Salesforce Release Notes

’25

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CONTENTS

Salesforce Release Notes

The Summer '25 release helps elevate your customer experiences by seamlessly integrating a digital labor force that works alongside your human workforce, driving efficiency and innovation across every process, workload, and application.

What's New This Release

- Admin Release Countdown Blog: Most important dates you'll want to mark on your calendar for Summer '25.

Release Readiness Essentials

Plan for the upcoming release with helpful resources.

- Release Readiness Trailblazers. Access resources and experts for all things release readiness. To help us track and respond to your feedback, use a hashtag that indicates the release, such as #Summer25Feedback.
- Trust Status Maintenance Site. See sandbox and other release dates and times. To see your maintenance dates, select Instances and your instance.
- Sandbox Refresh Calculator, Preview Video, and Preview Instructions. Plan if and when to refresh your sandboxes. Learn how to navigate the sandbox preview process. 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 Tips

Here are some tips to get the most out of the release notes.

- Use the table of contents to browse through release notes by product. You can also search and filter to zero in on the news that matters the most.
- Your browser's settings determine the language that you see. To change the website language, scroll to the bottom of this page and use the language switcher in the website footer.
- Salesforce Known Issues are listed separately.

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.

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 nrn_features_released_monthlyrn_features_released_monthlyotes.

Release Note Changes

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

How and When Do Features Become Available?

Some features 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.

Salesforce Overall

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

Release Updates

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

Agentforce & Einstein

Supercharge your workforce efficiency with predictive and generative AI.

Analytics

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

Commerce

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

Customization

Manage user access more easily with enhancements to the user, permission set, permission set group, and object access summaries. Strengthen Agentforce workflows with external data. Give your mobile users the same experience of Dynamic Related Lists as they get on desktop (Beta).

Data Cloud

Ingest, harmonize, unify, and analyze streaming and batch data with Data Cloud. Then use that data to unlock meaningful and intelligent experiences across Customer 360 applications and beyond.

Deployment

New change set components are available.

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.

Experience Cloud

Create content for your enhanced LWR site with Agentforce (beta). Improve the organization and security of user engagement data on sites connected to Data Cloud. Help LWR site visitors view records more easily with the new Record List component. Salesforce CDN customers who use Cloudflare have enhanced security protection against malicious traffic. Simplify the process of building a registration handler for single sign-on to your site by using Flow Builder.

Field Service

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

Hyperforce

Hyperforce is now available in Hyderabad, India. Tableau and Data Cloud are available in more regions, expanding global data residency options. Salesforce Shield now offers critical event data with Event Log Objects.

Industries

Salesforce introduces a range of enhancements to streamline operations and improve productivity across industries. Asset Management simplifies inventory processes, while Automotive Cloud enhances financial updates, vehicle inspections, and lending optimization. Channel Revenue Management improves partner inventory tracking and minimizes overpayment, and Communications Cloud streamlines billing inquiries and automates quoting. Consumer Goods Cloud simplifies deliveries, payments, and data sync, while Energy and Utilities Cloud tracks consumption, summarizes chats, and creates timesheets. Financial Services Cloud enhances client interactions and operational efficiency through real-time data refresh, and streamlines loan and policy management. Health Cloud improves financial control and appointment scheduling, and Life Sciences enhances therapy management, participant recruitment, and site management. Loyalty Management engages customers with interest-based clubs, personalized promotions, and point transfers, while Manufacturing Cloud integrates AI for asset services, manages program forecasts, and minimizes revenue leakage. Net Zero Cloud simplifies snippet drafting and expands carbon accounting. Public Sector Solutions automates tasks, improves productivity, and enhances search capabilities. Salesforce for Education automates advising, improves application review, and enhances registration. Vlocity Contract Lifecycle Management automates document generation. We also bring exciting changes in Insurance, Media Cloud, Nonprofit Cloud, Referral Marketing, and other industry-specific features.

Marketing

Personalize every moment of engagement across the customer lifecycle and drive growth for your business with the latest features and enhancements from Marketing Cloud.

MuleSoft

Use the MuleSoft Anypoint Platform suite of products to connect and integrate apps, systems, and data across your enterprise. Streamline operations by building and automating processes with clicks instead of code. You can design, develop, govern, and share APIs and integration apps and host them in the cloud or on-premises.

Mobile

Use a single component to configure Dynamic Related Lists on desktop and mobile (beta). Customize

Seller-Focused Mobile Experience with a generally available mobile builder. External Client Apps for Mobile Publisher is now generally available for new apps. Files Priming for Salesforce Mobile App Plus is generally available.

Omnistudio

Omnistudio offers faster standard designers and list views for all components. The standard designer for Omniscripts also supports the Newport Design System for easier custom designs. Expanding their multi-channel support, Omniscripts now can deploy to Lightning Web Runtime (LWR) sites for Experience Cloud. Omnistudio Data Mappers can load data from external sources by using a custom interface object as the input. Troubleshooting failed steps in Integration Procedures is easier with detailed logging. For easier migration from managed package runtime to standard runtime, Omnistudio automatically converts custom functions in Integration Procedures and Data Mappers. With new methods, you can now use Connect REST APIs to call Data Mappers or Integration Procedures on standard runtime.

Revenue Cloud

Improve product browsing by setting a default catalog. Create more complex product offerings with support for more product attributes. Simplify quotes by hiding less important products in complex bundles. Automate pricing simulations, apply sequential discounts, and track price change history. Speed up quote generation with cloning, enable auto-renewals, and manage flexible order amendments. Apply contractual volume or tier-based prices based on cumulative quantities purchased. Adapt to changes in ongoing orders by configuring how fulfillment plans respond. Save time and effort by configuring a fulfillment scenario for a product classification that covers a range of similar products. Use a dedicated billing app to streamline your daily tasks and get a 360-degree view of customer billing information. Improve operational efficiency with real-time visibility into invoices, credit memos, and billing schedules. Sell with commitment-based pricing and flexible token allocation. Associate usage-based grants with specific targets, such as accounts, contracts, or custom objects.

Sales

Boost your sales teams' results with new features across Sales Cloud.

Salesforce CMS

Delete enhanced CMS workspaces, create enhanced custom content types, and deliver all media content types at high scale.

Salesforce Flow

Compose intelligent workflows with Flow Builder and Flow Orchestration. Integrate across any system with Mulesoft for 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

Create external client apps in App Manager and connected apps in External Client App Settings. Enable SAML on external client apps. Manage more policy types in Policy Center, including policies from Data Cloud. Investigate suspicious login activity, and store threat detection event data by default. Monitor security settings across your Government Cloud Plus organizations from Security Center dashboard. Move to interactive conversations about your security posture with Security agent actions.

Monitor blocked redirections that originate from hyperlinks in URL and Long Text Area Fields in Salesforce Classic. And the Trusted URL and Browser Policy Violations list in Setup shows more CSP violations. Database Encryption beta in Sandboxes. Data Cloud External Key Management available. New deterministic encryption tenant secret workflow. AES-GCM Mode and P1363 Signing in Crypto class.

Service

Check out the latest features from Service Cloud to supercharge productivity across your organization. Service Cloud features are released as often as monthly, so check here for the latest information.

Work.com

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

Other Salesforce Products and Services

Get the latest information on these new features.

Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

Previous Release Notes

Find information about previously-announced features in the release note archive.

Release Notes for Features Released Monthly

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

- Monthly release notes aren't the same as release notes for delayed features. Sometimes, a feature released seasonally is subject to a slight delay. When that happens, the timing is explained in the "When" section of that feature's release note.
- New monthly release notes aren't the same as changes to previously published release notes. Sometimes, we need to update previously published release notes for the current seasonal or monthly release. When we make those updates, we list the specific change 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."

May '25 Release

Learn about features released in May '25.

Release Note Changes

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

April 28, 2025

Industries Updates

Add Context Record at User-Defined Level

Added April 28, 2025.

Revenue Updates

New Connect REST API Resources

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

Added April 28, 2025.

New Connect in Apex Classes

Added a release note to announce the new Apex classes available with Billing.

Added April 28, 2025.

New Invocable Action

Added a release note to announce the new invocable action available with Billing.

Added April 28, 2025.

New and Changed Objects for Billing

Updated the release note to announce the new TransactionAmountField field on the existing GeneralLedgerAcctAsgntRule object.

Added April 28, 2025.

Security, Identity, and Privacy Updates

Create an External Client App by Using Agentforce

Changed the requirements about who can use this action to indicate that it's available to users with the Use Agentforce Default Agent user permission.

April 22, 2025

Salesforce Summer ’25 Release Notes

Published preview release notes.

How and When Do Features Become Available?

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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	Yes			
Supported Browsers and Devices for Salesforce Classic	Yes			
Supported Browsers for CRM Analytics	Yes			

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				
Simplify Feature Discovery and Setup with Salesforce Go		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Enable Accessibility Enhancements for Page Headers and Modal Windows When Zoom Is Greater Than 200% (Release Update)			Yes	
Add the New Setup Domain	Yes			
Lightning Console				
Benefit from Better Lightning Console Performance with Deferred Inactive Workspace Page Loading	Yes			
Salesforce Data Pipelines				
Access Your Amazon S3 Data Using VPC	Yes			
Specify IAM Users and Roles for Authentication with Amazon Athena and S3 Connectors	Yes			
Use OAuth Security with Your Snowflake VPC Connection	Yes			
Bucket Data in Recipes with Clicks Not Code	Yes			
Subscribe to Recipe Notifications as a Read-Only User	Yes			
Improve Salesforce External Connector Sync Performance with Incremental and Periodic Full Syncs (Generally Available)	Yes			
Improve Snapshot Data Recipe Performance with Optimized Upsert and Delete Actions (Beta)	Yes			
Salesforce Scheduler				
Enhance Lobby Management			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
with Custom Flows and Actions				
Changed Connect REST API Request Bodies			Yes	
Trust Site Enhancements				
Experience a Tailored View of Your Salesforce Service Health with Personalized Trust (Beta)	Yes			

Agentforce & Einstein

Supercharge your workforce efficiency with predictive and generative AI.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Agentforce & Einstein Features			Yes	
Agentforce & Einstein Platform				
Agentforce Development				
Enhance Agent Action UI with Custom Lightning Types				
Find Lightning Types for Agentforce (Default) More Easily				

Analytics

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

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Tableau Next	Yes			
Reports and Dashboards				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Choose Which Dashboard Widgets to Refresh (Generally Available)	Yes			
Designate One Email Address to Send Report Subscription Notifications (Generally Available)			Yes	
Designate One Email Address to Send Dashboard Subscription Notifications			Yes	
Use Existing Report Settings When Adding Tables to Dashboards (Beta)				Yes
Data Cloud Reports and Dashboards				
Unlock Trends from Calculated Insights in Semantic Data Model Reports	Yes			
Build More Granular Summary Reports	Yes			
Distribute Reports and Dashboards on Semantic Data Models with Managed Packages	Yes			
Deploy Reports and Dashboards on Semantic Data Models Using Change Sets	Yes			
CRM Analytics				
Analytics Experience and Visualizations				
Filter and Navigate with the List Widget	Yes			
Add Custom Headers and Sorting in the Repeater Widget	Yes			
Maximize Data Clarity with	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Customizable Table Widget Tooltips				
Get One-Click Filtering and Navigation with the Toggle Widget	Yes			
Get More Filter Control for Your Dashboard Queries	Yes			
Reduce Data Cloud Direct Query Costs and Improve Performance with App-Level Caching			Yes	
Connect to Your Snowflake Data Using Direct Data for Snowflake with OAuth (Generally Available)			Yes	
Data Integration				
Access Your Amazon S3 Data Using VPC	Yes			
Specify IAM Users and Roles for Authentication with Amazon Athena and S3 Connectors	Yes			
Use OAuth Security with Your Snowflake VPC Connection	Yes			
Bucket Data in Recipes with Clicks Not Code	Yes			
Subscribe to Recipe Notifications as a Read-Only User	Yes			
Improve Salesforce External Connector Sync Performance with Incremental and Periodic Full Syncs (Generally Available)	Yes			
Improve Snapshot Data Recipe Performance with Optimized Upsert and Delete Actions (Beta)	Yes			
Einstein Discovery				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Decision Optimization in Einstein Discovery Is Retired	Yes			
Tableau	Yes			
Marketing Cloud Intelligence	Yes			
Accessibility Enhancements in Analytics	Yes			

Commerce

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

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Salesforce B2B and D2C Commerce				
Commerce Store Pages				
Enhance Product Displays with Videos	Yes			
Enhance Your Brand with Videos	Yes			
Advertise Your Products on Facebook and Instagram	Yes			
Boost Product Discovery with Featured Recommendations	Yes			
Test Product Experience with Interactive Preview	Yes			
Enhance Browsing and Navigation for an Immersive Shopping Experience	Yes			
Automatically Indicate Out-of-Stock Products	Yes			
Simplify Product Selection with	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Quick View				
Enhance Product Cards with Hover Images	Yes			
Easily Add Custom Fields to Self-Registration Page	Yes			
Enhance User Experience with Faster Load Times (Beta)			Yes	
Marketing Cloud for Commerce				
Capture Customer Emails for Marketing Campaigns with Marketing Consents	Yes			
Recover Lost Sales with Abandoned Cart Emails	Yes			
Provide Customers with Full Order Details in the Order Confirmation Email	Yes			
Cart, Checkout, and Shipping				
Personalize Your Customers' Shopping Experience with Gifting		Yes		
Place Orders Efficiently with Streamlined Design	Yes			
Show Personalized Product Recommendations in the Mini Cart	Yes			
Add Express Checkout in the Mini Cart for Faster Purchases			Yes	
Enjoy Effortless Shipping with Digital Product Handling	Yes			
Handle Split Payments with Custom Checkout	Yes			
Customize Shipping Rates and Processing Times with Shipping	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Profiles				
Provide Faster Actions on Cart and Checkout Pages	Yes			
Display Errors and Inventory Checks Clearly on the Checkout Page	Yes			
Streamline Tax Management in Your Commerce Store		Yes		
Quickly and Accurately Calculate Taxes on Shipping		Yes		
Commerce Components				
Add a Marketing Consent Option to My Profile Page	Yes			
Capture Subscriptions and Marketing Consents with the Email Sign Up Form Component	Yes			
Simplify Compliance with the Cookie Consent Component	Yes			
Commerce Promotions				
Create Upsell Opportunities with an Approaching Discount Message	Yes			
Entice Customers with Promotions That Offer a Bonus Product	Yes			
Commerce Search				
Provide Product Previews in Search Suggestions		Yes		
Refine Your Shopper's Experience with a Price Range Filter		Yes		
Group Products by Attributes on the Product Listing Page				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Enhance User Experience with Better Search Relevancy		Yes		
Sort Search Results Using Guest Shopper Prices		Yes		
Influence Product Positioning with Boost and Bury Rules	Yes			
Verify Merchandising Rule Behavior on the Preview Screen	Yes			
Commerce Subscriptions				
Keep Shoppers Informed About Subscription Payment Failure	Yes			
Alert Shoppers About Subscription Impact When Deleting Payment Methods	Yes			
Commerce Additional Features				
Assign a Default Buyer Group for Self-Registering Users	Yes			
Secure Contact Updates with Two-Factor Authentication	Yes			
Salesforce Order Management				
Expand Bundle Service to All Order Management Flows	Yes			
Protect Your Salesforce Org from High Volumes of Order Data	Yes			
Salesforce Payments				
Build Customer Trust by Restricting Access to Saved Payment Methods	Yes			
Control Access to Payment Records with Account-Based Sharing		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Upgrade the Payment Experience for Customers in the European Economic Area			Yes	
Reduce Security Risks by Detecting Payment Page Tampering			Yes	
Make ACH Payments Easier for Business Customers			Yes	
Find the Salesforce Payments API Documentation in a New Location			Yes	

Customization

Manage user access more easily with enhancements to the user, permission set, permission set group, and object access summaries. Strengthen Agentforce workflows with external data. Give your mobile users the same experience of Dynamic Related Lists as they get on desktop (Beta).

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Permissions				
Delivered Idea: Update Object Permissions for All Custom Permission Sets or Profiles in One Step		Yes		
Delivered Idea: Edit Permissions Faster in the Permission Set Summary		Yes		
Delivered Idea: Manage Included Permission Sets in the Permission Set Group Summary		Yes		
Delivered Idea: Review Tab Settings in Access Summaries		Yes		
Delivered Idea: View and		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Manage a User's Permission Sets, Groups, and Queues More Easily				
Salesforce Connect				
Access External Data in Prompt Builder		Yes		
Access Data Without Limits with Salesforce Connect		Yes		
Sharing				
Enable Secure Roles Behavior and Update Sharing Group References in Production (Release Update)			Yes	
Enable Secure Roles Behavior and Update Sharing Group References in Sandboxes (Release Update)			Yes	
Review Changing Sharing Recalculation Behavior		Yes		
Globalization				
Enable ICU Locale Formats (Release Update)		Yes		
Clear State and Country Picklist Mappings		Yes		
Review Updated Label Translations		Yes		
List Views				
Delivered Idea: Get the Desktop Dynamic Related List Experience on Mobile (Beta)			Yes	
Simplify Quick Filters for the Record Type Field	Yes			
Enhance Accessibility with the	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Improved List Views Dropdown Menu				
Fields				
Troubleshoot a Deployment That Contains a Custom Field Type Conversion		Yes		
Easily Remove Relationships Before Deleting a Custom Object		Yes		
AppExchange				
Boost Agentforce Capabilities with AgentExchange	Yes			
General Setup				
Some Record Page Text Is No Longer Truncated		Yes		
Select, Cut, and Paste Components More Easily When Using a Keyboard		Yes		

Data Cloud

Ingest, harmonize, unify, and analyze streaming and batch data with Data Cloud. Then use that data to unlock meaningful and intelligent experiences across Customer 360 applications and beyond.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Data Cloud Features Released by Month				
Cross Cloud Updates for Data Cloud				
Act on Data				
Create Related List Enrichments by Using Direct-DMO		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Relationships				
Deploy Related List Enrichments from a Data Cloud Sandbox		Yes		
Add Copy Field Enrichments to More Objects		Yes		

Deployment

New change set components are available.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Components for Change Sets		Yes		

Development

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

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Lightning Components				
LWC API Version 64.0		Yes		
Resolve Errors Related to Accessing Referenced Lightning Components		Yes		
Preview a Single Lightning Web Component Using Local Dev (Beta)			Yes	
Lightning Base Components		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Documentation Update				
Internal DOM Structure Is Changing for Lightning Base Components		Yes		
Use TypeScript with Lightning Base Components		Yes		
API Distortion Changes in Lightning Web Security		Yes		
Lightning Design System				
Lightning Design System Component Blueprints Updates	Yes			
Update Your Lightning Components to SLDS 2 with SLDS Linter (Beta)	Yes			
Keep Up with the Latest SLDS Validator Enhancements	Yes			
Apex				
Evaluate Dynamic Formulas in Template Mode		Yes		
Specify an Org-Wide Enablement of Debug Logs During Metadata Deployment			Yes	
API				
Use Your Org’s My Domain Login URL in API Calls (Release Update)			Yes	
Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)			Yes	
Get Notified About Composite API Requests with EventLogFile Event Types				
Other Improvements to			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Generating an OpenAPI Document for sObjects REST API (Beta)				
Retrieve Metadata Types with Dependencies		Yes		
Know When the Synchronous Compile on Deploy Setting Is Enabled in Sandboxes		Yes		
New Metadata Coverage Report	Yes			
Deploy and Retrieve Pilot Metadata Types			Yes	
Development Environments				
Data Mask (Beta)				
Access Information About Specific Data Mask Job (Beta)		Yes		
Automate the Running of Data Mask Processes with Job Scheduler (Beta)		Yes		
Other Improvements to Salesforce Data Mask (Beta)		Yes		
Platform Development Tools				
Agentforce DX		Yes		
Salesforce CLI				
Keep Up with the Latest Salesforce CLI Enhancements		Yes		
Salesforce Extensions for Visual Studio Code		Yes		
Code Builder		Yes		
Agentforce for Developers		Yes		
Scalability				
Book Sandbox Slots for Peak				Yes

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Load Testing with Scale Test				
Generate Improved Apex Investigations, Provide In-App Feedback, and View Search Insights with Scale Center				Yes
Optimize Code with ApexGuru				Yes
Remove Shift_JIS to Windows-31J Character Mapping			Yes	
Salesforce Functions				
Salesforce Functions Is Being Retired				Yes
Change Data Capture				
Receive Change Event Notifications for More Objects		Yes		
Platform Events				
Discover Your Apex Trigger Batch Size and User		Yes		
The Timeout of Outbound Messages Is Reduced to 20 Seconds from 60 Seconds		Yes		
Identify Outbound Messages in Queue with a Renamed Heading		Yes		
Streaming API Clients Can Receive Disconnect Messages from Salesforce App Servers		Yes		
Pub/Sub API				
Pub Sub API Is Available in All Hyperforce Regions		Yes		

Experience Cloud

Create content for your enhanced LWR site with Agentforce (beta). Improve the organization and security of user engagement data on sites connected to Data Cloud. Help LWR site visitors view records more easily with the new Record List component. Salesforce CDN customers who use Cloudflare have enhanced security protection against malicious traffic. Simplify the process of building a registration handler for single sign-on to your site by using Flow Builder.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Aura and LWR Sites				
Use Agentforce to Draft Text for Enhanced LWR Sites (Beta)			Yes	
Partition Enhanced LWR Site Data with Custom Data Spaces		Yes		
Let Users Know When Their Session Is About to End		Yes		
Aura Record Field Information Icons in Experience Builder Sites Have Changed		Yes		
Use the File Upload Enhanced Lightning Web Component with Aura and LWR Sites (Beta)		Yes		
Upgrade to Enhanced LWR Sites (Release Update)			Yes	
Components in Experience Builder				
Help Your Site Visitors View Records More Easily with the New Record List Component		Yes		
Enable a Modernized Record Experience in Aura Sites (Release Update)		Yes		
Mobile for Experience Cloud				
Take Advantage of the Latest Features from Mobile Publisher for Experience Cloud		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Security and Sharing				
Verify Sender Email Addresses for New Aura and LWR Sites		Yes		
Enhanced Security for Sites Using the Salesforce CDN		Yes		
Simplify Single Sign-On Registration with Flow Builder			Yes	

Field Service

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

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Agentforce for Field Service				
Rebook Appointments Easily with Proactive Scheduling Outreach			Yes	
Maintain Assets Efficiently with Proactive Asset Service Scheduling			Yes	
Experience Smarter Interactions with Context-Aware Agentforce	Yes			
Einstein for Field Service				
Access Pre-Work Briefs On the Go	Yes			
Field Service Go				
Simplify Field Service Feature Discovery and Setup		Yes		
Field Service Scheduling and Optimization				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Enhanced Scheduling and Optimization				
Get Additional Guidance When Transitioning to Enhanced Scheduling and Optimization		Yes		
Improve Usability of Resource Schedule Optimization with Reduced Data Loading	Yes			
Streamline Scheduling and Improve Operational Efficiency with Smarter Schedule Conflict Management		Yes		
Create More Precise Travel Time Estimations by Including a Buffer Time on Service Appointments (Generally Available)			Yes	
Get Better Optimization Results by Using Priorities to Schedule Complex Work Chains		Yes		
Manage Crew Member Absences More Efficiently with Color Coding	Yes			
Field Service Operations				
Improve Visibility into Resource Distribution and Demand with Capacity Visualization			Yes	
Upgrade Your Field Service Insights with Tableau Next (Generally Available)			Yes	
Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)		Yes		
Field Service Customer Engagement				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Manage Visual Remote Assistant (VRA) Sessions from the Mobile App	Yes			
Get More Insights with Data Cloud and Visual Remote Assistant (VRA) Integration			Yes	
Set Up Recording Rules Easily for Visual Remote Assistant (VRA) Sessions			Yes	
Field Service Mobile				
Data Capture				
Improve Work Plan Efficiency with Data Capture Forms		Yes		
Streamline Workflow with PDFs of Completed Data Capture Forms		Yes		
Get Feedback from Mobile Workers On the Go with Mobile Net Promoter Score (NPS) Surveys	Yes			
Create and Update Field Service Records Quickly and Efficiently	Yes			
Work More Efficiently with the Revamped Work Order Overview Page	Yes			

Hyperforce

Hyperforce is now available in Hyderabad, India. Tableau and Data Cloud are available in more regions, expanding global data residency options. Salesforce Shield now offers critical event data with Event Log Objects.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Access Salesforce in More Regions with Hyperforce			Yes	
Query Event Data with Salesforce Shield Event Log Objects			Yes	

Industries

Salesforce introduces a range of enhancements to streamline operations and improve productivity across industries. Asset Management simplifies inventory processes, while Automotive Cloud enhances financial updates, vehicle inspections, and lending optimization. Channel Revenue Management improves partner inventory tracking and minimizes overpayment, and Communications Cloud streamlines billing inquiries and automates quoting. Consumer Goods Cloud simplifies deliveries, payments, and data sync, while Energy and Utilities Cloud tracks consumption, summarizes chats, and creates timesheets. Financial Services Cloud enhances client interactions and operational efficiency through real-time data refresh, and streamlines loan and policy management. Health Cloud improves financial control and appointment scheduling, and Life Sciences enhances therapy management, participant recruitment, and site management. Loyalty Management engages customers with interest-based clubs, personalized promotions, and point transfers, while Manufacturing Cloud integrates AI for asset services, manages program forecasts, and minimizes revenue leakage. Net Zero Cloud simplifies snippet drafting and expands carbon accounting. Public Sector Solutions automates tasks, improves productivity, and enhances search capabilities. Salesforce for Education automates advising, improves application review, and enhances registration. Vlocity Contract Lifecycle Management automates document generation. We also bring exciting changes in Insurance, Media Cloud, Nonprofit Cloud, Referral Marketing, and other industry-specific features.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Asset Management				
Enable Work Order Estimation for Partner Community			Yes	
Guarantee Faster Returns and Replacements with Advanced Exchange			Yes	
Track Depot Repairs of Returned Assets			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Timesheets and Labor Cost Optimization Enhancements				
Manage Timesheets Quickly			Yes	
Allocate Vehicle Time Easily			Yes	
New and Changed Objects for Timesheets and Labor Cost Optimization			Yes	
Automotive Cloud				
Vehicle and Asset Lending Enhancements				
Set Up Rehashing for Vehicle and Asset Lending Faster	Yes			
Resolve and Prevent Duplicate Applicant Records			Yes	
Simplify Approval Processes Through Interaction Summaries	Yes			
Streamline Vehicle and Asset Inspections Through Assessment Questionnaires			Yes	
Enhance User Experience by Using Paths and Softphone Layouts	Yes			
Improve Customer Satisfaction Through Page Variations	Yes			
Give Guest Users Access to Enhanced Lead Management			Yes	
Easily Capture Public Complaints for Assets and Financial Products	Yes			
Changed Objects for Automotive Cloud			Yes	
Channel Revenue Management				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Channel Partner Inventory Tracking				
Streamline the Reconciliation of Calculated and Reported Partner Inventory Levels			Yes	
Address Discrepancies by Adjusting Partner Unsold Inventory			Yes	
Ensure Accurate Channel Inventory with Automated Partner Return Debits			Yes	
Optimize Customer Return Accuracy Through Channel Inventory Reconciliation			Yes	
Ship and Debit Process Management				
Automate Ship and Debit Claim Processing Based on Partner Inventory			Yes	
Communications Cloud				
Enterprise Sales Management				
Streamline Attribute Updates in the Working Cart with Real-Time and On-Demand Modes	Yes			
Undo Asset Changes During MACD Operations	Yes			
Add Assets Directly to Enterprise Quotes	Yes			
Find Existing Quotes Faster with Type-Ahead Search	Yes			
Accelerate Working Cart Navigation with Enhanced Data Table Controls	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Get Failure Notifications for Bulk Edits	Yes			
Quick Navigation from Enterprise Quotes to Related Records	Yes			
Enable Console Support for Enterprise Quotes	Yes			
Invocable Cart Actions for Agentforce				
Automate Cart Operations by Using Invocable Actions for Agentic Flows			Yes	
New Invocable Actions in Industries CPQ			Yes	
Communications Cloud Agent Console				
Improve the Efficiency and Quality of Customer Service		Yes		
Communications Cloud Sales				
Create and Manage a Group of Recipients for Offers			Yes	
Use Multi-Locations Quoting in Onboarding and Sales Journey			Yes	
Automate Order Submissions with Dynamic Revenue Orchestrator			Yes	
New Objects in Communications Cloud Sales		Yes		
Consumer Goods Cloud				
Retail Execution				
Receive and Process Data from External Apps in Consumer Goods Cloud Mobile App	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Customize Consumer Goods Cloud Mobile App Faster with LWC Quick Actions (Beta)	Yes			
Enable Quantity Adjustments and Cash Collection During Deliveries	Yes			
Drive Retail Execution During Delivery Visits	Yes			
Print Paper Invoices and Reports On the Go with a Bluetooth Thermal Printer			Yes	
Complete Audits with Optimized Layout	Yes			
Find Records Faster in Consumer Goods Cloud	Yes			
Visualize Relevant Customers on the Map		Yes		
Improve Data Cloud Insights with New Data Streams and Mappings		Yes		
Authenticate to Consumer Goods Mobile App on iOS Devices with Native Mobile SDK (Beta)	Yes			
Use Flexible Approval Processes for Consumer Goods Cloud	Yes			
Penny Perfect Pricing V1 Is Being Retired		Yes		
Get Updated Permission Sets for Direct Store Delivery				
Other Improvements in Retail Execution		Yes		
Changed Objects for Retail Execution		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Sync Management				
Control Sync Frequency on Consumer Goods Cloud Mobile App	Yes			
Changed Objects for Sync Management		Yes		
Visual Studio Code Based Modeler				
Other Improvements in Visual Studio Code Based Modeler		Yes		
Plan for Windows Server Based Modeler's Retirement		Yes		
Trade Promotion Management				
Get More Accurate Account Plans and Customer Business Plans		Yes		
Ingest Key Performance Indicator (KPI) Data from Processing Services to Data Cloud (Pilot)		Yes		
Improve Sales Uplift Predictions with Forward Buy		Yes		
Simplify Adding Tactics to Promotions		Yes		
New and Changed Objects in Trade Promotion Management		Yes		
New and Changed APIs in Trade Promotion Management		Yes		
Energy and Utilities Cloud				
Timesheets and Labor Cost Optimization Enhancements			Yes	
Summarize Chat and Voice Call Transcripts			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Track and Compare Monthly Consumption Details			Yes	
Financial Services Cloud				
Simplify Financial Services Cloud Feature Discovery and Setup				
Show Near Real-Time Client Details		Yes		
Financial Plans and Goals				
View Financial Goal Funding with Standard Objects		Yes		
Show Near Real-Time Household Details		Yes		
Simplify the Policy Cancellation Service Process		Yes		
Health Cloud				
Disease Surveillance Enhancements				
Accelerate Disease Surveillance Configuration Through a Guided Setup			Yes	
Simplify Disease Surveillance with the All-In-One Console App		Yes		
Set Up Inspections Easily with a Guided Setup			Yes	
Streamline Field Inspections with Health Inspection Console App			Yes	
Enhance Disease Investigations with Health Cloud Disease Surveillance Assessments			Yes	
Enhance Disease Surveillance with the Health Risk Evaluation		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Object				
Home Health Enhancements				
Gain Flexibility with Customized Budget Management for Home Healthcare				
Accelerate Your Home Health Setup				
Integrated Care Management Enhancements				
Enhance Patient Collaboration with Care Plan Creation in Experience Cloud Sites			Yes	
View All Care Plan Components Easily with a Single Click	Yes			
Intelligent Appointment Management Enhancements				
Manage Patient Appointment Waitlists Efficiently			Yes	
Improve Appointment Accuracy with Time Zone Management	Yes			
Utilization Management Enhancements				
Promptly Alert Subscribers with FHIR Subscription Notifications			Yes	
Accelerate Prior Authorization Requirement Checks with the Enhanced Data Model			Yes	
Identify Documentation Requirements Easily with the Enhanced Integration Procedure Output		Yes		
Quickly Validate Members by Using Member Number	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Identifier or Subscriber ID				
Coverage Requirement Discovery No Longer Supports HasHistoricDiagnosis Parameter		Yes		
New and Changed Objects in Health Cloud		Yes		
Insurance				
Brokerage				
Renew or Cancel Insurance Policies in Bulk				
Assign Flat Amounts to Producer Split Arrangement Line Items				
Control Rounded Amounts on Split Arrangements More Easily				
Life Sciences Cloud				
Advanced Therapy Management Enhancements				
Optimize Advanced Therapy Management Transition			Yes	
Resume Stalled Processes Instantly	Yes			
Site Management Enhancements				
Quickly Access Critical Site and Investigator Information	Yes			
Select and Activate Sites Faster	Yes			
Set Up a Research Study Faster	Yes			
New and Changed Objects in Life Sciences Cloud		Yes		
Loyalty Management				
Build Customer Advocacy and	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Engagement with Clubs				
Promotions				
Maximize Revenue with Personalized Promotion Recommendations			Yes	
Optimize Data Storage for Engagement Trail Promotions			Yes	
Find Members' Data Cloud Segment from Any Data Space			Yes	
Manage Promotion Budgets Better with Enhanced Promotion Limits	Yes			
Points Management				
Share Your Points with Friends and Family		Yes		
Automate Points Transfer to Membership Groups			Yes	
Use Field Aliases in All Rule Actions	Yes			
Removed: Buy X (Bundle or Product Variants), Get Discounts + Reward Promotion Template				Yes
New and Changed Objects in Loyalty Management		Yes		
New Metadata Types in Loyalty Management			Yes	
Manufacturing Cloud				
Prevent Revenue Leakage for Configured Products in Sales Agreements			Yes	
Minimize Downtime for Faulty Products with Advanced			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Exchanges				
Get Visibility Into Depot Repairs for Faulty Assets			Yes	
Media Cloud				
Media Proposals				
Design Proposals Tailored to Your Advertiser's Campaign Objectives	Yes			
Convey Your Value Proposition with Engaging Visual Presentations			Yes	
Keep Track of the Revenue Generated from Advertisement Opportunities		Yes		
New and Changed Objects in Media Cloud		Yes		
Net Zero Cloud				
Enhance Information Library Context by Linking Snippets with Disclosure Framework			Yes	
Einstein for Net Zero Cloud				
Enhance Disclosure Reporting by Using Einstein Generative AI with Data Cloud			Yes	
Identify the Emissions Data Gaps and Use Estimated Ways to Fill The Gaps			Yes	
Improve Carbon Accounting to Support Multilevel Organizational Hierarchy			Yes	
Simplify Emissions Factor Management for Stationary Assets			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
New and Changed Objects in Net Zero Cloud	Yes			
Public Sector Solutions				
Recruit Smartly with Comprehensive Candidate Data			Yes	
Einstein Generative AI for Public Sector Solutions				
Create a Funding Award Summary with Einstein (Beta)			Yes	
Generate a Specialized Version of a Grant Application for Board Review (Beta)			Yes	
User Access Management Enhancements				
Seamlessly Manage User Access by Persona		Yes		
Set Up User Access Faster with New Standard Permission Sets		Yes		
Give Users Access to Licensing and Permitting Sites Easily		Yes		
Other Changes in User Access Management		Yes		
Build More Comprehensive Custom Reports		Yes		
Empower Employees to Do More on the Employee Experience Cloud Site		Yes		
New and Changed Objects in Public Sector Solutions		Yes		
Referral Marketing				
Enhance Your Referral Program with Rewards of Your Choice	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Easily View the Referrals and Extended Rewards		Yes		
Automatically Enroll Advocates		Yes		
Other Improvements in Referral Marketing	Yes			
New and Changed Objects in Referral Marketing		Yes		
Salesforce for Education				
Use Different Rubrics to Assess Each Application Stage		Yes		
Transform Student Recruitment with Agentforce for Education: Student Recruitment (Beta)			Yes	
Gain Insights into Applicant Campus Preferences			Yes	
Enhance Students’ Campus and Program Search with Detailed Profiles		Yes		
Connect Students to Nearby Schools and Programs with Campus and Program Finder		Yes		
Maximize School and Program Visibility to K-12 Applicants		Yes		
Manage Critical Academic Operations			Yes	
Optimize the Course Registration Experience			Yes	
Define, Enforce, and Manage Student Holds Effectively		Yes		
Manage Your Course Offerings and Course Offering Schedules in Bulk				
Calculate the Grade Point				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Average of Students with Policy Rules				
Answer and Support Advisors Autonomously with Agentforce				
Manage Philanthropic Research Data Efficiently with Education Cloud				
Optimize Your Philanthropic Engagement and Research Efforts with Agentforce				
Build Lifelong Philanthropic Relationships with Gift Planning			Yes	
New and Changed Objects in Education Cloud				
Salesforce for Nonprofits				
Volunteer Management				
Improve Volunteer Programs with Volunteer Management		Yes		
Empower Programs and Organizations With Efficient Volunteer Management		Yes		
Share Volunteer Opportunities and Gather Participant Details With Volunteer Management in Experience Cloud			Yes	
New Objects in Volunteer Management	Yes			
Vlocity Contract Lifecycle Management				
Transition Automatically to Document Generation 2.0		Yes		
Configure File Size Limits to				Yes

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Accommodate Larger Custom Font Files				
Industries Common Features				
Action Launcher				
Simplify Service Access in Action Launcher with Unified Catalog		Yes		
Action Plans				
Accelerate Business Processes with Predefined Action Plan Templates		Yes		
Improve Task Visibility and Streamline Workflows with Action Plan Task Lists		Yes		
New and Changed Objects in Action Plans		Yes		
Actionable Relationship Center				
Visualize More Relationships on an ARC Graph		Yes		
Batch Management				
Changed Object in Batch Management		Yes		
New and Changed Metadata Types in Batch Management		Yes		
Business Rules Engine				
Simplify Testing of Business Rules Engine Components in Sandboxes				
Ensure Precision in Calculation Results				
Handle Null Values Flexibly by Setting Default Behaviour				
Migrate Decision Matrix Versions				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Efficiently by Using Ranks				
Accelerate Bulk Updates to Decision Tables with Improved CSV File Support	Yes			
Enhance Decision Table Invocations with Apex	Yes			
Decision Table Types Now Have New Names	Yes			
Improve Scalability and Efficiency in Decision Tables	Yes			
Collections and Recovery				
Accelerate Collections and Recovery Processes with Experience Cloud Site			Yes	
Efficiently Record Meeting Outcomes with a Quick Action			Yes	
Minimize Credit Risks with Promise-to-Pay Limits			Yes	
Get a Hierarchical View of Collection Plans and Related Records			Yes	
Reduce the Risk of Noncompliant Calls with Compliance Checks			Yes	
Manage Collection Campaigns More Effectively with Collections Data Kit			Yes	
New and Changed Objects			Yes	
Compliant Data Sharing				
Delete Compliant Data Sharing Participant Records		Yes		
Context Service				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Add Context Record at User-Defined Level		Yes		
Search Data Model Objects Faster with Data Space Filter		Yes		
Add Detailed Description for Context Attributes		Yes		
Easily Sync Extended Definitions with Standard Definitions				
Cross Object Field History (Generally Available)				
Track Changes Across Related Object Fields with Cross-Object Field History (Generally Available)		Yes		
Data Consumption Framework				
Easily Create Integration Definitions by Using Templates		Yes		
Access Up-to-Date Customer Data with Equifax Integration Template		Yes		
Data Processing Engine				
Transform Complex Data by Using Data Cloud		Yes		
Maintain Data Integrity Across Related Objects with Composite Writeback				
Write Data More Flexibly with Enhanced Upsert Action Type		Yes		
Changed Metadata Types in Data Processing Engine		Yes		
Discovery Framework				
Save Discovery Framework Assessments as Drafts to			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Complete Later				
Simplify Assessment Tracking with the Assessments Lightning Web Component		Yes		
Einstein Summary				
Enhance Productivity with AI-Generated Summaries on Mobile App				
Integrate Einstein Summary Component with Agentforce				
Fundraising				
Enter Gifts More Efficiently in the Gift Entry Grid			Yes	
Build Lifelong Philanthropic Relationships with Gift Planning			Yes	
Manage Philanthropic Research Data Efficiently			Yes	
Optimize Your Philanthropic Engagement and Research Efforts with Agentforce			Yes	
New and Changed Objects and Fields for Fundraising		Yes		
Grantmaking				
Simplify Funding Disbursement Scheduling				
Quickly Generate Progress Reports with Templates			Yes	
Automate Funding Award Requirements			Yes	
Changed Object in Grantmaking	Yes			
Industries Configure, Price, Quote (CPQ)				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Resolve Order Queries Efficiently with the Order Overview Page	Yes			
Streamline Deployment of Industries CPQ in LWC with Omnistudio for Managed Packages	Yes			
Other Improvements in Industries CPQ Classic Cart APIs	Yes			
Support for Offer Specification	Yes			
Support for Product Versioning	Yes			
Prioritize and Easily Find Qualified Products	Yes			
Eliminate Data Loss and Inconsistencies from Replace Operations	Yes			
Industry Integration Solutions				
Customize MuleSoft Direct Assets for Your Integration Needs				
Interest Tags				
Enforce Sharing Rules for Tag Category		Yes		
Omnistudio Document Generation				
Transition Automatically to Document Generation 2.0		Yes		
Configure File Size Limits to Accommodate Larger Custom Font Files				Yes
Omnistudio for Industries				Yes
Process Compliance Navigator				
Capture Business Operations	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Processes for Compliance				
Define Regulations and Track Amendments for Compliance	Yes			
Create Compliance Policies and Manage Policy Updates	Yes			
Combine Validation Controls by Using Validation Procedures			Yes	
Protect Your Company from Compliance Risks			Yes	
Track Compliance by Using Non-Validation Compliance Controls			Yes	
View Relationships for Compliance Objects			Yes	
Demonstrate Compliance Effectiveness			Yes	
New Connect REST API Resources			Yes	
New Invocable Action in Process Compliance Navigator			Yes	
New Objects in Process Compliance Navigator				
Program and Case Management				
Improve Referral Tracking and Reporting	Yes			
Save and Complete In-Progress Assessments	Yes			
Log Benefit Disbursements from Participant Record			Yes	
Save Time and Improve Benefit Tracking with Enhanced Benefit Disbursal Workflows			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Changed Objects in Program and Case Management	Yes			
Rollup Definitions				
Make More Informed Decisions with On-Demand Record Rollup			Yes	
View Multiple Record Rollup Results in One Place			Yes	
Configure On-Demand Record Rollup Easily with the New Guided Setup			Yes	
Stage Management				
Create Stage Definitions Faster			Yes	
Assign Tasks to Associated Users or Queues		Yes		
Clarify Record Transition Issues Through Custom Validation Messages		Yes		
Unlock Flexible Stage Progressions		Yes		

Marketing

Personalize every moment of engagement across the customer lifecycle and drive growth for your business with the latest features and enhancements from Marketing Cloud.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Marketing Cloud Account Engagement				
Get More Out of Your Engagement Data			Yes	
Reach More Prospects with WhatsApp			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Delivered Idea: Dismiss Configuration Issues in Optimizer			Yes	
Quickly Pinpoint Failed Email Sends		Yes		
Gain Control of Bot-Like Prospects by Deleting Excessive Visitor Records			Yes	
Marketing Cloud Engagement				
Archived Release Notes	Yes			
Marketing Cloud				
Save Time with New AI Capabilities for Reporting and Marketing Automation	Yes			
Create Meaningful Moments with Campaign Designer (Beta)	Yes			
Enjoy More Control Over Campaigns and Flows	Yes			
Create Customized Content More Efficiently	Yes			
Increase Customer Engagement with Personalization Recommendations	Yes			
Stay Compliant with New and Improved Consent Tools	Yes			
Gain Valuable Insights with Enhanced Reporting Options	Yes			
Manage Admin Tasks More Easily with These Enhancements	Yes			
Other Changes in Marketing Cloud Growth		Yes		

Mobile

Use a single component to configure Dynamic Related Lists on desktop and mobile (beta). Customize Seller-Focused Mobile Experience with a generally available mobile builder. External Client Apps for Mobile Publisher is now generally available for new apps. Files Priming for Salesforce Mobile App Plus is generally available.

