning Web Components.

Clone Your Messaging for In-App Deployment

To prevent outages for customers who haven't upgraded to the latest version of your mobile app, clone your Messaging for In-App deployment before releasing a new feature. Roll out the new feature on the cloned version of the deployment. Customers who haven't upgraded can keep using the older version.

Launch the Web Chat Client Using an API

With Launch Chat API, you can programmatically launch the web chat client using the JavaScript API. Hide the default chat button, then either create your own chat button or a web experience that calls Launch Chat API to launch the chat client.

Other Improvements to Messaging

Learn about additional improvements we've made to the admin, agent, and customer experience in enhanced Messaging channels and Messaging for In-App and Web.

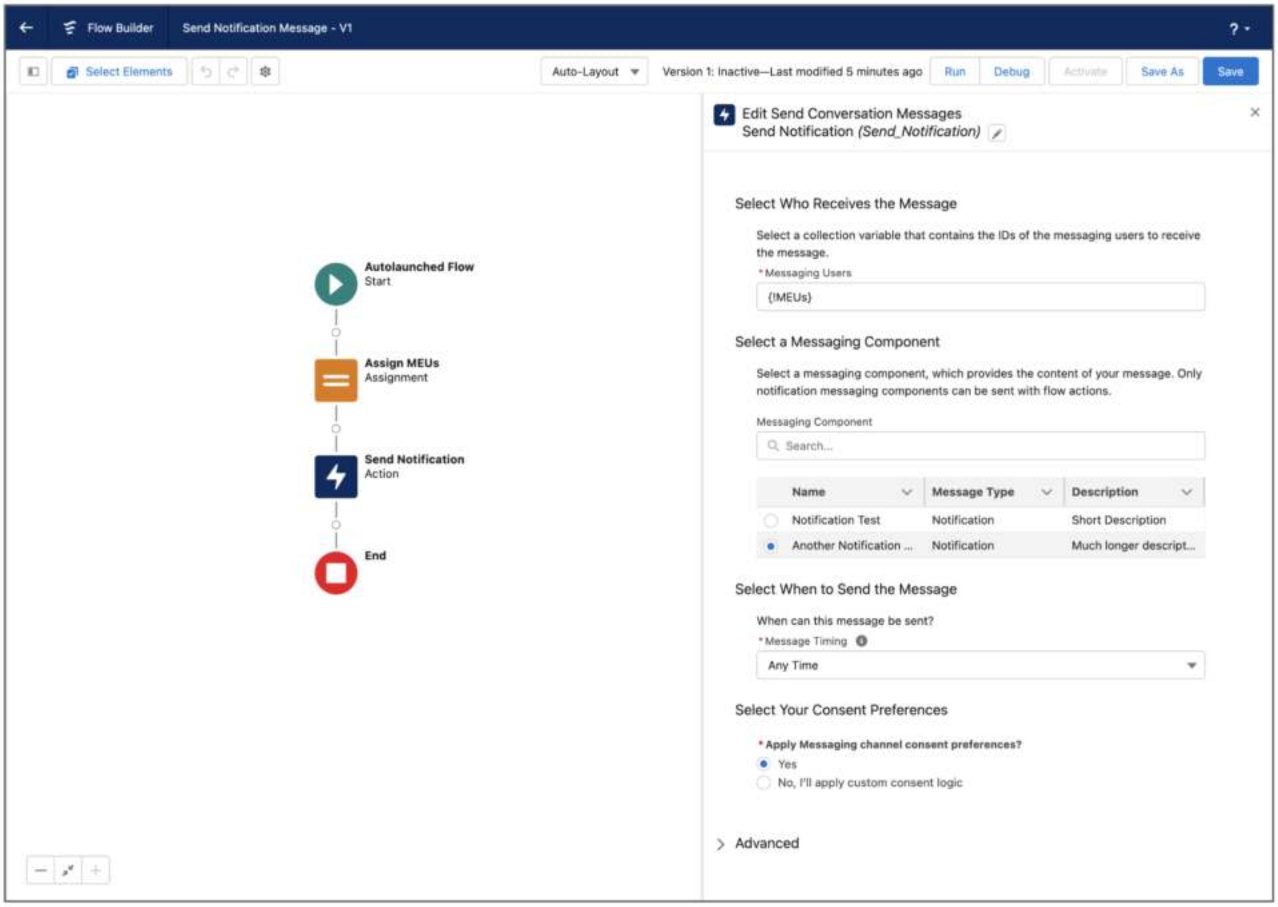
Send Automated Notifications with the Send Conversation Messages Action

Send important updates to customers with messaging components and a new invocable action. This feature is now available in enhanced WhatsApp channels and Messaging for In-App and Web. Previously, you could send automated notifications only in standard Messaging channels.

Where: This change applies to enhanced WhatsApp and Messaging for In-App and Web channels. View required editions.

How: To set up automated notifications in enhanced WhatsApp channels, get the WhatsApp Outbound Messages add-on license. Then, create a message template in WhatsApp Business Manager. Templates must fall into one of the three WhatsApp categories: Marketing, One-Time Passwords, and Transactional. After creating a template, create a Notification messaging component in Setup, link it to the template, and create a flow that uses the Send Conversation Messages action to send the messaging component. Sending a notification to a customer consumes one outbound message.

To set up automated notifications in Messaging for In-App and Web, create a Notification messaging component in Setup. Then, create a flow that uses the Send Conversation Messages action to send the messaging component.



Notifications are sent as messages in standalone messaging sessions with an unchanging status of Ended. If a customer responds, a new messaging session starts and is routed to your support team.

SEE ALSO:

Salesforce Help: Send Automated Messages in Enhanced Messaging Channels (can be outdated or unavailable during release preview)

Salesforce Help: Flow Core Actions: Send Conversation Messages (can be outdated or unavailable during release preview)

Initiate Conversations in Enhanced Messaging Channels and Messaging for In-App

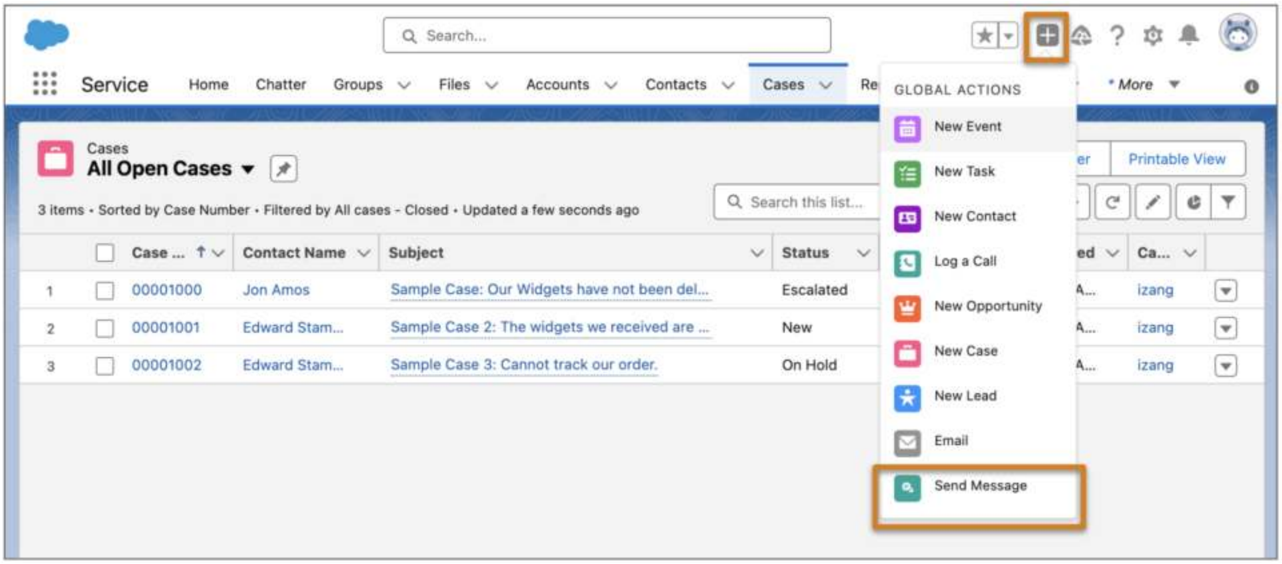
Let agents proactively message your customers in enhanced Messaging channels or Messaging for In-App from any record. Previously, agents could initiate conversations only in standard Messaging channels, and only from certain types of records.

Where: This change applies to enhanced WhatsApp, enhanced Facebook Messenger, and Messaging for In-App channels. View required editions.

Who: To send a proactive message, agents need the Initiate Messaging Session user permission.

How: Add the Send Message global action to your global action layout, and optionally to your Messaging User record page.

To start a conversation with a customer, agents click **Send Message** in the action menu. This action isn't available if you don't have an enhanced Messaging channel or Messaging for In-App and Web channel.



In the composer that appears, select a recipient and messaging channel. Sometimes these fields are already completed, depending on which record you're viewing. Then, enter your message, use the optional actions under the message field to add emojis or messaging components, and click **Send**.

When the customer responds, their messaging session is routed to the agent who initially sent the message. If that agent isn't available, it's sent to your support team according to your routing logic.

Note: In enhanced WhatsApp channels, if the customer responds, their messaging session is routed to the agent who initially sent the message. If that agent isn't available, it's routed to your support team. If more than 24 hours have passed since the selected messaging user's last message, agents can't write freeform messages. They can only send notification messaging components that are linked to approved WhatsApp message templates.

In Messaging for In-App, if the customer responds, it's routed to your support team, meaning a different agent may pick up the session.

SEE ALSO:

Salesforce Help: Start a Messaging Session with a Customer (can be outdated or unavailable during release preview)

Salesforce Help: Compare Messaging Channel Capabilities in Service Cloud (can be outdated or unavailable during release preview)

Set Multi-Language Keywords and Responses in Messaging for In-App and Web

Create keywords and responses in multiple languages so that customers can opt out of communication and request help.

Where: This change applies to Messaging for In-App and Web channels. View required editions.

How: To customize the consent settings for a Messaging for In-App and Web channel, go to the Messaging Settings page in Setup and click your channel's name. There, you can:

- Set keywords that customers can use to opt out of receiving messages, ask for help, or make a custom request.
- Write the auto-responses that customers receive when they send keywords. The keyword must be the only content of the message for it to trigger an auto-response.
- Set keywords and responses for languages other than the default language of English. A keyword can be used only once across the languages you add.

Provide at least one keyword in each field. Messaging for In-App and Web channels created after the Winter '24 release include default English keywords and responses, which you can update if needed. Updates to keywords and responses take effect within 5 minutes.

SEE ALSO:

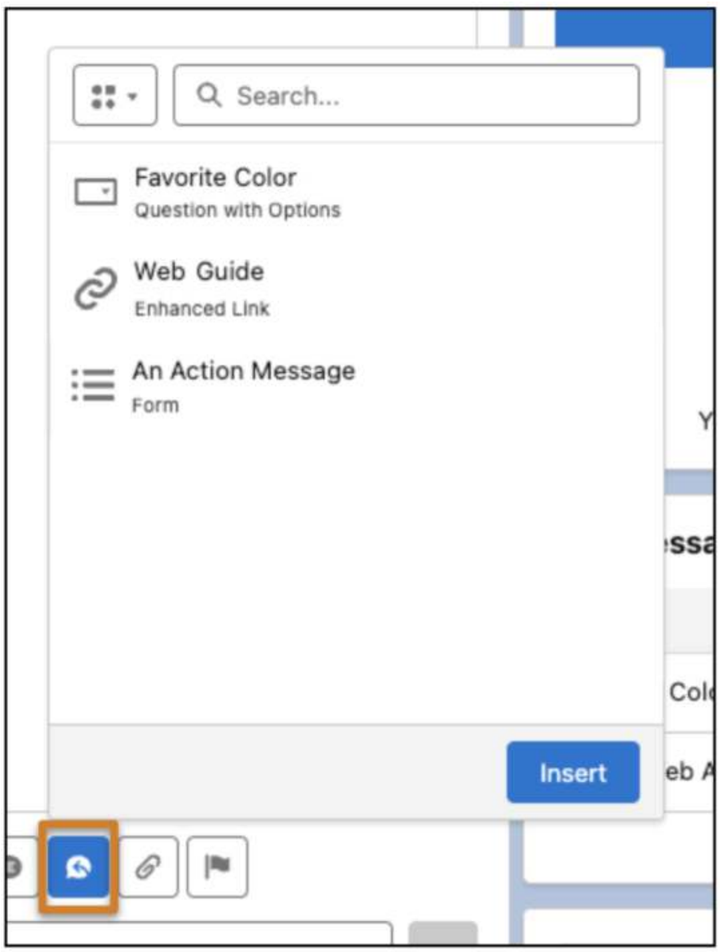
Salesforce Help: Customize Auto-Responses in Service Cloud Messaging Channels (can be outdated or unavailable during release preview)

Send Messaging Components More Easily

Agents can now send messaging components to customers just like they send files or quick text — by clicking an icon in the messaging window. The icon opens a pop-over that lets agents search for specific components and filter by component type. Previously, messaging components appeared in the sidebar.

Where: This change applies to enhanced Messaging channels and Messaging for In-App and Web channels. View required editions.

How: To send a messaging component, agents click the new icon in the messaging window. Optionally, search for a specific component or use the filter to view components of a certain type. Select a component and click **Insert**, and then click **Send**.



You can remove the original Messaging Components page component from your page layouts, because the new menu action replaces it.

The popup list of messaging components doesn't include dynamic components that are linked to a flow, such as time selector components. Agents continue to send these components by running a flow in the Service Console.

SEE ALSO:

Salesforce Help: Send Messaging Components in Messaging Sessions (can be outdated or unavailable during release preview)

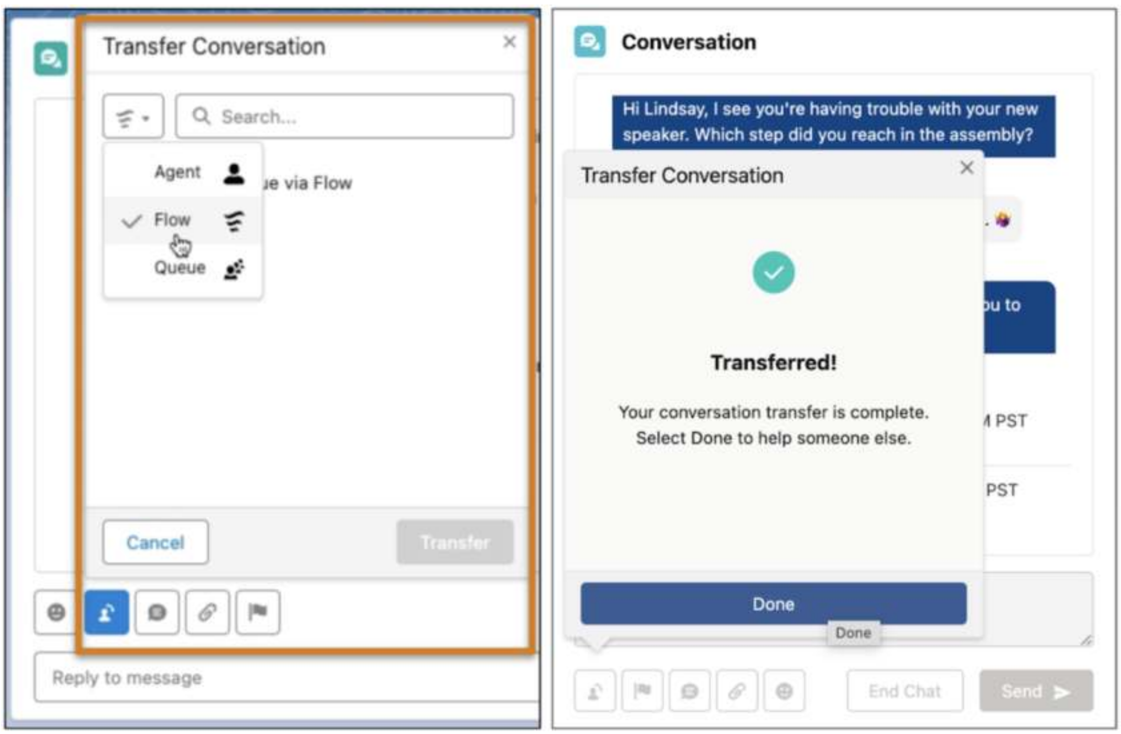
Salesforce Help: Add Messaging to the Service Console (can be outdated or unavailable during release preview)

Transfer Messaging Sessions Faster

When transferring a messaging session to another agent, routing flow, or queue, agents in enhanced Messaging channels and Messaging for In-App and Web can now filter recipients by type and see agent capacity percentages and queue wait times. This additional information helps the transferring agent route the session to the most readily available agent or queue.

Where: This change applies to enhanced Messaging channels and Messaging for In-App and Web. View required editions.

How: To transfer a messaging session, agents click the transfer icon in the messaging window. Select a recipient type: Agent, Flow, or Queue. Only agents who are online with a Messaging presence status appear in the list. You can see each agent's capacity percentage, including agents who are at full capacity. You'll also see each queue's wait time.



When the selected agent accepts the transfer, the original agent is removed from the conversation and their tab is closed automatically. After an agent clicks **Transfer**, the transfer can't be canceled.

SEE ALSO:

Salesforce Help: End or Transfer a Messaging Session (can be outdated or unavailable during release preview)

Navigate a High Volume of Quick Texts

The enhanced quick text picker works in more channels and supports your large body of quick texts with performance and agent experience improvements.

Where: This change applies to enhanced Messaging channels and Messaging for In-App and Web. View required editions.

How: The quick text picker has these improvements:

- To navigate into a quick text folder that has many subfolders, use the horizontal scroll bar to move back and forth. Previously, you clicked through a breadcrumbs bar.
- To add quick text to the messaging conversation faster, select a quick text and click **Insert** from the quick text picker or press **Enter** on your keyboard. Previously, you clicked the name of a quick text to insert it, and the quick text could take several seconds before appearing in the messaging window.
- Search results include folders. Previously, search results included individual quick texts only.
- Click the name of a quick text to preview it., and use your up and down arrow keys to navigate the list of quick texts in the picker. Previously, clicking the name of a quick text inserted it into the messaging session.
- New icons differentiate individual quick texts from quick text folders. Previously, only folders displayed icons.
- When you're offline, a Try Again button appears with a message letting you know that quick text couldn't load. Previously, nothing indicated that you were offline, and no button was available to reload the quick text picker.

SEE ALSO:

Salesforce Help: Increase Messaging Productivity (can be outdated or unavailable during release preview)

Message with Customers in Right-to-Left Languages

Messaging for In-App and Web now partially supports the right-to-left (RTL) languages of Hebrew and Arabic in your customer's messaging experience. Customers see their conversation messages, automated messages from messaging components, and the estimated wait time in right-to-left format. Einstein Bots don't support right-to-left text, and agents don't see a right-to-left display in the Service Console.

Where: This change applies to Messaging for In-App and Web. View required editions.

How: Enable a right-to-left language in Salesforce.

SEE ALSO:

Salesforce Help: Compare Messaging Channel Capabilities in Service Cloud (can be outdated or unavailable during release preview)

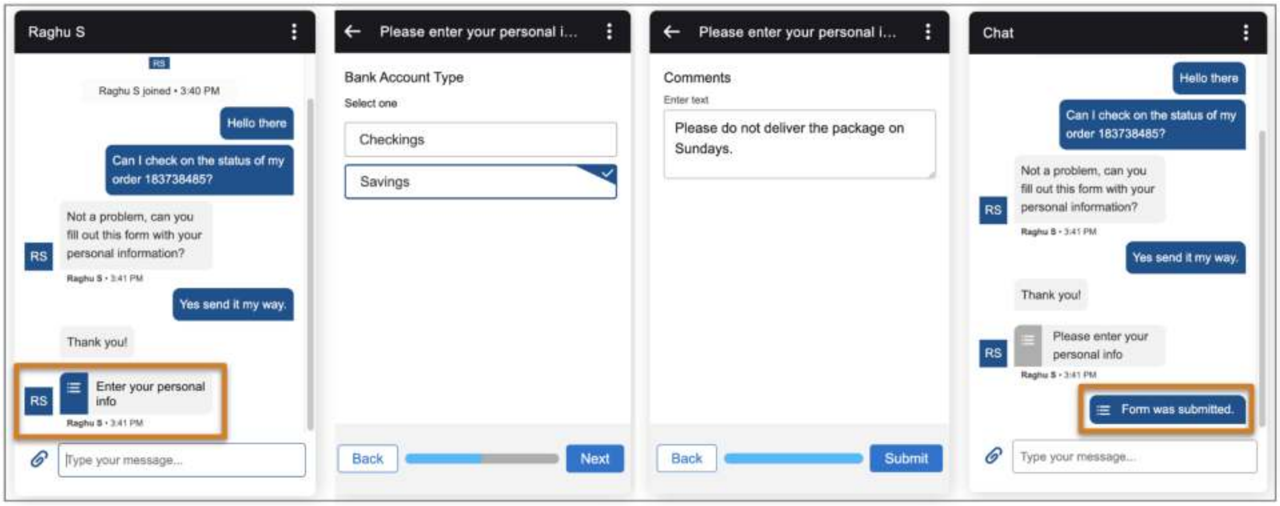
Send Secure Forms in Messaging Sessions

To gather sensitive information from customers and restrict its visibility, let agents send secure forms in Messaging for In-App and Web. When a customer submits their responses, Salesforce creates a record of them. Admins control whether agents can see the responses, and customers can't view their submitted responses.

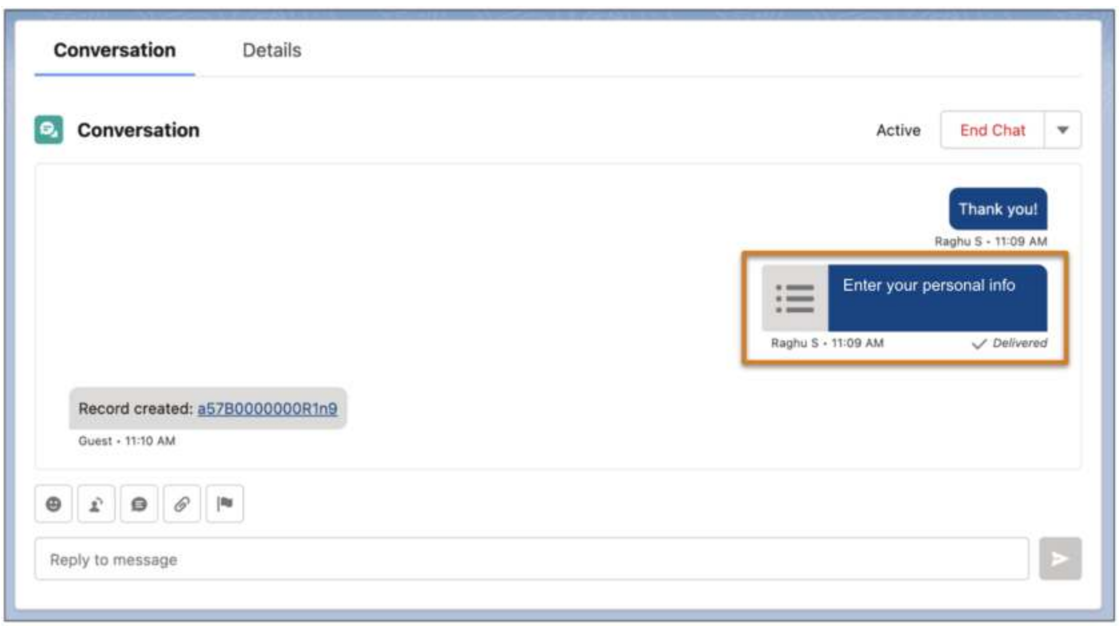
Where: This change applies to Messaging for In-App and Web. View required editions.

Any Form component created for Messaging for In-App and Web with the Form format is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Create a form messaging component on the Messaging Components page in Setup. Link the form to a global action that creates a record, such as a contact record. Add the Form format to your messaging component and configure its properties. Then, agents send the form during messaging sessions.



When a customer submits their form responses, a record is created in Salesforce. The type of record depends on the associated global action. For example, if your form messaging component is linked to a global action to create a contact, submitting form responses creates a contact record.



SEE ALSO:

Salesforce Help: Create and Send Secure Forms in Messaging Sessions (can be outdated or unavailable during release preview)

Build Trust with Customers by Presenting Terms and Conditions in Pre-Chat

Ask your customers to accept your Terms and Conditions before joining a messaging conversation. You can use Terms and Conditions to inform them that you track or record conversation data or share other important information. Add Terms and Conditions to your pre-chat form with a placeholder and a custom label.

Where: This change applies to Messaging for In-App and Web channels. View required editions.

How: In the Embedded Service Deployment Settings page, click **Settings**, and then select the boxes under Terms and Conditions. Save those changes.

Under Custom Labels, create a placeholder for your Terms and Conditions text on the customer-facing messaging window. Click **Finish**, and republish your deployment.

Customize Your Pre-Chat Form with Lightning Web Components

To change the look and feel of your pre-chat form without writing an entire messaging application from scratch, create and add Lightning Web Components.

Where: This change applies to Messaging for Web channels. View required editions.

How: Create a Lightning web component. In the Embedded Service Deployment Settings page for your deployment, click **Add Custom UI Components**. Select the Lightning web component from the Custom Component dropdown menu. Save your changes, and republish your deployment.

SEE ALSO:

Salesforce Developer Guide: Custom Lightning Web Components for Messaging for Web

Salesforce Help: Customize your UI with Lightning Web Components

Clone Your Messaging for In-App Deployment

To prevent outages for customers who haven't upgraded to the latest version of your mobile app, clone your Messaging for In-App deployment before releasing a new feature. Roll out the new feature on the cloned version of the deployment. Customers who haven't upgraded can keep using the older version.

Where: This change applies to Messaging for In-App. View required editions.

Who: An admin with Customize Application and Modify Metadata Through Metadata API Functions permissions can clone a Messaging for In-App Deployment.

How: Go to Embedded Service Deployments in Setup and select the option to **Clone** your deployment. Follow the steps to complete the process.

Launch the Web Chat Client Using an API

With Launch Chat API, you can programmatically launch the web chat client using the JavaScript API. Hide the default chat button, then either create your own chat button or a web experience that calls Launch Chat API to launch the chat client.

Where: This change applies to Messaging for Web. View required editions.

How: Call Launch Chat API from your Messaging for Web client.

SEE ALSO:

Salesforce Developer Guide: Launch Chat in Messaging for Web

Other Improvements to Messaging

Learn about additional improvements we've made to the admin, agent, and customer experience in enhanced Messaging channels and Messaging for In-App and Web.

Where: These changes apply to enhanced Messaging channels and Messaging for In-App and Web. View required editions.

Why:

- As part of the company-wide effort to help people with moderately low vision use Salesforce, we aligned color contrast in Chat and Messaging for In-App and Web with WCAG standards.
- In Messaging for In-App and Web, your customers now see a "reconnecting…" banner in the messaging window when a session was disconnected due to a network error. If the chat window is minimized, users see a spinner icon to indicate that it's reconnecting. Previously, your customers didn't know that a network error had occurred and that the chat was attempting to reconnect as a result.
- In enhanced Messaging channels and Messaging for In-App and Web, agents now receive an audio notification when a new message arrives.
- In enhanced Messaging channels and Messaging for In-App and Web, agents now see the date on conversation entries as well as the time.

Voice

Increase agent productivity by viewing conversation sentiments, listening-in to calls, keeping your business running during outages or maintenance, receiving simplified customer support for Service Cloud Voice with Amazon Connect, and more.