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				
Delivered Idea: Use Dynamic Related Lists on Mobile (Beta)			Yes	
Access Record Attachments in the Offline App with Files Priming (Generally Available)	Yes			
Mobile Publisher				
Use External Client Apps to Manage Your App's Push Notifications (Generally Available)		Yes		
View Mobile Publisher Content in Landscape Mode				
Align Mobile Publisher Release Numbering with Salesforce				
Preview PDFs on Android Devices				
Get Notified of New Mobile Publisher Version Release Notes		Yes		
General				
Set Up Mobile Features and Notifications By Using the External Client App Framework (Beta)				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Customize Seller-Focused Mobile Experience (Generally Available)		Yes		

Omnistudio

Omnistudio offers faster standard designers and list views for all components. The standard designer for Omniscripts also supports the Newport Design System for easier custom designs. Expanding their multi-channel support, Omniscripts now can deploy to Lightning Web Runtime (LWR) sites for Experience Cloud. Omnistudio Data Mappers can load data from external sources by using a custom interface object as the input. Troubleshooting failed steps in Integration Procedures is easier with detailed logging. For easier migration from managed package runtime to standard runtime, Omnistudio automatically converts custom functions in Integration Procedures and Data Mappers. With new methods, you can now use Connect REST APIs to call Data Mappers or Integration Procedures on standard runtime.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Build Omnistudio Components Faster with the New Omnistudio Standard Designer	Yes			
Quickly Browse and Manage Omnistudio Components with Standard List Views	Yes			
Customize Your Omniscript Design with Newport Design System				
Enhance Your Experience Cloud LWR Sites with Omniscripts				Yes
Use External Data Sources in an Omnistudio Data Mapper Load	Yes			
Troubleshoot Integration Procedures by Analyzing Error Logs	Yes			
Convert Custom Functions Automatically to Work		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Seamlessly in Omnistudio Standard Runtime				
Use the New Connect APIs for Omnistudio Data Mappers and Integration Procedures in Standard Runtime	Yes			
Improve Text Formatting in Omniscripts and Flexcards	Yes			
Experience Enhanced Security and Efficiency for Omnistudio				
Omnistudio Minor Releases		Yes		

Revenue Cloud

Improve product browsing by setting a default catalog. Create more complex product offerings with support for more product attributes. Simplify quotes by hiding less important products in complex bundles. Automate pricing simulations, apply sequential discounts, and track price change history. Speed up quote generation with cloning, enable auto-renewals, and manage flexible order amendments. Apply contractual volume or tier-based prices based on cumulative quantities purchased. Adapt to changes in ongoing orders by configuring how fulfillment plans respond. Save time and effort by configuring a fulfillment scenario for a product classification that covers a range of similar products. Use a dedicated billing app to streamline your daily tasks and get a 360-degree view of customer billing information. Improve operational efficiency with real-time visibility into invoices, credit memos, and billing schedules. Sell with commitment-based pricing and flexible token allocation. Associate usage-based grants with specific targets, such as accounts, contracts, or custom objects.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Product Catalog Management				
Effortlessly Manage Catalogs on Your Product List Page			Yes	
Manage Cart Visibility on Product List Container Page	Yes			
Control the Visibility of Guided Product Selection on Product	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
List Page				
Manage Complex Product Configurations with Expanded Attribute Support	Yes			
Scale Product Creation with Enhanced Product Classification	Yes			
Search Products in Large Catalogs Faster	Yes			
Simplify Quotes and Quote Documents to Enhance Focus on Essential Products	Yes			
Simplify Transaction Management with Auto-Renewals for Term Based Products			Yes	
New and Changed Objects in Product Catalog Management			Yes	
Salesforce Pricing				
Automate Cumulative Discount Calculations in Pricing Procedures				
Find the Best Price with Accurate Discount Calculations				
Gain Insights into Pricing Decisions and Discounts				
Improve Process Efficiency and Accuracy with Phases				
Improve Pricing Performance with Parallel Element Execution				
Make Smarter Purchasing Decisions by Using Price Tracking				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Enrich the Pricing Procedure Simulation Experience				
Changed Objects in Salesforce Pricing				
Product Configurator				
Support Complex Configurable Products with Ease with Advanced Configurator (Generally Available)			Yes	
Manage Product Configuration Logic with the Constraint Builder (Generally Available)				
Distinguish Product Configurator Settings Easily with More Accurate Labels		Yes		
Manage Asset Data Flexibly in Configuration Rules			Yes	
Transaction Management				
Accelerate Sales Cycles with a Conversational Quoting Agent			Yes	
Expedite Contract Price Negotiations with the Contract Pricing Schedule Component			Yes	
Give Your Customers Better Pricing with Volume-Based Discounts Across Cumulative Quantities			Yes	
Customize Contract Pricing with Custom Fields and Validations		Yes		
Help Your Customers Scale with Increased Amendment Limits	Yes			
Update Order Quantities and Add Products to Orders During		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Fulfillment				
Adjust Start Dates for Subscription Assets	Yes			
Increase Customer Retention by Renewing Expired Subscriptions	Yes			
Ensure Fair Pricing with As-Is Renewals	Yes			
Increase Revenue by Implementing Negotiated Price Uplifts	Yes			
Configure Transactions Faster by Accessing Dependent Picklists from Transaction Line Editor			Yes	
Customize the Placement of Action Buttons in the Transaction Line Editor on Quotes and Orders		Yes		
Provide Uninterrupted Product Access and Improve Customer Retention with Auto-Renewals			Yes	
Automate Renewal Opportunity Creation to Improve Forecasts and Sales			Yes	
Boost Sales Productivity by Cloning Line Items and Groups in Revenue Cloud			Yes	
Access All Groups from Transaction Line Editor	Yes			
View Only Essential Products in Quotes and Quote Documents	Yes			
Expand Revenue Cloud Access to Additional Experience Cloud			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Sites				
Increase Sales Efficiency with Usability Improvements for Quotes and Orders	Yes			
Provide a Better User Experience with Detailed Progress Indicators on Quotes and Orders	Yes			
Enhance Data Security for Quotes by Applying Restriction Rules		Yes		
Customize Your Pricing Procedures with Apex Hooks			Yes	
Troubleshoot Pricing Procedure Issues with Contextual Logging			Yes	
Speed Up Approval Processes with Dynamic Approval Notifications			Yes	
Increase the Efficiency of Your Approval Resubmission Processes with Smart Approvals			Yes	
Include Partners in Your Approval Processes			Yes	
New and Changed Objects in Transaction Management			Yes	
Usage Selling				
Offer Commitment-Based Pricing with Negotiable Rates			Yes	
Use Token-based Pricing for Products and Services				
Use Non-Monetary Units as Consumption Charges			Yes	
Define Rates with Tokens and			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Currencies				
Optimize Resource Allocation with Extended Grant Binding for Usage Selling			Yes	
Extend Usage Product Grant Binding Policy for Account and Contract			Yes	
Enhance Rating Accuracy				
Usage Management				
Manage Usage-Based Grants Efficiently				
Calculate Consumption Charges Based on Target-Specific Rates			Yes	
View Wallets for Grant Binding Targets			Yes	
Track Consumption Data Across the Consumption Process Stages				
Use Real-Time Data for Rating Procedures			Yes	
New and Changed Objects in Usage and Rate Management			Yes	
Salesforce Contracts				
Configure File Size Limits to Accommodate Larger Custom Font Files				Yes
Dynamic Revenue Orchestrator				
Expand the Range of Entities for Fulfillment Orchestration	Yes			
Orchestrate Changes to In-Flight Orders	Yes			
Configure Decomposition Rules	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
with Decomposition Workspace				
Accelerate Scenario Creation Through Product Classifications	Yes			
Power Attribute Mapping by Using Expression Sets	Yes			
Update Fulfillment Order Line Items and Order Line Items On the Go			Yes	
Understand Decomposition Easily with Explainability in the Decomposition Viewer	Yes			
Changed Objects in Dynamic Revenue Orchestrator	Yes			
Billing				
Manage All Billing Operations with a Dedicated App		Yes		
Elevate Customer Service with Instant Access to Complete Account Billing Information		Yes		
Monitor Bill Runs Centrally with Billing Operations Console		Yes		
Align Your Billing with Customer Preferences by Using Billing Profiles		Yes		
Configure Billing Milestones Seamlessly with an Intuitive User Interface		Yes		
Manage, Track, Troubleshoot, and Visualize Data on Billing Schedule Group Records	Yes			
Generate Invoice Previews from the User Interface		Yes		
Generate Billing Schedules for		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
External Transactions or Any Salesforce Objects				
Improve Tax Reporting with the Flexibility to Add External Tax Lines		Yes		
Calculate Taxes Based on Shipment Origin		Yes		
Configure Credit Memos from the User Interface		Yes		
Write Off Uncollectible Invoices		Yes		
Process Payments and Issue Refunds				
Integrate Billing with Native Payment Gateways by Using Salesforce Payments		Yes		
Securely Save Payment Methods for Seamless Collection		Yes		
Automate Configuration of Payment Schedules for Invoices		Yes		
Schedule Automatic Collection of Payments for Posted Invoices	Yes			
Apply Payments to Settle Balances of Invoices or Invoice Lines		Yes		
Design Custom Flows for Processing Payments and Settling Invoices		Yes		
Issue and Apply Refunds		Yes		
Capture Payments and Refunds in Corporate Currency		Yes		
Improve Your Revenue Recovery with Collections				
Track Payments of Invoices with		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Corresponding Collection Plan Items				
Secure Timely Payments by Creating Payment Promises		Yes		
Automate and Send Personalized Dunning Emails to Proactively Manage Overdues		Yes		
New and Changed Objects for Billing	Yes			
Changed Metadata Type			Yes	
New Connect REST API Resources			Yes	
New Connect in Apex Classes		Yes		
New Invocable Action			Yes	

Sales

Boost your sales teams' results with new features across Sales Cloud.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Agentforce for Sales				
Agentforce SDR				
Reach Out to All Kinds of Customers with Agentforce SDR		Yes		
Engage with Prospects in More Languages with Agentforce SDR		Yes		
Test Agentforce SDR Email Generation in Agent Builder		Yes		
Increase Seller Productivity and Sales Process Adherence with Agentforce Deal Agent			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Sales Fundamentals				
Review and Update Settings to Capture Leads from LinkedIn (Release Update)			Yes	
Einstein Conversation Insights				
Identify Coachable Moments by Uploading Recorded Video Calls			Yes	
Improve Sales Processes by Using Conversation Transcripts in Flows	Yes			
See Pricing and Objection Topics in Sales Signals	Yes			
Sales Engagement				
Manage Prospecting Center Efficiently with Companion Orgs			Yes	
Salesforce Forecasting				
Automate Prerequisite Steps to Configure Consumption Forecasting with One Click			Yes	
Sales Performance Management				
Salesforce Maps and Salesforce Maps Advanced				
Optimization Enhancements and Changes	Yes			
Sales Planning				
Control Who Can Export and Publish Quota Plans	Yes			
Navigate Quota Plans Easily			Yes	
Salesforce Spiff				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Email, Calendar, Phone, and Integrations				
Email Configuration				
Confirm Verified Email Addresses for Users Created in 2016 and Earlier (Release Update)			Yes	
Identify Users with Unverified Return Email Addresses		Yes		
Bypass User Email Verification for Domains That You Own		Yes		
Einstein Activity Capture				
Leverage Email Data with Sync Email as Salesforce Activity		Yes		
Customize Flows to Match Synced Email to Relevant Activity		Yes		
Improve Privacy and Security with Header-Only Email and Activity Sharing		Yes		
Prepare for Einstein Activity Capture Activity 360 Reporting, Activity Metrics, and Activities Analytics Dashboard Retirement		Yes		
Fine-Tune Email Associations When Using Sync Email as Salesforce Activity	Yes			
Email Integrations				
Decipher Attached Email Messages in Outlook More Efficiently			Yes	
Control Email Logging and Tracking in Email Integrations			Yes	
Salesforce for Outlook Is Being Retired in December 2027		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Assign Dedicated Phone Numbers to Sales Reps			Yes	
Other Changes in the Sales Cloud				
Sales Cloud Go is Now Salesforce Go		Yes		
Customize Seller-Focused Mobile Experience (Generally Available)		Yes		

Salesforce CMS

Delete enhanced CMS workspaces, create enhanced custom content types, and deliver all media content types at high scale.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Deliver All Media Content Types at High Scale		Yes		
Create More Powerful Content with Enhanced Custom Content Types		Yes		
Delete Enhanced CMS Workspaces		Yes		

Salesforce Flow

Compose intelligent workflows with Flow Builder and Flow Orchestration. Integrate across any system with Mulesoft for Flow: Integration.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Flow Builder				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Flow Builder Updates				
Get Related Records Faster (Beta)		Yes		
Find More Resources with Expanded Search (Beta)		Yes		
Manage Time-Specific Data Easily		Yes		
View Picklist Selections as Pills		Yes		
Select an Entire Resource More Efficiently When Browsing Through a Resource		Yes		
Enjoy the Efficiency and Flexibility of the new Einstein Panel in Flow Builder		Yes		
Test Flows for Error Handling		Yes		
Zoom Through the Flow Builder Canvas with Touch Gestures and Keyboard Shortcuts		Yes		
Select Resources Efficiently for More Elements When Adding Fields and Values	Yes			
Build on Your Successes by Saving an Existing Flow as a Template	Yes			
Manage Elements Faster in Auto-Layout Mode for All Flow Types	Yes			
Screen Flow Updates				
Keep Users on One Flow Screen with Automatically Triggered Screen Actions (Generally Available)		Yes		
Get Better Usability with the File Upload Enhanced Flow Screen		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Component (Beta)				
Get More Control Over Component and Field Layout in Screen Flows	Yes			
See How Your Screen Looks in Real Time on Different Screen Sizes	Yes			
Help Users Make Selections Faster by Adding Icons to Choice Resources	Yes			
Display Choices in Tiles with the Visual Picker Component in Screen Flows	Yes			
Flow Marketing Cloud				
Determine the Path of a Flow Based on Email Engagement		Yes		
Create Automations That Use Custom Data Spaces		Yes		
Trigger Flows Based on Custom Engagement Signals		Yes		
Prevent Individuals from Reentering Any Version of a Flow		Yes		
Create and Manage Resources and Variables in Flow Builder		Yes		
Updated Flow Types for Marketing Flows		Yes		
Use Segment Membership in Data Graph-Triggered Flows		Yes		
Reference Salesforce Records from Prior Elements		Yes		
Manage Elements Faster in Auto-Layout Mode for All Flow Types	Yes			
Pause an Automation Event-	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Triggered Flow Until a Customer Takes Action				
View More Detailed Metrics in On-Canvas Insights	Yes			
Create Email Marketing Flows Faster with Out-of-the-Box Templates	Yes			
Flow Actions				
Create a Flow Approval Process with an Action		Yes		
Use a Dynamic Action to Call a Flow Approval Process from a Flow		Yes		
Send Email Action Updates				
Flow Debugging				
Debug Flows at a Glance with the Element-Level Summaries		Yes		
Debug Data Graph-Triggered Flows		Yes		
Configure the Triggering DMO Record for Event-Triggered Flows		Yes		
Test Email and SMS Sends with Test Messages		Yes		
User Experience Improvements for Debug		Yes		
Flow Runtime				
Flow and Process Run-Time Changes		Yes		
Flow Management				
Test Flows Faster with Integrated Tests		Yes		
Log More Flow Data to Data		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Cloud				
Flow Configuration Enhancements				
Debug Flows More Easily by Viewing Output Resources in Flow Builder	Yes			
Enhance Flow Builder with Alternative Input Modes		Yes		
Add Extended Metadata Annotations for Invocable Actions (Developer Preview)		Yes		
Flow and Process Release Updates				
Enforcing No-Argument Constructor on Apex Classes Used for Invocable Action Parameters (Release Update)			Yes	
Restrict User Access to Run Flows (Release Update)			Yes	
Flow Approval Processes				
Create a Flow Approval Process from the Approvals App		Yes		
Run a Flow Approval Process from a Flow		Yes		
Add a Recall Path to a Flow Approval Process		Yes		
Complete Approval Work Items in the Work Guide as a Delegate				
Cancel an In-Progress Approval Submission		Yes		
Other Changes to Flow Approval Processes				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Flow Orchestration				
Control Orchestration Error Handling by Using Fault Paths		Yes		
Other Changes to Flow Orchestration		Yes		
MuleSoft for Flow: Integration				
Enhance Data Exchange with Newly Added Third-Party Connectors	Yes			
Explore Connector Capabilities and Connections to External Systems with the New Integrations Tab	Yes			
Accelerate Integrations with Templates	Yes			
Streamline Data Retrieval with Configurable Get Records Actions in Salesforce and NetSuite Connectors	Yes			
Find and Use Specific Sets of Actions Quickly with Grouped Toolbar Filters	Yes			
Other Improvements	Yes			

Security, Identity, and Privacy

Create external client apps in App Manager and connected apps in External Client App Settings. Enable SAML on external client apps. Manage more policy types in Policy Center, including policies from Data Cloud. Investigate suspicious login activity, and store threat detection event data by default. Monitor security settings across your Government Cloud Plus organizations from Security Center dashboard. Move to interactive conversations about your security posture with Security agent actions. Monitor blocked redirections that originate from hyperlinks in URL and Long Text Area Fields in Salesforce Classic. And the Trusted URL and Browser Policy Violations list in Setup shows more CSP violations. Database Encryption beta in Sandboxes. Data Cloud External Key Management available. New deterministic encryption tenant secret workflow. AES-GCM Mode and P1363 Signing in Crypto class.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Domains				
Update References to Legacy Host Names (Release Update)			Yes	
Update Instanced URLs in API Traffic			Yes	
Identity and Access Management				
Enhance Your Mobile App With Three New Plugins for External Client Apps (Beta)				
Build Single Sign-On Registration Handlers Without Code			Yes	
Get Information from Identity Providers More Easily		Yes		
Migrate to a Multiple-Configuration SAML Framework (Release Update)		Yes		
Verify SAML Integrations (Release Update)		Yes		
Triple Data Encryption Standard (Triple DES) for SAML Single Sign-On Stops Working in Winter ’26		Yes		
Control JWT-Based Access Token Enablement as an App Developer		Yes		
See Which Sessions Are Associated with JWT-Based Access Tokens		Yes		
Login Type Is Changed for a Session Associated With Lightning Experience Logins		Yes		
Take Advantage of Accessibility	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Improvements for Login Error Messages				
Control Connected App Creation on New Orgs				
Create External Client Apps in App Manager			Yes	
Integrate Service Providers as External Client Apps with SAML 2.0			Yes	
Built-In Authenticators and WebAuthn Security Keys Are Allowed by Default in New Orgs		Yes		
Policy Center				
Manage More Policy Types in Policy Center		Yes		
Privacy Center				
Retain Files and Attachments with Privacy Policies	Yes			
See Policy Preview Metrics for Files and Attachments	Yes			
Salesforce Shield				
Data Detect				
Get the Beta Version of Data Detect as an App in Salesforce (Beta)			Yes	
Improve Sensitive Data Detection in Text Fields Across Your Salesforce Org (Beta)			Yes	
Event Monitoring				
Explore Information About Suspicious Login Activity with the Login Anomaly Event			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Store Data for Threat Detection Events by Default			Yes	
Access Real Time Events in Flows			Yes	
Leverage ListViewEvent for Recently Viewed List Views			Yes	
Import Event Data from Shield's Event Monitoring into Data Cloud (Beta)			Yes	
Utilize Near Real-Time Apex Callout Spans (Pilot)			Yes	
Shield Platform Encryption				
Database Encryption Beta			Yes	
EKM for Data Cloud				
New Deterministic Secret Workflow			Yes	
GCM and P1363 Support			Yes	
Implement Field-Level Encryption Faster with Platform Encryption Analyzer			Yes	
Get More out of Shield Products with Shield Extension			Yes	
Security Center				
Implement Multi-Organization Support in Government Cloud Plus Instances		Yes		
Add Depth to Your Security Posture with Security Center Extension			Yes	
Agentforce for Identity				
Create an External Client App by Using Agentforce		Yes		
Agentforce for Security				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Identify Security Deviations by Using Agentforce		Yes		
Unlock Insights from Your Security Data		Yes		
Leverage Risk and Remediation Insights		Yes		
Gain Insights About Policies with Agentforce		Yes		
Identify Policies by Policy Type		Yes		
Compile Policies by Object		Yes		
Own from Salesforce		Yes		
Other Changes				
Track Blocked Redirections from Hyperlinks in Salesforce Classic		Yes		
Secure Redirections from Hyperlinks in Lightning Experience (Beta)		Yes		
Get More Comprehensive Feedback on CSP Violations		Yes		
Update Your Trusted URLs for the Latest CSP Directives (Release Update)			Yes	

Service

Check out the latest features from Service Cloud to supercharge productivity across your organization. Service Cloud features are released as often as monthly, so check here for the latest information.

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
AI Agents for Service Cloud				

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Agentforce Service Agent Release Notes Have Moved				
Agentforce Employee Service				
Boost Efficiency and Enhance Employee Experience with Agentforce for Self-Service	Yes			
Agentforce Service Assistant				
Update Permissions for Agentforce Service Assistant Users (Release Update)			Yes	
Case Management				
Enable Business Hours Age to Track Accurate Case Age Without Raising a Support Case				
Delivered Idea: Close Cases Faster by Adding the Close Case Button to the Case Details Page in Lightning Experience				
Customer Experience Intelligence				
Gain Precise Insights with Normalized CSAT Scores	Yes			
Enhance Data-Driven Insights with Rich Text Enabled Case Comments			Yes	
Channels				
Email				
Tailor the Email Summaries Prompt in Prompt Builder		Yes		
Notify Senders About Email-to-Case Processing Errors			Yes	
Draft With Einstein Improvement			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Transition to the Lightning Editor for Email Composers in Email-to-Case (Generally Available) (Release Update)			Yes	
Disable Ref ID and Transition to New Email Threading Behavior (Release Update)			Yes	
Hourly Single Email Send Limit Updated for Case Lightning Email Composer				
Messaging				
Let Service Reps and Supervisors View Translated Transcripts and Respond in the Customer's Preferred Language			Yes	
Hide the Option for Service Reps to Set a Messaging Session as Inactive			Yes	
Bring Your Own Channel				
Bring More Expertise to Customer Interactions with Multi-Rep Conferencing			Yes	
Customize Your Messaging for Web Chat Button		Yes		
Secure Your Conversations in Messaging for Web with reCAPTCHA			Yes	
Monitor Link Clicks and Window Closes with New Event Listeners		Yes		
Procure and Set Up SMS Codes				
Update Messaging Channel Settings in Bulk				
Streamline Business Messaging with WhatsApp Flows			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Get Timely Feedback with Post-Conversation Surveys			Yes	
Route Work Directly to Agentforce			Yes	
Voice				
Assign Dedicated Phone Numbers to Service and Sales Reps			Yes	
Manage Capacity via Status-Based Capacity for Voice (Generally Available)			Yes	
Focus on Primary Tasks by Using Voice in an App with Standard Navigation (Generally Available)		Yes		
Improve Rep Productivity with Real-Time Provider Status Visibility and Syncing				
Access and Configure the Latest AWS Services for Your Contact Center				
Get the Latest Enhancements for Your Amazon Connect Contact Center			Yes	
Get Control Over Provisioning AWS Artifacts During Contact Center Setup		Yes		
Reset Inaccessible AWS Root User Credentials Easily		Yes		
Add Users in Bulk to a Contact Center Easily		Yes		
Get Minimal Downtime With Automated Rep Global Sign-In	Yes			
Manage Voice Calls with a Headset More Easily	Yes			

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Deliver Voicemails More Reliably with Modified Contact Flows		Yes		
Chat				
Legacy Chat Is Being Retired				
Einstein Reply Recommendations				
Accelerate Case Resolution and Boost Service Efficiency with Einstein Follow-Up Emails	Yes			
Employee Service				
Drive Employee Enablement Program Completions with Enhanced Oversight	Yes			
Accelerate Employee Enablement Program Creation with Prebuilt Templates	Yes			
Optimize Employee Enablement Program with Dashboard and Reports		Yes		
Enhance Employee Enablement Programs with Surveys		Yes		
Accelerate Service Process Creation	Yes			
Rapidly Deploy Service Processes with Prebuilt Templates		Yes		
Improve Efficiency and Employee Experience with Agentforce for Self-Service	Yes			
Streamline Support Interactions with Integrated Slack Experience	Yes			
Leverage Data Visualization to		Yes		

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Enhance HR Service Delivery with Service Insights				
Manage Workday Employee Data by Using Prebuilt MuleSoft Integrations				
Changed Object in Employee Service		Yes		
Entitlements and Milestones				
Set Up SLA Management Faster with the New Simplified Setup Experience (Beta)	Yes			
Delivered Idea: Improve Customer Engagement with Rich Text and Media in Case Comments (Beta)	Yes			
Boost Rep Efficiency and Minimize Violations by Automatically Mapping Entitlements	Yes			
Feedback Management				
Enhance Your Survey Design with Dynamic Emoji	Yes			
Get a Visual Representation of Participants' Survey Progress	Yes			
Gather More Data with Users Uploading More Attachments	Yes			
Improve Response Rates by Creating Surveys with Compatible URLs			Yes	
Knowledge				
Gather Feedback to Improve Your Knowledge Base (Generally Available)			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Unify Knowledge with the Box Connector			Yes	
Improve Article Navigation with a Table of Contents	Yes			
Get More Done in the Lightning Article Editor	Yes			
Salesforce Go				
Simplify Service Cloud Feature Discovery and Setup		Yes		
Self-Service				
Resolve User Search Queries Faster by Sharing Data Category Selection with Agentforce Service Agent (Beta)				
Routing				
Use Status-Based Capacity with Voice (Generally Available)			Yes	
Declutter Omni Supervisor with Only Relevant AI Agents			Yes	
Provide Better AI Support with Real-time Monitoring of Email Conversations	Yes			
Respond Quickly to Changes in Service Channel Demand with Agentforce	Yes			
Simplify Your Service Cloud Reporting with Prebuilt Dashboards and Reports			Yes	
Eligible Salesforce Orgs Automatically Upgraded to Enhanced Omni-Channel		Yes		
Expand Language Access for Messaging Supervision			Yes	

Feature	Enabled for users	Enabled for administrators /developers	Requires administrator setup	Contact Salesforce to enable
Show Estimated Wait Times When Routing Work to Skills			Yes	
Other Enhancements to Omni-Channel			Yes	
Service Adoption				
Salesforce Go from My Service Journey	Yes			

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.

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

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

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

Supported Browsers and Devices for Lightning Experience

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

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

Supported Browsers and Devices for Salesforce Classic

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

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

Supported Browsers for CRM Analytics

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

Salesforce Overall

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

General Enhancements

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

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

Simplify Feature Discovery and Setup with Salesforce Go

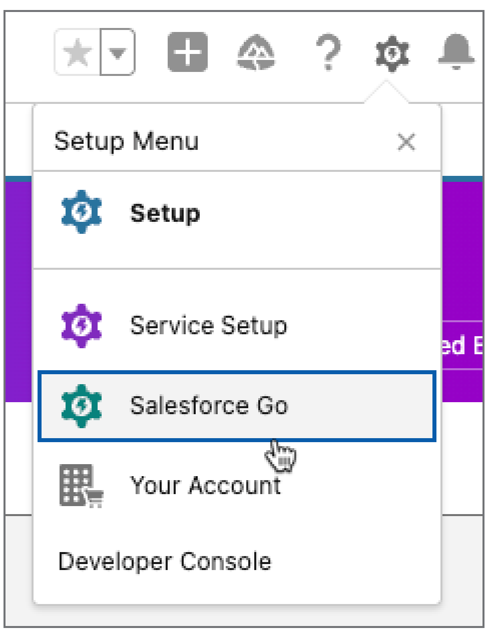
Discover and quickly set up features available in your Salesforce edition from one location in Setup. Assign user permissions, complete prerequisites and required configuration steps, and monitor feature usage. Explore the capabilities of unused and new features and access supplemental resources.

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

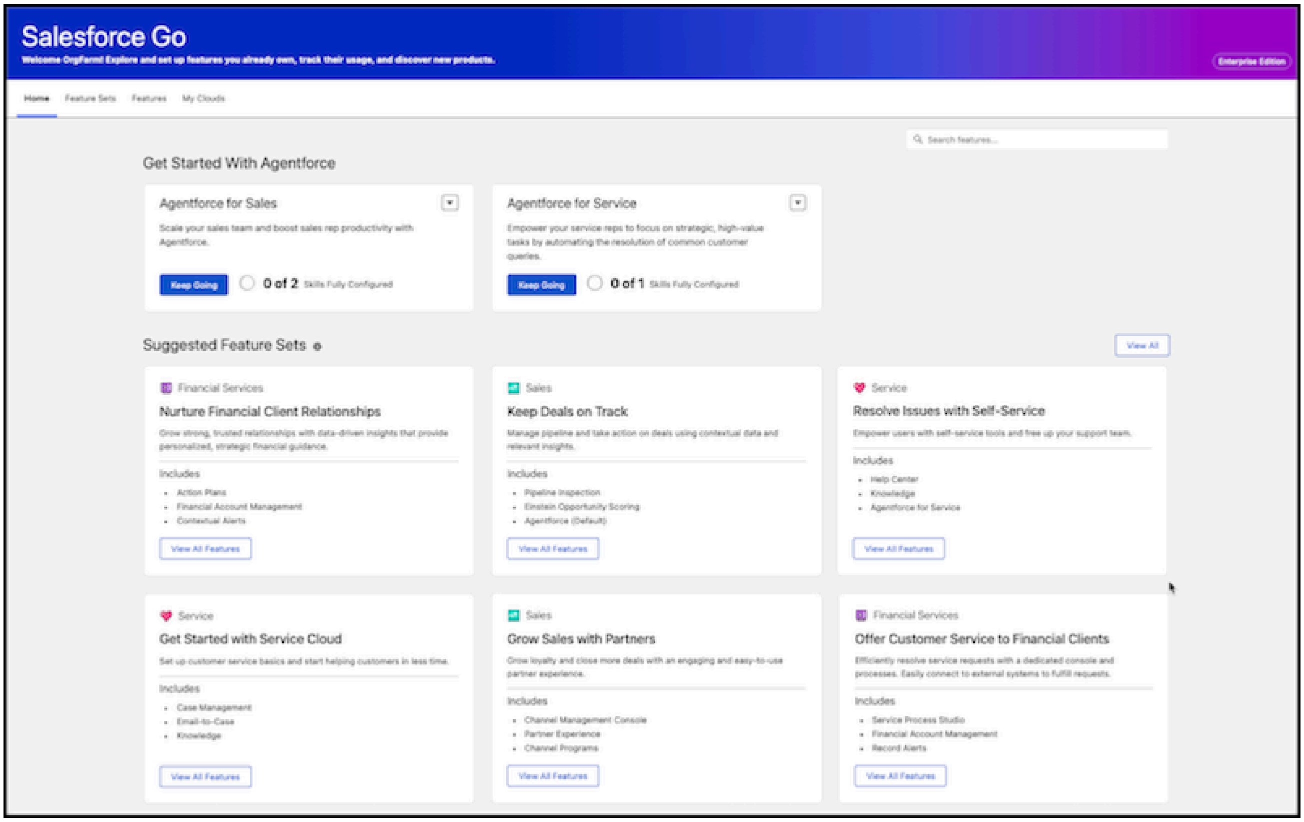
Who: To view Salesforce Go, you must have the View Setup and Configuration user permission. To turn on features in Salesforce Go, you must have the Customize Application user permission.

Why: Learn more about features by watching videos, taking interactive tours, completing recommended Trailhead modules, and reading Salesforce Help articles. Determine whether an available feature is a good fit for your company by sharing these resources with other stakeholders. And if you've turned on the Your Account app, you can purchase add-on licenses for some features directly from Salesforce Go.

How: From the gear menu, select Salesforce Go.



From the Salesforce Go home page, choose a feature set based on your business goal to view and select features to turn on. Or, to choose a feature directly, use the search field on the Salesforce Go Home page, or view your features on the Features tab.



See Also

Salesforce Help: Discover and Set Up Features With Salesforce Go (can be outdated or unavailable during release preview)

Enable Accessibility Enhancements for Page Headers and Modal Windows When Zoom Is Greater Than 200% (Release Update)

To help meet Web Content Accessibility Guidelines (WCAG) 2.2 for Resize and Reflow, enable Lightning Experience to adapt the behavior of page headers and modal windows when viewed at high magnification. This is the beginning of our effort to comply with WCAG 2.2 Resize and Reflow guidelines. Expect accessibility enhancements to other UI elements in future release updates.

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

When: Salesforce enforces this update in Spring '26. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: With this update, content is visible for users who view Salesforce via a browser at 200% magnification or greater.

Without this update, you can have trouble seeing the content on a page when you zoom in over 200%. The page headers can block content as you scroll. In modal windows, buttons and other content can display outside the viewport, requiring horizontal scrolling, which can make modal windows unusable.

These changes help you support users who want to zoom 300% to 400%. The page header scrolls with the page and doesn't block the content. In modal windows, buttons and content display within the viewport and the window is fully functional.

How: To review this update, from Setup, in the Quick Find box, enter *`Release Updates`*, and then select **Release Updates**. For Enable Accessibility Enhancements for Page Headers and Modal Windows When Zoom is Greater than 200%, follow the testing and activation steps.

Add the New Setup Domain

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

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

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

See Also

Knowledge Article: New Setup Domain Rollout FAQ
Salesforce Help: Test the Impact of Blocked Salesforce Session Cookies (can be outdated or unavailable during release preview)

Lightning Console

Improve performance with fewer extra page loads.

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

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

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

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

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

See Also

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

Salesforce Data Pipelines

Securely access your Amazon data using Virtual Private Connections (VPC) and AWS Identity and Access Management (IAM). Take advantage of OAuth functionality for your Snowflake VPC input connections. Bucket your recipe data with clicks not code using the improved editor.

Access Your Amazon S3 Data Using VPC
You can now explore your private Amazon S3 data in CRM Analytics. Use the Virtual Private Connection (VPC) for Amazon S3 Private Connector to connect data from S3 to Data Manager. The VPC interface endpoint provides secure connectivity to S3, meaning that data transfer from S3 takes place on the AWS internal network and not the public internet.

Specify IAM Users and Roles for Authentication with Amazon Athena and S3 Connectors
Improve the granularity of access to AWS resources using AWS Identity and Access Management (IAM) in your Amazon Athena and S3 connector configurations. With IAM authentication, you can specify IAM users, roles, and role values to control access to AWS resources. You can also set up cross-account IAM roles providing access to resources to other AWS accounts shared with users.

Use OAuth Security with Your Snowflake VPC Connection
Take advantage of OAuth across all Snowflake connectors to provide a consistent and secure connection experience. The Virtual Private Connection (VPC) for Snowflake input connector now has full OAuth functionality to match the Snowflake input, output, and sync out connectors.

Bucket Data in Recipes with Clicks Not Code
Create data buckets in the enhanced recipe editor without writing code or creating custom expressions. Use the redesigned bucketing feature in the recipe editor to define bucket ranges, operators, labels, and filter logic to easily group data into categories for analysis.

Subscribe to Recipe Notifications as a Read-Only User
Stay informed on recipe completions by subscribing to recipe notifications. Now read-only recipe users

can choose to be notified of recipe completions, including failed and warning statuses.

Improve Salesforce External Connector Sync Performance with Incremental and Periodic Full Syncs (Generally Available)
Improve the performance of your external data syncs by loading the data incrementally or periodically. An incremental sync extracts only the latest changes to external Salesforce data. Periodic full sync runs regular incremental syncs plus one full extract of all of your data weekly.

Improve Snapshot Data Recipe Performance with Optimized Upsert and Delete Actions (Beta)
Decrease processing time with quicker data recipe runs. Instead of processing all rows in the snapshot data, the optimized upsert and delete actions run incrementally on subsets of the snapshot data resulting in faster runs.

Access Your Amazon S3 Data Using VPC

You can now explore your private Amazon S3 data in CRM Analytics. Use the Virtual Private Connection (VPC) for Amazon S3 Private Connector to connect data from S3 to Data Manager. The VPC interface endpoint provides secure connectivity to S3, meaning that data transfer from S3 takes place on the AWS internal network and not the public internet.

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

How: From Setup, in the Quick Find box, enter `Private` and select **Private Connect**. Create an outbound connection, and then on the Named Credentials page, create external and named credentials. In Data Manager, on the Private tab, create a new connection for the Amazon S3 Private Connector.

See Also

Salesforce Help: Amazon S3 VPC Connection (can be outdated or unavailable during release preview)

Specify IAM Users and Roles for Authentication with Amazon Athena and S3 Connectors

Improve the granularity of access to AWS resources using AWS Identity and Access Management (IAM) in your Amazon Athena and S3 connector configurations. With IAM authentication, you can specify IAM users, roles, and role values to control access to AWS resources. You can also set up cross-account IAM roles providing access to resources to other AWS accounts shared with users.

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

How: Create IAM users, roles, and policies in AWS. In Data Manager, create a new Amazon Athena or Amazon S3 connection. For the Authentication Type, select **IAM** and provide the `AWS Access Key`, `AWS Secret Key`, and `AWS Role ARN` values from your AWS IAM configuration.

See Also

Salesforce Help: Amazon Athena Connection (can be outdated or unavailable during release preview)
Salesforce Help: Amazon S3 Connection (can be outdated or unavailable during release preview)

Use OAuth Security with Your Snowflake VPC Connection

Take advantage of OAuth across all Snowflake connectors to provide a consistent and secure connection experience. The Virtual Private Connection (VPC) for Snowflake input connector now has full OAuth functionality to match the Snowflake input, output, and sync out connectors.

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

How: In Snowflake, setup an OAuth compatible client, an OAuth server, and a security implementation for Okta. Use the Snowflake OAuth server and Okta credential values for the Salesforce named credentials created for the Snowflake Private Connector.

See Also

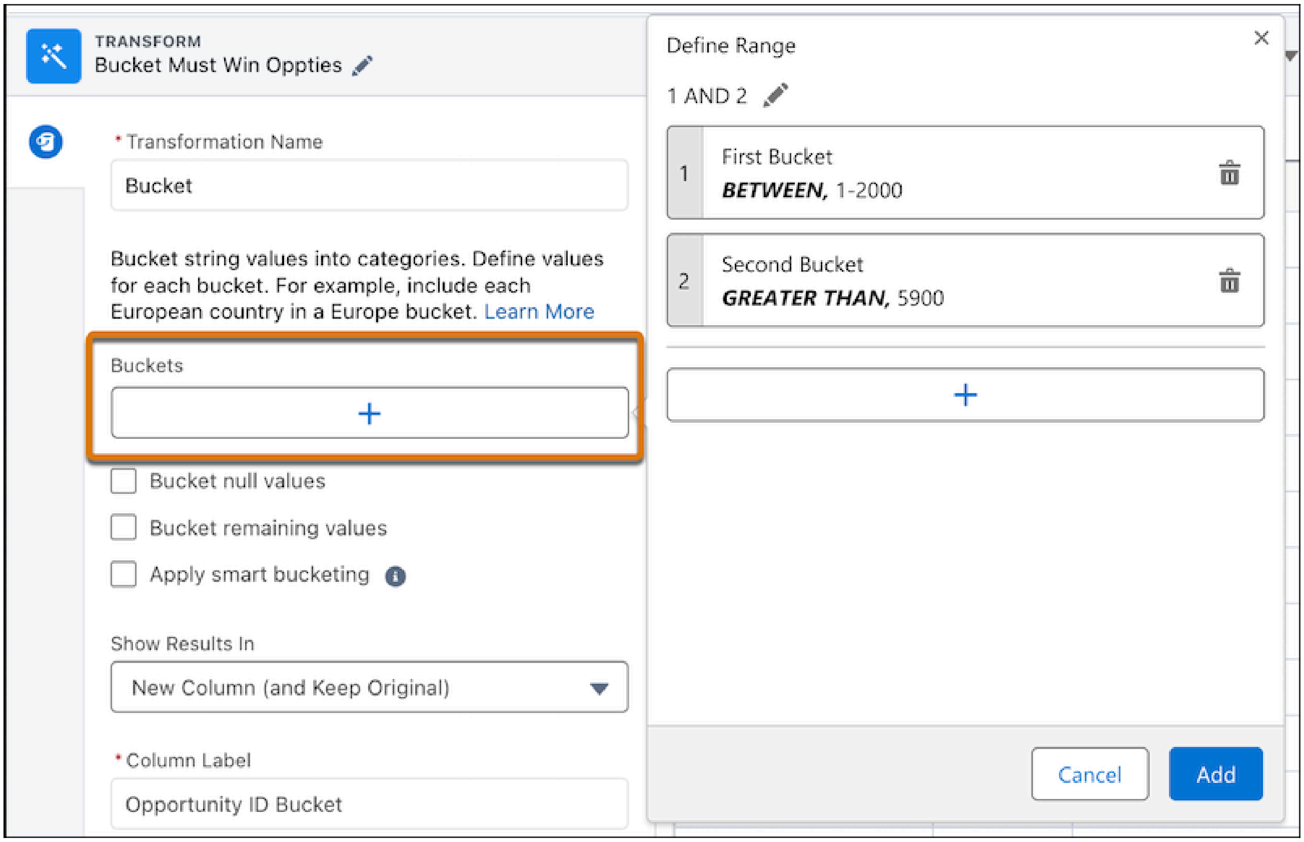
Salesforce Help: Snowflake VPC Connection (can be outdated or unavailable during release preview)

Bucket Data in Recipes with Clicks Not Code

Create data buckets in the enhanced recipe editor without writing code or creating custom expressions. Use the redesigned bucketing feature in the recipe editor to define bucket ranges, operators, labels, and filter logic to easily group data into categories for analysis.

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

How: In the recipe editor, for transform nodes, use the improved bucket flow to define your data buckets.



See Also

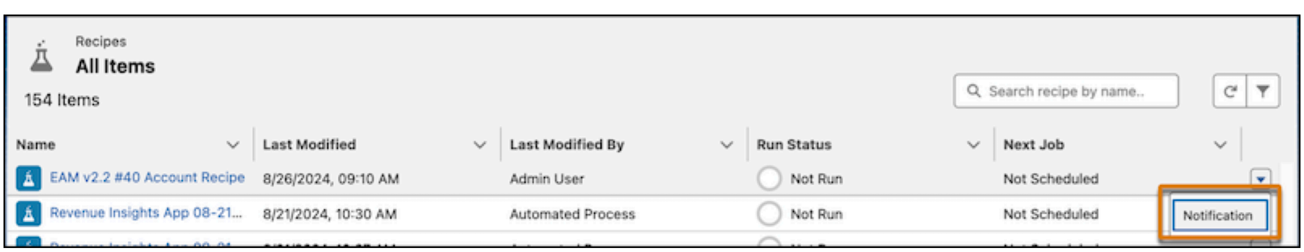
Salesforce Help: Bucket Transformations: Categorize Column Values (can be outdated or unavailable during release preview)

Subscribe to Recipe Notifications as a Read-Only User

Stay informed on recipe completions by subscribing to recipe notifications. Now read-only recipe users can choose to be notified of recipe completions, including failed and warning statuses.

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

How: In Data Manager, click the Recipes tab. From the action menu of the recipe that you want to subscribe to, and select **Notification**.



See Also

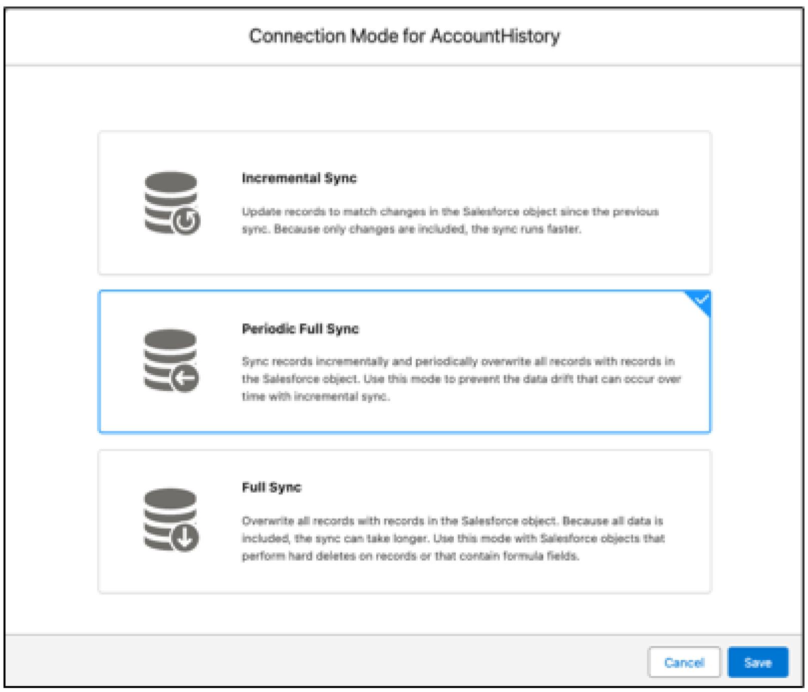
Salesforce Help: Set Recipe Notifications (can be outdated or unavailable during release preview)

Improve Salesforce External Connector Sync Performance with Incremental and Periodic Full Syncs (Generally Available)

Improve the performance of your external data syncs by loading the data incrementally or periodically. An incremental sync extracts only the latest changes to external Salesforce data. Periodic full sync runs regular incremental syncs plus one full extract of all of your data weekly.

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

How: In Data Manager, open a Salesforce external connection from the Connection tab and select the object that you want to sync. For the Edit Connection Mode, select **Incremental Sync** or **Periodic Full Sync**.



See Also

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

Improve Snapshot Data Recipe Performance with Optimized Upsert and Delete Actions (Beta)

Decrease processing time with quicker data recipe runs. Instead of processing all rows in the snapshot data, the optimized upsert and delete actions run incrementally on subsets of the snapshot data resulting in faster runs.

Where: This change applies to CRM Analytics and Salesforce Data Pipelines in Lightning Experience and

Salesforce Classic. CRM Analytics and Salesforce Data Pipelines are available for an extra cost in Enterprise, Performance, and Unlimited editions.

Note Existing Dataset (Upsert/Delete) is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

How: Re-create your recipes to take advantage of this optimization, ensuring the snapshot data contains a primary key field. In the output node, select the **Existing Dataset (Upsert)** or **Existing Dataset (Delete)** option to use the optimized features.

See Also

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

Salesforce Scheduler

Enhance Lobby Management with Custom Flows and Actions. Learn about changed Connect REST API request bodies.

Enhance Lobby Management with Custom Flows and Actions
Empower your greeters by creating better customer experiences by customizing components in lobby management. Greeters can now efficiently check in customers on waitlists by launching and using custom flows. Customize the actions available to greeters on service appointment cards and waitlist participant cards so they can use custom flow actions. Greeters can choose to hide or show waitlist topics with no participants.

Changed Connect REST API Request Bodies
This request body has changes.

Enhance Lobby Management with Custom Flows and Actions

Empower your greeters by creating better customer experiences by customizing components in lobby management. Greeters can now efficiently check in customers on waitlists by launching and using custom flows. Customize the actions available to greeters on service appointment cards and waitlist participant cards so they can use custom flow actions. Greeters can choose to hide or show waitlist topics with no participants.

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

How: Open and edit your lobby management page. Select the component that you want to customize. In the Properties pane, change settings to show actions, hide actions, or use custom flows.

Changed Connect REST API Request Bodies

This request body has changes.

Scheduler

Available Territory Slots

This request body has this new property.

- `recordLimit`—Set the maximum number of earliest available slots across the specified territories to display.

Trust Site Enhancements

The Trust site is the single place to see the status of Salesforce services and products, upcoming availability impacting activities, and availability-related communications.

Experience a Tailored View of Your Salesforce Service Health with Personalized Trust (Beta)
Personalized Trust (beta) is a new and smarter Trust site. With an authenticated login process that uses your Salesforce credentials, get to the information that you need faster. Access crucial updates on availability-related events and communications relevant to your specific Salesforce products and services in one easy-to-use location.

Experience a Tailored View of Your Salesforce Service Health with Personalized Trust (Beta)

Personalized Trust (beta) is a new and smarter Trust site. With an authenticated login process that uses your Salesforce credentials, get to the information that you need faster. Access crucial updates on availability-related events and communications relevant to your specific Salesforce products and services in one easy-to-use location.

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

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

Why: Personalized Trust (beta) supports Sales Cloud, Service Cloud, Industries (production only), and Marketing Cloud Engagement. For now, the existing Status.salesforce.com remains for all products and Trust notifications. For more information, see our Personalized Trust (Beta) Experience FAQ.

How: To access Personalized Trust (beta), go to Trust.salesforce.com or Status.salesforce.com, click **Learn More**, and then click **Log In**.

We value your feedback. Share your thoughts by using this feedback form or by reaching out to your account team.

Release Updates

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

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

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

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

Enforced with This Release

These updates are scheduled to be enforced this release.

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

Upgrade the Create Record Form, Record Banner, and Record Detail components to run on Lightning Web Component technology, which improves accessibility and performance. In Summer '25, the upgrade is enforced for all orgs.

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

To prevent unintended access for external site users if you enable digital experiences, Salesforce is securing access to records in non-preview sandbox orgs. The default sharing group available for roles and subordinates before you enable digital experiences is now displayed as Roles and Internal Subordinates instead of Roles and Subordinates. To prepare for this change, update code and customizations that reference the old group name. This update was first available in Spring '25 and is enforced in Summer '25.

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

If you're syncing leads from LinkedIn Lead Forms to Salesforce, you must manually disconnect your LinkedIn account, reconfigure the feature by enabling a new setting, and then reconnect your account. Otherwise, LinkedIn leads will stop syncing when LinkedIn retires their legacy Ads Lead Sync APIs. This update was first available and scheduled to be enforced in Winter '25, but we postponed the enforcement date to Summer ’25.

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. These API versions are 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.

Verify SAML Integrations (Release Update)

Salesforce is upgrading its SAML framework as part of regular ongoing maintenance. This maintenance update improves the Salesforce security posture and, as a result, improves your security posture. This update can impact integrations that use SAML, including single sign-on (SSO) and single logout. This update was first announced in Winter ’25 and is enforced in Summer ’25. To avoid potential service interruptions, test your SAML integrations as soon as Summer ’25 sandboxes become available.

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.

Enable ICU Locale Formats (Release Update)

With this update, the International Components for Unicode (ICU) locale formats replace Oracle’s Java Development Kit (JDK) locale formats in Salesforce. Locales control the format for dates, times, currencies, addresses, names, numeric values, and the start day of the week. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe.

Update References to Legacy Host Names (Release Update)

Prevent disruption for your customers and end users when the temporary redirection of legacy (non-enhanced) Salesforce host names ends. With this release update, legacy host name redirections end in production and demo orgs. Those redirections already ended in all other orgs in Winter ’25. This update was first available in Spring ’25 and is enforced in Spring ’26.

Scheduled to Be Enforced in Winter ’26

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

Confirm Verified Email Addresses for Users Created in 2016 and Earlier (Release Update)

To comply with the latest email security standards, only users with a verified email address can send email from Salesforce. This change affects user accounts created on or before November 1, 2016. User accounts created after that date already can't send emails unless their email address is verified.

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

To prevent unintended access for external site users if you enable digital experiences, Salesforce is securing access to records. The default sharing group available for roles and subordinates before you enable digital experiences is now displayed as Roles and Internal Subordinates instead of Roles and Subordinates. To prepare for this change, update code and customizations that reference the old group name. Although Salesforce dynamically converts outdated references during a transition period, you must update all code and customizations to prevent errors. This update is available starting in Summer '25.

Enforcing No-Argument Constructor on Apex Classes Used for Invocable Action Parameters (Release Update)

In order to allow access to certain standard classes that are available to be used as invocable action parameters, we're enforcing a change for built-in Apex actions that also enforces the visibility of the no-argument constructor on any class. This release update was first available in Summer '24 and was scheduled to be enforced in Spring '25, but we postponed the enforcement date to Winter '26. This release update was previously named Enforce Permission Requirements Defined on Built-In Apex Classes Used as Inputs (Release Update).

Restrict User Access to Run Flows (Release Update)

This update was first made available in Winter '24 and was scheduled to be enforced in Winter '25, but we postponed the enforcement to Winter '26. With this update enabled, Salesforce restricts a user's ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites org permission, which gave all users in the org access to run any flow. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows. Salesforce postponed the enforcement to allow additional time for admins to test and prepare for the change. There is no impact to admins who already enabled the update. We appreciate your adoption of this change.

Update Permissions for Agentforce Service Assistant Users (Release Update)

Starting in Winter '26, access to Service Assistant is provided only through the Service Planner User permission set license. At that time, permissions for Service Assistant will be removed from the Salesforce license, and feature access through that license isn't available. Admins must assign feature access to users using the Service Assistnat permssion set license.

Scheduled to Be Enforced in Spring '26

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

Enable Accessibility Enhancements for Page Headers and Modal Windows When Zoom Is Greater Than 200% (Release Update)

To help meet Web Content Accessibility Guidelines (WCAG) 2.2 for Resize and Reflow, enable Lightning Experience to adapt the behavior of page headers and modal windows when viewed at high magnification. This is the beginning of our effort to comply with WCAG 2.2 Resize and Reflow guidelines. Expect accessibility enhancements to other UI elements in future release updates. This update was first available in Summer ’25 and is enforced in Spring ’26.

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

If you see this release update, your Salesforce instance uses our original single-configuration SAML framework, which supports single sign-on (SSO) with only one external identity provider. With this release update, we’re removing support for the single-configuration SAML framework and supporting only the multiple-configuration SAML framework. To preserve your existing configuration, follow the steps to apply this update. Otherwise, your SSO configuration stops working when this update is enforced for production instances in Spring ’26.

Upgrade to Enhanced LWR Sites (Release Update)

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

Use Your Org’s My Domain Login URL in API Calls (Release Update)

To prevent disruption after infrastructure updates that change your instance name, make sure that API traffic to your org uses the org’s My Domain login URL. This update is available starting in Summer ’25.

Canceled Updates

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

Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

This update was canceled. The Frequency and Frequency Type fields on the Maintenance Plan are no longer being retired. You can continue to use the frequency fields or maintenance work rules to set up maintenance plans based on your organizational needs.

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

This update has been canceled. We continue to encourage you to work the Trusted URL and Browser Policy Violations list in Setup and to enable **Adopt updated CSP directives** in Session Settings. Also, that setting continues to be enabled by default in new orgs.

No Scheduled Enforcement Date

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

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

This update turns off Ref ID threading and transitions to Lightning threading in Email-to-Case. With the new Email-to-Case threading behavior, incoming emails aren't matched using Ref IDs. Instead, they're matched using a secure token in the email subject or body. If no match is found, Email-to-Case checks metadata from the email headers. This update was first available in Winter '21.

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

When enabled, this release update replaces the email editor in the docked and case feed email composers. This update was generally available in Lightning Experience in Spring '24.

Agentforce & Einstein

Supercharge your workforce efficiency with predictive and generative AI.

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Agentforce & Einstein Features

Learn more about how Agentforce & Einstein can supercharge productivity across all Salesforce clouds. Agentforce & Einstein features are released as often as monthly, so check back again soon for the latest AI solutions. Features included in the May monthly release generally become available when Summer '25 rolls out to your org.

Agentforce & Einstein Platform

Build smart solutions for your business cases with generative AI, predictive AI, and everything in between. Learn about functionality, security, and performance improvements to AI at Salesforce. Agentforce & Einstein platform changes are released as often as monthly, so check back again soon for the latest and greatest.

Agentforce & Einstein Features

Learn more about how Agentforce & Einstein can supercharge productivity across all Salesforce clouds. Agentforce & Einstein features are released as often as monthly, so check back again soon for the latest AI solutions. Features included in the May monthly release generally become available when Summer '25 rolls out to your org.

Product Area	Feature	Release Note
	May ’25	
Automation & Integration	Einstein Decision Element	Determine the Path of a Flow Based on Email Engagement
	Flow Creation with Einstein	Enjoy the Efficiency and Flexibility of the new Einstein Panel in Flow Builder
Commerce Cloud	Cart Recommendations	Show Personalized Product Recommendations in the Mini Cart
Education Cloud	Agentforce for Education: Student Advising (Pilot)	Answer and Support Advisors Autonomously with Agentforce
Field Service	Proactive Asset Service Scheduling	Maintain Assets Efficiently with Proactive Asset Service Scheduling
	Proactive Scheduling Outreach	Rebook Appointments Easily with Proactive Scheduling Outreach
Field Service Mobile	Ask Siri for Pre-Work Briefs	Access Pre-Work Briefs On the Go
	Record Context in Agentforce	Experience Smarter Interactions with Context-Aware Agentforce
Fundraising	Philanthropic Research Topics (Pilot)	Optimize Your Philanthropic Engagement and Research Efforts with Agentforce
	Summarize Philanthropic Research Data	Manage Philanthropic Research Data Efficiently
Marketing Cloud	Campaign Designer (Beta)	Create Meaningful Moments with Campaign Designer (Beta)
	Einstein Predictive Feature Updates	Save Time with New AI Capabilities for Reporting and Marketing Automation
Platform	External Objects	Access External Data in Prompt Builder
	Policy Center	Gain Insights about Policies with Agentforce
		Compile Policies by Object
		Identify Policies by Policy Type
Public Sector Solutions	Einstein Funding Award Summary (Beta), Einstein Board Version	Einstein Generative AI for Public Sector Solutions

Product Area	Feature	Release Note
	of Grant Application (Beta)	
Revenue Cloud	Quote Management	Accelerate Sales Cycles with a Conversational Quoting Agent
Sales	Agentforce SDR	Engage with Prospects in More Languages with Agentforce SDR
		Reach Out to All Kinds of Customers with Agentforce SDR
		Test Agentforce SDR Email Generation in Agent Builder
Sales	Einstein Conversation Insights	Identify Coachable Moments by Uploading Recorded Video Calls
		Improve Sales Processes by Using Conversation Transcripts in Flows
		See Pricing and Objection Topics in Sales Signals
Service	Change Reps' Presence Statuses with Agentforce	Respond Quickly to Changes in Service Channel Demand with Agentforce
	Einstein Reply Recommendations	Accelerate Case Resolution and Boost Service Efficiency with Einstein Follow-Up Emails
	Enhanced Messaging and Messaging for In-App and Web	Let Service Reps and Supervisors View Translated Transcripts and Respond in the Customer's Preferred Language
	Monitor Email Conversations in Omni Supervisor	Provide Better AI Support with Real-time Monitoring of Email Conversations
	Show AI Agents in Omni Supervisor	Declutter Omni Supervisor with Only Relevant AI Agents

Agentforce & Einstein Platform

Build smart solutions for your business cases with generative AI, predictive AI, and everything in between. Learn about functionality, security, and performance improvements to AI at Salesforce. Agentforce & Einstein platform changes are released as often as monthly, so check back again soon for the latest and greatest.

Feature	Release Note
May '25	
Agentforce Development	Enhance Agent Action UI with Custom Lightning Types View Custom and Standard Lightning Types in Setup

Agentforce Development

Develop custom solutions with our suite of generative AI tools, including Agentforce, Prompt Builder, Einstein Studio, and the Models API.

Enhance Agent Action UI with Custom Lightning Types
Improve the Agentforce (Default) agent UI in Lightning Experience with custom Lightning types and LWCs to create a more intuitive and user-friendly agent action input and output. This feature enhances the user interface by making sure that chat responses look exactly as needed. As a result, the interface becomes more intuitive and user-friendly.

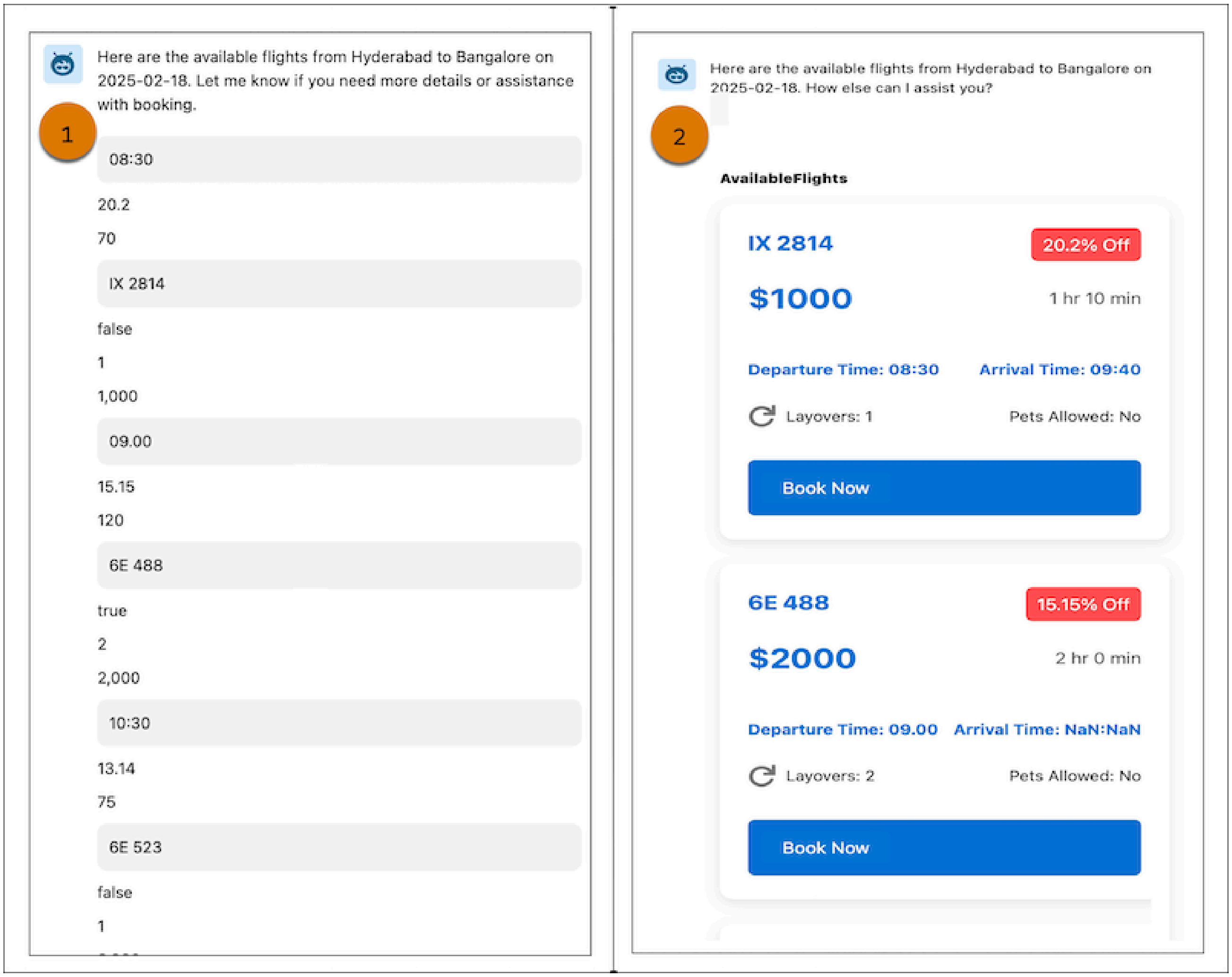
Find Lightning Types for Agentforce (Default) More Easily
Now you can easily find and use your org's Lightning types for the Agentforce (Default) agent in Lightning Experience. The Setup UI now features a list view of all custom and standard Lightning types deployed in your org, so that you can quickly identify and streamline customization for agent actions.

Enhance Agent Action UI with Custom Lightning Types

Improve the Agentforce (Default) agent UI in Lightning Experience with custom Lightning types and LWCs to create a more intuitive and user-friendly agent action input and output. This feature enhances the user interface by making sure that chat responses look exactly as needed. As a result, the interface becomes more intuitive and user-friendly.

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

Why: Here is the default UI for output in an agent action (1) and the customized UI for output after you've applied custom Lightning types (2).



How: To set up this feature, developers and Salesforce admins create Lightning Web Components (LWCs) for custom agent action input or output, reference the Apex class in the `schema.json` file, and define the LWC components in the `editor.json` or `renderer.json` files. After deploying the custom Lightning type and LWCs via Metadata API, select the custom Lightning types in the Input Rendering or Output Rendering fields in the Agent Action configuration. Then test the custom Agent action in the Agentforce Builder to ensure proper functionality.

See Also

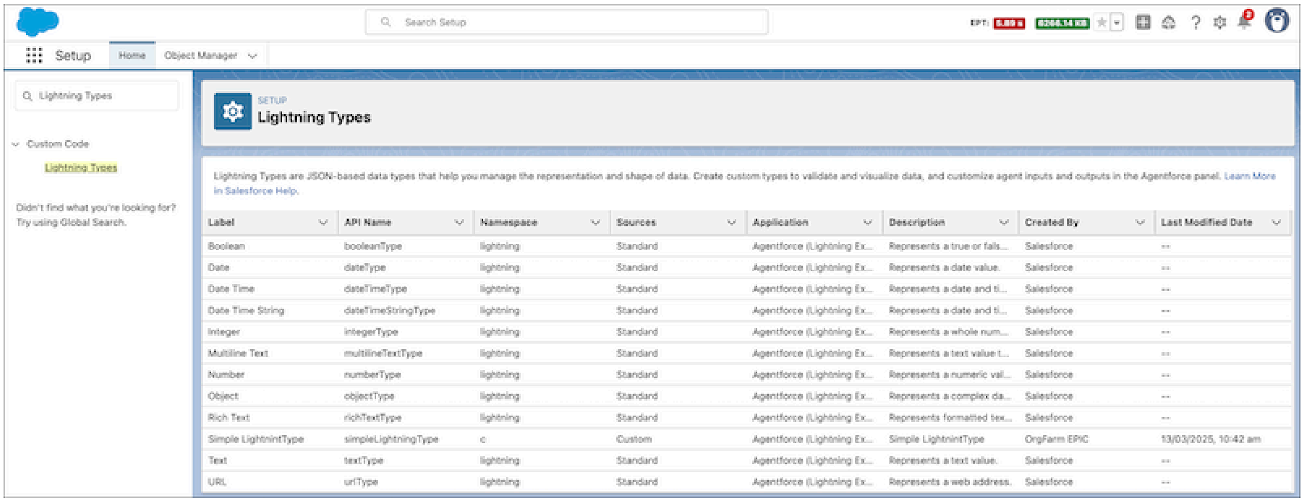
Lightning Types

Find Lightning Types for Agentforce (Default) More Easily

Now you can easily find and use your org's Lightning types for the Agentforce (Default) agent in Lightning Experience. The Setup UI now features a list view of all custom and standard Lightning types deployed in your org, so that you can quickly identify and streamline customization for agent actions.

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

How: From Setup, in the Quick Find box, enter *Lightning Types*, and then select **Lightning Types**. This page displays a detailed list of your org's standard and custom Lightning types.



See Also

Lightning Types

Analytics

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

Introducing Tableau Next
Welcome to Salesforce's end-to-end, agentic analytics experience. Tableau Next integrates the #1 analytics platform with Agentforce's context-aware AI and the Data Cloud semantic layer that unifies business knowledge across your organization. Composable and API-first, Tableau Next empowers you to create, share, and reuse analytics assets seamlessly. Build and deliver personalized, contextual, and actionable insights for every user, backed by Salesforce's enterprise-grade performance, security, and scalability.

Lightning Reports and Dashboards
Get up-to-date information without waiting for the entire dashboard by refreshing specific dashboard widgets. Send report and dashboard subscriptions from a designated organization-wide email address.

Data Cloud Reports and Dashboards
Accelerate decision-making with calculated insights in Data Cloud semantic model reports. Gain deeper insights from semantic model summary reports with support for five groupings. Deploy semantic model reports using managed packages.

CRM Analytics
CRM Analytics enhancements include new and updated features for dashboards, lenses, analytics apps, and data integration.

Einstein Discovery
Decision optimization beta is retired.

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

Marketing Cloud Intelligence
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.

Accessibility Enhancements in Analytics
Learn about small but important changes that make analytics more accessible.

Introducing Tableau Next

Welcome to Salesforce's end-to-end, agentic analytics experience. Tableau Next integrates the #1 analytics platform with Agentforce's context-aware AI and the Data Cloud semantic layer that unifies business knowledge across your organization. Composable and API-first, Tableau Next empowers you to create, share, and reuse analytics assets seamlessly. Build and deliver personalized, contextual, and actionable insights for every user, backed by Salesforce's enterprise-grade performance, security, and scalability.

Where: This change applies to Lightning Experience with Data Cloud. Tableau Next is available in Enterprise, Performance, and Unlimited editions.

Why: Tableau Next is a complete analytics platform for data professionals, business users, and admins.

- **Data Integration and Interpretion in the Semantic Layer -** Integrate data from various sources and inspect it to ensure data integrity. Create a single source of truth for reliable, governed, reusable models, a metrics store, and streamlined data management.
- **Metric, Viz, and Dashboard Composition with World-Class Analysis Tools -** Create metrics backed by semantic models to track and assess business processes and performance. Explore data and surface insights that you can act on by building visualizations on related data in your workspace to draw conclusions and make business decisions. Take data visualization to the next level with dashboards, where you can add interactivity, enhance data exploration, and provide a clear overview of the critical information that you need in one place.
- **Asset Management, Deployment, and Marketplace -** Easily share workspaces and assets with colleagues. Extend Tableau Next throughout your organization by integrating Tableau Next metrics and dashboards into Lightning pages and custom pages using Lightning Web Components. Create your own analytics templates to share your designs and best practices, or use out-of-the-box dashboard templates for a quick start.
- **Integrated Action Layer -** Engage with Tableau Next metrics, visualizations, and dashboards for effective, data-based collaborations with your team. Customize and personalize Tableau Next on your home page and in your Slack metric digest. Explore and refine metrics to show you the insights most relevant for your work, and stay on track by setting metric goals. Launch integrated flows and actions in Salesforce. And take it all on the road with Tableau Next Mobile.
- **Streamlined Setup and Analyst-Savvy Organization -** Experience simplified setup and configuration on Tableau Next's administration page. In Tableau Next personal orgs and ordered workspaces, access

all of your tools for data analysis, including data connections, a semantic model builder and metric creator, and visualization and dashboard builders to share findings with others.

See Also

Salesforce Help: Tableau Next User Guide (can be outdated or unavailable during release preview)

Lightning Reports and Dashboards

Get up-to-date information without waiting for the entire dashboard by refreshing specific dashboard widgets. Send report and dashboard subscriptions from a designated organization-wide email address.

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

Designate One Email Address to Send Report Subscription Notifications (Generally Available)
Create consistent email communications and reduce the risk of spoofing by using an organization-wide email address to send report subscriptions from. Previously, emails were sent with the address of the user who created the report subscription.

Designate One Email Address to Send Dashboard Subscription Notifications
Create consistent email communications and reduce the risk of spoofing by using an organization-wide email address to send dashboard subscriptions from. Previously, emails were sent with the address of the user who created the dashboard subscription.

Use Existing Report Settings When Adding Tables to Dashboards (Beta)
You can now copy settings directly from the source report when you add a Lightning table to a dashboard. This reduces the need to manually configure report settings such as groupings, custom formulas, formatting, bucketing, or sorting, and ensures that the tables in the dashboard retain the same configuration as in the report.

Choose Which Dashboard Widgets to Refresh (Generally Available)

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

Where: This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: This functionality is available on a rolling basis starting in Summer ’25.

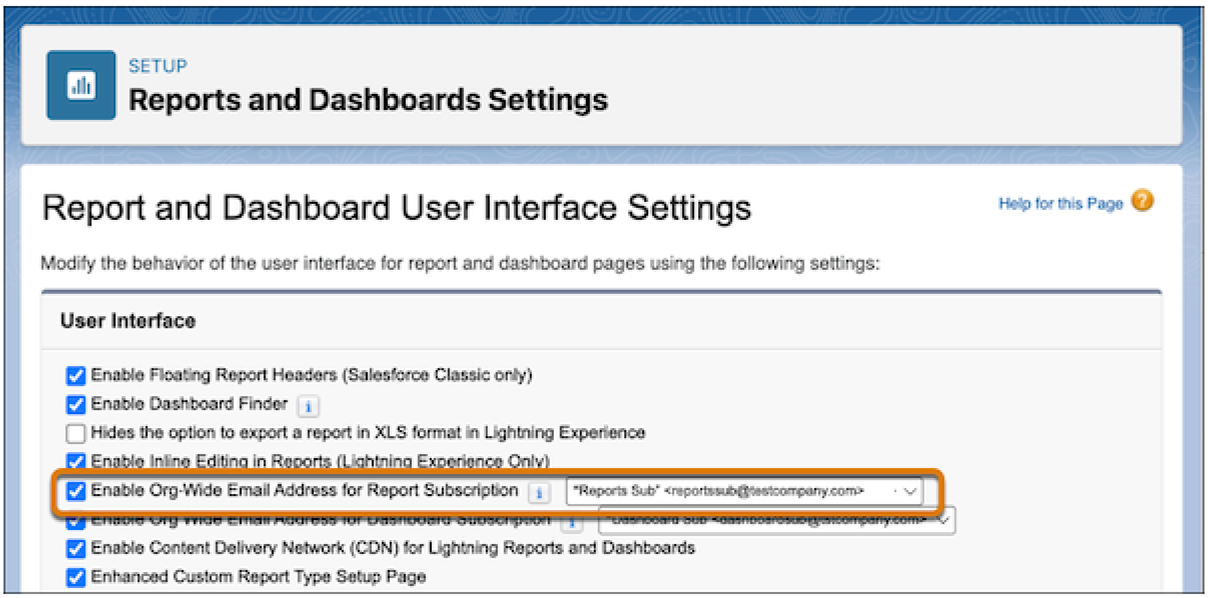
How: In the dashboard, click the widget’s refresh icon to view its latest data.

Designate One Email Address to Send Report Subscription Notifications (Generally Available)

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

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

How: From Setup, in the Quick Find box, enter `Reports`, and then select **Reports and Dashboards Settings**. Select **Enable Org-Wide Email Address for Report Subscription**, and then select the organization-wide email address to use from the dropdown list. You can set up the organization-wide email address in the Organization-Wide Addresses page in Setup.



See Also

Salesforce Help: Subscribe to Reports in Lightning Experience (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Organization-Wide Email Addresses (can be outdated or unavailable during release preview)

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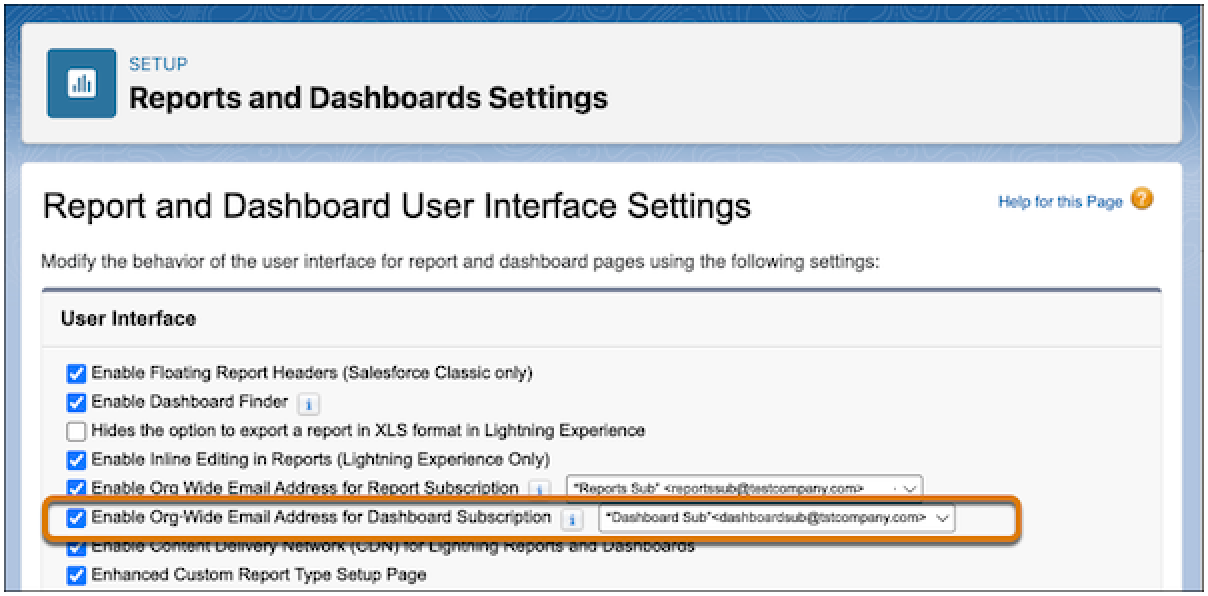

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Where: This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

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

How: To turn on this feature, contact Salesforce Customer Support. On the dashboard, click **+Widget** and select **Chart or Table**. Select the report, and click the Lightning Table icon to add a table. Then, select **Use table settings from report (Beta)**.

Data Cloud Reports and Dashboards

Accelerate decision-making with calculated insights in Data Cloud semantic model reports. Gain deeper insights from semantic model summary reports with support for five groupings. Deploy semantic model reports using managed packages.

Unlock Trends from Calculated Insights in Semantic Data Model Reports
Get an in-depth analysis of records in a semantic data model by including its calculated insights in a Data Cloud report. When you create a semantic model report, you can apply the multidimensional metrics and segments defined in the calculated insight to your report. The Report Builder also retains the insight's filters and joins so that you report on the semantic model efficiently and discover data patterns from related records quickly. Leverage the insight's segments to bucket the report, set conditional formatting rules on the insight's fields, and use them in advanced formulas.

Build More Granular Summary Reports
To fine-tune your analysis and surface more insights, add up to five row groupings to a semantic model summary report. Simultaneously track detailed metrics with row-level formulas and gain a comprehensive view with aggregate summaries for related data in the same report. For example, focus your marketing efforts with a semantic model report that unifies data from different marketing channels and ranks the sources based on five demographic characteristics: age group, gender, education, income, and family status.

Distribute Reports and Dashboards on Semantic Data Models with Managed Packages
To give your colleagues access to semantic data model reports or dashboards, you can easily package them and their dependent components in a first-generation managed package for distribution. You can deploy semantic model reports and dashboards from a source org to a target org when the semantic model is located in the same dataspace in both orgs.

Deploy Reports and Dashboards on Semantic Data Models Using Change Sets
When you're ready to migrate a semantic data model report or dashboard from a sandbox to a production environment, speed up the process with a change set. Using a simple point-and-click interface, you can migrate reports and dashboards from a sandbox to any org with an established deployment connection. Previously, you deployed these reports and dashboards programmatically using Metadata API.

Unlock Trends from Calculated Insights in Semantic Data Model Reports

Get an in-depth analysis of records in a semantic data model by including its calculated insights in a Data Cloud report. When you create a semantic model report, you can apply the multidimensional metrics and segments defined in the calculated insight to your report. The Report Builder also retains the insight's filters and joins so that you report on the semantic model efficiently and discover data patterns from related records quickly. Leverage the insight's segments to bucket the report, set conditional formatting rules on the insight's fields, and use them in advanced formulas.

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

Why: For example, let's say you want to deepen your analysis of opportunities by industry. In a report on the Opportunities semantic model, include segments and revenue metrics from the calculated insight to evaluate opportunity pipeline by industry.

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

Build More Granular Summary Reports

To fine-tune your analysis and surface more insights, add up to five row groupings to a semantic model summary report. Simultaneously track detailed metrics with row-level formulas and gain a comprehensive view with aggregate summaries for related data in the same report. For example, focus your marketing efforts with a semantic model report that unifies data from different marketing channels and ranks the sources based on five demographic characteristics: age group, gender, education, income, and family status.

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

How: To deploy a Data Cloud report and dashboard as a managed package, add the Report and Dashboard component types to a managed package, and click **Upload**.

To view the report and dashboard in a target org, install the managed package.