IN THIS SECTION:

Improve Customer Service and Agent Training with Conversation Sentiment Analysis

To evaluate agent performance and identify coaching opportunities, supervisors can view the sentiments of a phone conversation between an agent and a customer inside the recording player. The supervisor can easily spot moments when the customer or agent isn't happy, listen to the corresponding recorded call segments, and then provide training. In addition to Sentiment Journey, we added Agent Sentiment Score and Customer Sentiment Score fields to the VoiceCall entity for easy reporting. Post-call Sentiment Journey is available for Salesforce orgs in the North America region only.

Listen In to an Amazon Connect Voice Call through Salesforce

To support an agent, supervisors can listen in to a call directly from Salesforce through Omni Supervisor. Previously, supervisors had to listen in from Amazon Connect.

Keep Your Amazon Contact Center Running 24/7 with Disaster Recovery

Keep your business running during an unplanned outage or a planned maintenance. With disaster recovery, you get a backup contact center and Amazon Connect instance in case your telephony system goes down. Whether you run a primary or backup contact center, customers call the same phone numbers to reach your organization. Disaster recovery for your Amazon Connect instance is available in the US only.

Check Voice Channel Performance with More Metrics (Generally Available)

To help you identify anomalies in your contact center, and fix them on your own with documentation, Voice performance metrics is generally available. Add two new Voice objects to your custom report types to spot trends on disconnected calls, missed calls by agents, call error rates, and other call actions. This feature includes a sample package with prebuilt reports and dashboards so you can see trends easily. Some metrics are only available for Service Cloud Voice with Amazon Connect. All data for the new Voice objects is deleted after 30 days.

Resolve Setup Issues Quickly with Self-Service Checks (Generally Available)

Get your contact center up and running faster with on-demand diagnostics. With help just a click away, there's no need to blindly troubleshoot or contact Salesforce Customer Support. For example, run the Single Sign-On service checks to verify that Service Cloud Voice can authenticate all agents and supervisors in your contact center. Run the Contact Center User service checks to verify that every contact center agent and supervisor is assigned the right permission set license. This feature, which is now generally available, includes some changes since the pilot release.

Enable Record Types on Voice Calls to Support Different Business Processes

Offer separate business processes, picklist values, and page layouts to different agents answering calls. For example, create unique voice call record types for agents who answer calls for Gold Support versus Platinum Support.

Track Disconnect Reasons on Voice Calls

Understand why calls were disconnected by adding the Disconnect Reason field to Voice Call page layouts. Disconnect Reason values are provided by your telephony vendor. For Amazon Connect contact centers on 13.0 or later, Disconnect Reason values are automatically provided through Contract Trace Records (CTR). For other telephony partners, you can provide Disconnect Reason values through the telephony API.

Send Calls to the Most Qualified Agents with Skills-Routing (Pilot)

To route a call to an agent with the right skill set, use Omni-Channel skills-based routing. This feature is available if your telephony provider supports skills-based routing.

Migrate an Existing Salesforce Contact Center Created from an XML Import

If you created your contact center using the XML-import process, migrate your contact center to take advantage of easier maintenance and additional features. Perform the migration to easily update your contact center to future versions–no need to manually update the serverless application anymore. The migration also gives you access to more Service Cloud Voice features.

Automate Actions Based on Intelligence Signals from Partner Systems

Previously, you could automatically trigger actions based on intelligence signals from Amazon Connect Contact Lens. Now, partners can enable Conversation Intelligence to ingest intelligence signals from partner systems.

Get Agents Online Faster with More Voice Status Utility Capabilities

In addition to helping agents check whether their browser, microphone, and Amazon Connect connection is ready for voice calls, the utility now checks if agents' presence status is synced with Amazon Connect. It also displays tips to help agents use Voice and Omni-Channel more effectively. The Voice Status Utility is available for console apps and the Voice Extensions page.

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Help agents know when they're logged in to Amazon Connect on virtual desktops with a new local media page. Previously, agents may not have known when their Amazon Connect sessions expired, timed out, or when they needed to log in again.

Respect Agent Capacity for Voice Calls Is Turned on by Default for New Salesforce Orgs (Beta)

Enable agents to work across multiple channels with voice call routing that respects the current agent capacity set in Omni-Channel. Existing Salesforce orgs with Service Cloud Voice can turn on this feature, while new Salesforce orgs with Service Cloud Voice have the feature turned on by default.

Sync Agent Presence Statuses Is Turned on by Default

Your contact centers now automatically sync agents' Omni-Channel presence statuses to indicate their availability to receive work. The Presence Status Sync button on your contact center is turned on to detect and restore out-of-sync statuses.

Experience a Sleeker Call Interface in the Omni-Channel Utility

Show or hide call controls easily. Spot call statuses and timers, and see multiple calls in the slimmer Omni-Channel utility.

Add More AWS Services to Service Cloud Voice with Amazon Connect

Easily add more AWS services to your contact center. The Service Cloud Voice Additional AWS Services add-on license offers more services, such as Amazon Pinpoint, Amazon Connect Voice ID, and Amazon Kinesis Data Firehose. The license also provides full capabilities and access to some of the services you already have, such as Amazon CloudWatch, Amazon Dynamo DB, and Amazon EventBridge. Similar to how Salesforce handles telephony charges, the cost of additional services is passed through a monthly invoice. You can review monthly charges on the Service Cloud Voice Usage and Cost Report.

Preview Estimated Wait Times for All Queues Before Transferring Calls

Agents can provide better service by seeing estimated wait times for all partner queues, not 10, before they transfer calls. All partner queues display estimated wait times returned 10 at a time.

Set Up Amazon Real-Time Metrics Dashboard from Omni Supervisor

The **View Amazon Real-Time Metrics** button no longer appears by default in Omni Supervisor. Add the AWS Dashboard action to Omni Supervisor tabs to see real-time metrics that identify opportunities and uncover issues in your contact center.

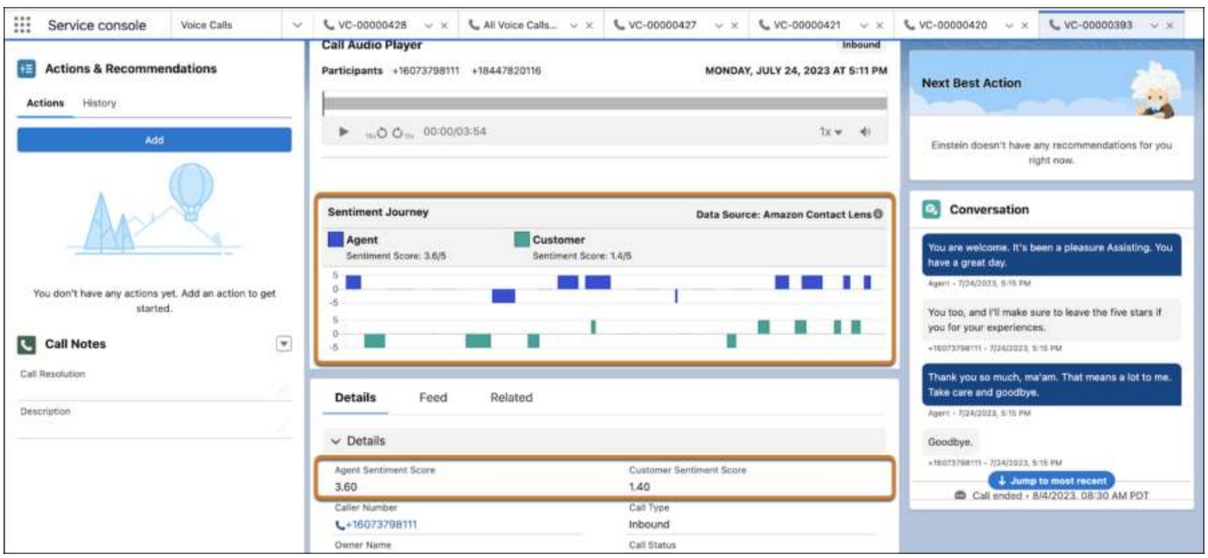
Improve Customer Service and Agent Training with Conversation Sentiment Analysis

To evaluate agent performance and identify coaching opportunities, supervisors can view the sentiments of a phone conversation between an agent and a customer inside the recording player. The supervisor can easily spot moments when the customer or agent isn't happy, listen to the corresponding recorded call segments, and then provide training. In addition to Sentiment Journey, we added Agent Sentiment Score and Customer Sentiment Score fields to the VoiceCall entity for easy reporting. Post-call Sentiment Journey is available for Salesforce orgs in the North America region only.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: In the Call Audio Player component of a Voice Call record, view the overall sentiments of the agent and customer alongside the call recording after the conversation. To view the sentiment scores for the agent and customer, add the fields to the Voice Call page layout or include them in a report.



SEE ALSO:

Salesforce Help: Sentiment Journey for Call Conversations (can be outdated or unavailable during release preview)

Listen In to an Amazon Connect Voice Call through Salesforce

To support an agent, supervisors can listen in to a call directly from Salesforce through Omni Supervisor. Previously, supervisors had to listen in from Amazon Connect.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

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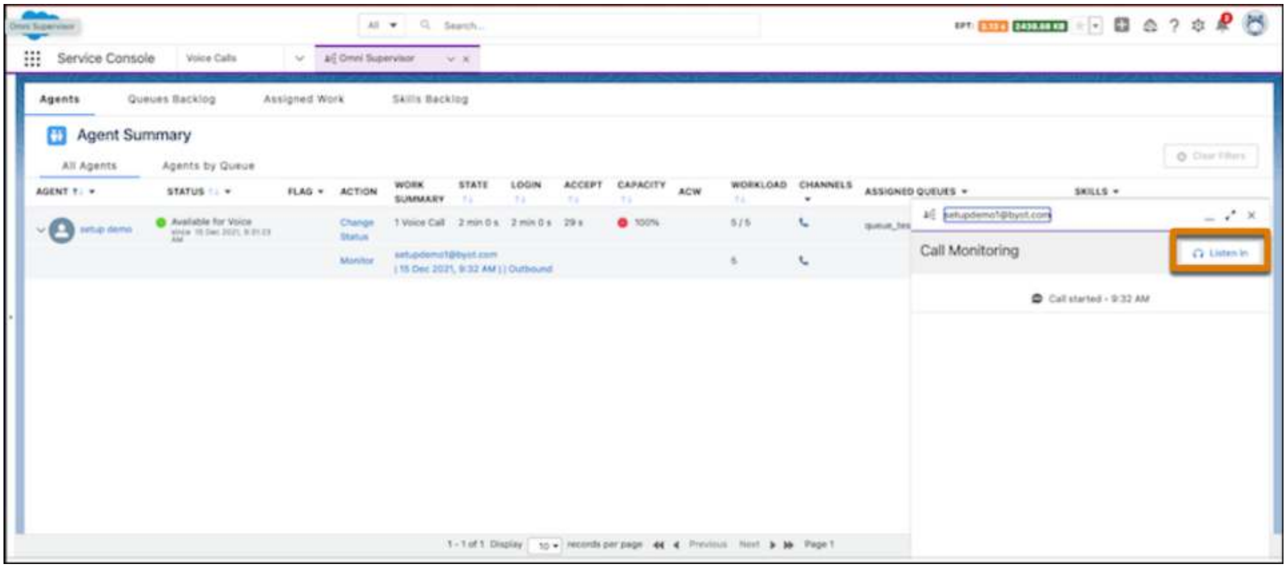
- Service Cloud Voice with Partner Telephony from Amazon Connect



How: In Amazon Connect, turn on **Enable Multi-Party Calls and Enhanced Monitoring**.

SEE ALSO:

Salesforce Help: Listen In to a Voice Call (can be outdated or unavailable during release preview)

Keep Your Amazon Contact Center Running 24/7 with Disaster Recovery

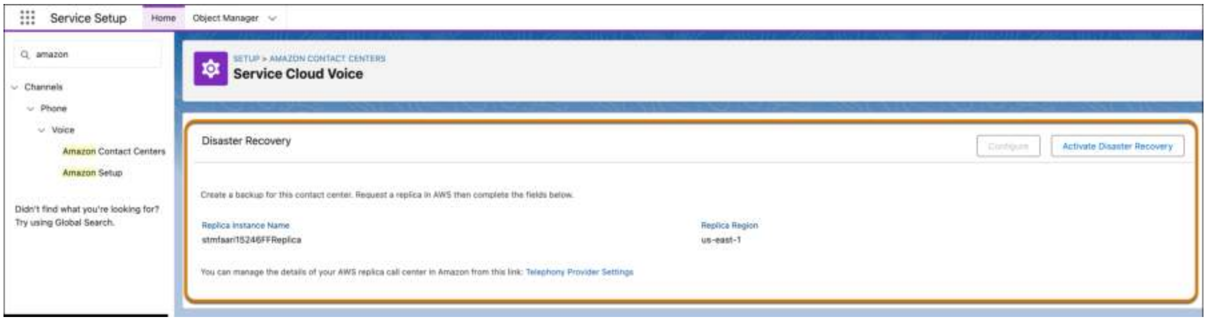
Keep your business running during an unplanned outage or a planned maintenance. With disaster recovery, you get a backup contact center and Amazon Connect instance in case your telephony system goes down. Whether you run a primary or backup contact center, customers call the same phone numbers to reach your organization. Disaster recovery for your Amazon Connect instance is available in the US only.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

Who: Disaster Recovery is available to Service Cloud Voice customers at an additional charge. For Service Cloud Voice with Amazon Connect, you must purchase the Additional AWS Services Add-on License to use this feature. For Service Cloud Voice with Partner Telephony from Amazon Connect, the additional charge for this service is added to your Amazon Connect bill.

How: Before you can use this feature, create a backup Amazon Connect instance and contact center, and then configure disaster recovery for your primary contact center. Backup contact centers have feature limitations.