See Also

Salesforce Help: Disribute Reports and Dashboards on Semantic Data Models with with Managed Packages (can be outdated or unavailable during release preview)

Deploy Reports and Dashboards on Semantic Data Models Using Change Sets

When you're ready to migrate a semantic data model report or dashboard from a sandbox to a production environment, speed up the process with a change set. Using a simple point-and-click interface, you can migrate reports and dashboards from a sandbox to any org with an established deployment connection. Previously, you deployed these reports and dashboards programmatically using Metadata API.

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

How: To deploy a Data Cloud report and dashboard using a change set, add the Report and Dashboard component types to an outbound change set along with any dependent components. Choose the org you want to migrate and click **Upload**.

To view the report and dashboard in the production org, deploy the change set from the Inbound Change Sets page in the org.

CRM Analytics

CRM Analytics enhancements include new and updated features for dashboards, lenses, analytics apps, and data integration.

Analytics Experience and Visualizations

Save credits and improve performance with app-level caching for Data Cloud Direct Queries. Describe and sort table contents with custom headers for repeater widgets. Navigate between dashboard pages and apply filters with one click in both list and toggle widgets.

Get One-Click Filtering and Navigation with the Toggle Widget
You can now configure the toggle widget to navigate to another page or dashboard. This enhancement removes the need to use a toggle widget to filter and a link widget for navigation, resulting in a more efficient dashboard building experience.

Get More Filter Control for Your Dashboard Queries
You now have the ability to control whether dashboard queries can be updated by filters from linked or embedded dashboards. This feature enables you to apply external filters to one query while isolating another. Previously, this level of control wasn't available, which could result in data inconsistencies on the dashboard.

Reduce Data Cloud Direct Query Costs and Improve Performance with App-Level Caching
CRM Analytics can now run Data Cloud Direct queries on the browser side by temporarily storing data in CRM Analytics memory. This enhancement reduces the need for repeated live queries, resulting in credit consumption savings and improved performance.

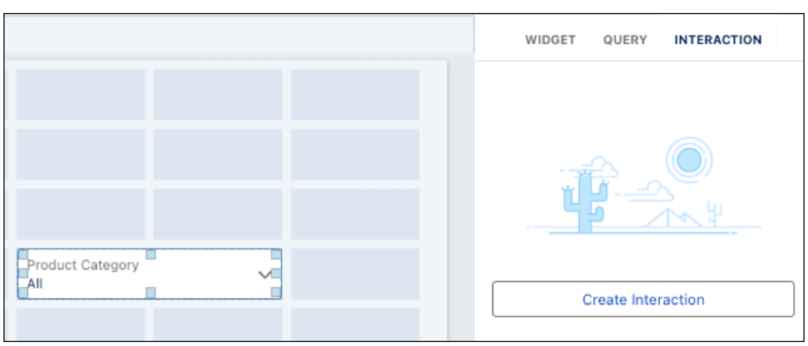
Connect to Your Snowflake Data Using Direct Data for Snowflake with OAuth (Generally Available)
Create a live connection to your Snowflake warehouse and explore your data where it lives without copying it for CRM Analytics. By configuring Snowflake, Salesforce, and CRM Analytics with an external OAuth authorization server, such as Okta, you can achieve a secure integration that protects your data while providing real-time access for your analytics.

Filter and Navigate with the List Widget

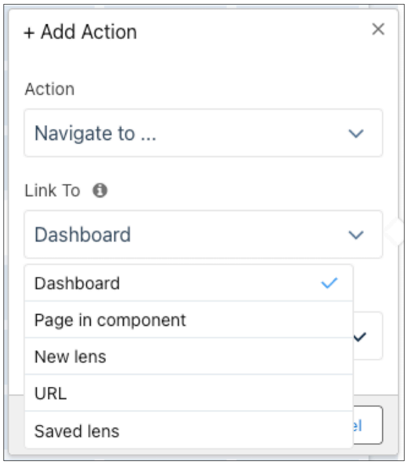
You can now configure the list widget to navigate to another page or dashboard. This enhancement removes the need to use a list widget to filter and a link widget for navigation, resulting in a more efficient dashboard building experience.

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.

How: Edit an existing list widget or create one on the dashboard. Click the widget and select **Create Interaction | +Add Action**.



Use the menu to set up an action.

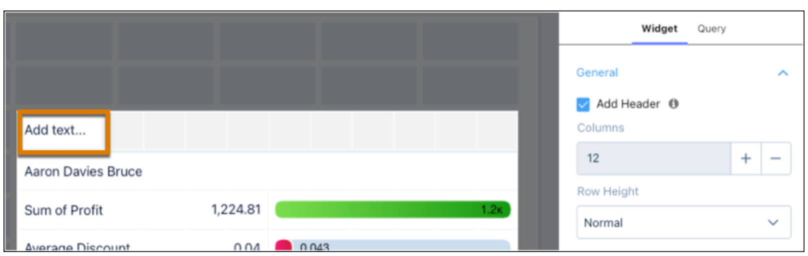


Add Custom Headers and Sorting in the Repeater Widget

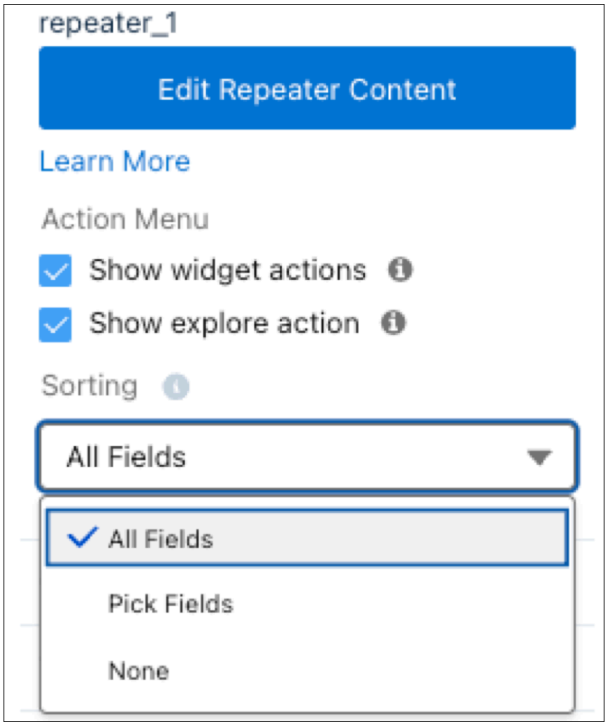
Custom headers can now be added to the repeater widget, removing the need for workarounds such as adding a text widget above it. You can also customize the repeater header to sort your data.

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

How: Edit an existing repeater widget or set up a new one. Select **Add Header**, then drag a text widget to the header. Add a column name to the text widget. Click **Done**.



Use Sorting to select fields to sort widget data.



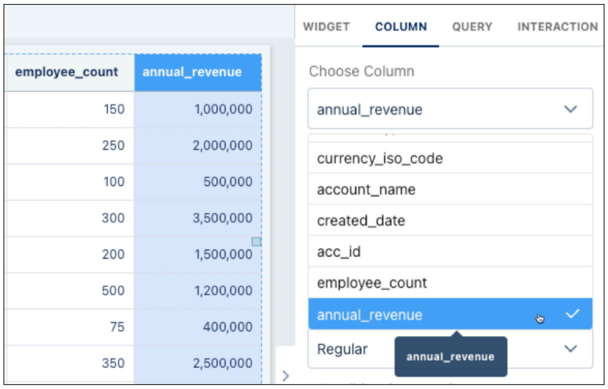
Click the widget action menu to sort data in the repeater widget.

Maximize Data Clarity with Customizable Table Widget Tooltips

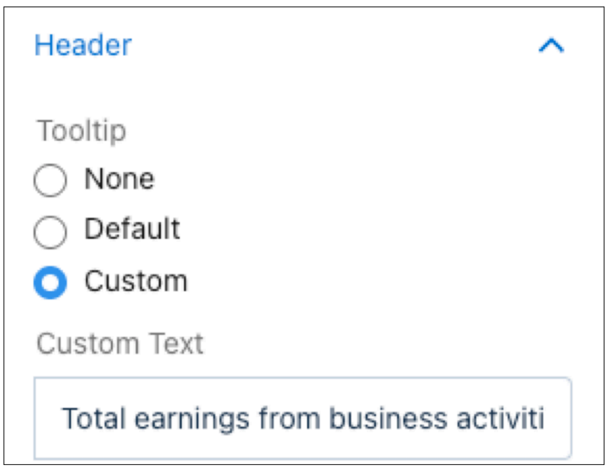
You can now add custom tooltips to table widget columns to provide valuable information, such as the method of calculation, definitions of terms, and data sources. With clear and concise explanations, you can help users better understand the data and promote transparency.

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 add a tooltip to a table column, edit the dashboard and select a table widget. Select a column in the Column tab.



Select **Custom** and type in a tooltip.



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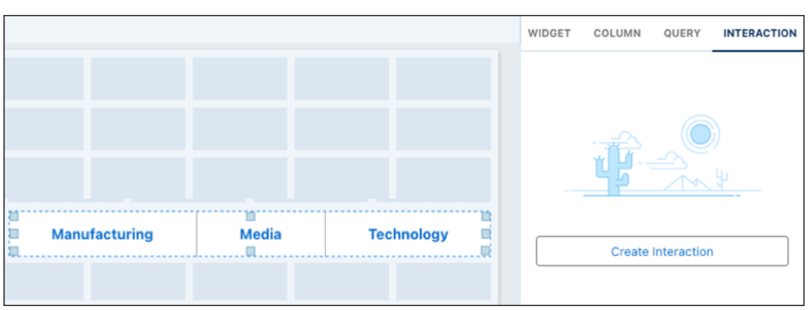

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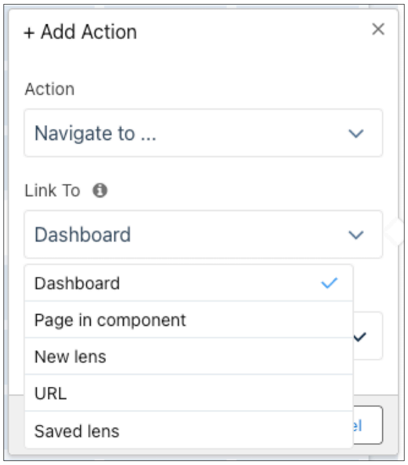
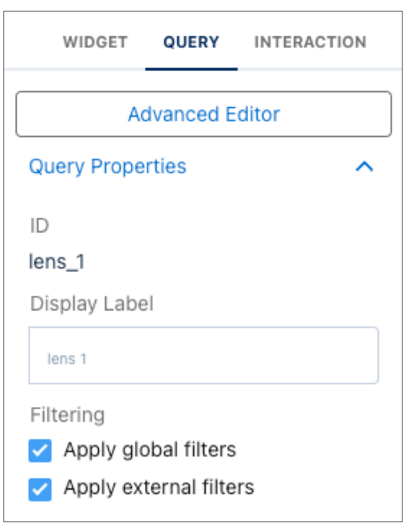


Get More Filter Control for Your Dashboard Queries

You now have the ability to control whether dashboard queries can be updated by filters from linked or embedded dashboards. This feature enables you to apply external filters to one query while isolating another. Previously, this level of control wasn't available, which could result in data inconsistencies on the dashboard.

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 enable or disable external filters for a query, edit the dashboard and select the widget that has the query you want to update. Click **Apply external filters**.



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

How: From Setup, in the Quick Find box, enter *`Analytics`*, and then click **Settings**. Click **Enable Data Cloud Direct query results caching**.

Next, enter the number of hours in **Data Cloud query cache expiration time** to cache the data. Data is cached for one hour if the field is empty.

Connect to Your Snowflake Data Using Direct Data for Snowflake with OAuth (Generally Available)

Create a live connection to your Snowflake warehouse and explore your data where it lives without copying it for CRM Analytics. By configuring Snowflake, Salesforce, and CRM Analytics with an external OAuth authorization server, such as Okta, you can achieve a secure integration that protects your data while providing real-time access for your analytics.

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

How: To set up a connection with Snowflake, configure Snowflake with your selected external authorization server. Next, define a named credential in Salesforce to add a live Snowflake connection.

Authenticate your Snowflake account and connect it to CRM Analytics by editing Authentication Settings for External Systems in CRM Analytics user settings.

In Data Manager, connect to Snowflake using the Live Connections option. Add a new connection with the Snowflake Direct Connector. After the connection is established, access a Snowflake source table as a live dataset.

Analytics Data Integration

Securely access your Amazon data using Virtual Private Connections (VPC) and AWS Identity and Access Management (IAM). Take advantage of OAuth functionality for your Snowflake VPC input connections. Bucket your recipe data with clicks not code using the improved editor.

You can now explore your private Amazon S3 data in CRM Analytics. Use the Virtual Private Connection (VPC) for Amazon S3 Private Connector to connect data from S3 to Data Manager. The VPC interface endpoint provides secure connectivity to S3, meaning that data transfer from S3 takes place on the AWS internal network and not the public internet.

Specify IAM Users and Roles for Authentication with Amazon Athena and S3 Connectors

Improve the granularity of access to AWS resources using AWS Identity and Access Management (IAM) in your Amazon Athena and S3 connector configurations. With IAM authentication, you can specify IAM users, roles, and role values to control access to AWS resources. You can also set up cross-account IAM roles providing access to resources to other AWS accounts shared with users.

Use OAuth Security with Your Snowflake VPC Connection

Take advantage of OAuth across all Snowflake connectors to provide a consistent and secure connection experience. The Virtual Private Connection (VPC) for Snowflake input connector now has full OAuth functionality to match the Snowflake input, output, and sync out connectors.

Bucket Data in Recipes with Clicks Not Code

Create data buckets in the enhanced recipe editor without writing code or creating custom expressions. Use the redesigned bucketing feature in the recipe editor to define bucket ranges, operators, labels, and filter logic to easily group data into categories for analysis.

Subscribe to Recipe Notifications as a Read-Only User

Stay informed on recipe completions by subscribing to recipe notifications. Now read-only recipe users can choose to be notified of recipe completions, including failed and warning statuses.

Improve Salesforce External Connector Sync Performance with Incremental and Periodic Full Syncs (Generally Available)

Improve the performance of your external data syncs by loading the data incrementally or periodically. An incremental sync extracts only the latest changes to external Salesforce data. Periodic full sync runs regular incremental syncs plus one full extract of all of your data weekly.

Improve Snapshot Data Recipe Performance with Optimized Upsert and Delete Actions (Beta)

Decrease processing time with quicker data recipe runs. Instead of processing all rows in the snapshot data, the optimized upsert and delete actions run incrementally on subsets of the snapshot data resulting in faster runs.

Access Your Amazon S3 Data Using VPC

You can now explore your private Amazon S3 data in CRM Analytics. Use the Virtual Private Connection (VPC) for Amazon S3 Private Connector to connect data from S3 to Data Manager. The VPC interface endpoint provides secure connectivity to S3, meaning that data transfer from S3 takes place on the AWS internal network and not the public internet.

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

How: From Setup, in the Quick Find box, enter `Private` and select **Private Connect**. Create an outbound connection, and then on the Named Credentials page, create external and named credentials. In Data Manager, on the Private tab, create a new connection for the Amazon S3 Private Connector.

See Also

Salesforce Help: Amazon S3 VPC Connection (can be outdated or unavailable during release preview)

Specify IAM Users and Roles for Authentication with Amazon Athena and S3 Connectors

Improve the granularity of access to AWS resources using AWS Identity and Access Management (IAM) in your Amazon Athena and S3 connector configurations. With IAM authentication, you can specify IAM users, roles, and role values to control access to AWS resources. You can also set up cross-account IAM roles providing access to resources to other AWS accounts shared with users.

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

How: Create IAM users, roles, and policies in AWS. In Data Manager, create a new Amazon Athena or Amazon S3 connection. For the Authentication Type, select **IAM** and provide the `AWS Access Key`, `AWS Secret Key`, and `AWS Role ARN` values from your AWS IAM configuration.

See Also

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

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

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Take advantage of OAuth across all Snowflake connectors to provide a consistent and secure connection experience. The Virtual Private Connection (VPC) for Snowflake input connector now has full OAuth functionality to match the Snowflake input, output, and sync out connectors.

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How: In Snowflake, setup an OAuth compatible client, an OAuth server, and a security implementation for Okta. Use the Snowflake OAuth server and Okta credential values for the Salesforce named credentials created for the Snowflake Private Connector.

See Also

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

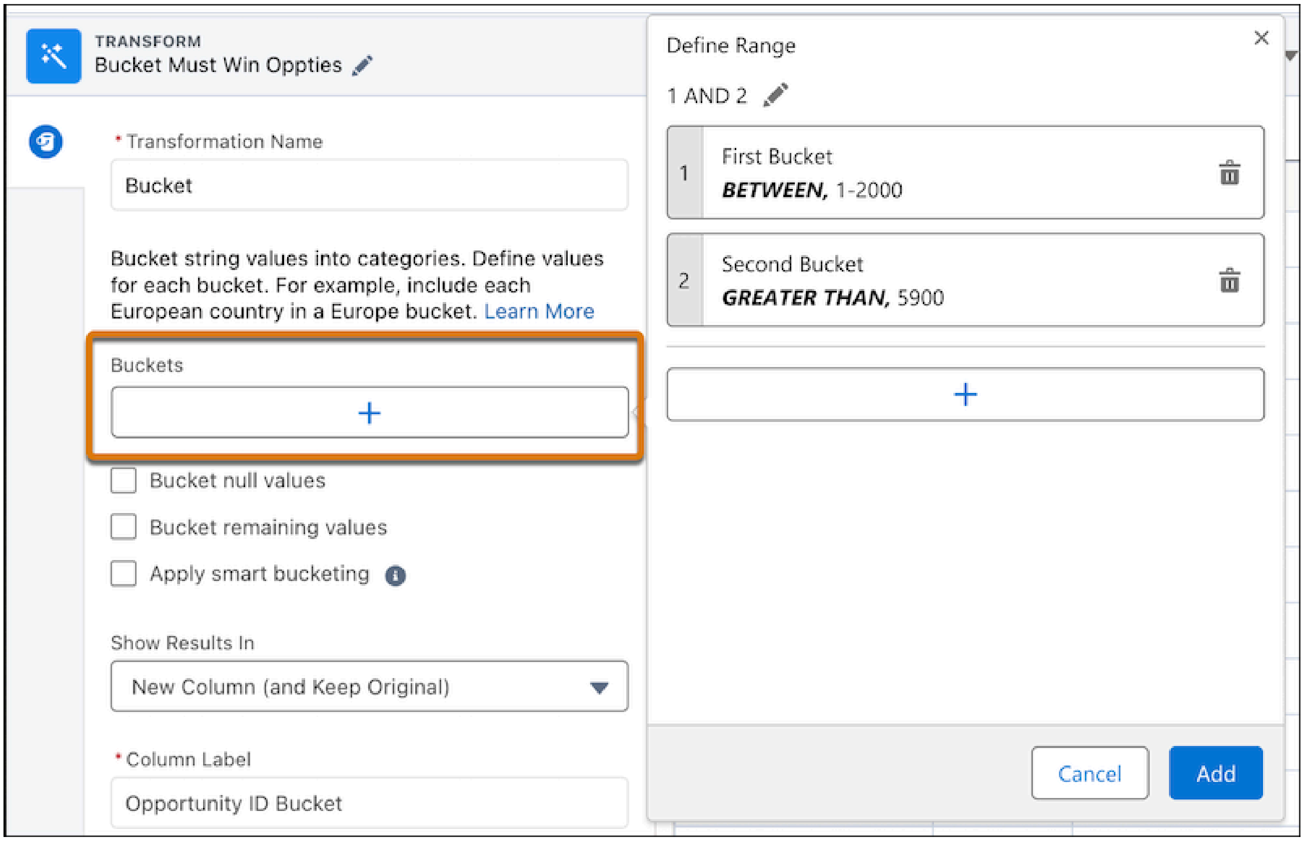
Bucket Data in Recipes with Clicks Not Code

Create data buckets in the enhanced recipe editor without writing code or creating custom expressions. Use the redesigned bucketing feature in the recipe editor to define bucket ranges, operators, labels, and filter logic to easily group data into categories for analysis.

Where: This change applies to CRM Analytics and Salesforce Data Pipelines in Lightning Experience and

Salesforce Classic. CRM Analytics and Salesforce Data Pipelines are available for an extra cost in Enterprise, Performance, and Unlimited editions.

How: In the recipe editor, for transform nodes, use the improved bucket flow to define your data buckets.



See Also

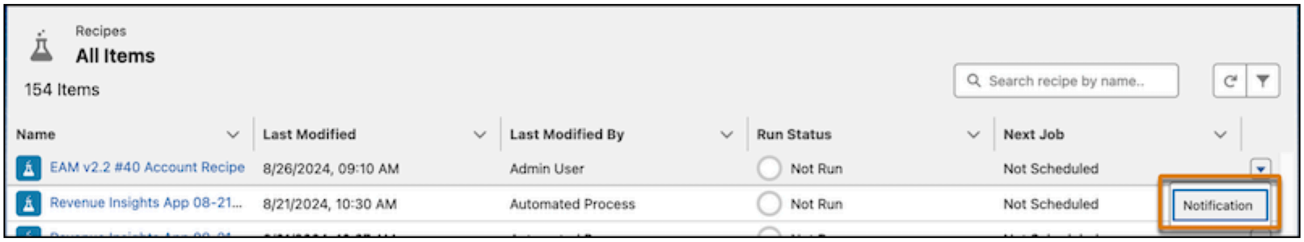
Salesforce Help: Bucket Transformations: Categorize Column Values (can be outdated or unavailable during release preview)

Subscribe to Recipe Notifications as a Read-Only User

Stay informed on recipe completions by subscribing to recipe notifications. Now read-only recipe users can choose to be notified of recipe completions, including failed and warning statuses.

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

How: In Data Manager, click the Recipes tab. From the action menu of the recipe that you want to subscribe to, and select **Notification**.



See Also

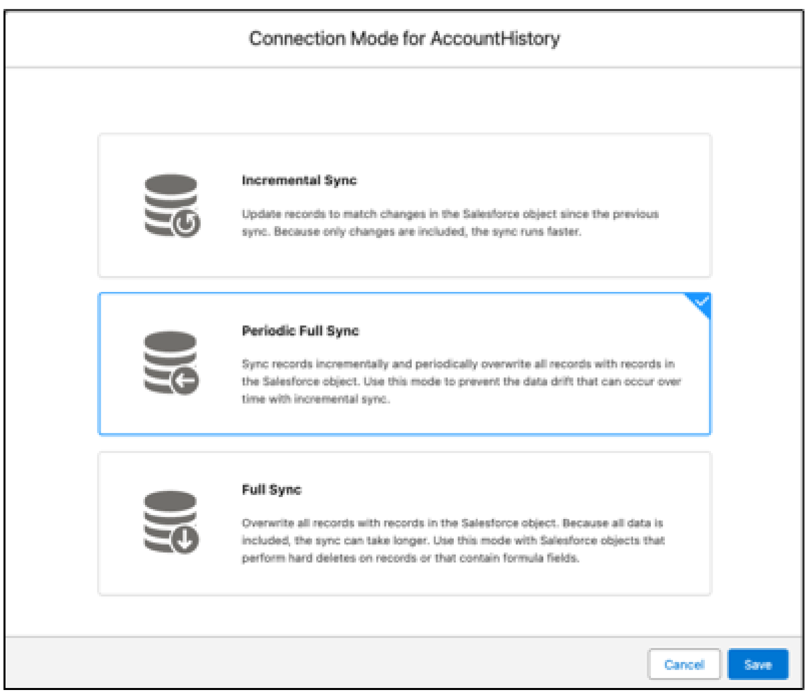
Salesforce Help: Set Recipe Notifications (can be outdated or unavailable during release preview)

Improve Salesforce External Connector Sync Performance with Incremental and Periodic Full Syncs (Generally Available)

Improve the performance of your external data syncs by loading the data incrementally or periodically. An incremental sync extracts only the latest changes to external Salesforce data. Periodic full sync runs regular incremental syncs plus one full extract of all of your data weekly.

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

How: In Data Manager, open a Salesforce external connection from the Connection tab and select the object that you want to sync. For the Edit Connection Mode, select **Incremental Sync** or **Periodic Full Sync**.



See Also

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

Improve Snapshot Data Recipe Performance with Optimized Upsert and Delete Actions (Beta)

Decrease processing time with quicker data recipe runs. Instead of processing all rows in the snapshot data, the optimized upsert and delete actions run incrementally on subsets of the snapshot data resulting in faster runs.

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

Note Existing Dataset (Upsert/Delete) is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

How: Re-create your recipes to take advantage of this optimization, ensuring the snapshot data contains a primary key field. In the output node, select the **Existing Dataset (Upsert)** or **Existing Dataset (Delete)** option to use the optimized features.

See Also

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

Einstein Discovery

Decision optimization beta is retired.

Decision Optimization in Einstein Discovery Is Retired

After June 5, 2025, you can no longer use the Decision Optimization beta in Einstein Discovery.

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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

Accessibility Enhancements in Analytics

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

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: Check out details about these changes.

CRM Analytics

- Screen readers announce context changes in the watchlist container and keep users informed when they change, save, or cancel the watchlist order.
- The keyboard focus order across multiple areas such as Home, Browse, Collections, Setup pages, and the CRM Analytics properties panel is improved.
- Screen readers announce changes to the sorting state in the asset results table on the browse tab. This update helps users understand the current sorting order of columns such as Type, Location, and Created By.
- The visual indicator for keyboard focus for interactive elements such as feed type menus, radio buttons, and annotation sidebars is enhanced.
- Keyboard navigation is improved after users perform actions such as clicking the clear button or opening a modal.

Commerce

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

Salesforce B2B and D2C Commerce
Add videos to your product galleries and tell compelling stories about your brand and products, creating a richer, more engaging customer experience. Manage marketing consents with Marketing Cloud and Data Cloud for B2B and D2C Commerce. Personalize shopping with gifting options and a streamlined checkout. Promote products on social media to drive sales. Enable product previews, group searched items by size or color, and optimize search facets. Shoppers can view failed subscription payments, and merchants get email notifications to promptly address issues. Shoppers can update their contact info with two-factor authentication for added security.

Salesforce Order Management
Help more customers by supporting product bundles in all service flows. High-scale order ingestion protects your store from being overwhelmed by high volumes of order data.

Salesforce Payments
Payment data is more secure with buyer-controlled access to saved payments information, management of payment record sharing, and platform events that track potentially malicious changes to payment pages. You can use a business account to make ACH payments. European Economic Area customers get an improved and compliant payment experience.

Salesforce B2B and D2C Commerce

Add videos to your product galleries and tell compelling stories about your brand and products, creating a richer, more engaging customer experience. Manage marketing consents with Marketing Cloud and Data Cloud for B2B and D2C Commerce. Personalize shopping with gifting options and a streamlined checkout. Promote products on social media to drive sales. Enable product previews, group searched items by size or color, and optimize search facets. Shoppers can view failed subscription payments, and merchants get email notifications to promptly address issues. Shoppers can update their contact info with two-factor authentication for added security.

Commerce Store Pages
Enhance product displays with engaging videos to boost sales and strengthen your brand. Help customers on Facebook and Instagram discover your products by using the External Channel feature. Create custom selections of featured product recommendations on the home page or product page to upsell or cross-sell products. Enjoy a live and interactive preview of your product page while editing the product record. Default experience delivery and performance improvements ensure a seamless and enjoyable user experience.

Marketing Cloud for Commerce
Commerce Cloud and Marketing Cloud have joined forces to help you build customer relationships using valuable messaging and marketing consent tools. Your B2B or D2C Commerce store not only generates customer and order data, it also generates events, like when a new order is placed or a

shopping cart is abandoned. Events trigger out-of-the-box flows that send messages using Marketing Cloud services, which are powered by Data Cloud. For example, use the abandoned cart email to remind customers about items in their shopping cart and encourage them to make a purchase. Add the repeater component in the order confirmation email template to include order line items and shipping groups in the email body. In the Commerce app, you can also create consent messages to capture customer emails and engage with customers via marketing campaigns and promotions.

Cart, Checkout, and Shipping

Personalize your customers' shopping experience with gifting options, and enhance checkout performance with a streamlined design. Display personalized product recommendations right in the mini cart, and add express checkout for faster purchases. Flag digital products and simplify the shipping process to make it easier for your customers to complete their transactions.

Commerce Components

Enhance customer control with the Marketing Consent Settings component, allowing shoppers to select their preferred marketing communications, such as newsletters or product updates, directly from their profile page. The Email Sign-Up Form component capture shopper emails and presents up to five configurable marketing consent options, managed in the Commerce App. Simplify compliance with the Cookie Consent component so shoppers can accept or reject cookies and view links to a custom policy page for detailed information on your privacy practices.

Commerce Promotions

Diversify your promotion strategy by offering a bonus or gift product at no additional cost with qualifying purchases. Additionally, create promotional messages that notify customers when their cart value is close to reaching a discount threshold.

Commerce Search

Enable product preview for D2C stores, group searched products by attributes such as size or color, and improve the order of search facets. Additionally, use price filter ranges and sort results based on guest shopper prices.

Commerce Subscriptions

Shoppers can see failed subscription payments on the My Subscriptions page. Merchants receive email notifications when a subscription payment fails, allowing them to address subscription issues promptly. Shoppers see a warning when they delete a payment method linked to active subscriptions, informing them that future payments will fail and prompting them to update their payment method.

Commerce Additional Features

Shoppers can now update their contact information with two-factor authentication, receiving a one-time passcode to confirm changes. This makes sure that only verified users can modify their details. Self-registering users are not automatically assigned to the store's default buyer group. To assign them automatically, set a default buyer group in the self-registration settings.

Commerce Store Pages

Enhance product displays with engaging videos to boost sales and strengthen your brand. Help customers on Facebook and Instagram discover your products by using the External Channel feature. Create custom selections of featured product recommendations on the home page or product page to upsell or cross-sell products. Enjoy a live and interactive preview of your product page while editing the product record. Default experience delivery and performance improvements ensure a seamless and enjoyable user experience.

Enhance Product Displays with Videos
Add videos to your product galleries to create a more immersive shopping experience. Upload videos, select from your library, or link to videos hosted on platforms such as YouTube, Vimeo, Amazon Web Services, and other supported services.

Enhance Your Brand with Videos
Tell compelling stories about your brand and products by adding videos to your store. Integrate the videos on your home page or within the product gallery to create a richer, more engaging customer experience.

Advertise Your Products on Facebook and Instagram
Help customers on Facebook and Instagram discover your products. Sync your store's catalog and update your product listings on these social platforms by using the External Channel feature. You can also retarget customers and attract new ones when Meta Pixel is enabled. After you integrate your store's catalog, you can visit the external channel's business account to create ads that feature products related to your customers' behavior.

Boost Product Discovery with Featured Recommendations
Upsell or cross-sell products by creating custom selections of featured product recommendations. Highlight new arrivals, bestsellers, or any collection on the home page or product page.

Test Product Experience with Interactive Preview
View a live, interactive preview of your product page while creating or editing the product record. The preview includes product page interactions, such as swatches and pills, so you can test the experience before activating the product.

Enhance Browsing and Navigation for an Immersive Shopping Experience
Engage your D2C shoppers more effectively by configuring product listings or search results to load more products. This way, shoppers need not click through pages to view a product. Also, after viewing a product, they can return to the exact spot on the page that they were at.

Automatically Indicate Out-of-Stock Products
Shoppers can immediately understand when a product variation is out of stock by seeing a visual indicator such as a strikethrough or grayed-out option. Users avoid unnecessary clicks and quickly identify which options are available. This way, they can make faster decisions and add available products to their cart more efficiently. This streamlined experience reduces frustration and helps guide customers toward available products, increasing the likelihood of a purchase.

Simplify Product Selection with Quick View
Provide important product information, such as images, descriptions, prices, and availability, when shoppers hover over a product card. Shoppers can make informed purchase decisions and add items to their cart without going to multiple product pages. This streamlined shopping experience is crucial for converting browsers into buyers and reduces the chance of them abandoning their carts.

Enhance Product Cards with Hover Images
Show a secondary product image when shoppers hover over the primary one. This offers a quick visual preview without requiring the shopper to leave the page. As a result, shoppers engage better and make faster decisions.

Easily Add Custom Fields to Self-Registration Page

Add custom fields to the self-registration form directly from the Self Registration component, without creating field sets. This simplifies customization and reduces setup time.

Enhance User Experience with Faster Load Times (Beta)

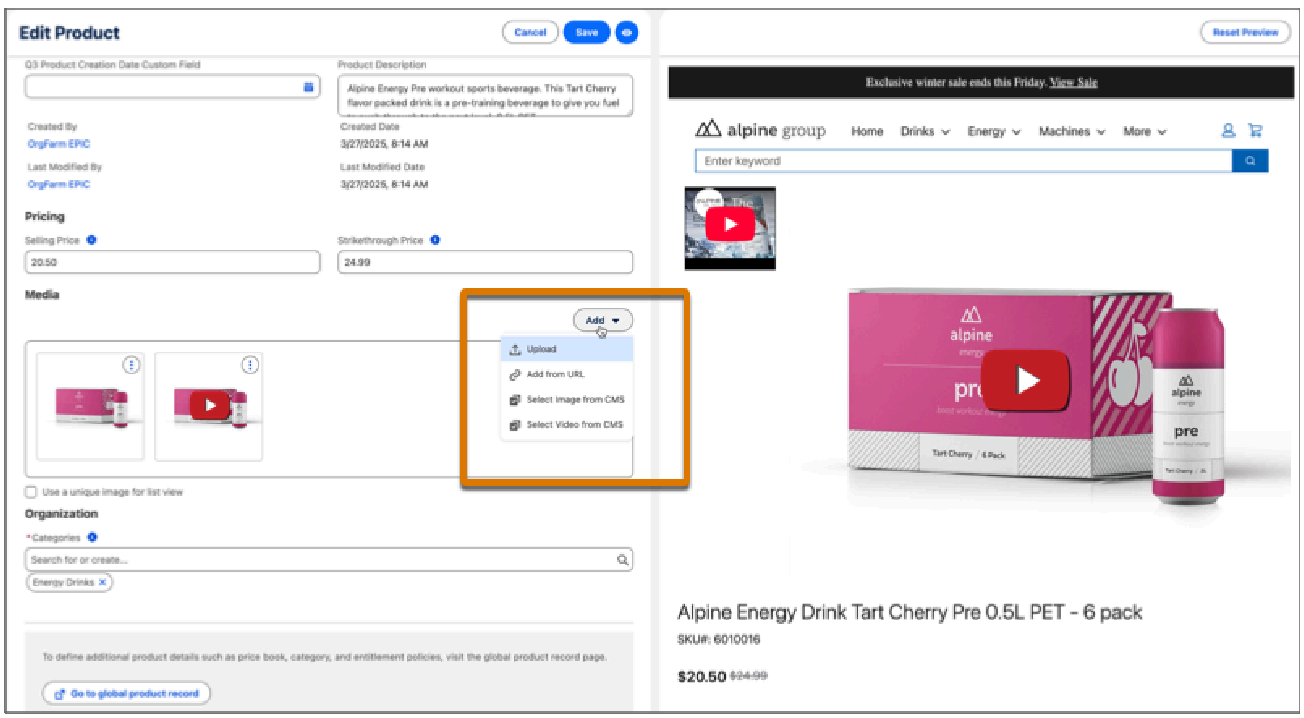
Experience improved page loading times on important pages, such as Home, Category, Product Detail, Search, Cart, Login, and Registration. D2C stores load faster as pages have been optimized for quicker interaction response times.

Enhance Product Displays with Videos

Add videos to your product galleries to create a more immersive shopping experience. Upload videos, select from your library, or link to videos hosted on platforms such as YouTube, Vimeo, Amazon Web Services, and other supported services.

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

How: In your store, go to Merchandising and select **Products**. Select a product and add a video from the CMS or the URL of a video hosted on a site.



See Also

Enhance Your Brand with Videos

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

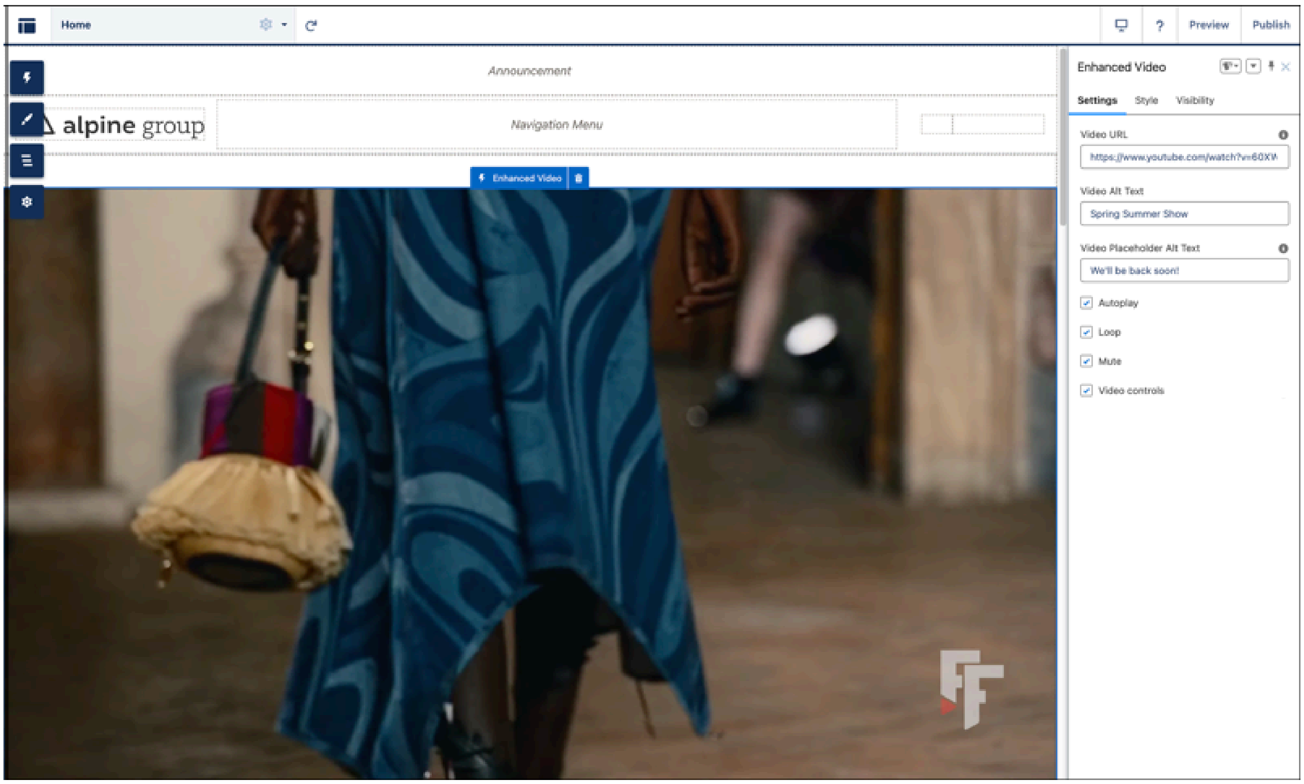
Salesforce Help: Add Videos to Content from the Rich Text Editor (can be outdated or unavailable during release preview)

Enhance Your Brand with Videos

Tell compelling stories about your brand and products by adding videos to your store. Integrate the videos on your home page or within the product gallery to create a richer, more engaging customer experience.

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

How: To add videos, in Experience Builder, drag the Enhanced Video component to your home page or Product page, and add your video URL.



See Also

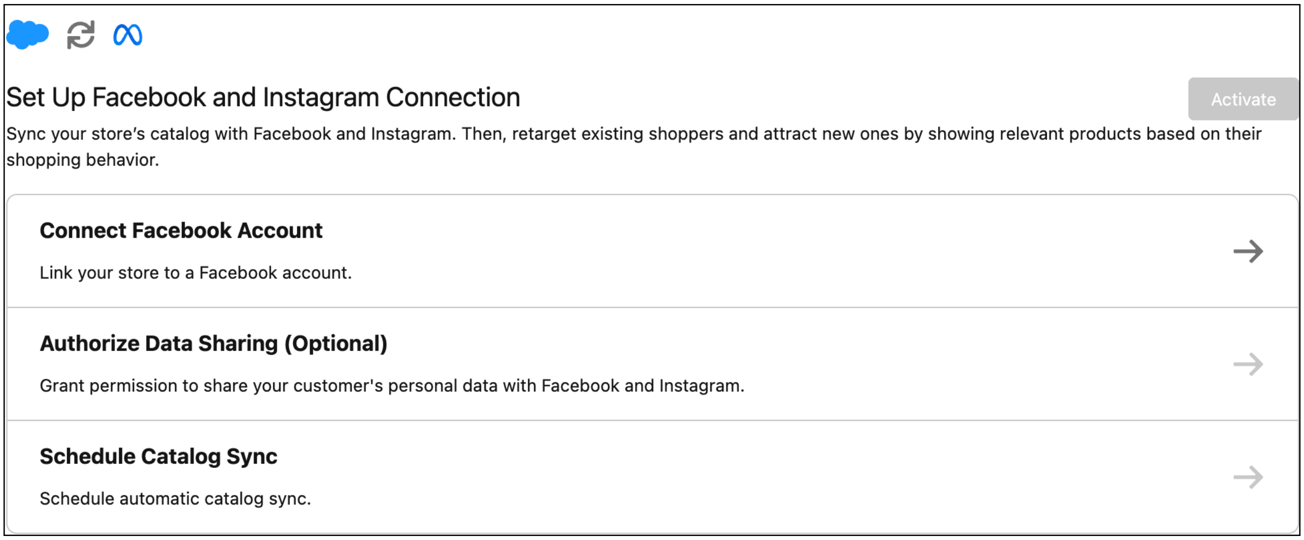
Salesforce Help: Guidelines for Adding Brand and Product Videos to a Commerce Store (can be outdated or unavailable during release preview)

Advertise Your Products on Facebook and Instagram

Help customers on Facebook and Instagram discover your products. Sync your store's catalog and update your product listings on these social platforms by using the External Channel feature. You can also retarget customers and attract new ones when Meta Pixel is enabled. After you integrate your store's catalog, you can visit the external channel's business account to create ads that feature products related to your customers' behavior.

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

How: In your store's Settings, select **External Channels**. In the External Channels window, follow the guided steps to set up connections to Facebook and Instagram.



See Also

Salesforce Help: Publish Your Experience Builder Site Customizations (can be outdated or unavailable during release preview)

External Link: Meta Social technologies

Boost Product Discovery with Featured Recommendations

Upsell or cross-sell products by creating custom selections of featured product recommendations. Highlight new arrivals, bestsellers, or any collection on the home page or product page.

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

Why: Here's how you can enhance the shopper's experience by showcasing a featured collection of related products.

How: From the object management settings for Product Featured Product, add picklist values for Featured Product Relationship Type. From Product Workspace, assign featured products for a product. In

Experience Builder, customize the Carousel component to display the featured product collection.

See Also

Salesforce Help: Create Featured Product Collections for your Store (can be outdated or unavailable during release preview)

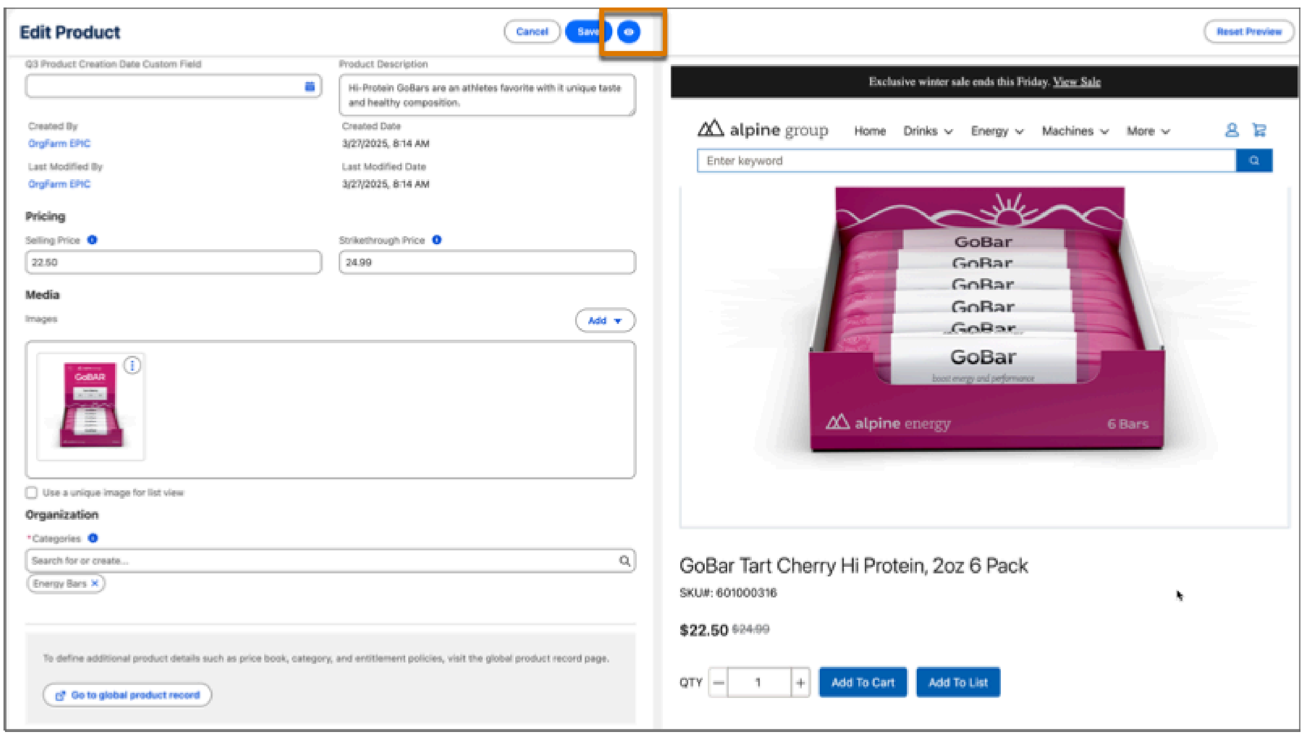
Salesforce Help: Show Product Collection from Category on the Home Page (can be outdated or unavailable during release preview)

Test Product Experience with Interactive Preview

View a live, interactive preview of your product page while creating or editing the product record. The preview includes product page interactions, such as swatches and pills, so you can test the experience before activating the product.

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

How: In your store, go to Merchandising and select **Products**. Create or edit a product record to see a live preview. If the preview isn't enabled, click the preview icon. The preview is updated in real time, and you can interact with the page elements, such as swatches and pills.



See Also

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

Enhance Browsing and Navigation for an Immersive Shopping Experience

Engage your D2C shoppers more effectively by configuring product listings or search results to load more products. This way, shoppers need not click through pages to view a product. Also, after viewing a product, they can return to the exact spot on the page that they were at.

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

How: From the Product page, open Experience Builder and select the Results Grid component. From the Results Navigation Type dropdown list, select **Load More**.

See Also

Salesforce Help: Format the Display of Product Cards on Search Pages in a Commerce Store (can be outdated or unavailable during release preview)

Automatically Indicate Out-of-Stock Products

Shoppers can immediately understand when a product variation is out of stock by seeing a visual indicator such as a strikethrough or grayed-out option. Users avoid unnecessary clicks and quickly identify which options are available. This way, they can make faster decisions and add available products to their cart more efficiently. This streamlined experience reduces frustration and helps guide customers toward available products, increasing the likelihood of a purchase.

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

How: This feature is applied when inventory is turned on.

See Also

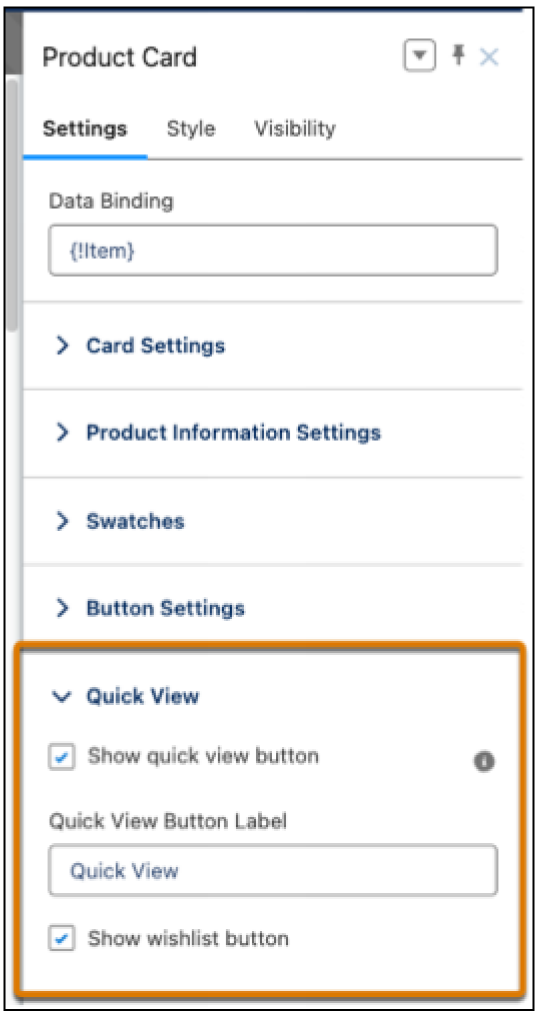
[*Salesforce Help*: Enable Product Cards on Search Pages in a Commerce Store (can be outdated or unavailable during release preview)]

Simplify Product Selection with Quick View

Provide important product information, such as images, descriptions, prices, and availability, when shoppers hover over a product card. Shoppers can make informed purchase decisions and add items to their cart without going to multiple product pages. This streamlined shopping experience is crucial for converting browsers into buyers and reduces the chance of them abandoning their carts.

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

How: In Experience Builder, go to the Category page and open the Product Card component. Select **Show quick view button**. Repeat on the Search page.



See Also

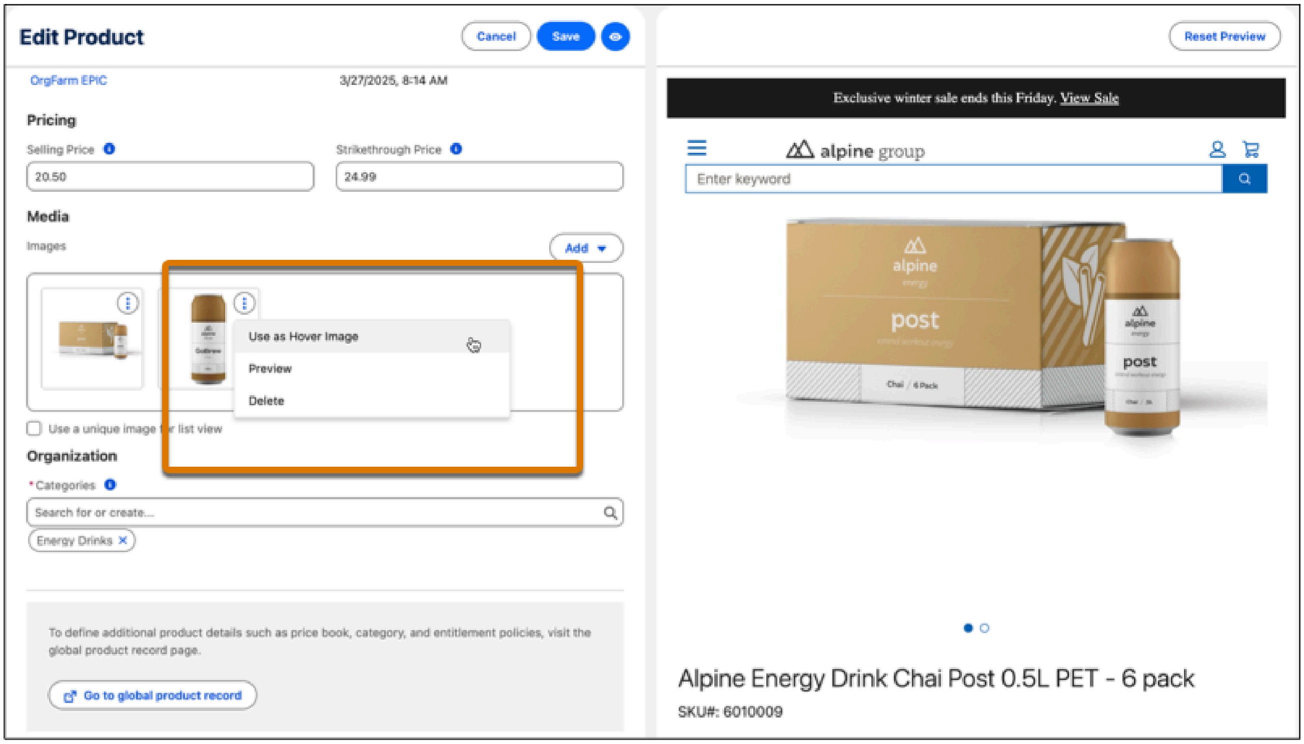
[*Salesforce Help*: Enable Product Cards on Search Pages in a Commerce Store (can be outdated or unavailable during release preview)]

Enhance Product Cards with Hover Images

Show a secondary product image when shoppers hover over the primary one. This offers a quick visual preview without requiring the shopper to leave the page. As a result, shoppers engage better and make faster decisions.

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

How: In your store, go to Merchandising and select **Products**. Select a product and under Media, add a new hover image or set an existing image as a hover image.



See Also

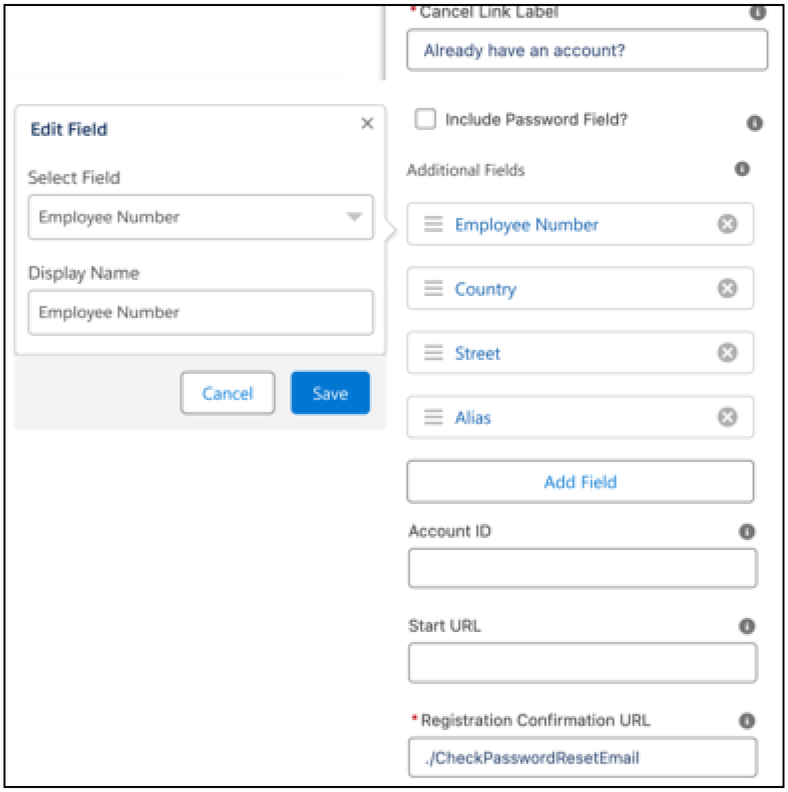
Salesforce Help: Manage Products in the Product Workspace (can be outdated or unavailable during release preview)

Easily Add Custom Fields to Self-Registration Page

Add custom fields to the self-registration form directly from the Self Registration component, without creating field sets. This simplifies customization and reduces setup time.

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

How: In Experience Builder, select the Register page. If the Self Registration component is marked as deprecated, remove it. Drag the updated Self Registration component onto the page and select the additional fields you want to include.



See Also

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

Enhance User Experience with Faster Load Times (Beta)

Experience improved page loading times on important pages, such as Home, Category, Product Detail, Search, Cart, Login, and Registration. D2C stores load faster as pages have been optimized for quicker interaction response times.

Where: This change applies to new stores created by using the D2C Commerce in Enterprise, Unlimited, and Developer editions.

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

How: To enable Experience Delivery (beta), go to the Settings tab of the site's Administration workspace.

See Also

LWR Sites for Experience Cloud Developer Guide: Improve LWR Site Performance with Experience Delivery (Beta) (can be outdated or unavailable during release preview)

Marketing Cloud for Commerce

Commerce Cloud and Marketing Cloud have joined forces to help you build customer relationships using valuable messaging and marketing consent tools. Your B2B or D2C Commerce store not only generates customer and order data, it also generates events, like when a new order is placed or a shopping cart is abandoned. Events trigger out-of-the-box flows that send messages using Marketing Cloud services, which are powered by Data Cloud. For example, use the abandoned cart email to remind customers about items in their shopping cart and encourage them to make a purchase. Add the repeater component in the order confirmation email template to include order line items and shipping groups in the email body. In the Commerce app, you can also create consent messages to capture customer emails and engage with customers via marketing campaigns and promotions.

Capture Customer Emails for Marketing Campaigns with Marketing Consents
Use Marketing Cloud, Commerce Cloud, and Data Cloud services to create and manage marketing consents so you can capture customer email addresses for multi-channel marketing and engagement. Create consents for different purposes, such as product newsletters or marketing promotions. By adding the Marketing Consent Settings and Email Sign Up Form components to your store in Experience Builder, you can control where consents appear to customers.

Recover Lost Sales with Abandoned Cart Emails
Use the abandoned cart email to remind customers about the items still in their cart. The email includes a link to the cart, which increases the chance of completing the purchase.

Provide Customers with Full Order Details in the Order Confirmation Email
The default order confirmation email template now includes order line items and shipping groups. For preexisting stores, use the Repeater component in Email Builder to add order line items and shipping groups to the order confirmation email.

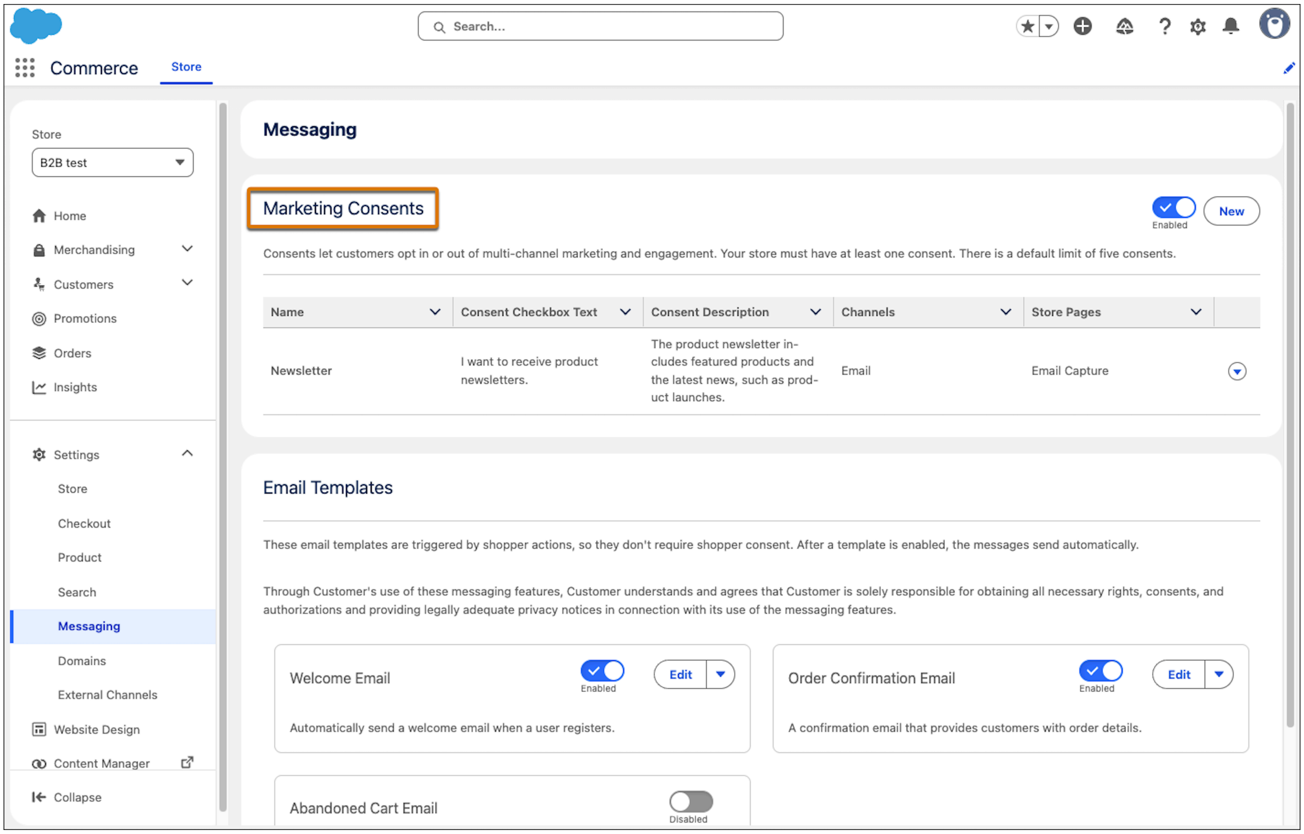
Capture Customer Emails for Marketing Campaigns with Marketing Consents

Use Marketing Cloud, Commerce Cloud, and Data Cloud services to create and manage marketing consents so you can capture customer email addresses for multi-channel marketing and engagement. Create consents for different purposes, such as product newsletters or marketing promotions. By adding the Marketing Consent Settings and Email Sign Up Form components to your store in Experience Builder, you can control where consents appear to customers.

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

Who: To access the Messaging Workspace and enable Marketing Consents, you need the `CommerceMessagingAddOn` license, the refreshed Commerce app, Marketing Cloud, and Data Cloud.

How: Add the Marketing Consent Settings and Email Sign Up Form components to your store in Experience Builder. In your store settings, go to Messaging and in the Messaging Consents section, create consents and enable them.



See Also

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

Add a Marketing Consent Option to My Profile Page

Capture Subscriptions and Marketing Consents with the Email Sign Up Form Component

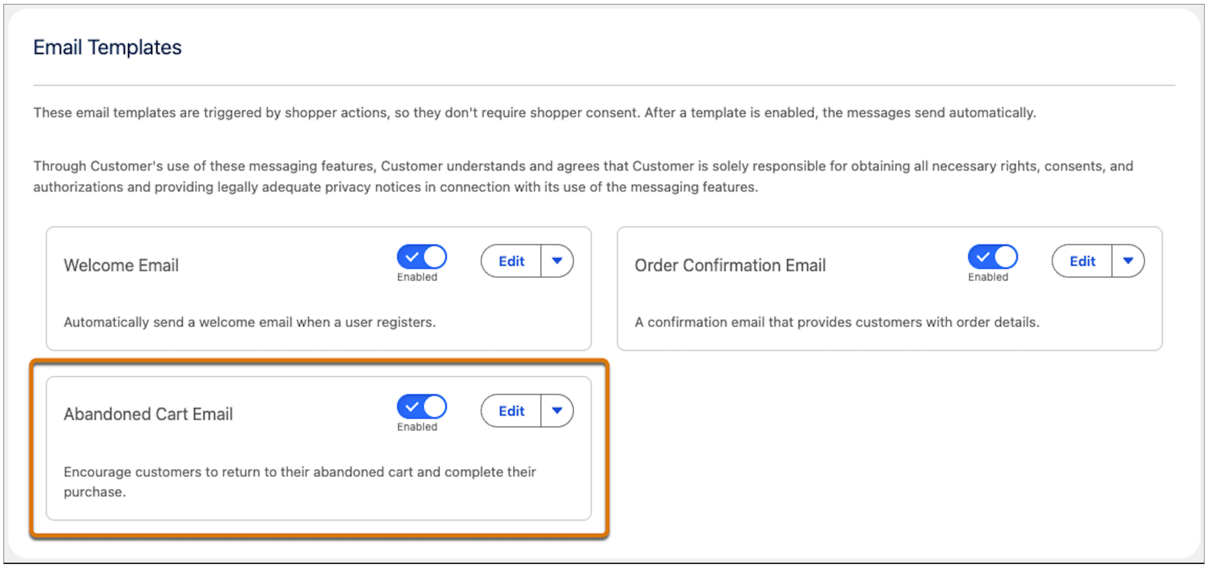
Recover Lost Sales with Abandoned Cart Emails

Use the abandoned cart email to remind customers about the items still in their cart. The email includes a link to the cart, which increases the chance of completing the purchase.

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

Who: To access the Messaging Workspace and enable the Abandoned Cart Email, you need the `CommerceMessagingAddOn` license, the refreshed Commerce app, the Commerce Admin permission set, Marketing Cloud, and Data Cloud.

How: In your store settings, go to Messaging. From the Abandoned Cart Email tile, edit and customize the template in Email Builder. Enable the email to start the sending of messages.



See Also

Salesforce Help: Manage Customer Notifications with Commerce Messaging (can be outdated or unavailable during release preview)

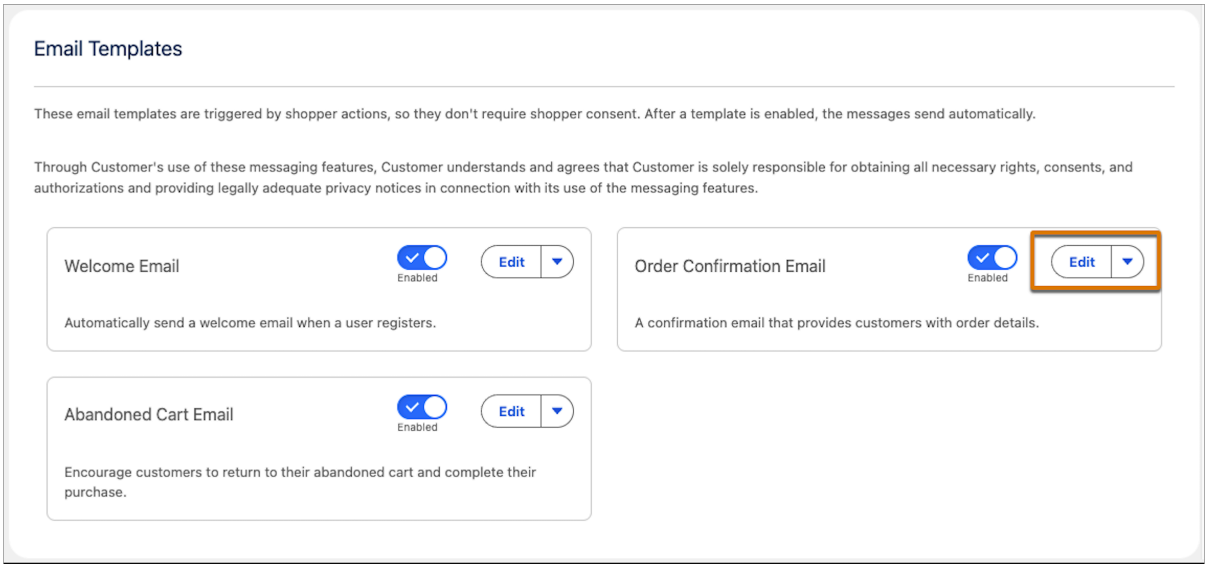
Provide Customers with Full Order Details in the Order Confirmation Email

The default order confirmation email template now includes order line items and shipping groups. For preexisting stores, use the Repeater component in Email Builder to add order line items and shipping groups to the order confirmation email.

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

Who: To access the Messaging Workspace, you need the `CommerceMessagingAddOn` license, the refreshed Commerce app, the Commerce Admin permission set, Marketing Cloud, and Data Cloud.

How: In your store settings, go to Messaging. From the Order Confirmation Email tile, edit the template in Email Builder and add the Repeater component.



See Also

Salesforce Help: Work with Repeater Components (can be outdated or unavailable during release preview)

Create Customized Content More Efficiently

Salesforce Help: Manage Customer Notifications with Commerce Messaging (can be outdated or unavailable during release preview)

Cart, Checkout, and Shipping

Personalize your customers' shopping experience with gifting options, and enhance checkout performance with a streamlined design. Display personalized product recommendations right in the mini cart, and add express checkout for faster purchases. Flag digital products and simplify the shipping process to make it easier for your customers to complete their transactions.

Personalize Your Customers' Shopping Experience with Gifting

Include a gift option at checkout to personalize the delivery experience. Provide options for your shoppers to mark their orders as gifts, add personal messages, and gift wrap to personalize their orders during checkout. Enhance their shopping experience and make every purchase special.

Place Orders Efficiently with Streamlined Design

Now, all transactions in new LWR stores benefit from improved performance and reduced potential for orphaned payments. Plus, the simplified design makes it easy to scale to meet your growing business needs.

Show Personalized Product Recommendations in the Mini Cart

Provide a more personalized shopping experience by adding a “You May Also Like” section to the mini cart for desktop and mobile shopping. The mini cart uses Product Recommendations API to suggest complementary products based on customer purchase frequency and browsing behavior. Shoppers can go to the product page of recommended items or add them to their wishlist. By default, product recommendations in the mini cart match the product recommendations shown on the cart page unless you change settings in one area or the other.

Add Express Checkout in the Mini Cart for Faster Purchases

Make it easier for shoppers to complete their purchase by adding express checkout to the mini cart. Shoppers can use PayPal, Venmo, Apple Pay, Amazon Pay, Google Pay, or Link to easily check out, reducing cart abandonment and increasing conversion rates.

Enjoy Effortless Shipping with Digital Product Handling

Simplify your shipping process by excluding digital products from shipping calculations. Automatically separate digital and physical orders at checkout, grouping digital items together. Provide customers with instant access to their digital products, enhancing their shopping experience.

Handle Split Payments with Custom Checkout

Give your customers more payment flexibility with split payment support in custom checkout. With this feature, customers can use multiple credit cards to complete a purchase.

Customize Shipping Rates and Processing Times with Shipping Profiles

Offer your customers flexible shipping options by creating custom shipping profiles. With custom shipping profiles, you can configure shipping rates and processing times to match the specific needs of each product in your store.

Provide Faster Actions on Cart and Checkout Pages

Updated APIs on the Cart, Checkout, and Split Shipping pages now support synchronous operations. Customers experience faster and more responsive cart and checkout processes, with improved page load times and reduced delays. With these changes, customers can add to and edit the cart, open the mini cart, apply and remove coupons, and check out faster.

Display Errors and Inventory Checks Clearly on the Checkout Page

A new user experience for fatal errors on the Checkout page reduces customer confusion and, if necessary, provides a clear direction back to the Cart page for resolution. Customers now see a clear error window over the Checkout page. However, they can't change any order information until the error is fixed. Previously, customers encountered a blank Checkout page with a header-level error. To reduce friction at checkout, the new error experience also verifies that inventory is available when a customer adds or edits the quantity of a cart item. This new error experience doesn't replace inline error handling for issues that customers can fix on the Checkout page. If you already have a store, you get the new error user experience after publishing, but the updated inventory checks are available only for new stores.

Streamline Tax Management in Your Commerce Store

Experience a consistent and streamlined approach to tax management for products in your Commerce store. If you're using Stripe as your tax provider, select the tax category for your store. All related records (including tax policy, tax treatment, and tax engine) are automatically created if necessary, and mapped to the store. Additionally, the Stripe tax provider configuration now includes an option to map a tax policy directly to your store, making the tax policy selection available across all tax providers.

Quickly and Accurately Calculate Taxes on Shipping

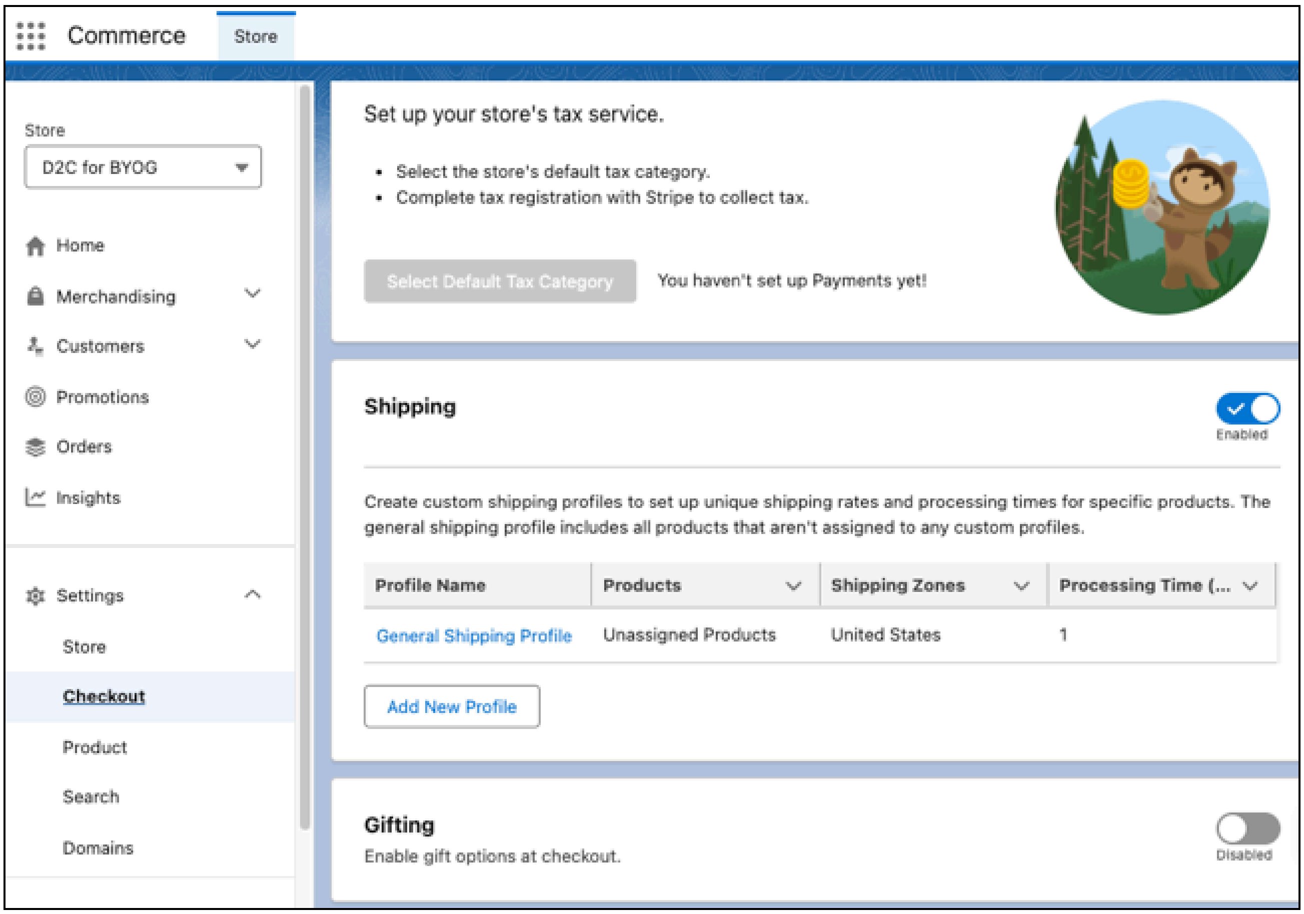
If you opted for the Native Tax Solution, the taxes on the shipping cost of products are calculated based on the product's tax code and the shipping address. This tax amount is then added to the cart total. With this enhancement, you're no longer required to manually add the tax amount on shipping to the invoice after the invoice is created. This greatly speeds up and simplifies the invoice creation process.

Personalize Your Customers' Shopping Experience with Gifting

Include a gift option at checkout to personalize the delivery experience. Provide options for your shoppers to mark their orders as gifts, add personal messages, and gift wrap to personalize their orders during checkout. Enhance their shopping experience and make every purchase special.

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

How: In your store settings, go to **Checkout** and turn on **Gifting**. For stores created before Summer ’25, go to Experience Builder, delete the existing checkout component, and drag the new version of the component onto the page. Publish your store to enable Gifting in the checkout.



See Also

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

Place Orders Efficiently with Streamlined Design

Now, all transactions in new LWR stores benefit from improved performance and reduced potential for orphaned payments. Plus, the simplified design makes it easy to scale to meet your growing business needs.

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

How: Streamlined place order is enabled by default for new LWR stores. The enhanced design consolidates order placement API calls and processes payments asynchronously.

See Also

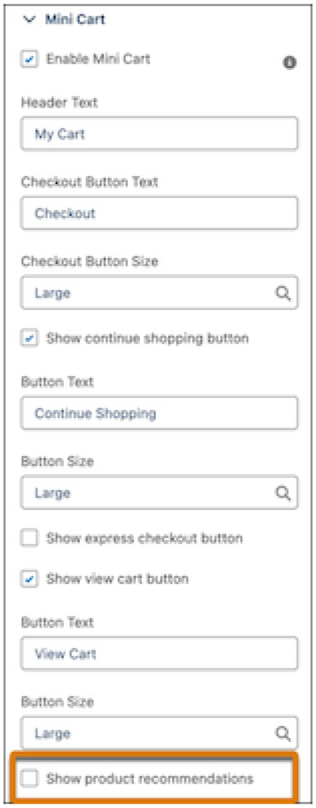
B2B Commerce and D2C Commerce Developer Guide: Streamlined Place Order (can be outdated or unavailable during release preview)

Show Personalized Product Recommendations in the Mini Cart

Provide a more personalized shopping experience by adding a “You May Also Like” section to the mini cart for desktop and mobile shopping. The mini cart uses Product Recommendations API to suggest complementary products based on customer purchase frequency and browsing behavior. Shoppers can go to the product page of recommended items or add them to their wishlist. By default, product recommendations in the mini cart match the product recommendations shown on the cart page unless you change settings in one area or the other.

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

How: To show product recommendations in the cart or mini cart, turn on Commerce Einstein. In Experience Builder, select **Show product recommendations** under the Mini Cart settings of the Cart Badge component. If you already have a store, drag the new version of the Cart Badge component onto your page to pull in the recommendations data.



See Also

Salesforce Help: Enable Cart Preview and Checkout from the Cart Icon in a Commerce Store (can be outdated or unavailable during release preview)

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

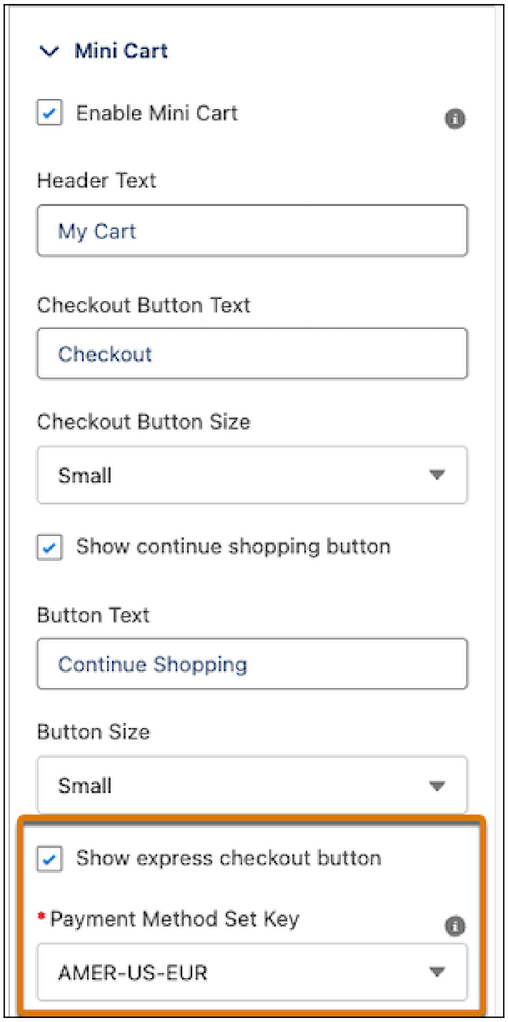
Salesforce Help: Commerce Einstein (can be outdated or unavailable during release preview)

Add Express Checkout in the Mini Cart for Faster Purchases

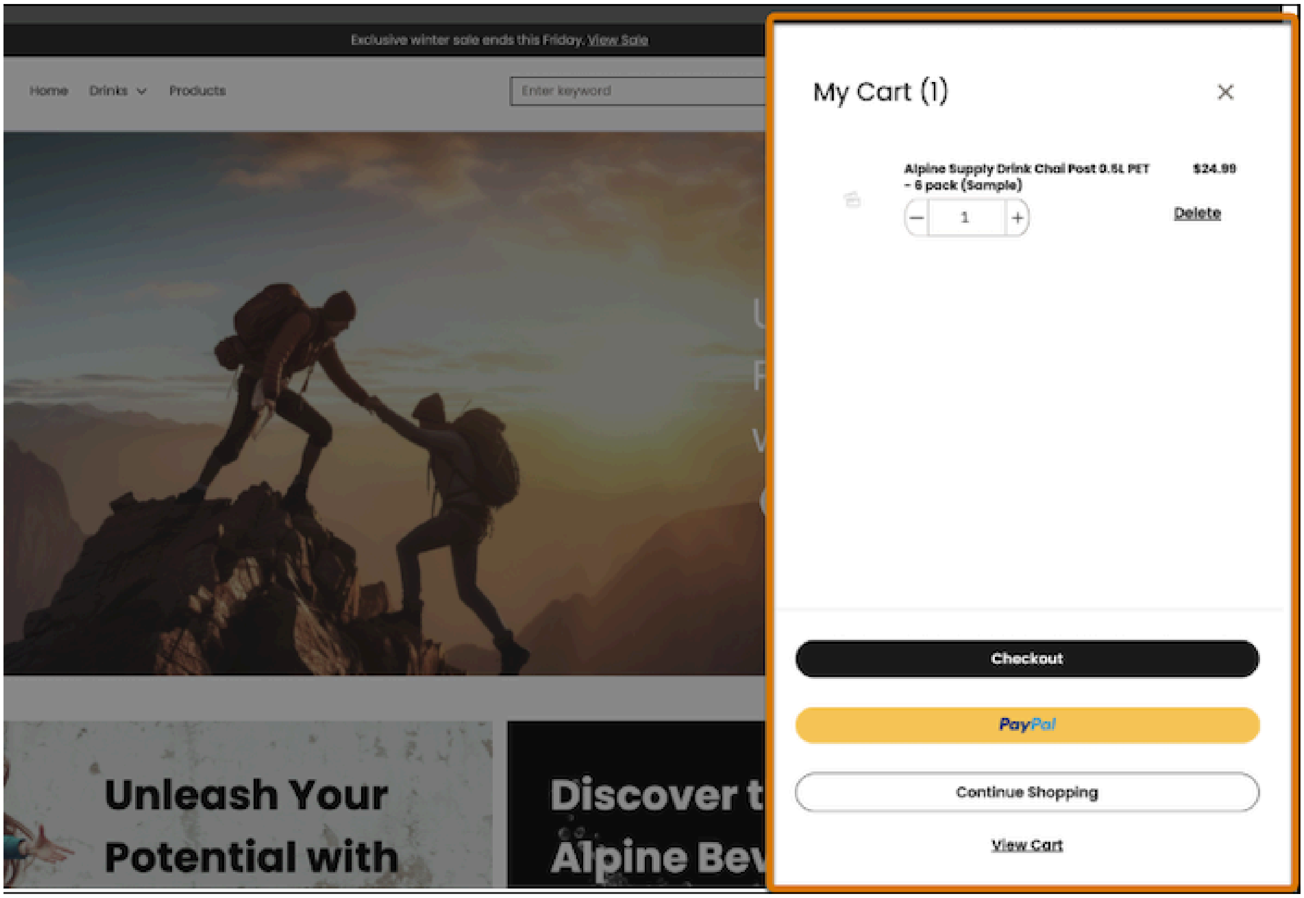
Make it easier for shoppers to complete their purchase by adding express checkout to the mini cart. Shoppers can use PayPal, Venmo, Apple Pay, Amazon Pay, Google Pay, or Link to easily check out, reducing cart abandonment and increasing conversion rates.