SEE ALSO:

Salesforce Help: Disaster Recovery Overview for Service Cloud Voice (can be outdated or unavailable during release preview)

Amazon Documentation: Get started with Amazon Connect Global Resiliency - Amazon Connect (can be outdated or unavailable during release preview)

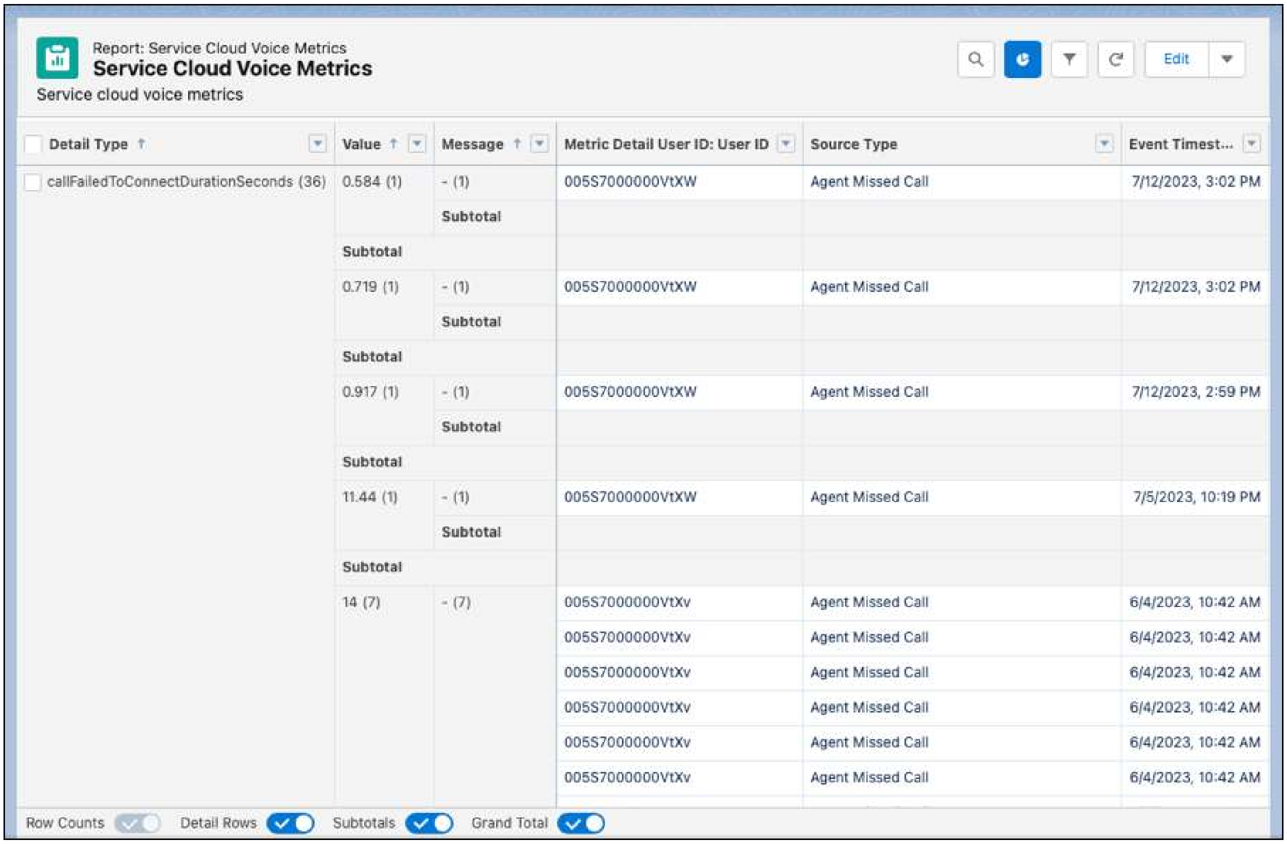
Check Voice Channel Performance with More Metrics (Generally Available)

To help you identify anomalies in your contact center, and fix them on your own with documentation, Voice performance metrics is generally available. Add two new Voice objects to your custom report types to spot trends on disconnected calls, missed calls by agents, call error rates, and other call actions. This feature includes a sample package with prebuilt reports and dashboards so you can see trends easily. Some metrics are only available for Service Cloud Voice with Amazon Connect. All data for the new Voice objects is deleted after 30 days.

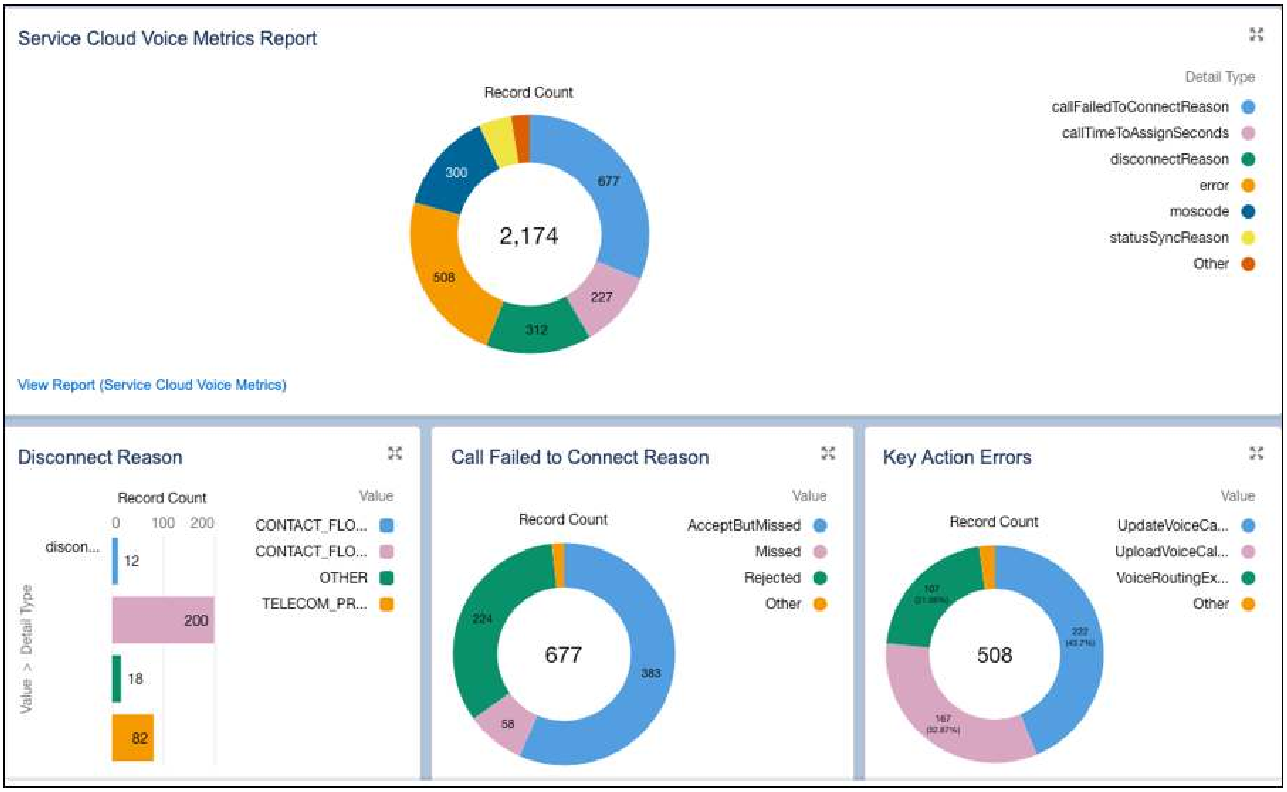
Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: Create a report and select a custom report type that includes the new Voice objects, Voice Channel Interaction Event and Voice Channel Interaction Detail Event. Filter Voice fields to see any trends.



To install the sample package with prebuilt reports and dashboards, download ServiceCloudVoiceHealth.zip from GitHub. Then in your Salesforce org, Open SCVHealthMetrics.dashboard and change the runningUser to an admin user, and create a Zip file to deploy. Use the metadata API to deploy the new Zip file to your org.



SEE ALSO:

[Check Voice Channel Performance (can be outdated or unavailable during release preview)]

[Service Cloud Voice Performance Metrics Guide (can be outdated or unavailable during release preview)]

[Use Metadata API to Retrieve and Deploy Using Workbench (can be outdated or unavailable during release preview)]

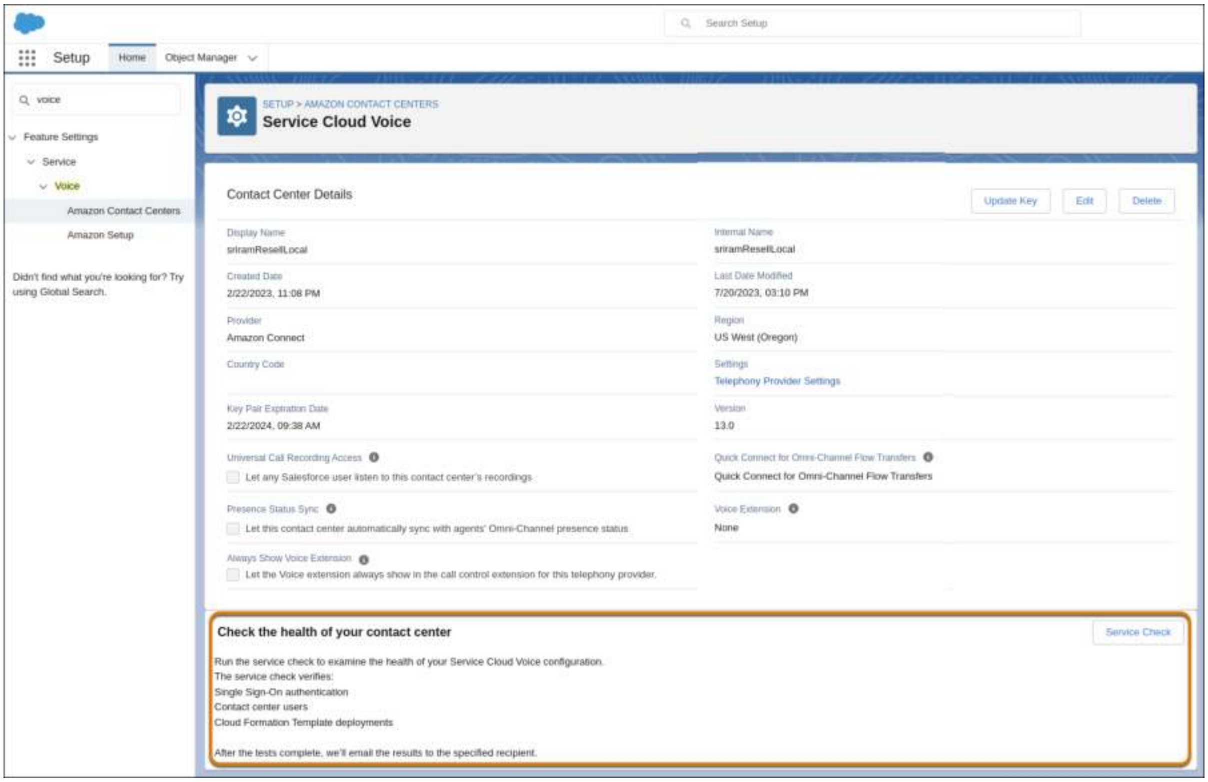
Resolve Setup Issues Quickly with Self-Service Checks (Generally Available)

Get your contact center up and running faster with on-demand diagnostics. With help just a click away, there's no need to blindly troubleshoot or contact Salesforce Customer Support. For example, run the Single Sign-On service checks to verify that Service Cloud Voice can authenticate all agents and supervisors in your contact center. Run the Contact Center User service checks to verify that every contact center agent and supervisor is assigned the right permission set license. This feature, which is now generally available, includes some changes since the pilot release.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: To run the service checks, click **Service Check** on the contact center details page.



SEE ALSO:

Salesforce Help: Resolve Setup Issues with Self-Service Checks (can be outdated or unavailable during release preview)

Enable Record Types on Voice Calls to Support Different Business Processes

Offer separate business processes, picklist values, and page layouts to different agents answering calls. For example, create unique voice call record types for agents who answer calls for Gold Support versus Platinum Support.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

SEE ALSO:

Salesforce Help: Tailor Business Processes to Different Record Types Users (can be outdated or unavailable during release preview)

Track Disconnect Reasons on Voice Calls

Understand why calls were disconnected by adding the Disconnect Reason field to Voice Call page layouts. Disconnect Reason values are provided by your telephony vendor. For Amazon Connect contact centers on 13.0 or later, Disconnect Reason values are automatically provided through Contract Trace Records (CTR). For other telephony partners, you can provide Disconnect Reason values through the telephony API.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
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- Service Cloud Voice with Partner Telephony from Amazon Connect

SEE ALSO:

Salesforce Help: Page Layouts (can be outdated or unavailable during release preview)

Salesforce Help: Create the Voice Call Record Page (can be outdated or unavailable during release preview)

Service Cloud Voice Implementation Guide: CTRDataSyncFunction Lambda Function (can be outdated or unavailable during release preview)

Send Calls to the Most Qualified Agents with Skills-Routing (Pilot)

To route a call to an agent with the right skill set, use Omni-Channel skills-based routing. This feature is available if your telephony provider supports skills-based routing.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Partner Telephony

Note: This feature is not generally available and is being piloted with certain Customers subject to additional terms and conditions. It is not part of your purchased Services. This feature is subject to change, may be discontinued with no notice at any time in SFDC's sole discretion, and SFDC may never make this feature generally available. Make your purchase decisions only on the basis of generally available products and features. This feature is made available on an AS IS basis and use of this feature is at your sole risk.

How: To take part in this pilot, contact your Salesforce account representative.