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

How: Go to the store’s home page in Experience Builder, and enable express checkout in the Cart Badge component properties.



Customers see the first eligible express checkout option in the mini cart, based on the order in the payment method set that you specify in the cart badge component. If no express payment qualifies, none is shown.



See Also

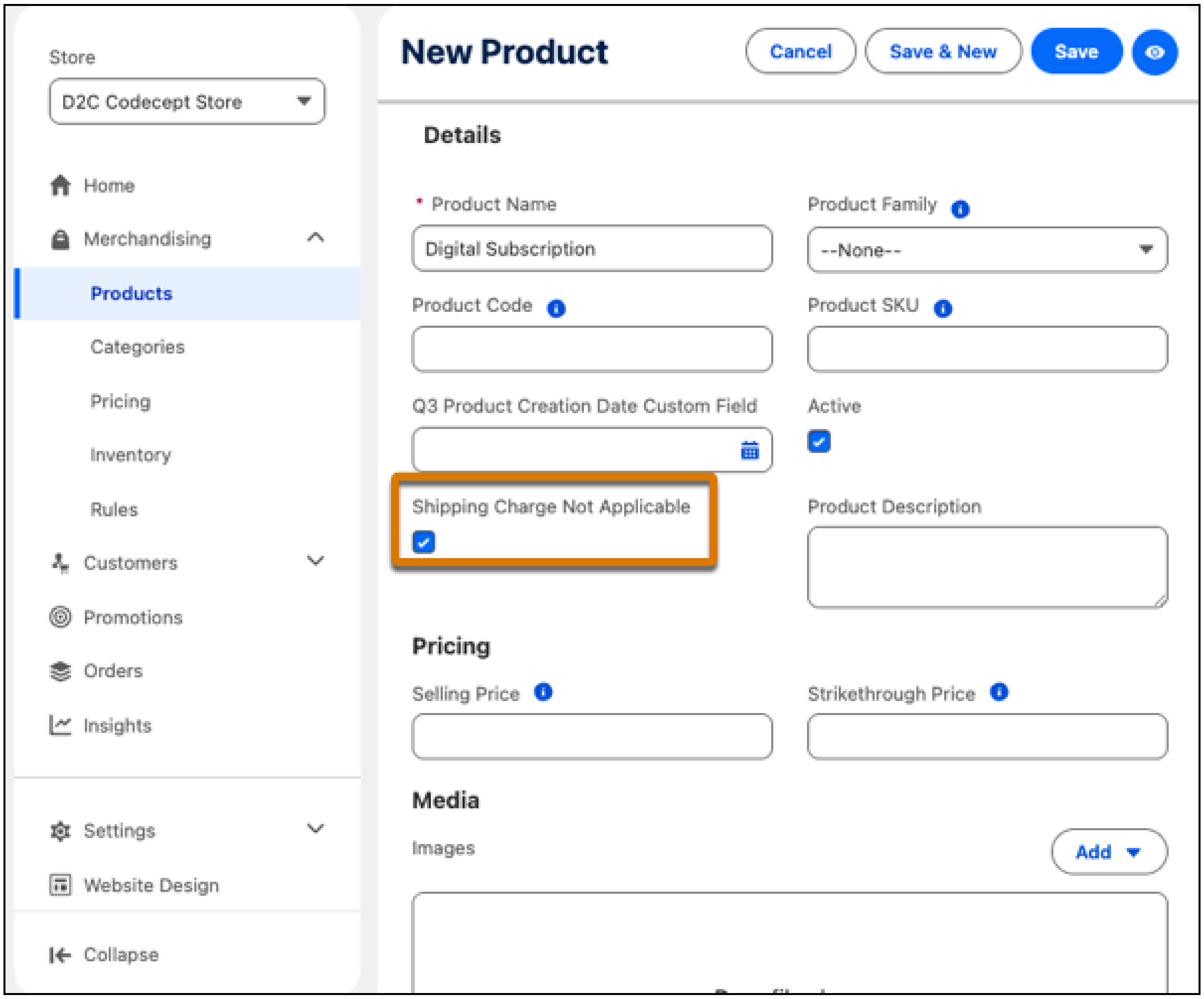
Salesforce Help: Enable Cart Preview and Checkout from the Cart Icon in a Commerce Store (can be outdated or unavailable during release preview)

Enjoy Effortless Shipping with Digital Product Handling

Simplify your shipping process by excluding digital products from shipping calculations. Automatically separate digital and physical orders at checkout, grouping digital items together. Provide customers with instant access to their digital products, enhancing their shopping experience.

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

How: Contact your Salesforce Admin to enable Shipping Charge Not Applicable in the product settings and add it to the Commerce Product Layout in Object Manager. After this feature is enabled, you can see the Shipping Charge Not Applicable field on your product page. Go to the store. In the Product Workspace, select **Shipping Charge Not Applicable** for digital products.



See Also

Salesforce Help: Manage Shipping Zones and Rates for a B2B or D2C Store (can be outdated or unavailable during release preview)

Handle Split Payments with Custom Checkout

Give your customers more payment flexibility with split payment support in custom checkout. With this feature, customers can use multiple credit cards to complete a purchase.

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

How: Use Checkout APIs to set up split payment support. Your store must have streamlined place order, high-scale orders, and Cart Calculate API enabled.

See Also

B2B Commerce and D2C Commerce Developer Guide: Split Payments for Custom Checkout (can be outdated or unavailable during release preview)

Salesforce Help: Customize the Payment Section of Checkout in a Commerce Store (can be outdated or unavailable during release preview)

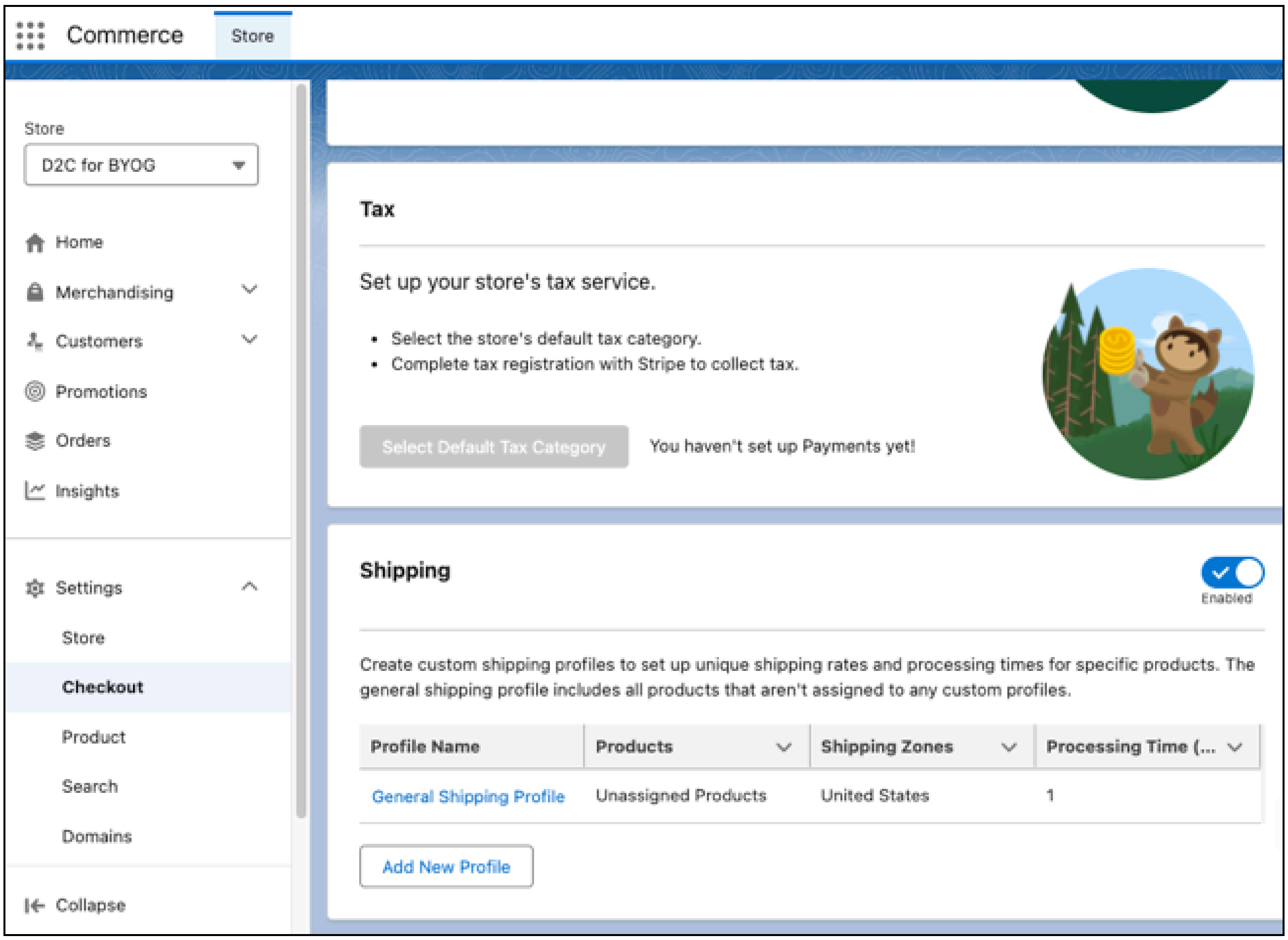
Place Orders Efficiently with Streamlined Design

Customize Shipping Rates and Processing Times with Shipping Profiles

Offer your customers flexible shipping options by creating custom shipping profiles. With custom shipping profiles, you can configure shipping rates and processing times to match the specific needs of each product in your store.

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

How: To add multiple custom shipping profiles, go to your store's **Checkout** (1) settings and select **Shipping** (2). Click **Add New Profile** (3).



See Also

Salesforce Help: Create Multiple Shipping Profiles for Commerce Store (can be outdated or unavailable during release preview)

Provide Faster Actions on Cart and Checkout Pages

Updated APIs on the Cart, Checkout, and Split Shipping pages now support synchronous operations.

Customers experience faster and more responsive cart and checkout processes, with improved page load times and reduced delays. With these changes, customers can add to and edit the cart, open the mini cart, apply and remove coupons, and check out faster.

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

See Also

B2B Commerce and D2C Commerce Developer Guide: Storefront APIs (can be outdated or unavailable during release preview)

Display Errors and Inventory Checks Clearly on the Checkout Page

A new user experience for fatal errors on the Checkout page reduces customer confusion and, if necessary, provides a clear direction back to the Cart page for resolution. Customers now see a clear error window over the Checkout page. However, they can't change any order information until the error is fixed. Previously, customers encountered a blank Checkout page with a header-level error. To reduce friction at checkout, the new error experience also verifies that inventory is available when a customer adds or edits the quantity of a cart item. This new error experience doesn't replace inline error handling for issues that customers can fix on the Checkout page. If you already have a store, you get the new error user experience after publishing, but the updated inventory checks are available only for new stores.

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

See Also

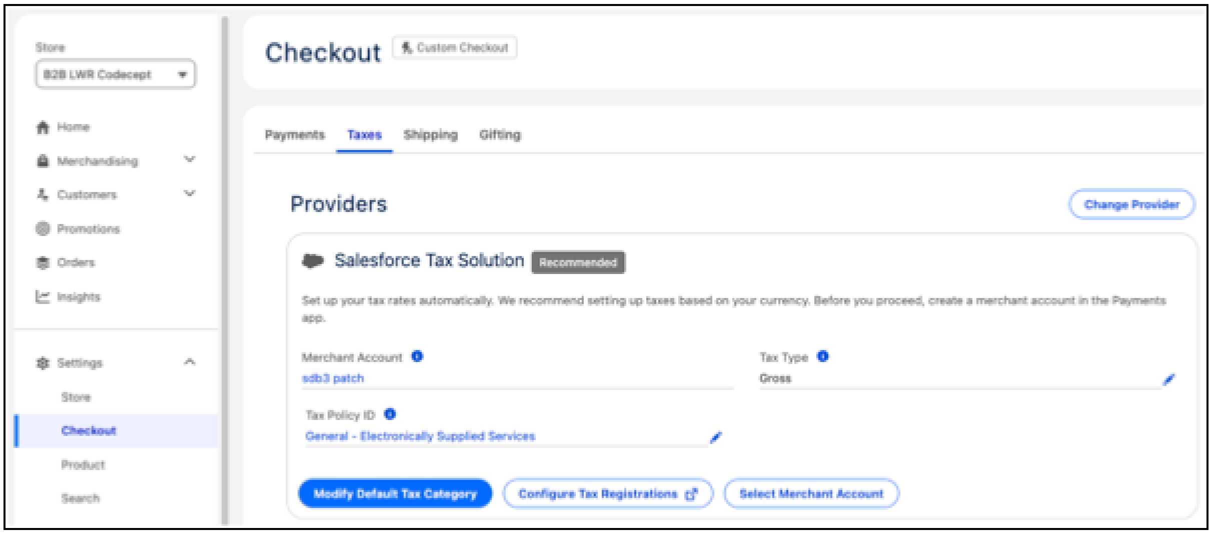
Salesforce Help: Website Design for the Checkout Page in a Commerce Store (can be outdated or unavailable during release preview)

Streamline Tax Management in Your Commerce Store

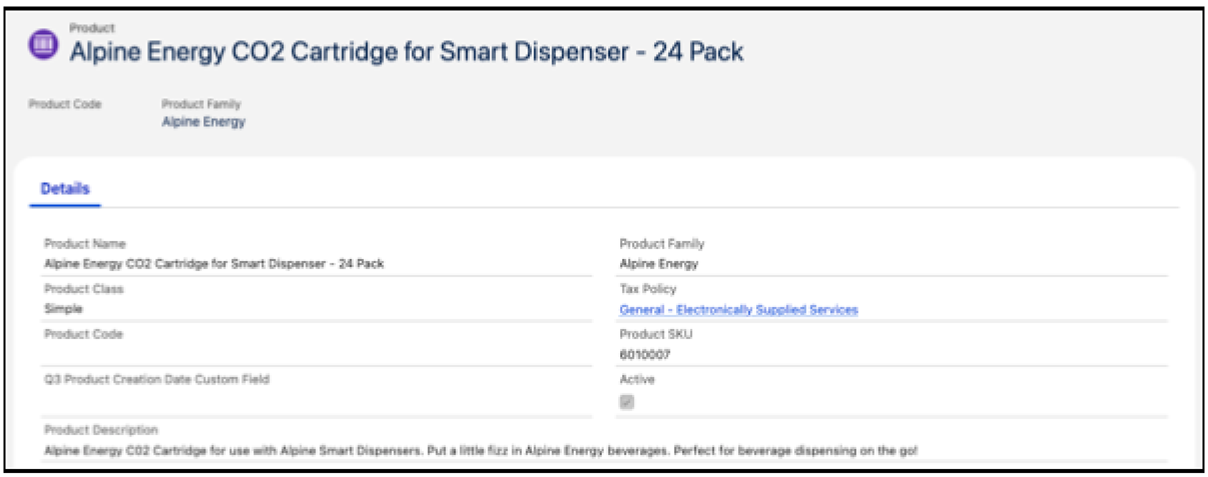
Experience a consistent and streamlined approach to tax management for products in your Commerce store. If you're using Stripe as your tax provider, select the tax category for your store. All related records (including tax policy, tax treatment, and tax engine) are automatically created if necessary, and mapped to the store. Additionally, the Stripe tax provider configuration now includes an option to map a tax policy directly to your store, making the tax policy selection available across all tax providers.

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

How: First, select a default tax category for your store. The Tax Policy ID field is automatically populated based on your default tax category.



When you set up a product in your store, specify the tax policy for the product. This determines how taxes are calculated at the time of checkout.



See Also

Salesforce Help: Select Salesforce Tax Solution and Set Up a Tax Provider for Custom Checkout (can be outdated or unavailable during release preview)

Salesforce Help: Configure Checkout to Support Subscriptions for Commerce Stores (can be outdated or unavailable during release preview)

Quickly and Accurately Calculate Taxes on Shipping

If you opted for the Native Tax Solution, the taxes on the shipping cost of products are calculated based on the product's tax code and the shipping address. This tax amount is then added to the cart total. With this enhancement, you're no longer required to manually add the tax amount on shipping to the invoice after the invoice is created. This greatly speeds up and simplifies the invoice creation process.

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

How: No additional setup is required for this feature to work. The default tax policy set for the store applies to all products in the store.

See Also

Salesforce Help: Manual Salesforce Tax Solution for Custom Checkout (can be outdated or unavailable during release preview)

Salesforce Help: Configure Tax Rates and Treatments with the Manual Salesforce Tax Solution (can be outdated or unavailable during release preview)

Commerce Components

Enhance customer control with the Marketing Consent Settings component, allowing shoppers to select their preferred marketing communications, such as newsletters or product updates, directly from their profile page. The Email Sign-Up Form component capture shopper emails and presents up to five configurable marketing consent options, managed in the Commerce App. Simplify compliance with the Cookie Consent component so shoppers can accept or reject cookies and view links to a custom policy page for detailed information on your privacy practices.

Add a Marketing Consent Option to My Profile Page
Provide your shoppers with options so they can choose the type of marketing communications they want to receive. You can do this by adding the Marketing Consent Settings component. Show a list of consent options, such as newsletters and product updates, configured in the Messaging workspace.

Capture Subscriptions and Marketing Consents with the Email Sign Up Form Component
The Email Sign-Up Form component now makes it easy to collect a shopper's email address and present subscription or marketing consent options. You can show up to five configurable marketing consents, and shoppers can provide or withhold consent for each. These consent options are managed directly in the Commerce App.

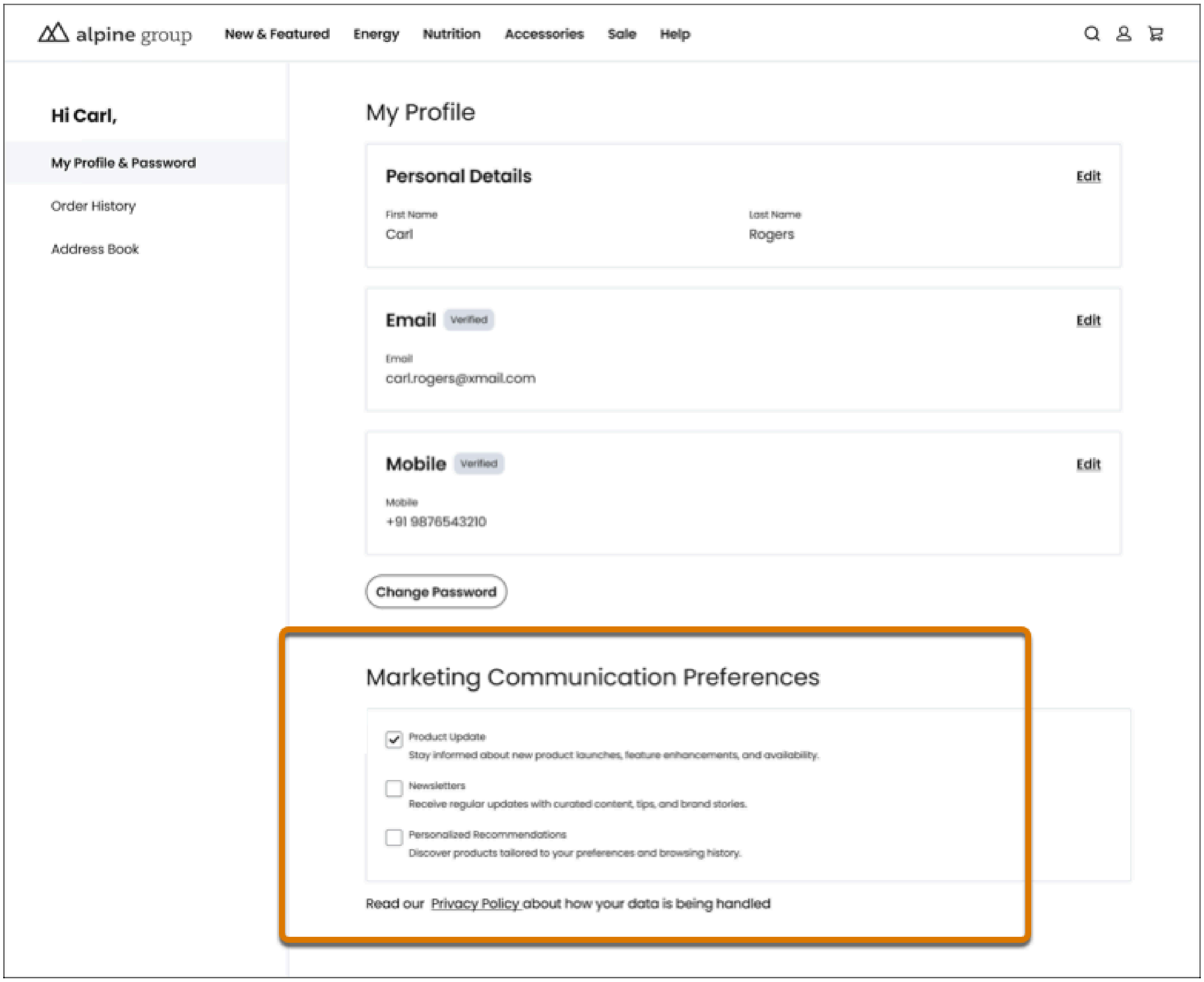
Simplify Compliance with the Cookie Consent Component
Use the Cookie Consent component to request shopper consent for cookies on your storefront. Shoppers can choose to accept or reject cookies, helping you stay in compliance with privacy regulations. You can also link to a custom policy page that explains your cookie and privacy policies in detail.

Add a Marketing Consent Option to My Profile Page

Provide your shoppers with options so they can choose the type of marketing communications they want to receive. You can do this by adding the Marketing Consent Settings component. Show a list of consent options, such as newsletters and product updates, configured in the Messaging workspace.

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

How: In Experience Builder, drag the **Marketing Consent Settings** component onto My Profile page. The component shows the marketing consents configured in the Messaging Workspace so shoppers can review and select the communications they'd like to receive. If no marketing consents are configured, the component remains hidden, even if it's added to the page.



See Also

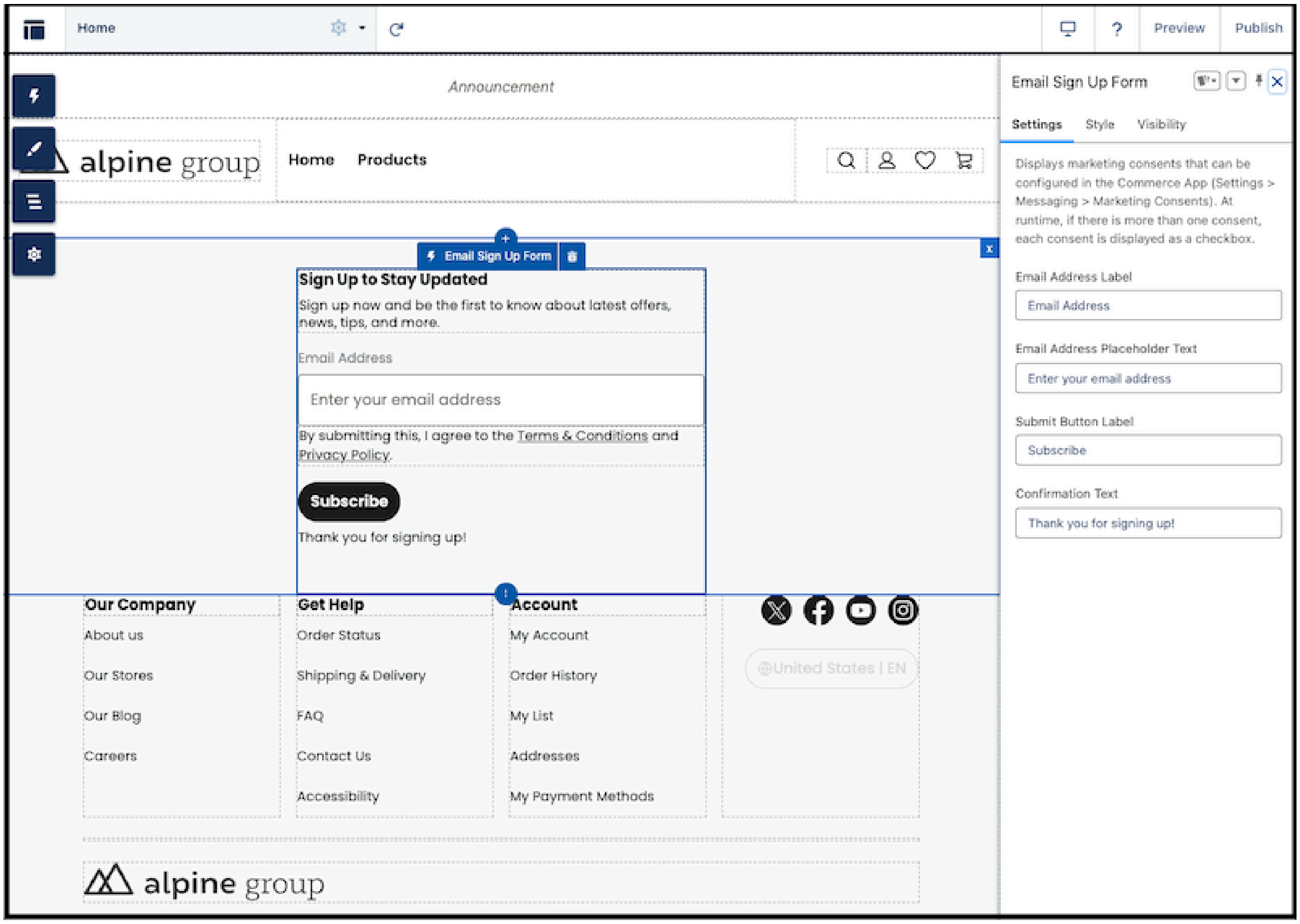
Capture Customer Emails for Marketing Campaigns with Marketing Consents

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

Capture Subscriptions and Marketing Consents with the Email Sign Up Form Component

The Email Sign-Up Form component now makes it easy to collect a shopper's email address and present subscription or marketing consent options. You can show up to five configurable marketing consents, and shoppers can provide or withhold consent for each. These consent options are managed directly in the Commerce App.

How: In Experience Builder, select any page that uses the Commerce Layout, and click the Email Sign Up Form component.



See Also

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

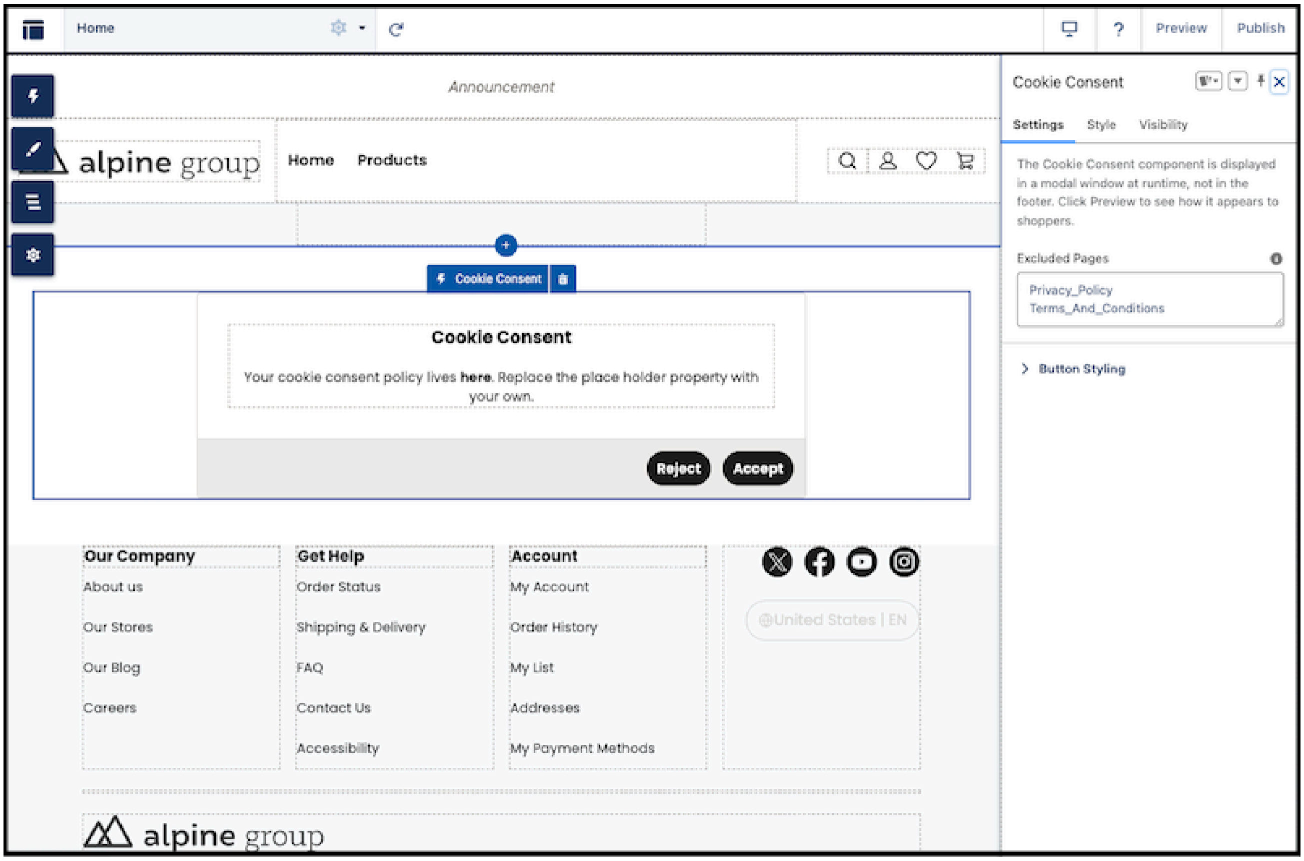
Capture Customer Emails for Marketing Campaigns with Marketing Consents

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

Simplify Compliance with the Cookie Consent Component

Use the Cookie Consent component to request shopper consent for cookies on your storefront. Shoppers can choose to accept or reject cookies, helping you stay in compliance with privacy regulations. You can also link to a custom policy page that explains your cookie and privacy policies in detail.

How: In Experience Builder, go to any page that uses the Commerce Layout, and click the Cookie Consent component.



See Also

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

Commerce Promotions

Diversify your promotion strategy by offering a bonus or gift product at no additional cost with qualifying purchases. Additionally, create promotional messages that notify customers when their cart value is close to reaching a discount threshold.

Create Upsell Opportunities with an Approaching Discount Message
Inform shoppers their cart is approaching a discount with promotional messaging in your B2B or D2C store. With approaching discount alerts, you can increase sales across your store and create upsell opportunities. Apply approaching discount alerts to promotions that target shipping, shipping rates, or transactions.

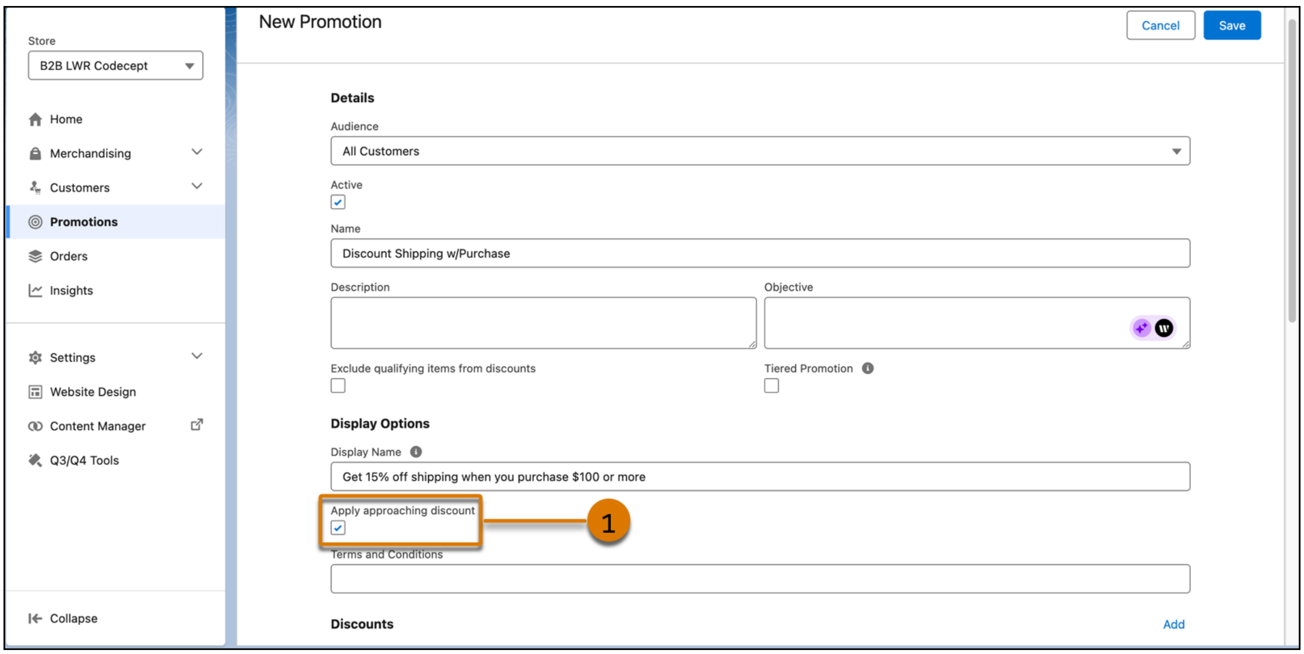
Entice Customers with Promotions That Offer a Bonus Product
Attract more customers and increase cart values by offering a bonus product promotion in your B2B or D2C store. Bonus product promotions automatically add a designated gift product at no additional cost if the cart contents meet specific criteria. Previously, bonus product promotions were applied only if the target item receiving the discount was in the cart.

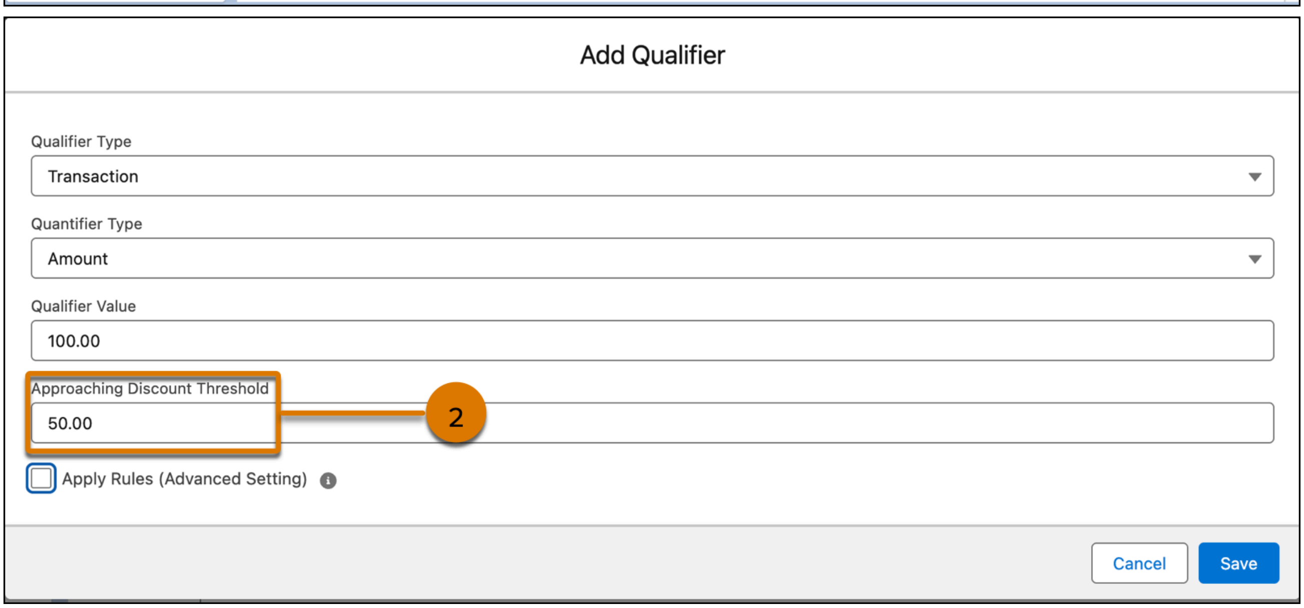
Create Upsell Opportunities with an Approaching Discount Message

Inform shoppers their cart is approaching a discount with promotional messaging in your B2B or D2C store. With approaching discount alerts, you can increase sales across your store and create upsell opportunities. Apply approaching discount alerts to promotions that target shipping, shipping rates, or transactions.

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

How: Create a promotion and select **Apply approaching discount** (1). Add a qualifier and set a threshold value (2) for when you want the message to be shown to customers. Only the total transaction can act as a qualifier for promotions with approaching discount alerts. For example, if the minimum qualifier for a promotion is $100 in the cart and you set a threshold value of 50, shoppers will see a message that their cart is approaching a discount if they have spent $50. In Experience Builder, for new stores, the Approaching Discount component is included on the Cart page. Add it manually to any other page.





See Also

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

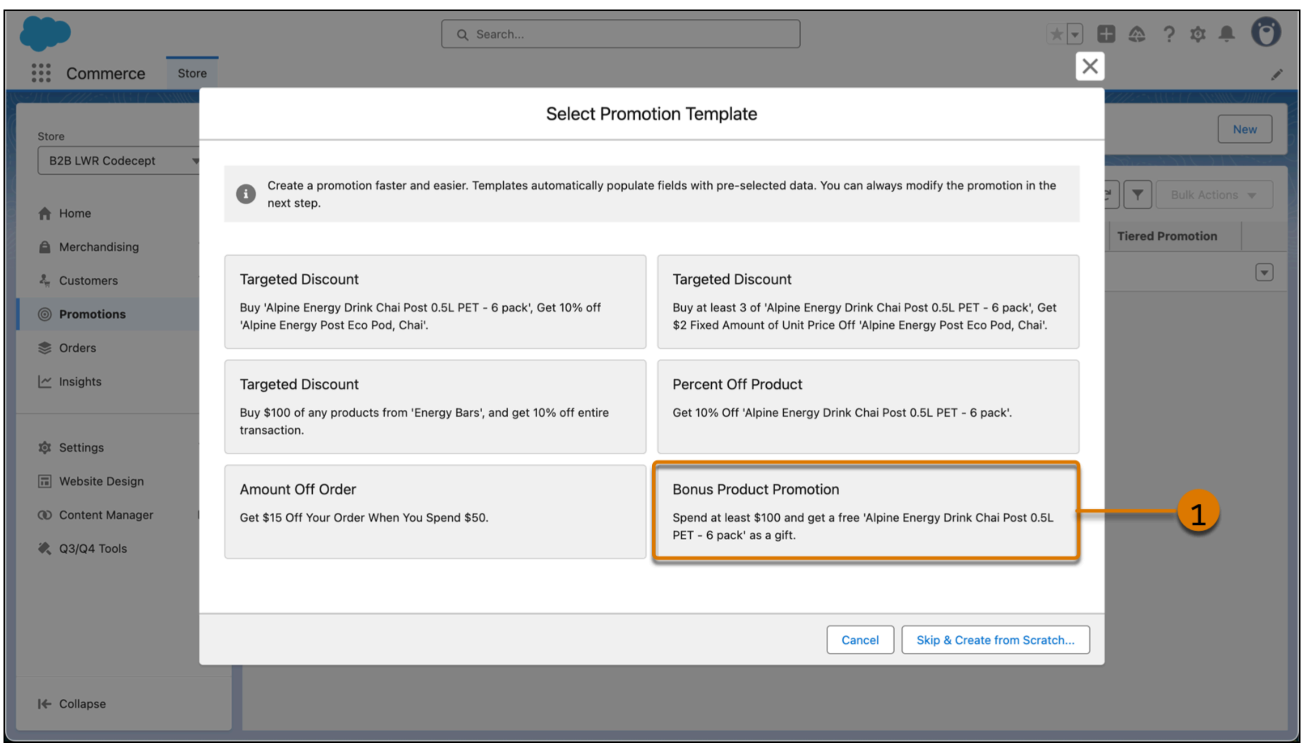
Salesforce Help: Choose What Qualifies for a Promotion for a B2B or D2C Store from Within the Guided Workflow (can be outdated or unavailable during release preview)

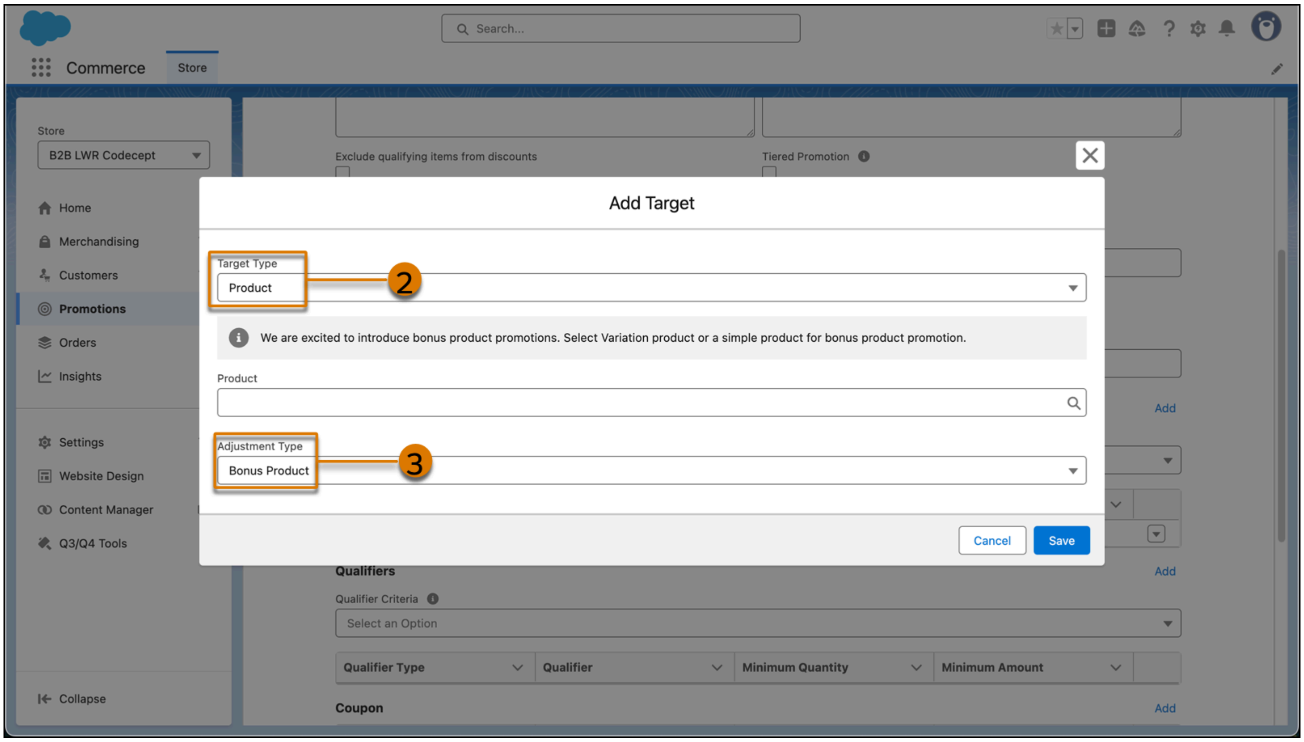
Entice Customers with Promotions That Offer a Bonus Product

Attract more customers and increase cart values by offering a bonus product promotion in your B2B or D2C store. Bonus product promotions automatically add a designated gift product at no additional cost if the cart contents meet specific criteria. Previously, bonus product promotions were applied only if the target item receiving the discount was in the cart.

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

How: In the Promotion Workspace, select the Bonus Product Promotion template (1) for a quick start, or create a promotion from scratch. If you create a promotion from scratch, add a discount target and select Product (2) for Target Type and Bonus Product (3) for Adjustment Type. The target bonus product can be a single variation or a simple product and can be a purchasable or non-purchasable product. If you have an existing store, publish it to see changes for items designated as bonus products. If you don't publish your store, bonus products behave like regular cart items.





See Also

Salesforce Help: Define a Discount for a B2B or D2C Store from Within the Guided Worfklow (can be outdated or unavailable during release preview)

Salesforce Help: Edit a Promotion Discount for a B2B or D2C Store (can be outdated or unavailable during release preview)

Commerce Search

Enable product preview for D2C stores, group searched products by attributes such as size or color, and improve the order of search facets. Additionally, use price filter ranges and sort results based on guest shopper prices.

Provide Product Previews in Search Suggestions

Improve shoppers' search experience by showing product previews. For example, typing a search keyword such as "drinks" suggests relevant categories and specific products, such as "Gatorade Sports Drink," along with their images. Even when a shopper hasn't entered any search term, you can still optionally show a list of bestselling products from a category. This feature is compatible with D2C header components, including Mega Menu and Header-Split spacing.

Refine Your Shopper's Experience with a Price Range Filter

Help shoppers find products within their budget by setting a price range filter to refine search results on the Product List Page in your D2C store. This feature uses guest user prices, which are visible to users who aren't logged in, and supports multiple currencies for markets, not individual stores. Verify that guest browsing is enabled and manage indexing to keep prices up to date.

Group Products by Attributes on the Product Listing Page

Control how the Product Listing Page shows products by grouping products based on attributes, such as color or size. For example, you can group all the red shirts together or show all the size 10 shoes in one product card. This feature overrides the "Show parent only" and "Show best match only" options in the Product Variation Display Settings. It also requires a full index update whenever you make changes.

Enhance User Experience with Better Search Relevancy
Improve user experience with advanced search optimizations that better match unique terms such as brand names and refine ranking based on product relevance and attributes. These enhancements deliver more accurate and satisfying search results, tailored to each catalog entry.

Sort Search Results Using Guest Shopper Prices
With guest browsing enabled, you can now sort search results in D2C stores by using the prices shown to nonmembers or logged-out users. You can also sort search results by using a specific price book. If no price book is selected, the system defaults to using guest shopper prices for sorting. Products without a price are always listed last.

Influence Product Positioning with Boost and Bury Rules
Use boost and bury rules to show relevant products to your customers in search results and category pages. This can reduce store abandonment and increase conversion rates. Apply rules by search keyword, product category, or globally across the entire store.

Verify Merchandising Rule Behavior on the Preview Screen
Use the Preview screen to verify that merchandising rules are influencing how products show up in search results and category pages as expected.

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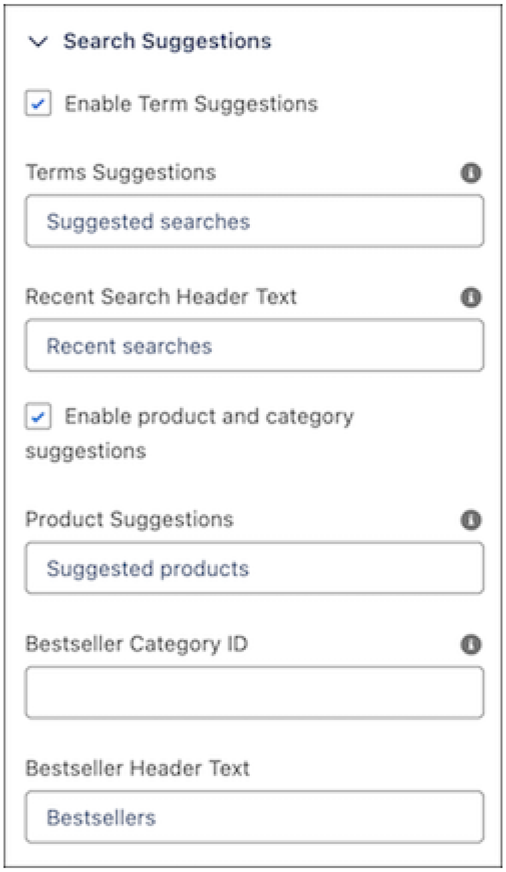
Where: This change applies to D2C Commerce in Enterprise, Unlimited, and Developer editions.

How: In your store's Settings, select **Search**. Select the Search Index tab to perform a full index update. In the Experience Builder search input component, select **Enable product and category suggestions** and configure the display of your product previews in search suggestions.



See Also

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

Salesforce Help: Create Product Categories and Subcategories in a Commerce Store (can be outdated or unavailable during release preview)

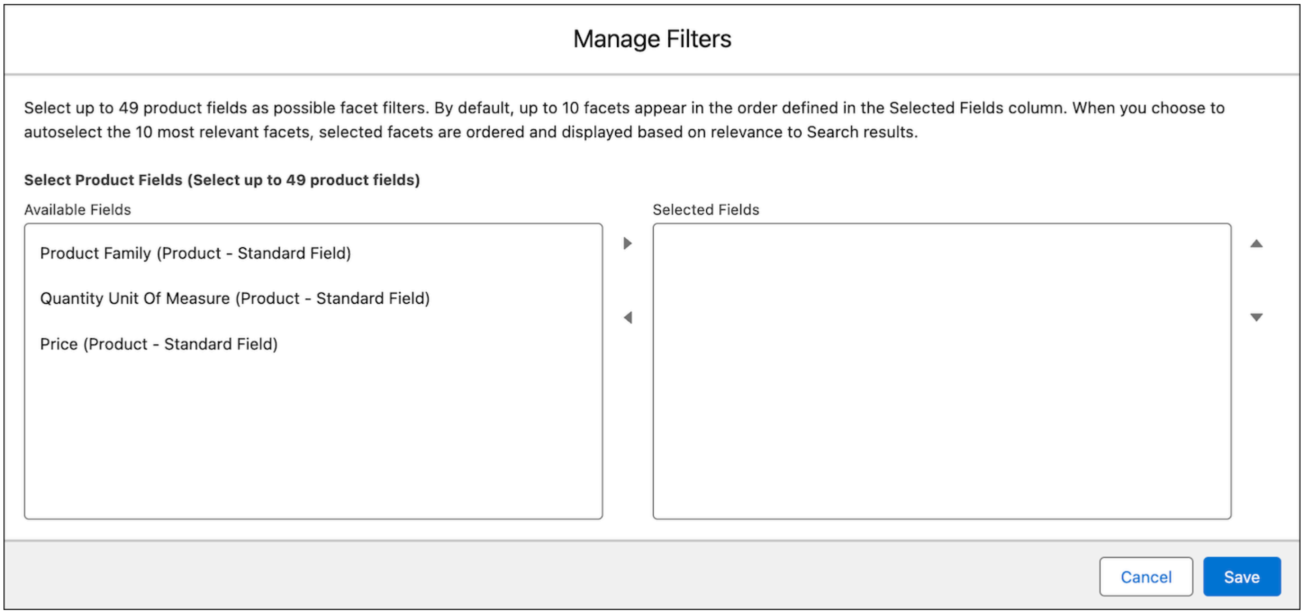
Salesforce Help: Update the Commerce Search Index (can be outdated or unavailable during release preview)

Refine Your Shopper's Experience with a Price Range Filter

Help shoppers find products within their budget by setting a price range filter to refine search results on the Product List Page in your D2C store. This feature uses guest user prices, which are visible to users who aren't logged in, and supports multiple currencies for markets, not individual stores. Verify that guest browsing is enabled and manage indexing to keep prices up to date.

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

How: In your store's Settings, select **Search**. Select the **Results Filters** tab, and click **Manage Filters**. Select **Price (Product - Standard Field)** from the list of available fields.



See Also

Salesforce Help: Manage Guest Access to a B2B or D2C Store (can be outdated or unavailable during release preview)

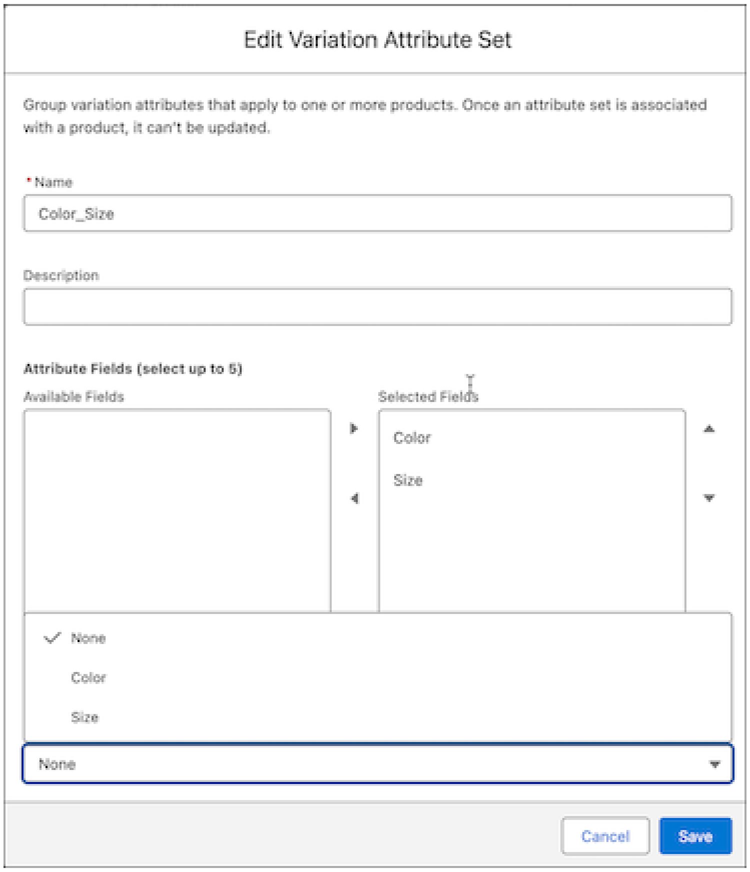
Salesforce Help: Update the Commerce Search Index (can be outdated or unavailable during release preview)

Group Products by Attributes on the Product Listing Page

Control how the Product Listing Page shows products by grouping products based on attributes, such as color or size. For example, you can group all the red shirts together or show all the size 10 shoes in one product card. This feature overrides the “Show parent only” and “Show best match only” options in the Product Variation Display Settings. It also requires a full index update whenever you make changes.

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

How: In your store’s Settings, select **Product**. Select the **Variation Attribute Sets** tab, and click **New**. Enter the information requested, and select which attribute you want to group by.



See Also

Salesforce Help: Configure How to Display Product Variation Search Results (can be outdated or unavailable during release preview)

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

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

Enhance User Experience with Better Search Relevancy

Improve user experience with advanced search optimizations that better match unique terms such as brand names and refine ranking based on product relevance and attributes. These enhancements deliver more accurate and satisfying search results, tailored to each catalog entry.

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

See Also

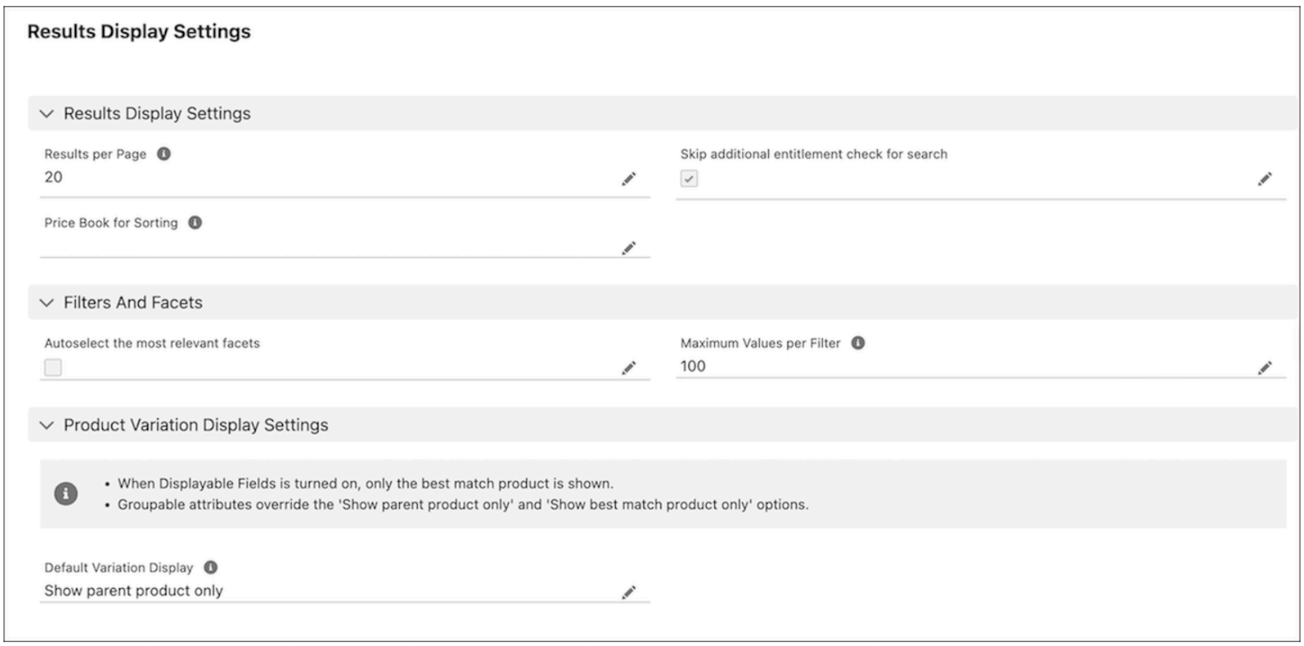
Salesforce Help: AI-Powered Search for Commerce (can be outdated or unavailable during release preview)

Sort Search Results Using Guest Shopper Prices

With guest browsing enabled, you can now sort search results in D2C stores by using the prices shown to nonmembers or logged-out users. You can also sort search results by using a specific price book. If no price book is selected, the system defaults to using guest shopper prices for sorting. Products without a price are always listed last.

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

How: In your store's Settings, select **Search**. Select the **Sort Rules** tab to create a price sort option. Select the **Results Display Settings** tab, enter a specific price book for sorting if you want to use it, or leave the field empty to use guest shopper prices.



See Also

Salesforce Help: Add a Sort Rule (can be outdated or unavailable during release preview)

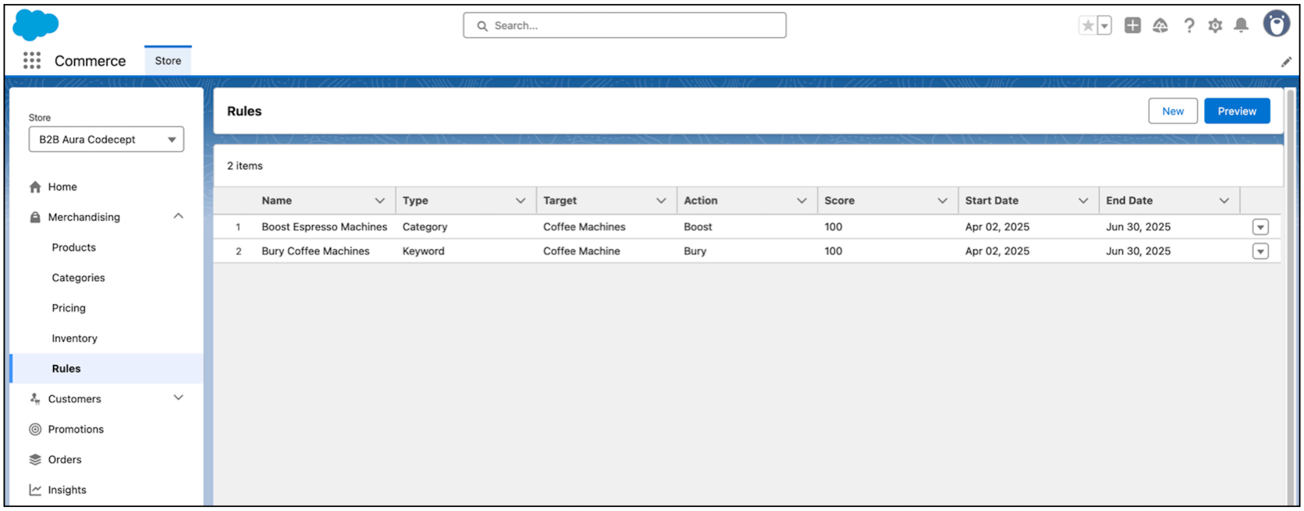
Salesforce Help: Select a Price Book for Sort (can be outdated or unavailable during release preview)

Influence Product Positioning with Boost and Bury Rules

Use boost and bury rules to show relevant products to your customers in search results and category pages. This can reduce store abandonment and increase conversion rates. Apply rules by search keyword, product category, or globally across the entire store.

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

How: Under Merchandising, go to Rules.



See Also

Salesforce Help: Create Boost and Bury Rules (can be outdated or unavailable during release preview)

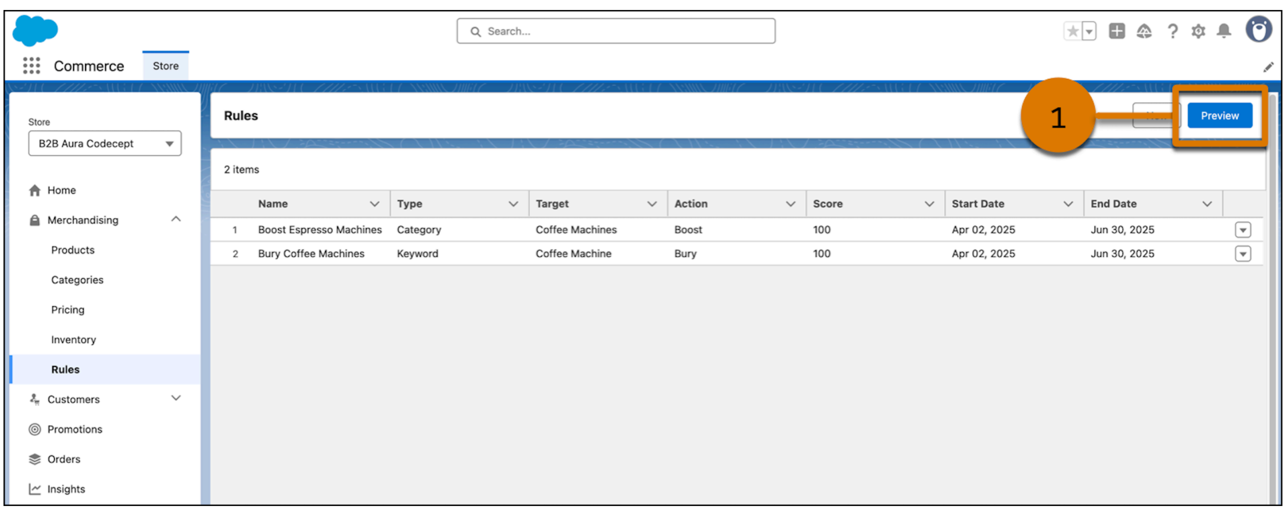
B2B Commerce and D2C Commerce Developer Guide: Boost and Bury Rule (can be outdated or unavailable during release preview)

Verify Merchandising Rule Behavior on the Preview Screen

Use the Preview screen to verify that merchandising rules are influencing how products show up in search results and category pages as expected.

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

How: Under Merchandising, go to Rules, then go to Preview (1).



See Also

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

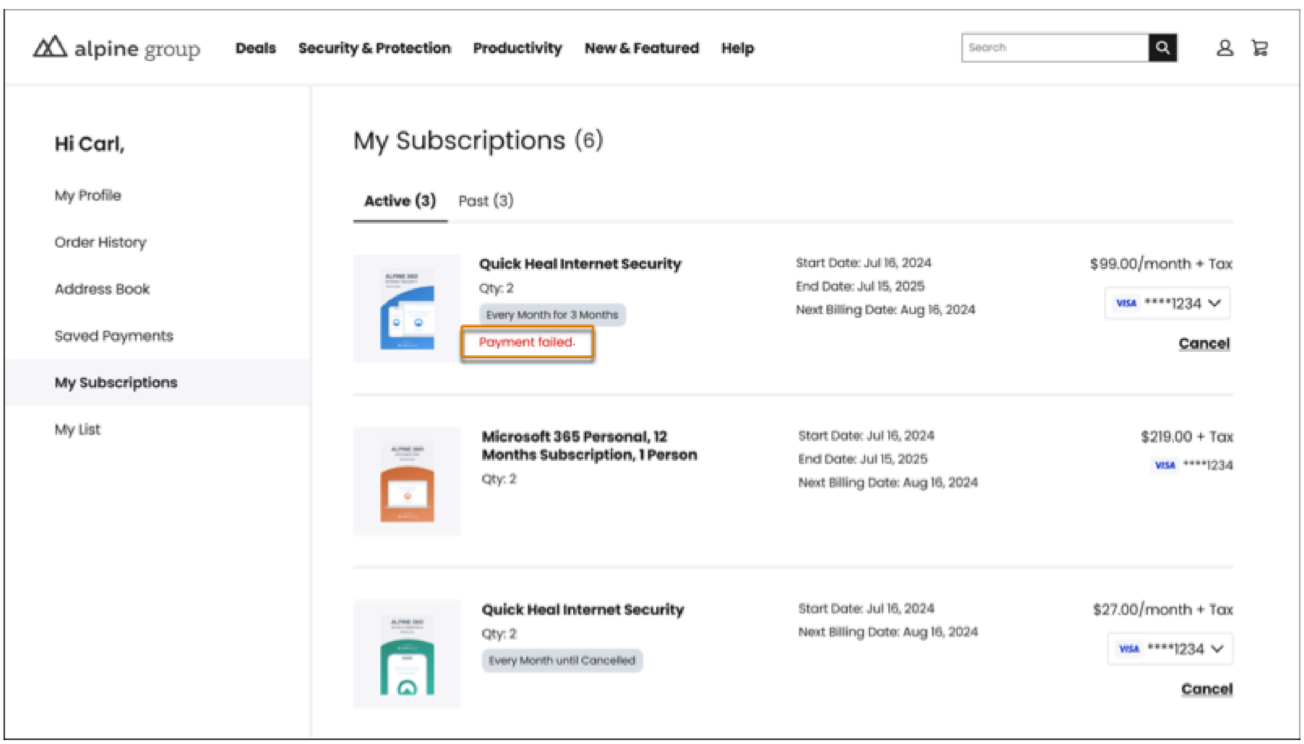
Commerce Subscriptions

Shoppers can see failed subscription payments on the My Subscriptions page. Merchants receive email notifications when a subscription payment fails, allowing them to address subscription issues promptly. Shoppers see a warning when they delete a payment method linked to active subscriptions, informing them that future payments will fail and prompting them to update their payment method.

Keep Shoppers Informed About Subscription Payment Failure

Shoppers can now see the status of their recurring subscription payments, including payment failures, on the My Subscriptions page. Merchants receive email notifications when a payment fails, so they can address subscription issues promptly.

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



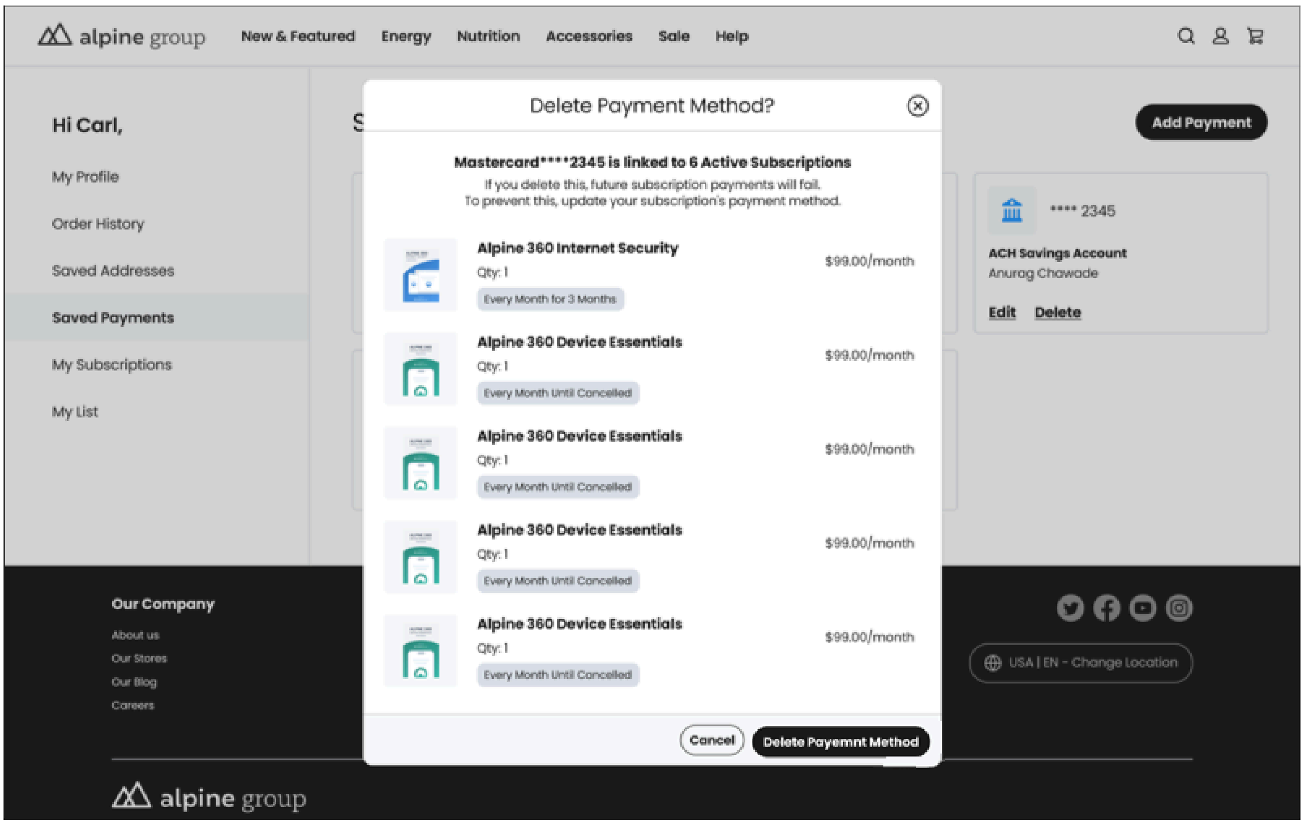
See Also

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

Alert Shoppers About Subscription Impact When Deleting Payment Methods

Shoppers now see a warning when they delete a payment method that is linked to active subscriptions. The alert informs them that future subscription payments will fail and prompts them to update their payment method to avoid disruptions.

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



See Also

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

Commerce Additional Features

Shoppers can now update their contact information with two-factor authentication, receiving a one-time passcode to confirm changes. This makes sure that only verified users can modify their details. Self-registering users are not automatically assigned to the store's default buyer group. To assign them automatically, set a default buyer group in the self-registration settings.

Assign a Default Buyer Group for Self-Registering Users

Self-registering users are no longer added to the store's default buyer group or to buyer groups in other stores within the same org. To automatically assign them to a specific buyer group, set a default buyer group in the self-registration settings.

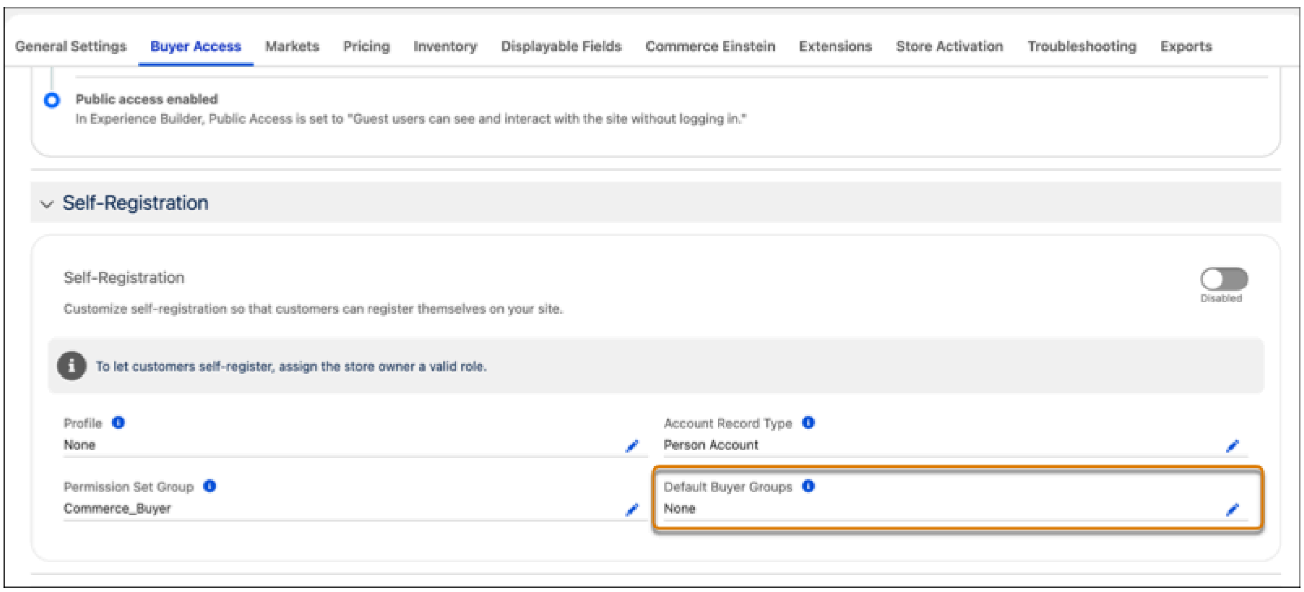
Secure Contact Updates with Two-Factor Authentication
Enhance account security by verifying your shoppers' contact changes. When shoppers want to update their email address or phone number, they receive a one-time passcode (OTP) for confirmation. This makes sure that only verified users can modify their details.

Assign a Default Buyer Group for Self-Registering Users

Self-registering users are no longer added to the store's default buyer group or to buyer groups in other stores within the same org. To automatically assign them to a specific buyer group, set a default buyer group in the self-registration settings.

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

How: In your store settings, go to **Buyer Access** and set a default buyer group for Self-Registration.



See Also

Salesforce Help: Configure Self-Registration for a B2B or D2C Store (can be outdated or unavailable during release preview)

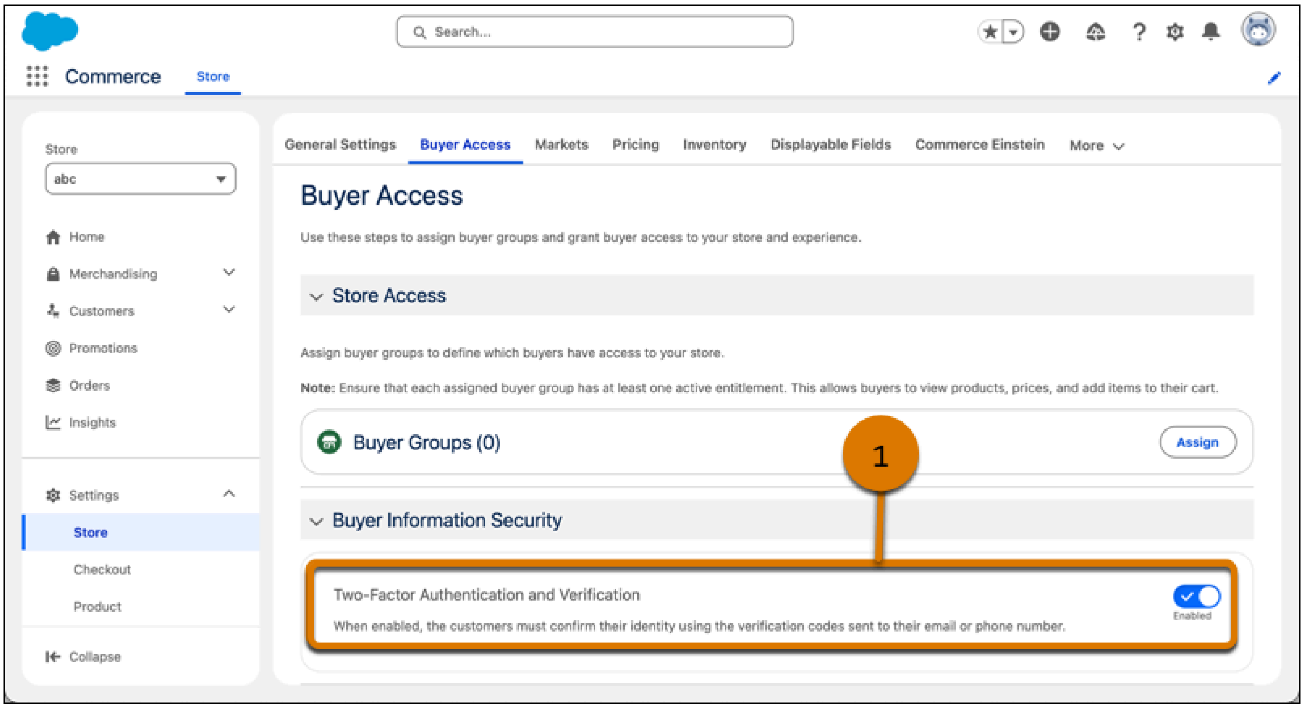
Secure Contact Updates with Two-Factor Authentication

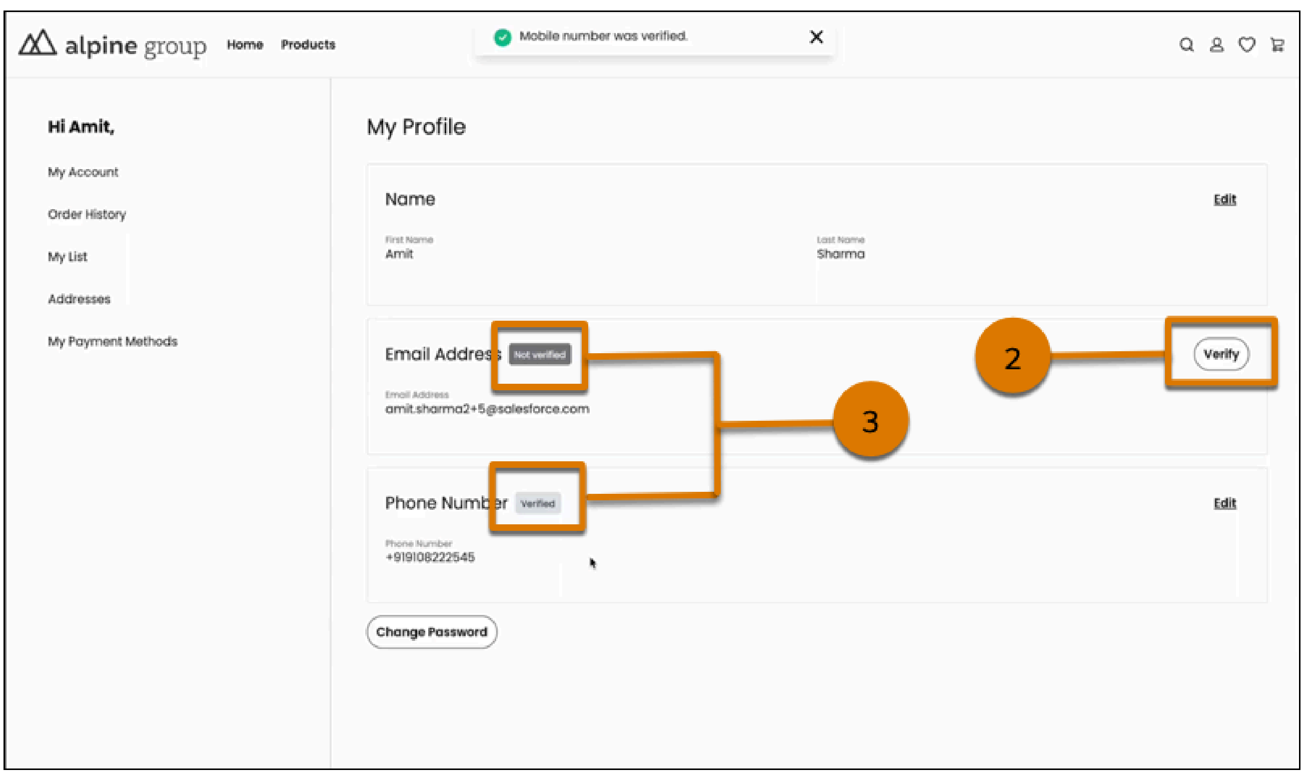
Enhance account security by verifying your shoppers' contact changes. When shoppers want to update their email address or phone number, they receive a one-time passcode (OTP) for confirmation. This makes sure that only verified users can modify their details.

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

Developer editions.

How: For new stores, this feature is enabled by default. For existing stores, turn on Two-Factor Authentication and Verification in Buyer Access settings (1). Then, on the Experience Builder, add the Profile Details component to My Profile page. This enables shoppers to verify their email address and phone number (2), with tags showing their verification status (3). Once verified, email address or phone number changes require OTP authentication via their current email, followed by verification of the new details.





See Also

Salesforce Help: Secure Buyer Contact Updates with Two-Step Verification (can be outdated or unavailable during release preview)

Salesforce Order Management

Help more customers by supporting product bundles in all service flows. High-scale order ingestion protects your store from being overwhelmed by high volumes of order data.

Expand Bundle Service to All Order Management Flows

Improve customer satisfaction by servicing orders containing product bundles. You can now discount, reship, and exchange orders with bundles. You can also order bundles on behalf of customers.

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

How: If you've cloned your service flows before this release, modify them.

See Also

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

Protect Your Salesforce Org from High Volumes of Order Data

High-scale order ingestion (HSOI) is now the default method of creating order summaries for all Commerce Cloud orgs. HSOI protects your store from high volumes of order data by increasing how many orders your org can safely process to 5,000 per minute.

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

How: For B2C Commerce customers, HSOI is enabled after you provision a B2C high-scale integration. For all Commerce Cloud customers, HSOI requires configuration for page layouts and, if you're using custom permissions, requires special considerations. You can no longer disable HSOI.