SEE ALSO:

Salesforce Help: Route to a Skill (can be outdated or unavailable during release preview)

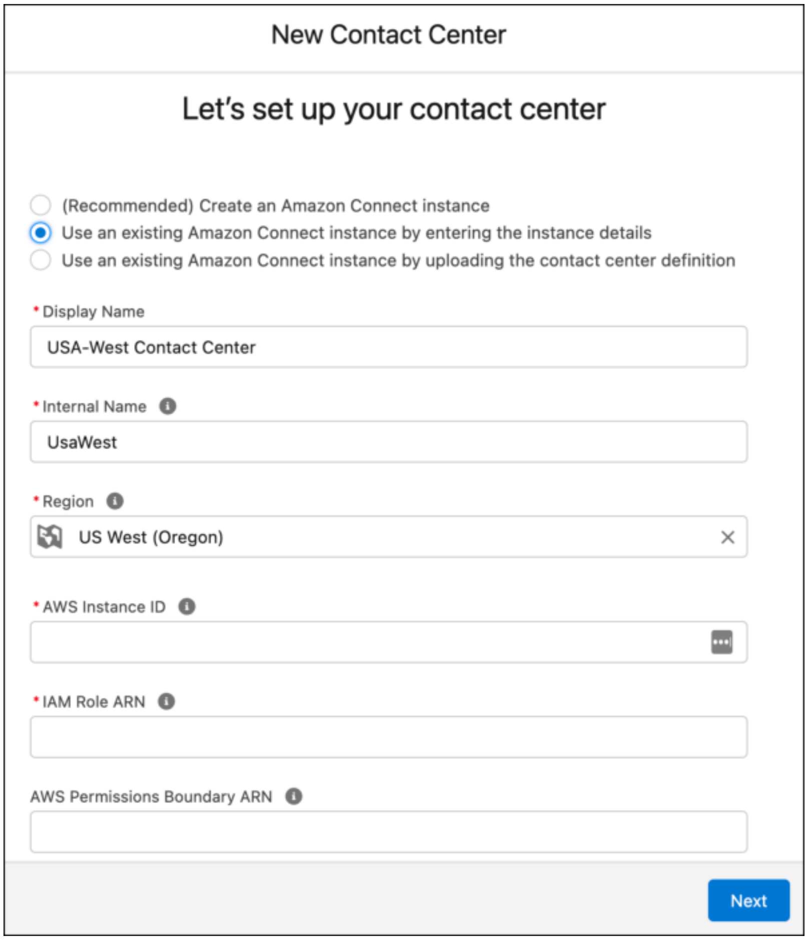
Migrate an Existing Salesforce Contact Center Created from an XML Import

If you created your contact center using the XML-import process, migrate your contact center to take advantage of easier maintenance and additional features. Perform the migration to easily update your contact center to future versions–no need to manually update the serverless application anymore. The migration also gives you access to more Service Cloud Voice features.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

How: To use your own Amazon Connect instance, when you create your contact center, select **Use an existing Amazon Connect instance by entering the instance details** and fill out the Amazon Connect details.



To update the contact center, click Install Updates on the Contact Centers page. No need to manually apply contact center updates using an AWS serverless application.

SEE ALSO:

Salesforce Help: Migrate an Existing Amazon Connect Instance Created from an XML Import (can be outdated or unavailable during release preview)

Automate Actions Based on Intelligence Signals from Partner Systems

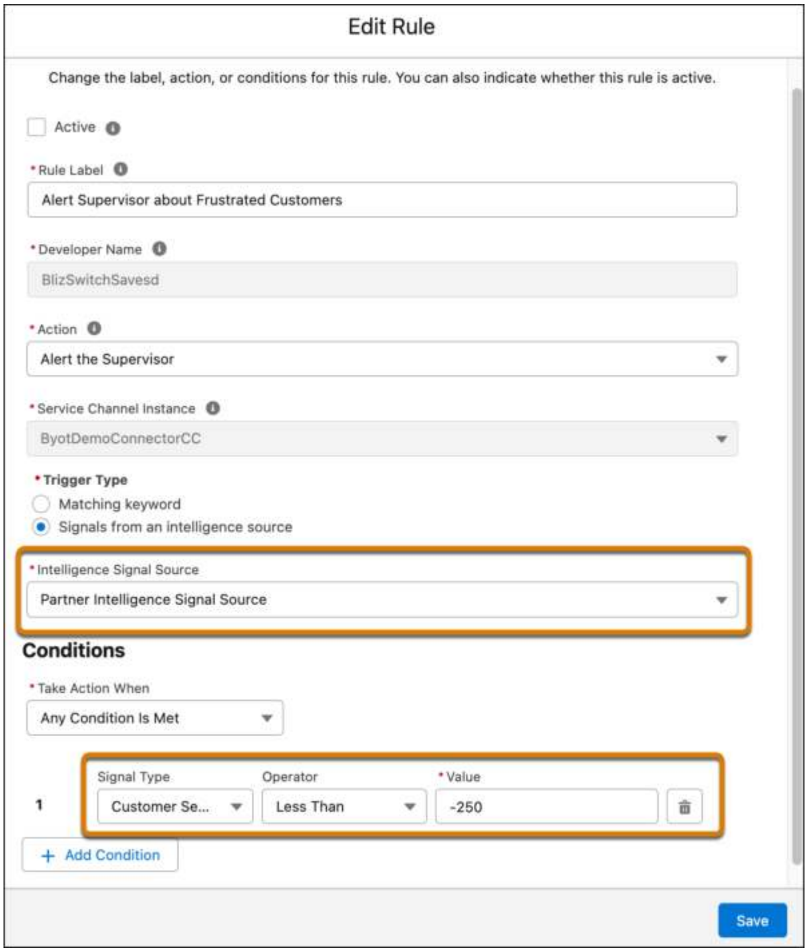
Previously, you could automatically trigger actions based on intelligence signals from Amazon Connect Contact Lens. Now, partners can enable Conversation Intelligence to ingest intelligence signals from partner systems.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with this telephony model:

- Service Cloud Voice with Partner Telephony

How: To get authorization to bring in signals from a new intelligence signal source, a partner can reach out to their Salesforce account executive. Then, they can create an Apex class that specifies the intelligence signal source and all supported signal types. Finally, they can package that Apex class in a managed package, which Service Cloud Voice customers, like you, can deploy to their Salesforce orgs.

After you deploy the package to your org, you can then select the new intelligence signal source and signal types when you create a Conversation Intelligence rule.



When a signal is detected, Service Cloud Voice initiates the associated action. For example, the supervisor is alerted when the customer's sentiment score drops below -250.

SEE ALSO:

Salesforce Help: Taking Action Based on Intelligence Signals (can be outdated or unavailable during release preview)

Get Agents Online Faster with More Voice Status Utility Capabilities

In addition to helping agents check whether their browser, microphone, and Amazon Connect connection is ready for voice calls, the utility now checks if agents' presence status is synced with Amazon Connect. It also displays tips to help agents use Voice and Omni-Channel more effectively. The Voice Status Utility is available for console apps and the Voice Extensions page.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
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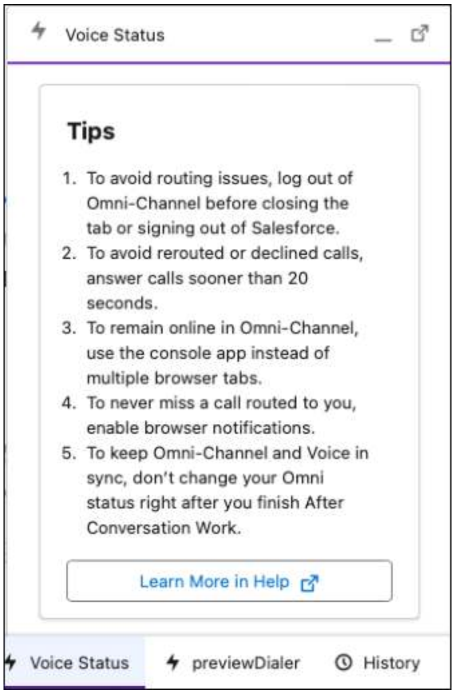

SEE ALSO:

Salesforce Help: Check Voice Status (can be outdated or unavailable during release preview)

Salesforce Help: Set Up the Voice Status Utility for Agents (can be outdated or unavailable during release preview)

Salesforce Help: Customize Call Controls and Voice Extensions (can be outdated or unavailable during release preview)

Improve Agent Login Experiences on Virtual Desktops

Help agents know when they're logged in to Amazon Connect on virtual desktops with a new local media page. Previously, agents may not have known when their Amazon Connect sessions expired, timed out, or when they needed to log in again.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

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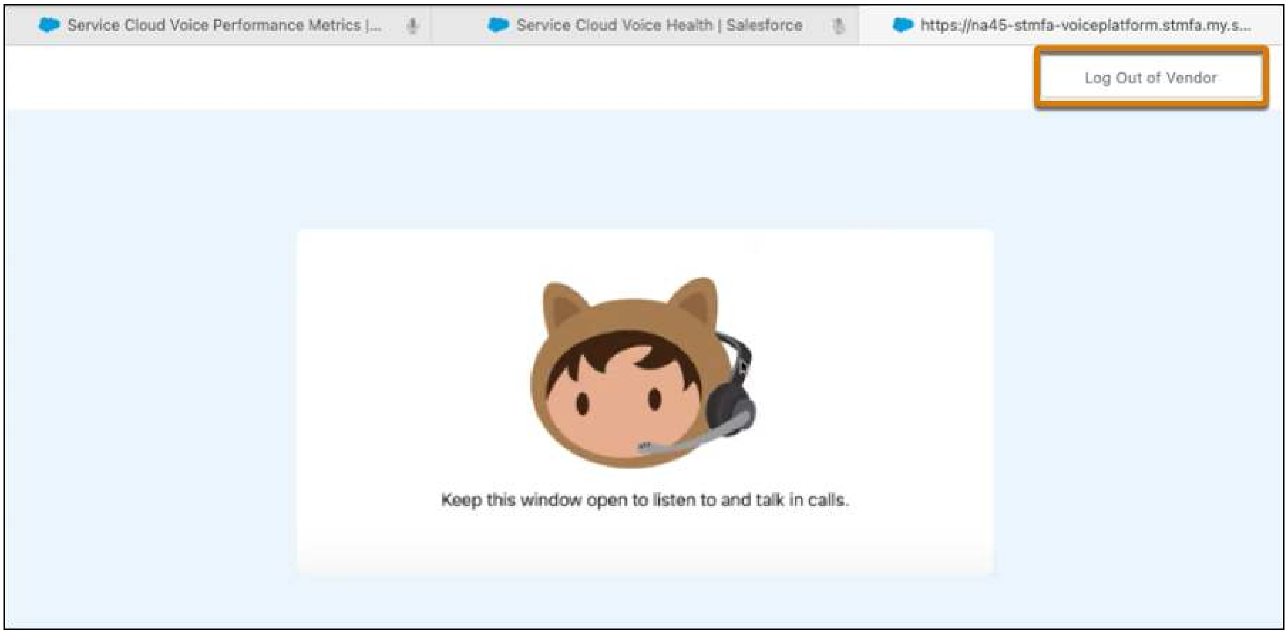

SEE ALSO:

Salesforce Help: Set Up Voice Call Audio for Virtual Desktop Users (can be outdated or unavailable during release preview)

Respect Agent Capacity for Voice Calls Is Turned on by Default for New Salesforce Orgs (Beta)

Enable agents to work across multiple channels with voice call routing that respects the current agent capacity set in Omni-Channel. Existing Salesforce orgs with Service Cloud Voice can turn on this feature, while new Salesforce orgs with Service Cloud Voice have the feature turned on by default.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

Note: Respect Agent Capacity for Service Cloud Voice is a Beta Service. Customers may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: From Setup, in the Quick Find box, enter `Amazon Setup` or `Partner Telephony Setup` depending on your telephony model. Then, click **Respect Agent Capacity**.

SEE ALSO:

Salesforce Help: Respect Agent Capacity for Voice Calls (Beta) (can be outdated or unavailable during release preview)

Sync Agent Presence Statuses Is Turned on by Default

Your contact centers now automatically sync agents' Omni-Channel presence statuses to indicate their availability to receive work. The Presence Status Sync button on your contact center is turned on to detect and restore out-of-sync statuses.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

If you created your contact center using the XML-import process, the **Presence Status Sync** button on your contact center isn't automatically turned on. To turn it on, add the following to your call center definition XML file: `<item sortOrder="6" name="reqPresenceStatusSyncAccess" label="Automatic Presence Status Syncing">true</item>`. You can choose the number for `sortOrder=` to specify the order in which the item appears when edited in Salesforce.

Alternatively, you can turn on **Presence Status Sync** from Setup. In the Quick Find box, enter *Amazon Setup* or *Partner Telephony Setup* depending on your telephony model, and choose a contact center. Click **Presence Status Sync** and then **Save**.

Note: If your contact center supports custom mappings between routable presence statuses to non-routable presence statuses or vice versa, turn off the **Presence Status Sync** button or your custom mappings won't work.

SEE ALSO:

Salesforce Help: Configure Your Service Cloud Voice Contact Center (can be outdated or unavailable during release preview)

Salesforce Help: Sync Agent Presence Statuses Automatically (can be outdated or unavailable during release preview)

Salesforce Help: Creating a Call Center Definition File (can be outdated or unavailable during release preview)

Experience a Sleeker Call Interface in the Omni-Channel Utility

Show or hide call controls easily. Spot call statuses and timers, and see multiple calls in the slimmer Omni-Channel utility.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

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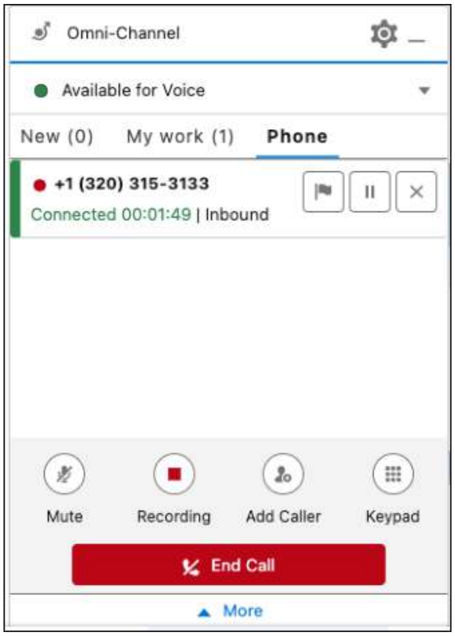


SEE ALSO:

Salesforce Help: Answer and Make Calls (can be outdated or unavailable during release preview)

Add More AWS Services to Service Cloud Voice with Amazon Connect

Easily add more AWS services to your contact center. The Service Cloud Voice Additional AWS Services add-on license offers more services, such as Amazon Pinpoint, Amazon Connect Voice ID, and Amazon Kinesis Data Firehose. The license also provides full capabilities and access to some of the services you already have, such as Amazon CloudWatch, Amazon Dynamo DB, and Amazon EventBridge. Similar to how Salesforce handles telephony charges, the cost of additional services is passed through a monthly invoice. You can review monthly charges on the Service Cloud Voice Usage and Cost Report.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect

All models of Service Cloud Voice are available as an add-on license in Service and Sales Clouds.

How: Contact your Salesforce account executive to learn about purchasing the Service Cloud Voice Additional AWS Services Add-on license.

SEE ALSO:

Set Up Voice ID (can be outdated or unavailable during release preview)

Service Cloud Voice Usage and Cost Report (can be outdated or unavailable during release preview)

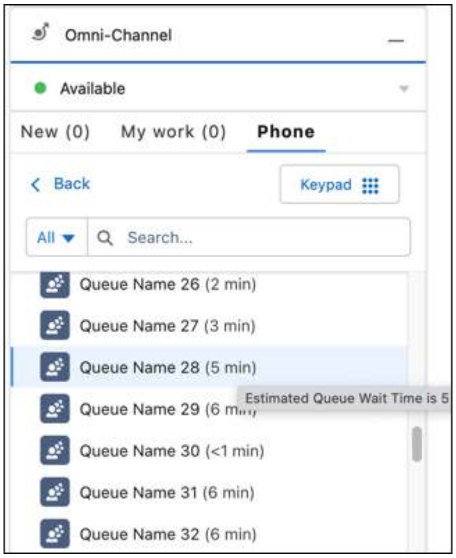
Preview Estimated Wait Times for All Queues Before Transferring Calls

Agents can provide better service by seeing estimated wait times for all partner queues, not 10, before they transfer calls. All partner queues display estimated wait times returned 10 at a time.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

Salesforce calculates estimated wait times only if 10 calls were made to the queue over the past 10 minutes. If this criterion isn't met, the estimated wait time isn't shown. Estimated wait time is automatically turned on for all queues that are mapped to Salesforce queues in both Service Cloud Voice with Amazon Connect and Service Cloud Voice with Partner Telephony from Amazon Connect.



SEE ALSO:

Salesforce Help: Map Your Salesforce Queues to Telephony Provider Queues (can be outdated or unavailable during release preview)

Salesforce Help: Make Smarter Routing Decisions by Checking Agent Availability Queues (can be outdated or unavailable during release preview)

Service Cloud Voice for Partner Telephony Developer Guide: Configure Estimated Wait Times for Queues (can be outdated or unavailable during release preview)

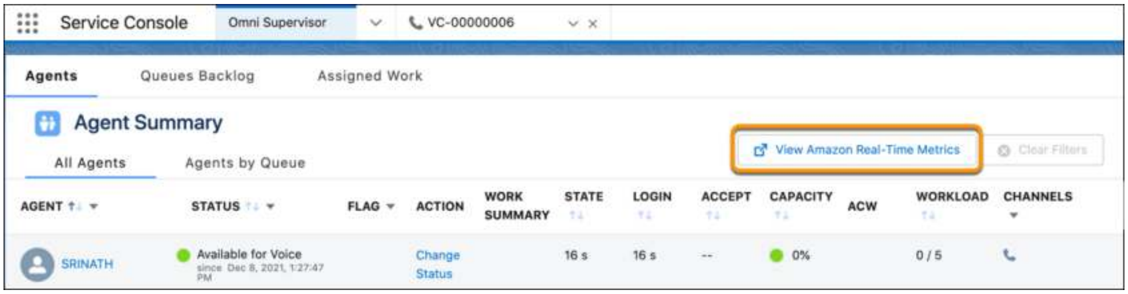
Set Up Amazon Real-Time Metrics Dashboard from Omni Supervisor

The **View Amazon Real-Time Metrics** button no longer appears by default in Omni Supervisor. Add the AWS Dashboard action to Omni Supervisor tabs to see real-time metrics that identify opportunities and uncover issues in your contact center.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions. Available in Salesforce orgs with these telephony models:

- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect

Who: Only users with the Contact Center Admin permission set can set up and see the View Amazon Real-Time Metrics button.



SEE ALSO:

Salesforce Help: Show the Default Actions on Omni Supervisor Tabs (can be outdated or unavailable during release preview)

Salesforce Help: Add the Custom Action to Omni Supervisor Tabs (can be outdated or unavailable during release preview)

Salesforce Help: View Real-Time Metrics about Your Amazon Connect Contact Center (can be outdated or unavailable during release preview)

Chat

Ask your customers to accept your Terms and Conditions before chatting, and more.

IN THIS SECTION:

Build Trust with Customers by Presenting Terms and Conditions in Pre-Chat

Ask your customers to accept your Terms and Conditions before joining a chat conversation. Use Terms and Conditions to inform them that you track or record conversation data, or share other important information.

Other Improvements

Learn about additional improvements we've made to Chat.

Build Trust with Customers by Presenting Terms and Conditions in Pre-Chat

Ask your customers to accept your Terms and Conditions before joining a chat conversation. Use Terms and Conditions to inform them that you track or record conversation data, or share other important information.

Where: This feature is available in all versions of Chat in Performance, Developer, Enterprise, Unlimited, and Essentials.

How: In the Embedded Service Deployment Settings page, click **Settings**, and then select the boxes under Terms and Conditions. Save those changes.

In the Additional Branding page, customize your message to customers with a placeholder and your Terms and Conditions URL. Save your changes.

Other Improvements

Learn about additional improvements we've made to Chat.

Where: This change applies to Embedded Chat on Enterprise, Performance, Unlimited, and Developer Editions with Service Cloud or Sales Cloud

Why: Due to lack of usage and to focus on maintaining newer versions, 1.0 versioned files in Embedded Chat are no longer supported.

Channel Tools

Individual-Object Linking replaces Channel-Object Linking with expanded capabilities in flows, and Conversation Transcript Export data can now be downloaded more than one time in both active and expired Salesforce orgs.

IN THIS SECTION:

Individual-Object Linking (Generally Available)

Individual-Object Linking automatically searches, links, or screen-pops records about the person behind an active conversation. This change gives agents more insight into who they're messaging with. This feature was beta in Summer '23 and is now generally available.

Where: This change applies to Lightning Experience in:

- Standard Messaging channels, enhanced Messaging channels, and Messaging for In-App and Web. View required editions
- Service Cloud Voice channels in Enterprise and Unlimited editions.
- Email-to-Case in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

Export Conversation Transcripts Multiple Times and from an Active Salesforce Org

You can export and download conversation transcripts from an active Salesforce org and export more than one time per org. If you let your Salesforce contract expire, you can still ask Salesforce Customer Support to temporarily enter trial status and complete an export.

Where: This feature is available in:

- Enhanced Voice in Enterprise and Unlimited editions.
- Messaging for In-App and Web, Enhanced WhatsApp Messenger, and Enhanced Facebook Messenger. View required editions

How: In an active Salesforce org, click **Export Now** in the Conversation Transcript Export setup page. Download your results.

If your Salesforce contract expired, contact Salesforce Customer Support to request temporary reactivation in order to export your data.

After downloading your export results, wait 7 days to see the Export Now button reappear. At that time, you can redownload your data. Doing so replaces the previous downloaded data. The related export data and its audit data is available till 30 days from the date of last successful export.

Knowledge

Author articles easily and more effectively and optimize agent interaction with articles by controlling content visibility.

IN THIS SECTION:

Turn On Lightning Article Editor and Article Personalization for Knowledge

Unlock a richer and more user-friendly experience with the new Lightning Article Editor. And with Article Personalization, your knowledge content is tailored to your business needs and unlocks agent productivity.

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

When: Salesforce enforces this update in Spring '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: With the Lightning Article Editor, you can:

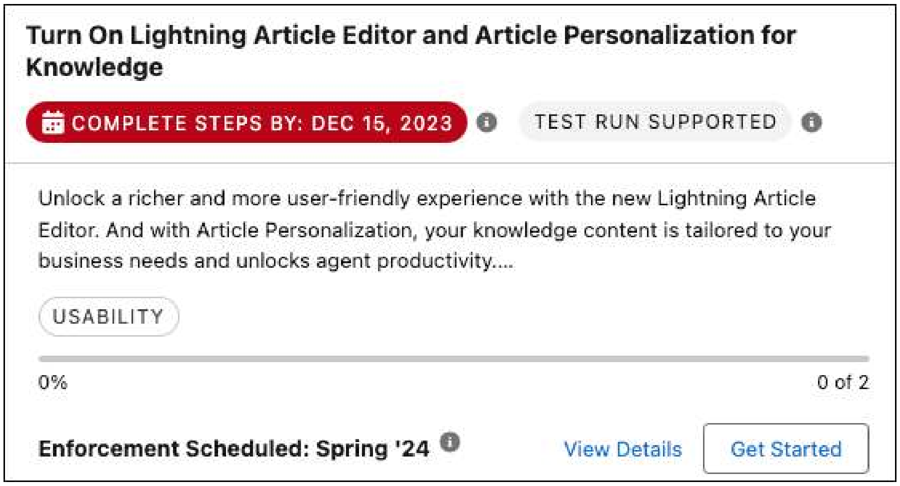
- Boost author productivity with accessible content formatting capabilities and advanced table editing.
- Size the editor to your liking to author articles more effectively and to better understand how articles look to readers.
- Copy and paste content seamlessly from external sources, such as Google Docs or websites, while maintaining the look and feel of the source content.
- Ensure your articles follow W3C accessibility standards using a built-in accessibility checker tool.

Updates to the editor from beta to general availability include:

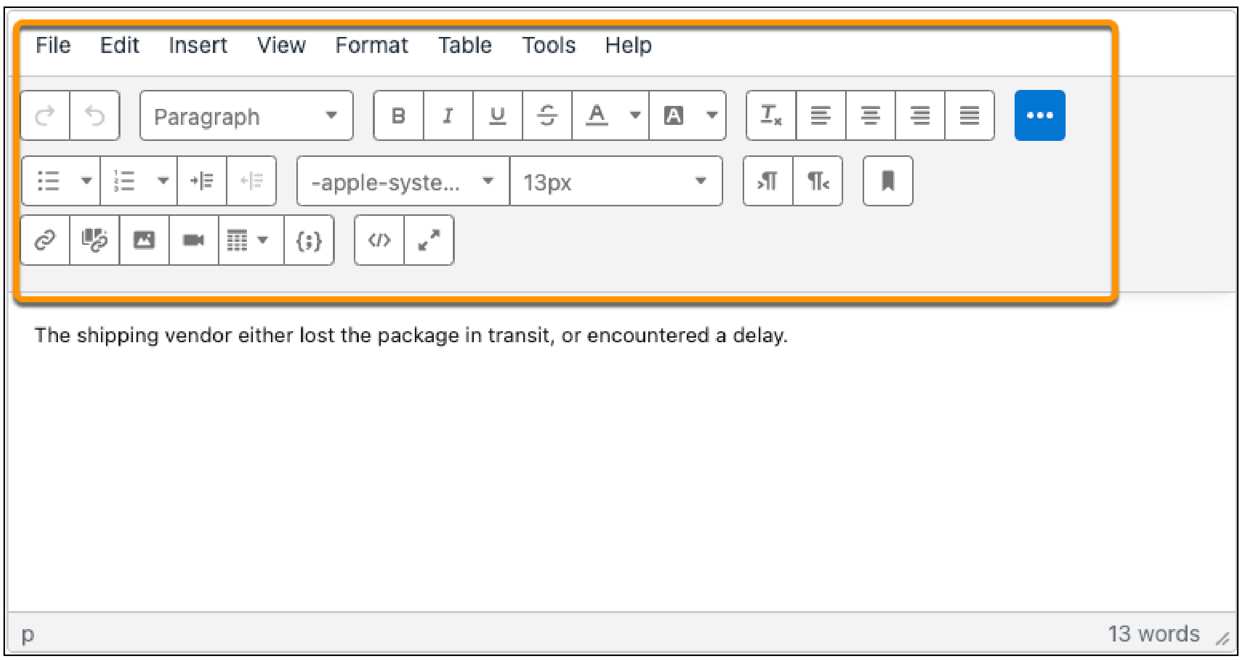
- Support multiple languages by localizing labels and allowing authoring in both left-to-right and right-to-left languages.
- Add accordions (collapsible sections) to improve the readability of large articles.
- Use copy code and zoom in and out of code functions in the Source Code editor.
- Add horizontal lines directly from the editor menu.
- See dates and times based on user locales.
- Support for list renumbering.
- Insert quick text.
- Miscellaneous usability improvements.

With Article Personalization, you can create custom visibility rules that hide or show fields based on the user, user permissions, and record. Salesforce admins customize knowledge articles by controlling which parts of an article are shown or hidden from specific audiences. Service agents interacting with the content find answers faster because they see only what they need to see.

How: To enable the Lightning Article Editor and Article Personalization for Knowledge, go to Release Updates in Setup, find the update, and get started.



After you enable the release update, the new Lightning Article Editor replaces the old Knowledge editor.



SEE ALSO:

- Release Updates
- *Salesforce Help*: Manage Release Updates (can be outdated or unavailable during release preview)
- *Salesforce Help*: Lightning Article Editor (can be outdated or unavailable during release preview)
- *Salesforce Help*: Supported Languages (can be outdated or unavailable during release preview)
- *Salesforce Help*: Set Up and Use Quick Text (can be outdated or unavailable during release preview)
- Release Updates
- *Salesforce Help*: Manage Release Updates (can be outdated or unavailable during release preview)
- *Salesforce Help*: Article Personalization for Knowledge (can be outdated or unavailable during release preview)

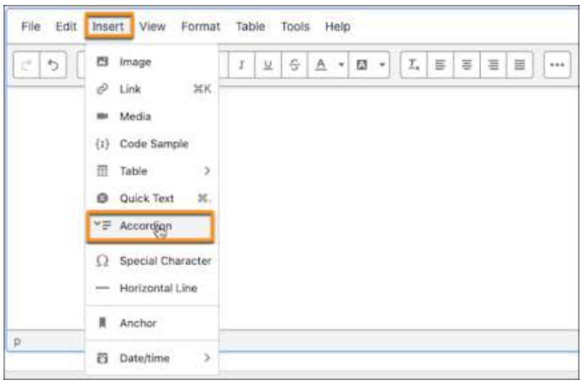
Improve the Readability of Lengthy Knowledge Articles with Accordions

Knowledge articles that contain large blocks of text can overwhelm both readers and article authors. With accordions now available in knowledge articles, article authors can structure lengthy content into collapsible and expandable sections, and give the sections a title. Expandable and collapsible sections allow authors to logically transform text-heavy content into content that can be more easily consumed by readers and other authors.

Where: This change applies to Salesforce Knowledge in Lightning Experience in production, sandbox, and development instances.

Note: Accordions are available in Lightning Experience and Experience Cloud's LWR runtime only. Experience Cloud's Aura runtime isn't currently supported.

How: To add an accordion, from the Lightning Article Editor's Insert menu, select **Accordion**.



Routing

Enhanced Omni-Channel boasts several new features and a more efficient workflow.

IN THIS SECTION:

Upgrade to Enhanced Omni-Channel

Make your Omni-Channel experience even better with Enhanced Omni-Channel. The new Enhanced Agent UI lets agents work more smoothly and logically, including pausing work while they take on more urgent items. Follow your agents' work on one page with a new summary wallboard in the Enhanced Supervisor experience.

Speed Through Work with the Omni-Channel Enhanced Agent Experience

Omni-Channel boasts two new features as part of the Enhanced Agent Experience. First, agents working in orgs that use status-based capacity can now pause work they're not actively engaged with. Agents see their paused work, which by default doesn't consume capacity. Second, a newly designed UI for agents shows information in a more useful way and easily integrates various work modes. Instead of the old console tabs, Omni-Channel features an inbox-style view for work. In the widget, see which work items are open, which are paused, which were updated, and so on. Click an item in the Omni-Channel widget to work on it.

Follow Your Agents' Work Easily with the Enhanced Omni Supervisor Experience (Generally Available)

The Omni-Channel Wallboard shows supervisors real-time metrics about agents and work in one central page. Use it to identify bottlenecks, unused capacity, wait times, problems, and other information at a glance.

Improve Multi-Channel Agent Efficiency with Interruptible Capacity

Make it easy for agents to work in multiple channels immediately so they're handling the most important tasks. Route time-critical work items so that customers receive faster response times. With Interruptible Capacity, efficiently fit work to agents' capacities. Previously, supervisors who had agents simultaneously handling phone calls, chats, and cases struggled because long-running cases block chats or calls. Now supervisors can set dedicated capacities to let users separate out the work and receive chats and calls while working on cases.

Audit Queue Membership Changes with Event Monitoring

Monitor when members are added to or removed from queues using the new Group Membership event type. Queues can contain individual users, roles, public groups, or territories.

IdeaExchange Delivered: View Queue Members with Reports

To help you see the users, roles, public groups, and territories added to your queues, create a custom report type and build reports on queue members. These reports facilitate queue membership and record access management. Previously, you clicked in to each queue individually or ran queries to see its members. We delivered this feature thanks to your ideas on IdeaExchange.

Upgrade to Enhanced Omni-Channel

Make your Omni-Channel experience even better with Enhanced Omni-Channel. The new Enhanced Agent UI lets agents work more smoothly and logically, including pausing work while they take on more urgent items. Follow your agents' work on one page with a new summary wallboard in the Enhanced Supervisor experience.

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

How: From Omni-Channel Settings, click **Enhanced Omni-Channel Routing**.

Messaging, Voice, and Bots already work with Enhanced Omni-Channel. To use Chat with Enhanced Omni-Channel, upgrade Chat to Messaging for In-App or Web. For Messaging, upgrade Standard Messaging channels to their Enhanced versions.

SEE ALSO:

Speed Through Work with the Omni-Channel Enhanced Agent Experience

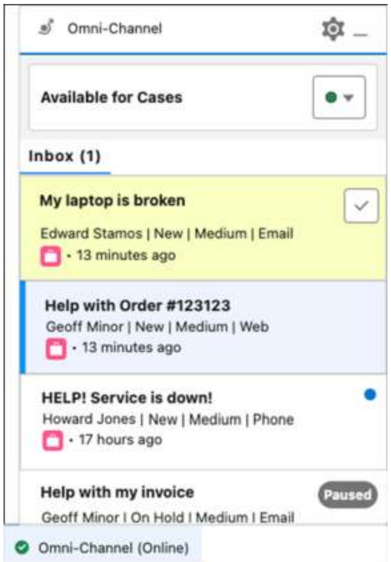
Follow Your Agents' Work Easily with the Enhanced Omni Supervisor Experience (Generally Available)

Speed Through Work with the Omni-Channel Enhanced Agent Experience

Omni-Channel boasts two new features as part of the Enhanced Agent Experience. First, agents working in orgs that use status-based capacity can now pause work they're not actively engaged with. Agents see their paused work, which by default doesn't consume capacity. Second, a newly designed UI for agents shows information in a more useful way and easily integrates various work modes. Instead of the old console tabs, Omni-Channel features an inbox-style view for work. In the widget, see which work items are open, which are paused, which were updated, and so on. Click an item in the Omni-Channel widget to work on it.

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

How: Enable Enhanced Omni-Channel to get the Enhanced Agent experience. From the utility bar in any app with Omni-Channel included, click **Omni-Channel** to open the widget.



Important: The full capabilities of Enhanced Agent are linked to status-based capacity, which is enabled only on certain channels.

SEE ALSO:

Upgrade to Enhanced Omni-Channel

Follow Your Agents' Work Easily with the Enhanced Omni Supervisor Experience (Generally Available)

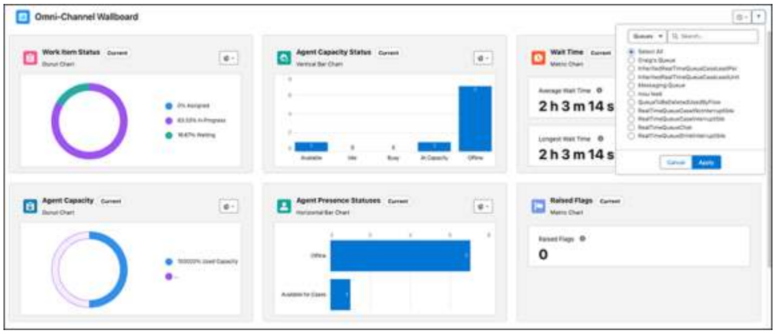
The Omni-Channel Wallboard shows supervisors real-time metrics about agents and work in one central page. Use it to identify bottlenecks, unused capacity, wait times, problems, and other information at a glance.

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

Why: Wallboard charts show agent work statuses, handle times, work item statuses, agent capacity statuses, available capacity, and more metrics.

Previously a pilot program, the wallboard for Winter '24 includes these new features.

- A summary graphical view of all key metrics
- The ability to filter by skills and queues
- A Raised Flags widget that shows when agents need help
- A time window that shows aggregated information over 15, 30, 45, or 60 minutes
- Supervisor actions to manage Messaging sessions while in the queue



How: Turn on Enhanced Omni Channel to use the Omni-Channel Wallboard. In Omni Supervisor, open the Wallboard tab.

SEE ALSO:

Upgrade to Enhanced Omni-Channel

Salesforce Help: Wallboard Tab (can be outdated or unavailable during release preview)

Improve Multi-Channel Agent Efficiency with Interruptible Capacity

Make it easy for agents to work in multiple channels immediately so they're handling the most important tasks. Route time-critical work items so that customers receive faster response times. With Interruptible Capacity, efficiently fit work to agents' capacities. Previously, supervisors who had agents simultaneously handling phone calls, chats, and cases struggled because long-running cases block chats or calls. Now supervisors can set dedicated capacities to let users separate out the work and receive chats and calls while working on cases.

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

How: Define agent interruptible capacity in the Presence Configuration admin page. Define what work is interruptible in either the Service Channel or Routing Configuration setups, or both.

SEE ALSO:

Salesforce Help: Prioritize with Interruptible Capacity (can be outdated or unavailable during release preview)

Audit Queue Membership Changes with Event Monitoring

Monitor when members are added to or removed from queues using the new Group Membership event type. Queues can contain individual users, roles, public groups, or territories.

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

SEE ALSO:

Get Information About Public Group and Queue Membership Changes

View Queue Members with Reports

To help you see the users, roles, public groups, and territories added to your queues, create a custom report type and build reports on queue members. These reports facilitate queue membership and record access management. Previously, you clicked in to each queue individually or ran queries to see its members. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: To create the custom report type, from Setup, in the Quick Find box, enter `Report Types`, and then select **Report Types**. Select **Group Member** as the Primary Object because queues are a type of group. After you deploy the custom report type, users can select it when building reports.

SEE ALSO:

Salesforce Help: Monitor Queue Members with Reports (can be outdated or unavailable during release preview)

IdeaExchange: Reporting on Queues

Self-Service

Self-Service provides an online support channel for your customers, allowing them to resolve their inquiries without contacting a customer service representative.

IN THIS SECTION:

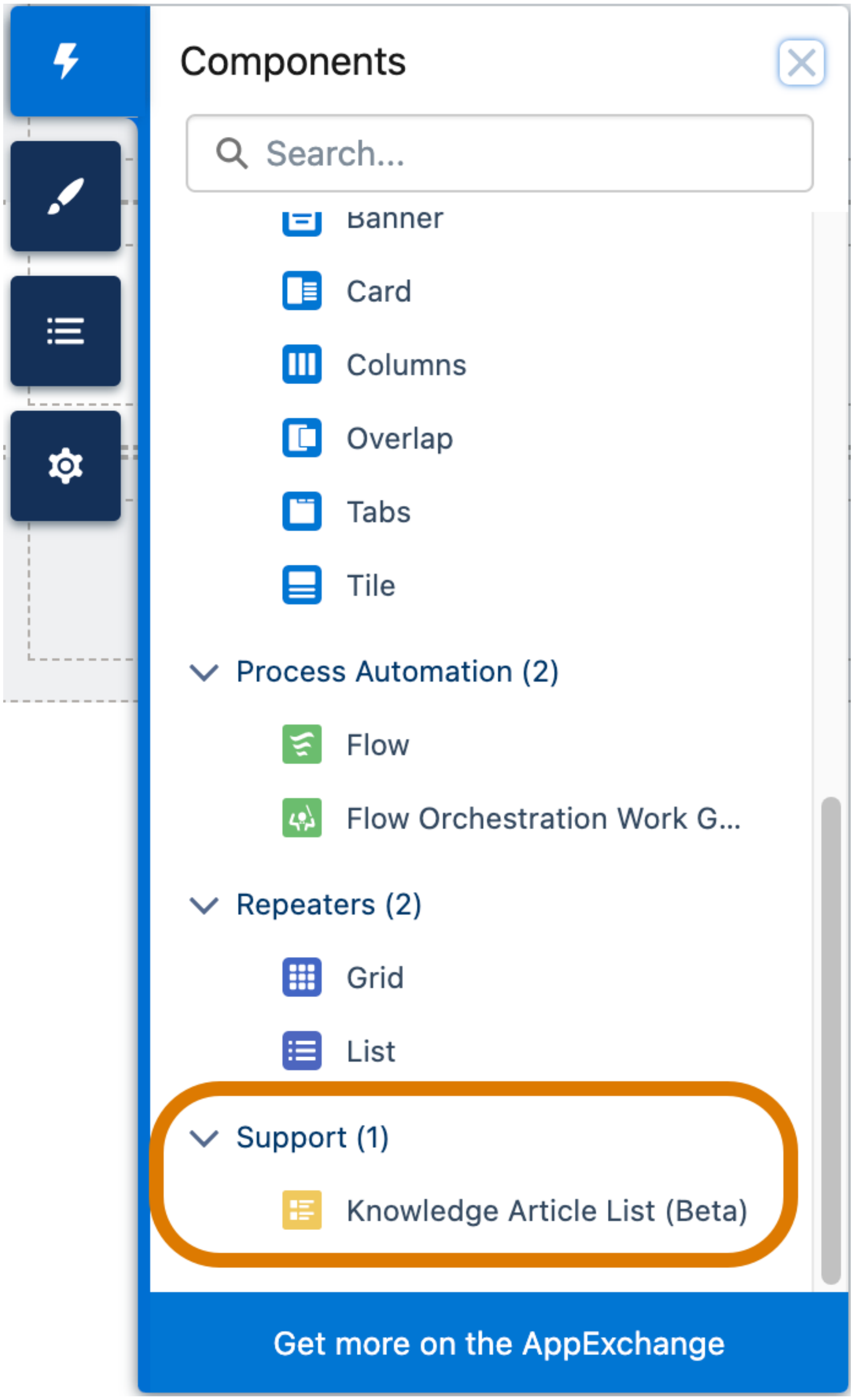
Show Knowledge Articles on Your Enhanced LWR Site

Help your customers discover knowledge articles so they can self-serve with the Knowledge Article List component. This component, available on the Network Data Category page, lists knowledge articles that belong to the same data category. You can also control how knowledge articles are sorted on the page for more customization opportunities. Previously, knowledge articles were available on LWR only through search.

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

This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

How: Add the Knowledge Article List component to your LWR site.


Components
Search...
Banner
Card
Columns
Overlap
Tabs
Tile
Process Automation (2)
Flow
Flow Orchestration Work G...
Repeaters (2)
Grid
List
Support (1)
Knowledge Article List (Beta)
Get more on the AppExchange

IN THIS SECTION:

SEE ALSO:

Salesforce Help: Activate Data Categories on Your LWR Site (can be outdated or unavailable during release preview)

Salesforce Help: Add the Network Data Category Object Page (can be outdated or unavailable during release preview)

Structure Your Help Site with Data Categories (Beta)

Help your customers discover self-serve solutions with Data Categories in LWR sites. Structure your internal knowledge and catalog items, which help you efficiently classify, discover, and show the most relevant article, question, or idea to your users. Previously, internal knowledge articles were mapped to topics instead of data categories, and catalog items couldn't be linked to LWR sites.

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

This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

SEE ALSO:

Salesforce Help: Work with Data Categories (can be outdated or unavailable during release preview)

Work.com

Prepare your business, employees, and facilities. Respond to major events, such as the current COVID-19 crisis, with the apps and services in Work.com.

See the Work.com release notes for the latest updates: Work.com Release Notes

Other Salesforce Products and Services

Get the latest information on features from Customer Success Group, Heroku, and IdeaExchange.

Customer Success Group

Salesforce Customer Success gives every customer access to resources and expertise from the world's most extensive success ecosystem. From easy-to-use resources to embedded solution experts, we help you create your own path to success. With each release, we introduce new and better ways to help you see results from all your Salesforce products. Highlights for Winter '24 include:

- Signature Success Plan is now available for Marketing Cloud Personalization
- Signature Success Plan Enhancements:
  - Customer Success Score: Signature Success Plan customers now have direct access to their Salesforce Customer Success Score in the Help portal. With the Salesforce Customer Success Score, customers can:
    - Access & understand their Salesforce success with a self-service dashboard

    - Track their progress with insight into historical trends and updates to their overall success score
    - Improve their Salesforce success with recommendations to take action
  - Enhanced Annual Technical Health Review (ATHR): Enhanced ATHR includes analysis of architecture risk areas and guidance to improve (for Sales, Service & Platform).
  - Proactive Monitoring alert for Search Performance: Enhanced Proactive Monitoring to include detection of degraded or long running application searches on the platform (for Sales, Service & Platform).
- Premier Success Plan: Expert Coaching Enhancements

Get to know Success Plans by visiting our overview page or taking the Salesforce Success Plans Trailhead module. Or visit the Salesforce Help Portal for more resources. To learn more about how to maximize your Salesforce success, check out our Success Now Handbook.

Heroku

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the Heroku Changelog.

IdeaExchange

Share ideas with the Trailblazer community and Salesforce product managers with the IdeaExchange. In 2021, we rebuilt the IdeaExchange on Lightning Experience. The new version features an improved search experience that aids discoverability, more informative idea records, and search-as-you-type dupe detection to help avoid posting the same idea twice. For more information, visit the IdeaExchange.

Release Updates

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

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

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

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

Enforced with This Release

These updates are scheduled to be enforced this release.

Deploy Enhanced Domains (Release Update)

To comply with the latest browser and security standards, enable and deploy enhanced domains. With enhanced domains, your company-specific My Domain name is included in the URLs that Salesforce hosts for your org. Consistent domain formats improve the user experience and standardize URLs for use in custom code and API calls. Also, with enhanced domains, your users can access Salesforce from browsers that block third-party cookies. Because this update affects application and login URLs, including Experience Cloud sites, Salesforce Sites, and Visualforce pages, if you haven't deployed enhanced domains, we recommend that you do so before your org gets this release. This update, originally named Enable Enhanced Domains, was first available in Summer '21 and is enforced in Winter '24.

Disable Access to Session IDs in Flows (Release Update)

To improve security, this update prevents flow interviews from resolving the $Api.Session_ID variable at run time. Previously, when a flow screen included the $Api.Session_ID variable, the browser session ID of the user that ran the flow appeared on the page. A user was able to employ the session ID to bypass security controls. This update was first made available in Winter '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

Enable Faster Account Sharing Recalculation by Not Storing Case and Contact Implicit Child Shares (Release Update)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Case and Contact objects. Implicit child share records are no longer stored between accounts and their child case and contact records. Instead, the system determines whether users can access child case and contact records when they try to access them. This release update was first available starting in Summer '23 and is enforced in Winter '24.

Make Paused Flow Interviews Resume in the Same Context (Release Update)

With this update enabled, paused autolaunched flows resume in the same context as when they were paused. Also, for each flow that runs in API version 57.0 or later, user permission to run the flow is verified before an interview resumes. If your Process Builder processes launch flows that contain Pause elements, we recommend configuring those flows to run in API version 57.0 or later. Otherwise, this update can change the context of resumed interviews. Instead of resuming in system context without sharing, the process-launched flows resume in the context specified in the flow version properties. This update was first available in Winter '21 and enforcement was scheduled for Winter '22. We then postponed the enforcement date to Spring '23 and postponed again to Winter '24.

Prepare for the Japanese Katakana Style Change (Release Update)

To improve the Japanese katakana translation for foreign language words, the current Japanese Industrial Standards (JIS) style is replaced with the 1991 Cabinet Notification Directive style.

Require Sender Name and Email Address to Send Chatter Email Notifications (Release Update)

To increase data security, administrators must provide a From Name and Email Address for Chatter email notifications to continue being sent.

Salesforce Object ID Is Refined to Use Three Characters for Server IDs (Release Update)

Previously, a valid Salesforce Object ID had a two-character Server ID or Instance ID as the 4th and 5th characters in the overall 15-18 characters. With this change, Salesforce now generates three-character Server IDs, which are the 4th, 5th, and 6th characters in the Object ID. Existing Object IDs don't change and neither does the length of an Object ID, which is still 15-18 characters. This update can cause test cases to fail if the test code doesn't account for the new ID structure. This release update was first available in Summer '23 is enforced in Winter '24.

Security Enhancements for CSRF Tokens for Lightning Apps (Release Update)

This update enforces the generation of a different cross-site request forgery (CSRF) token for each Lightning app, which ensures that a token is used only in its intended context. The update also improves the handling for invalid and expired tokens. This update was first available in Spring '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Winter '24.

Automatically Enabled in This Release

The features related to these updates are scheduled to be automatically enabled but not enforced in this release. The list can include new, previously announced, and previously postponed release updates. You can disable the behavior for the indicated release updates until their enforcement date.

MFA Auto-Enablement Continues: Find Out When and How Your Org Is Affected (Release Update)

As of February 1, 2022, Salesforce requires all customers to use multi-factor authentication (MFA) when accessing Salesforce products. To help customers meet this requirement, Salesforce is automatically enabling MFA for production orgs in several phases via the MFA Auto-Enablement Release Update. With Winter '24, MFA is auto-enabled for the third phase of orgs. The final phase in Spring '24 includes all orgs that weren't previously auto-enabled.

Scheduled to Be Enforced in Spring '24

These updates are scheduled to be enforced in Spring '24. The list can include new, previously announced, and previously postponed release updates.

Enable EmailSimple Invocable Action to Respect Organization-Wide Profile Settings (Release Update)

This update preserves data integrity by rolling back transactions that end in an exception. When you execute an Apex action using REST API, the API doesn't change Salesforce data if that exception occurs. This update, originally named Enforce Rollbacks for Custom Invocable Action Exceptions in Connect REST API, was first made available in Spring '23 and was scheduled to be enforced in Winter '24, but we postponed the enforcement date to Spring '24.

Enable Faster Account Sharing Recalculation by Not Storing Opportunity Implicit Child Shares (Release Update)

To improve performance, Salesforce is changing the way that automatic account sharing recalculation works behind the scenes for the Opportunity object. Implicit child share records are no longer stored between accounts and their child opportunity records. Instead, the system determines whether users can access child opportunity records when they try to access them. You can now enable this feature for opportunities yourself. Previously, Salesforce Customer Support enabled this functionality. This release update is available starting in Winter '24.

Enable ICU Locale Formats (Release Update)

To provide a consistent experience across the platform and improve integration with International Components for Unicode (ICU)-compliant applications across the globe, enable the ICU locale formats. When you enable this update, the ICU locale formats replace Oracle's JDK locale formats in Salesforce. This update was first made available in Winter '20 and is enforced in Spring '24. Effective Spring '24, you can no longer use Oracle's JDK locale formats in Salesforce.

Enable JsonAccess Annotation Validation for the Visualforce JavaScript Remoting API (Release Update)

The Visualforce Remoting API uses JavaScript to directly call methods in Apex controllers from Visualforce pages. To prevent unauthorized serialization and deserialization across packaging namespaces, this update validates the JsonAccess annotation of your Apex classes. This update was first made available in Winter '23 and was scheduled to be enforced in Winter '24. The enforcement date has been postponed to Spring '24.

Enforce RFC 7230 Validation for Apex RestResponse Headers (Release Update)

When this update is enabled, regardless of API version, REST response headers defined in Apex via the `RestResponse.addHeader(name, value)` method have the header names validated based on RFC 7230. The update is available starting in Spring '23.

Enforce Rollbacks for Apex Action Exceptions in REST API (Release Update)

This update preserves data integrity by rolling back transactions that end in an exception. When you execute an Apex action using REST API, the API doesn't change Salesforce data if that exception occurs. This update, originally named Enforce Rollbacks for Custom Invocable Action Exceptions in Connect REST API, was first made available in Spring '23 and was scheduled to be enforced in Winter '24, but we postponed the enforcement date to Spring '24.

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

After Prevent Guest User from Editing or Deleting Approval Requests is enabled, guest users can approve or reject an approval request. Guest users are no longer able to edit, reassign, or delete approval requests. This update was first made available in Winter '23 and was scheduled to be enforced in Summer '23, but we postponed the enforcement date to Spring '24.

Turn On Lightning Article Editor and Article Personalization for Knowledge

Unlock a richer and more user-friendly experience with the new Lightning Article Editor. And with Article Personalization, your knowledge content is tailored to your business needs and unlocks agent productivity.

Scheduled to Be Automatically Enabled in Spring '24

The features related to these updates are scheduled to be automatically enabled, but not enforced, in Spring '24. The list can include new, previously announced, and previously postponed release updates. You can disable the behavior for the indicated release updates until their enforcement date.

MFA Auto-Enablement Continues: Find Out When and How Your Org Is Affected (Release Update)

As of February 1, 2022, Salesforce requires all customers to use multi-factor authentication (MFA) when accessing Salesforce products. To help customers meet this requirement, Salesforce is automatically enabling MFA for production orgs in several phases via the MFA Auto-Enablement Release Update. With Winter '24, MFA is auto-enabled for the third phase of orgs. The final phase in Spring '24 includes all orgs that weren't previously auto-enabled.

Scheduled to Be Enforced in Summer '24

These updates are scheduled to be enforced in Summer '24. The list can include new, previously announced, and previously postponed release updates.

Allow Only Trusted Cross-Org Redirections (Release Update)

To protect your users and network, add the specific Salesforce org URLs that you trust to the Trusted URLs for Redirects allowlist. Users can't access a different Salesforce org, including its publicly served pages and content, from your Salesforce org unless the URL is on the allowlist. This update is available starting in Winter '24.

Enable New Order Save Behavior (Release Update)

After the New Order Save Behavior is enabled, whenever an order product update causes a change to the parent order, Salesforce runs custom application logic. Previously, in this scenario, Salesforce didn't correctly evaluate custom application logic on the parent record.

Run Flows in Bot User Context (Release Update)

With this update enabled, a flow initiated by a bot uses the user profile and permission sets associated with the bot to determine the object permissions and field-level access of the flow. This update was first made available in Summer '23.

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

When enabled, this release update replaces the email editor in the docked and case feed email composers. The new email editor is available in Lightning Experience as a beta feature.

Scheduled to Be Enforced in Winter '25

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

Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

The Frequency and Frequency Type fields on the Maintenance Plan are being retired. To prepare for this retirement and take advantage of updated features, migrate your Frequency and Frequency Type data to Maintenance Work Rules. This update was first available in Summer '22 and was scheduled to be enforced in Winter '22, but we postponed the enforcement date to Winter '25.

Restrict User Access to Run Flows (Release Update)

With this update enabled, Salesforce restricts a user's ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites license. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows.

Scheduled to Be Enforced in Summer '25

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

Evaluate Criteria Based on Original Record Values in Process Builder (Release Update)
This update fixes a bug with the evaluation criteria in processes that have multiple criteria and a record update. This release update ensures that a process with multiple criteria and a record update evaluates the original value of the field that began the process with a value of null. This update was first made available in Summer '19.

Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)
The retirement of versions 21.0 through 30.0 of the Salesforce Platform API was first scheduled for Summer '23. The retirement is now postponed to Summer '25. You can continue to use these API versions but they're not supported and won't be available starting in Summer '25. Applications consuming them are then disrupted. Requests fail with an error message indicating that the endpoint is deactivated. Upgrade all applications that use a legacy API version to a current version before this breaking change occurs.

Legal Terms

We made seasonal updates to Salesforce Legal Terms.

Trust & Compliance

For a complete list of changes to the Trust & Compliance documents related to this release, see the Salesforce Trust & Compliance Documentation Change Log.

Business Associate Addendum Restrictions

For a complete list of changes to the Business Associate Addendum Restriction documents, see the Business Associate Addendum Restrictions Change Log.

Acceptable Use Policy

For a complete list of changes to the Acceptable Use Policy documents, see the Acceptable Use Policy Change Log.