See Also

Salesforce Help: Configure High Scale Order Ingestion (can be outdated or unavailable during release preview)

Salesforce Payments

Payment data is more secure with buyer-controlled access to saved payments information, management of payment record sharing, and platform events that track potentially malicious changes to payment pages. You can use a business account to make ACH payments. European Economic Area customers get an improved and compliant payment experience.

Build Customer Trust by Restricting Access to Saved Payment Methods
Give your buyers more control over their saved payment methods in B2B stores with custom checkout. Buyers can choose to keep payment methods private or share them with specific contacts within the same account hierarchy. This ensures secure and seamless transactions.

Control Access to Payment Records with Account-Based Sharing
Set up account-based sharing to manage who can access payment, refund, authorization, auto-adjustment, and saved payment method records. By using this feature, you can define sharing settings based on the account field, ensuring that only the authorized users have access to sensitive payment information.

Upgrade the Payment Experience for Customers in the European Economic Area
European Economic Area (EEA) card holders now get an updated experience during checkout. EEA customers who use a co-badged card can now choose their preferred card brand. For iDeal card holders, a button links them to the payment page, replacing merchant-provided bank selection lists. For SEPA direct debit customers, Stripe automatically updates the SEPA mandate. Lastly, Affirm, Afterpay, and Klarna customers see the latest offers, such as interest-free payments.

Reduce Security Risks by Detecting Payment Page Tampering
Salesforce Payments tracks any changes to Content Security Policy headers and scripts on all pages where customers enter payment information. Any change to a security header or script triggers a platform event. You can receive alerts for these events, review the change, and respond appropriately to secure your customers' data. Salesforce Payments security tracking complies with PCI DSS v4.0.1 standards.

Make ACH Payments Easier for Business Customers
You can now accept ACH payments from business bank accounts to make business-to-business transactions easier. This feature is available only for Stripe merchant accounts.

Find the Salesforce Payments API Documentation in a New Location
The Payments Connect API, previously documented in the Connect REST API Developer Guide, has moved to the B2B Commerce and D2C Commerce Developer Guide. Also, the reference information now follows the OpenAPI Specification (OAS) standards for REST APIs.

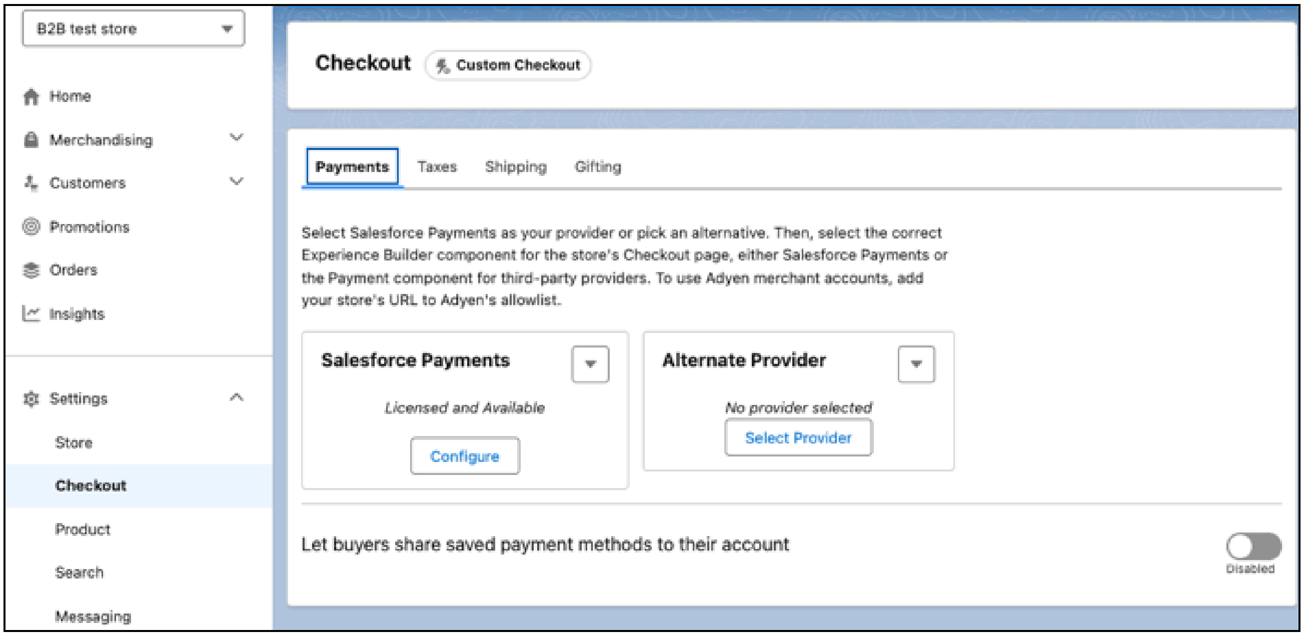
Build Customer Trust by Restricting Access to Saved Payment Methods

Give your buyers more control over their saved payment methods in B2B stores with custom checkout. Buyers can choose to keep payment methods private or share them with specific contacts within the same account hierarchy. This ensures secure and seamless transactions.

Where: This change applies to B2B Commerce and Salesforce Payments in Enterprise, Unlimited, and

Developer editions.

How: In your store page, go to **Checkout** and click **Payments**. Turn on the switch to share the saved payment methods.



See Also

Salesforce Help: Let Customers Save and Manage Their Payment Methods (can be outdated or unavailable during release preview)

Control Access to Payment Records with Account-Based Sharing

Set up account-based sharing to manage who can access payment, refund, authorization, auto-adjustment, and saved payment method records. By using this feature, you can define sharing settings based on the account field, ensuring that only the authorized users have access to sensitive payment information.

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

Who: To use account-based sharing, you must have an RLM Billing Advanced Add On enabled in your org.

See Also

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

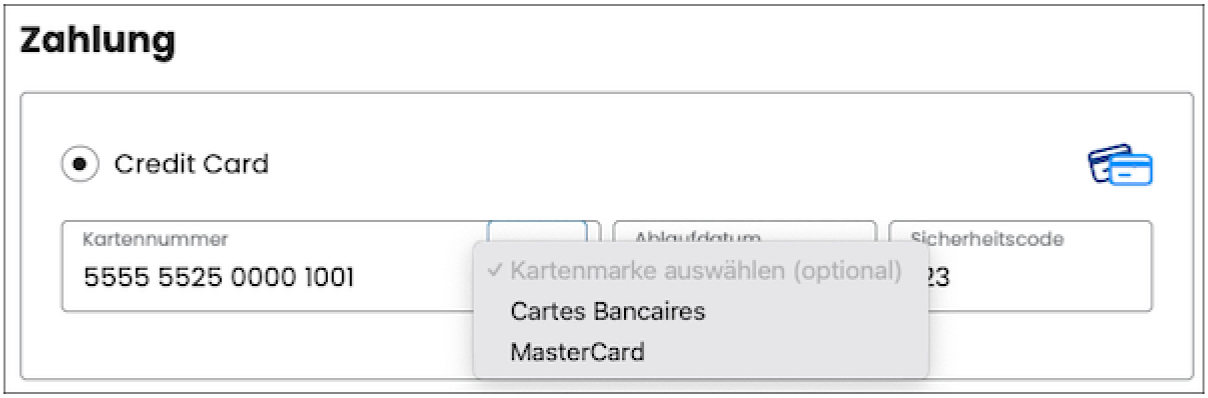
Upgrade the Payment Experience for Customers in the European Economic Area

European Economic Area (EEA) card holders now get an updated experience during checkout. EEA customers who use a co-badged card can now choose their preferred card brand. For iDeal card holders, a button links them to the payment page, replacing merchant-provided bank selection lists. For SEPA direct debit customers, Stripe automatically updates the SEPA mandate. Lastly, Affirm, Afterpay, and Klarna customers see the latest offers, such as interest-free payments.

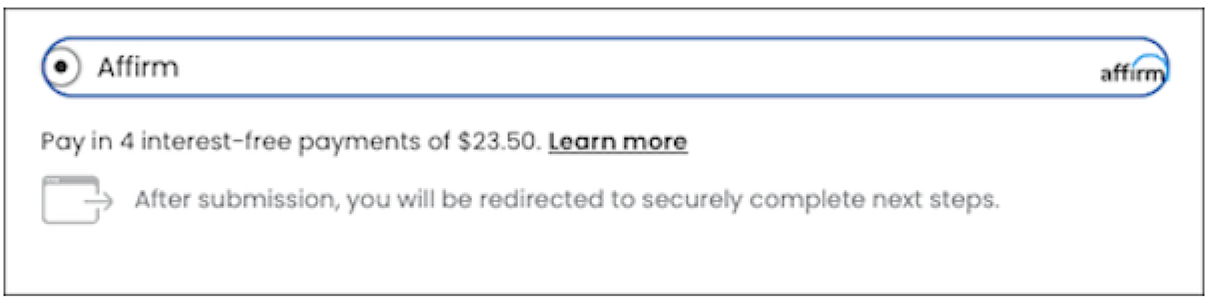
Where: This change applies to Salesforce Payments in Enterprise, Unlimited, and Developer editions.

How: New stores automatically get these upgrades, but existing stores must be republished.

Here's an example of the co-badged card upgrade.



Here’s an example of an Affirm payment offer.



See Also

Salesforce Help: Salesforce Payments Merchant Accounts and Payment Methods (can be outdated or unavailable during release preview)

Reduce Security Risks by Detecting Payment Page Tampering

Salesforce Payments tracks any changes to Content Security Policy headers and scripts on all pages where customers enter payment information. Any change to a security header or script triggers a platform event. You can receive alerts for these events, review the change, and respond appropriately to secure your customers' data. Salesforce Payments security tracking complies with PCI DSS v4.0.1 standards.

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

How: To capture these events, create an Apex or platform-event triggered flow.

See Also

Platform Events Developer Guide

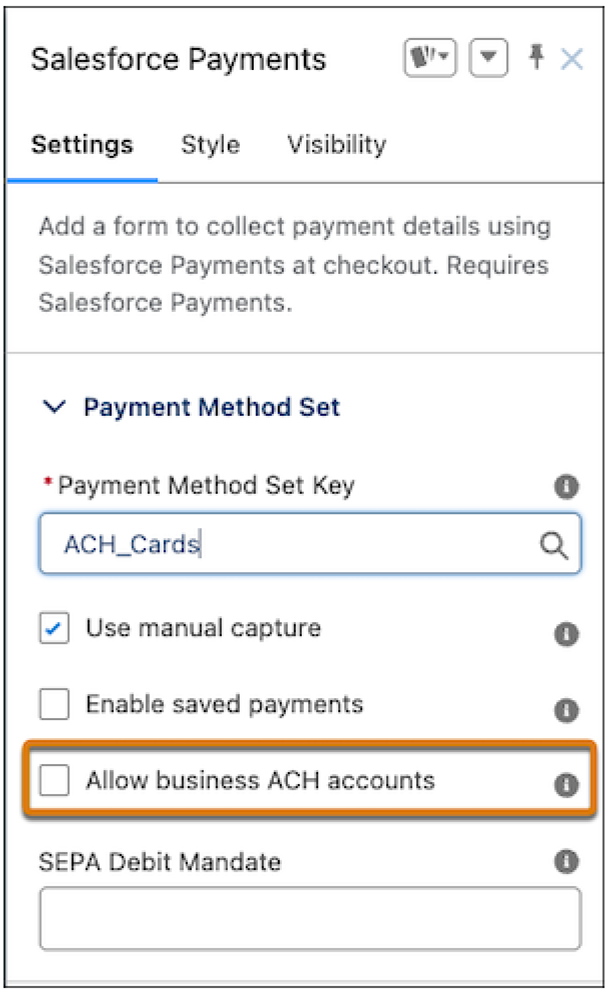
Platform Events Developer Guide: Subscribing to Platform Events

Make ACH Payments Easier for Business Customers

You can now accept ACH payments from business bank accounts to make business-to-business transactions easier. This feature is available only for Stripe merchant accounts.

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

How: From the Checkout page in Experience Builder, open the Salesforce Payments component properties, and select the ACH business account checkbox.



See Also

Salesforce Help: Salesforce Payments Merchant Accounts and Payment Methods (can be outdated or unavailable during release preview)

Salesforce Help: Customize the Payment Section of Checkout in a Commerce Store (can be outdated or unavailable during release preview)

Find the Salesforce Payments API Documentation in a New Location

The Payments Connect API, previously documented in the Connect REST API Developer Guide, has moved to the B2B Commerce and D2C Commerce Developer Guide. Also, the reference information now follows the OpenAPI Specification (OAS) standards for REST APIs.

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

How: For API reference information, see the Salesforce Payments API and the Commerce Payments API.

See Also

B2B Commerce and D2C Commerce Developer Guide: Salesforce Payments API

B2B Commerce and D2C Commerce Developer Guide: Commerce Payments API

Customization

Manage user access more easily with enhancements to the user, permission set, permission set group, and object access summaries. Strengthen Agentforce workflows with external data. Give your mobile users the same experience of Dynamic Related Lists as they get on desktop (Beta).

Permissions

Enhancements to the user, permission set, permission set group, and object access summaries make managing user access easier.

Salesforce Connect

Use data from external objects in your prompt templates. Access more external data without limits.

Sharing

Salesforce enforces secure roles behavior in sandboxes and introduces a release update for this change in production orgs. Review changes to how sharing rules are recalculated automatically in some scenarios.

Globalization

ICU locale formats keep your data consistent across regions. Clear state and country picklist data mappings that are in an unrecoverable state.

List Views

The Dynamic Related List - Single component now renders on mobile devices (beta). The list views dropdown menu for all objects uses Lightning Web Components (LWC). It’s easier to configure a related-list quick filter for the Record Type field.

Fields

Troubleshoot deployments that change the field type of a custom field. When you delete a custom object, UI changes alert you when another object has a lookup field that references that custom object.

AppExchange

Browse and deploy prebuilt solutions directly into Agentforce.

General Setup
Some record page text has had its truncation removed at high zoom levels to improve accessibility. Navigate through Lightning App Builder more easily with improvements to keyboard command support.

Permissions

Enhancements to the user, permission set, permission set group, and object access summaries make managing user access easier.

Delivered Idea: Update Object Permissions for All Custom Permission Sets or Profiles in One Step
Save time and clicks by editing object access simultaneously in all custom permission sets and profiles. There's no need to go to individual permission set or profile pages. In Object Manager, go to a specific object's access summary to review, add, or remove object permissions. We delivered this feature thanks to your ideas on IdeaExchange.

Delivered Idea: Edit Permissions Faster in the Permission Set Summary
Instead of going to many Setup pages, you can now update the user, object, field, and custom permissions in a permission set directly from the summary view. Previously, you were able to make only minimal permissions edits in the summary. We delivered this feature thanks to your ideas on IdeaExchange.

Delivered Idea: Manage Included Permission Sets in the Permission Set Group Summary
Edit which permission sets are included in a permission set group without leaving the summary view. Previously, this information was read only, so this update makes it easier to take action while reviewing the permission set group. We delivered this feature thanks to your ideas on IdeaExchange.

Delivered Idea: Review Tab Settings in Access Summaries
Easily see the tabs that a user can access or the tabs included in a permission set or permission set group. Using the summary views is faster than searching through multiple Setup pages, which was previously required to get this information. We delivered this feature thanks to your ideas on IdeaExchange.

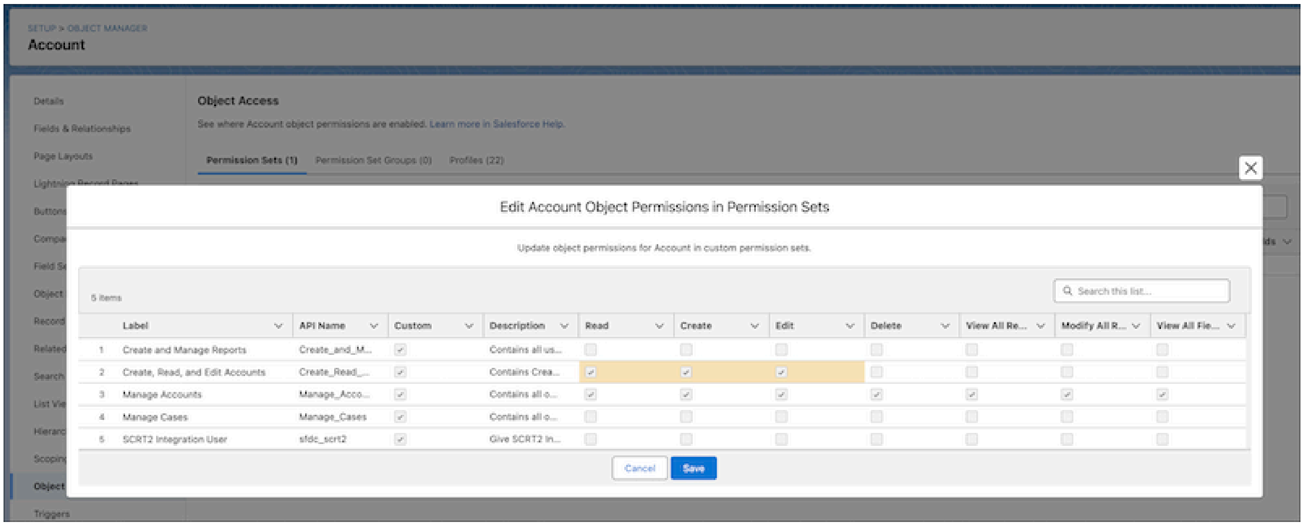
Delivered Idea: View and Manage a User's Permission Sets, Groups, and Queues More Easily
If you want to know what permission sets, groups, and queues a user is assigned to, you're in luck. With enhancements to the user access summary, you can add or remove a user from one or more permission sets, groups, or queues. You can also search, sort, and refresh the lists in each summary section.

Update Object Permissions for All Custom Permission Sets or Profiles in One Step

Save time and clicks by editing object access simultaneously in all custom permission sets and profiles. There's no need to go to individual permission set or profile pages. In Object Manager, go to a specific object's access summary to review, add, or remove object permissions. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: In Setup, go to Object Manager, and then select an object. In the sidebar, click **Object Access**. In the Permission Sets or Profiles tabs, click **Edit**, make your changes, and then save your work.



See Also

IdeaExchange: View & Manage Object CRUD Access in Object Manager

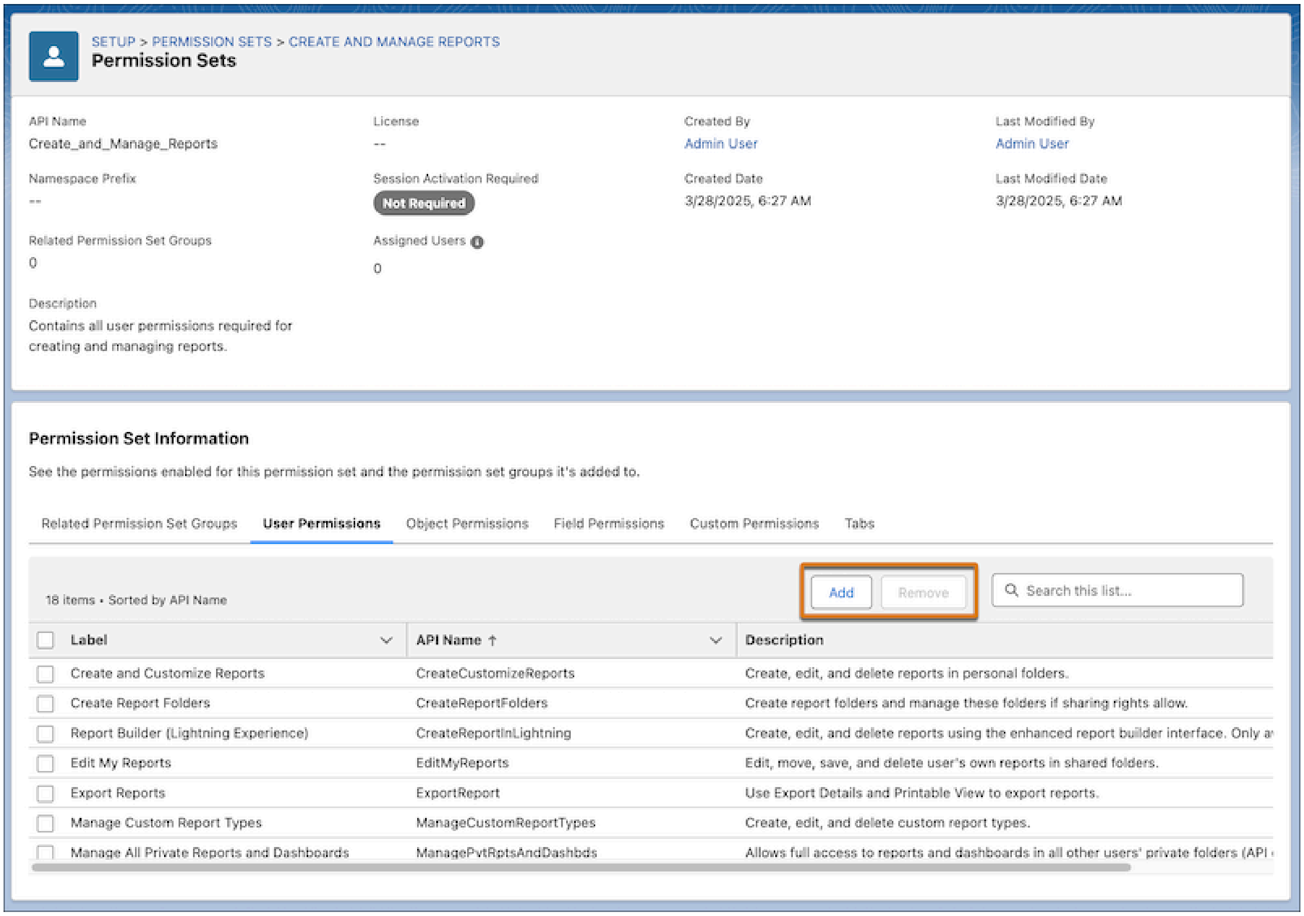
Salesforce Help: Manage Object Access in Object Manager (can be outdated or unavailable during release preview)

Edit Permissions Faster in the Permission Set Summary

Instead of going to many Setup pages, you can now update the user, object, field, and custom permissions in a permission set directly from the summary view. Previously, you were able to make only minimal permissions edits in the summary. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: In Setup, select a permission set, click **View Summary**, and then update the permissions in the various tabs.



See Also

IdeaExchange: Permissions View Associated to a Permission Set

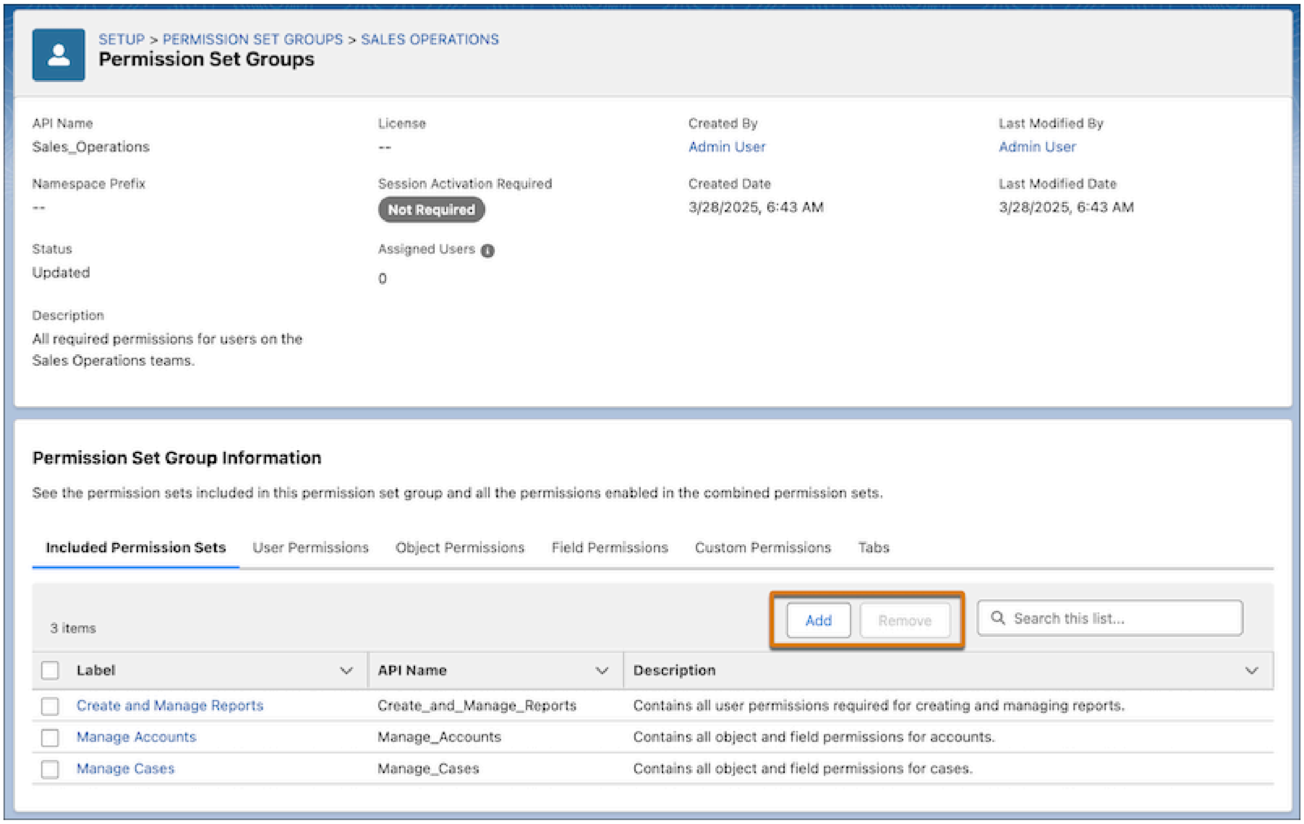
Salesforce Help: Manage Permissions in the Permission Set and Permission Set Group Access Summaries (can be outdated or unavailable during release preview)

Manage Included Permission Sets in the Permission Set Group Summary

Edit which permission sets are included in a permission set group without leaving the summary view. Previously, this information was read only, so this update makes it easier to take action while reviewing the permission set group. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: In Setup, select a permission set group, and then click **View Summary**. Under the Included Permission Sets tab, click **Add** or **Remove**.



See Also

IdeaExchange: Add Permission Set Groups to Manage Assignments

Salesforce Help: Manage Permissions in the Permission Set and Permission Set Group Access Summaries (can be outdated or unavailable during release preview)

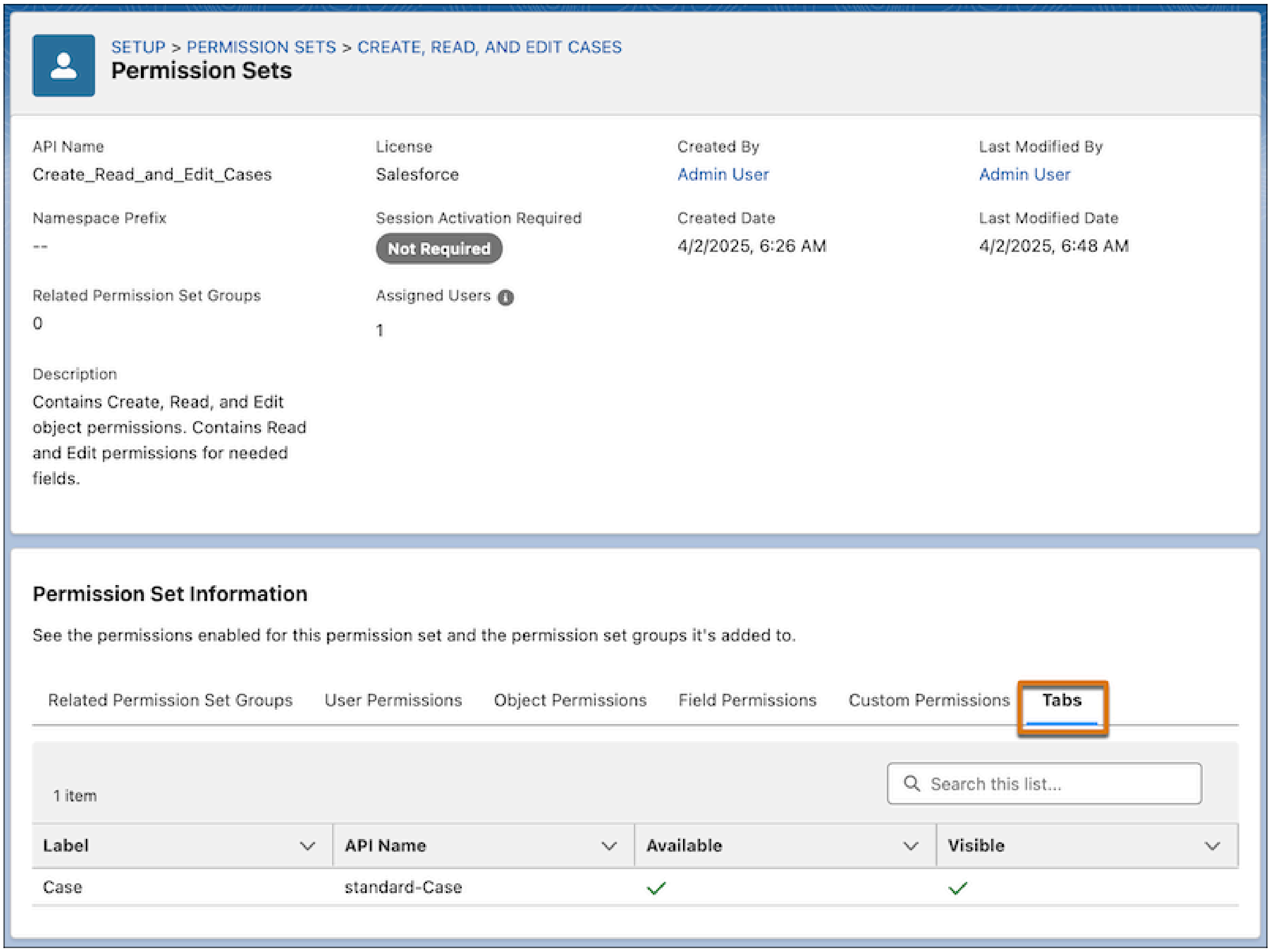
Salesforce Help: Add Permission Sets to a Permission Set Group (can be outdated or unavailable during release preview)

Review Tab Settings in Access Summaries

Easily see the tabs that a user can access or the tabs included in a permission set or permission set group. Using the summary views is faster than searching through multiple Setup pages, which was previously required to get this information. We delivered this feature thanks to your ideas on IdeaExchange.

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

How: In Setup, select a user, permission set, or permission set group, and then click **View Summary**.



See Also

IdeaExchange: Access Summary on User

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

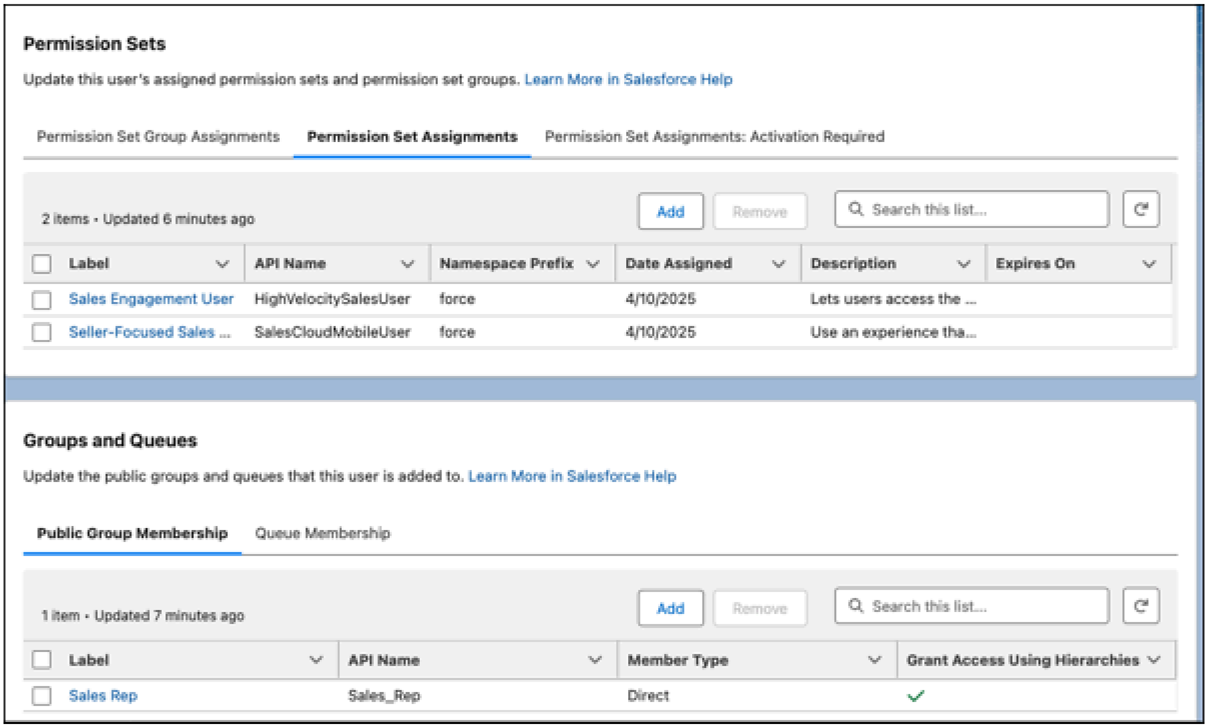
Salesforce Help: Manage Permissions in the Permission Set and Permission Set Group Access Summaries (can be outdated or unavailable during release preview)

View and Manage a User's Permission Sets, Groups, and Queues More Easily

If you want to know what permission sets, groups, and queues a user is assigned to, you're in luck. With enhancements to the user access summary, you can add or remove a user from one or more permission sets, groups, or queues. You can also search, sort, and refresh the lists in each summary section.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

How: In Setup, select a **user**, and then click **View Summary**.



See Also

IdeaExchange: Ability to add a User to a Public group from their User record

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

Salesforce Connect

Use data from external objects in your prompt templates. Access more external data without limits.

Access External Data in Prompt Builder

Now you can augment Agentforce workflows with external data. When you create a prompt template, select an external object and then access that object's fields just as you would with a custom or standard object. A common use case is when you have order and fulfillment data stored in an external system and you want to create a Salesforce agent that looks up the status of an order.

Access Data Without Limits with Salesforce Connect

Access data outside of your Salesforce org without worrying about limits. We removed the limits for new rows and callouts for these adapters: OData 2.0, OData 4.0, OData 4.01, Custom, GraphQL, Amazon DynamoDB, and the SQL adapters for Amazon Athena and Snowflake. This change is available for orgs hosted on Hyperforce.

Access External Data in Prompt Builder

Now you can augment Agentforce workflows with external data. When you create a prompt template, select an external object and then access that object's fields just as you would with a custom or standard object. A common use case is when you have order and fulfillment data stored in an external system and you want to create a Salesforce agent that looks up the status of an order.

Where: Prompt Builder is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

Prompt Builder is included in Unlimited+. To use Prompt Builder in Enterprise, Performance, and Unlimited editions requires the Einstein for Sales, Einstein for Platform, or Einstein for Service add-on. These add-ons include Data Cloud. To purchase an add-on, contact your Salesforce account executive.

How: In Prompt Builder, in the Prompt Template Workspace, select an external object in the Resource field. Then select the external object fields as merge fields in the prompt template. To preview a prompt that references an external object, the external object must have a Name field or Salesforce returns an error.

See Also

Salesforce Help: Prompt Builder (can be outdated or unavailable during release preview)
Salesforce Help: Define External Objects (can be outdated or unavailable during release preview)

Access Data Without Limits with Salesforce Connect

Access data outside of your Salesforce org without worrying about limits. We removed the limits for new rows and callouts for these adapters: OData 2.0, OData 4.0, OData 4.01, Custom, GraphQL, Amazon DynamoDB, and the SQL adapters for Amazon Athena and Snowflake. This change is available for orgs hosted on Hyperforce.

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

When: These changes are available on a rolling basis after the Summer '25 release is complete and are available to all customers by July 14, 2025.

See Also

Salesforce Help: General Limits for Salesforce Connect (can be outdated or unavailable during release preview)

Sharing

Salesforce enforces secure roles behavior in sandboxes and introduces a release update for this change in production orgs. Review changes to how sharing rules are recalculated automatically in some scenarios.

Enable Secure Roles Behavior and Update Sharing Group References in Production (Release Update)
To prevent unintended access by external site users if you enable digital experiences, Salesforce now secures access to records. The default sharing group that's available for roles and subordinates before you enable digital experiences is now displayed as Roles and Internal Subordinates instead of as Roles and Subordinates. To prepare for this change, update code and customizations that reference the old group name. Although Salesforce dynamically converts outdated references during a transition period,

you must update all code and customizations to prevent errors. This update is available starting in Summer ’25.

Enable Secure Roles Behavior and Update Sharing Group References in Sandboxes (Release Update)
To prevent unintended access by external site users if you enable digital experiences, Salesforce now secures access to records in non-preview sandbox orgs. The default sharing group that’s available for roles and subordinates before you enable digital experiences is now displayed as Roles and Internal Subordinates instead of as Roles and Subordinates. To prepare for this change, update code and customizations that reference the old group name. This update was first available in Spring ’25 and is enforced in Summer ’25.

Review Changing Sharing Recalculation Behavior
To improve performance for large-scale transactions, Salesforce is changing how some sharing recalculations work behind the scenes. When group membership or role updates occur, related sharing rules are automatically recalculated. Previously, both of these operations always ran synchronously. Now, after group membership or role updates occur, related owner-based sharing rules can be recalculated asynchronously when that approach results in better performance. You can monitor these stages in the Setup Audit Trail.

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

To prevent unintended access by external site users if you enable digital experiences, Salesforce now secures access to records. The default sharing group that’s available for roles and subordinates before you enable digital experiences is now displayed as Roles and Internal Subordinates instead of as Roles and Subordinates. To prepare for this change, update code and customizations that reference the old group name. Although Salesforce dynamically converts outdated references during a transition period, you must update all code and customizations to prevent errors. This update is available starting in Summer ’25.

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

When: Salesforce enforces this update for production orgs in Winter ’26. To get the major release upgrade date for your instance, go to Trust Status, find your instance, and click the maintenance tab.

These changes were enforced in sandboxes in Summer ’25 through a separate release update.

Why: Previously, when you enabled digital experiences, records shared with Roles and Subordinates were made available by default to external site users. To secure access so that records were available only to internal users, it was necessary to use the Convert External User Access wizard and make manual updates. With this update, access to those records is limited to internal users by default.

How: Use this release update to test these changes and implement any necessary fixes before the enforcement date. If your code and customizations still reference the Roles and Subordinates value after both the release update is enforced and Salesforce stops dynamically converting references, your users can experience issues.

If you previously enabled the sandbox version of this release update in your production org using the test run, no further action is required.

See Also

Knowledge Article: Prepare for Changes to “Role and Subordinates” Group (roleAndSubordinates)
Enable Secure Roles Behavior and Update Sharing Group References in Sandboxes (Release Update)

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

To prevent unintended access by external site users if you enable digital experiences, Salesforce now secures access to records in non-preview sandbox orgs. The default sharing group that’s available for roles and subordinates before you enable digital experiences is now displayed as Roles and Internal Subordinates instead of as Roles and Subordinates. To prepare for this change, update code and customizations that reference the old group name. This update was first available in Spring ’25 and is enforced in Summer ’25.

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

When: This update was first available in Spring ’25 and is enforced in Summer ’25. To get the major release upgrade date for your instance, go to Trust Status, find your instance, and then click the maintenance tab.

This release update is intended for sandbox orgs. For production orgs, Salesforce provides a separate release update for these changes in Summer ’25 that’s enforced in Winter ’26.

Why: Previously, when you enabled digital experiences, records shared with Roles and Subordinates were made available by default to external site users. To secure access so that records were available only to internal users, it was necessary to use the Convert External User Access wizard and make manual updates. With this update, access to those records is limited to internal users by default.

How: Use this release update to test these changes in a sandbox and identify necessary fixes for when this change is later enabled in production via a separate release update. Although Salesforce dynamically converts outdated references during a transition period, you must update all code and customizations to prevent errors.

Use caution if you enable this release update using the test run in a production org. If your code and customizations still reference the Roles and Subordinates value, your users can experience issues.

See Also

Knowledge Article: Prepare for Changes to “Role and Subordinates” Group (roleAndSubordinates)
Enable Secure Roles Behavior and Update Sharing Group References in Production (Release Update)

Review Changing Sharing Recalculation Behavior

To improve performance for large-scale transactions, Salesforce is changing how some sharing recalculations work behind the scenes. When group membership or role updates occur, related sharing rules are automatically recalculated. Previously, both of these operations always ran synchronously. Now, after group membership or role updates occur, related owner-based sharing rules can be recalculated asynchronously when that approach results in better performance. You can monitor these stages in the Setup Audit Trail.

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

When: This change is available on a rolling basis starting in Summer '25.

How: No action is required to enable this behavior.

Globalization

ICU locale formats keep your data consistent across regions. Clear state and country picklist data mappings that are in an unrecoverable state.

Enable ICU Locale Formats (Release Update)
With this update, the International Components for Unicode (ICU) locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. Locales control the format for dates, times, currencies, addresses, names, numeric values, and the start day of the week. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. This update was first made available in Winter '20 and will be enabled in Summer '25 on orgs that haven't already switched to ICU locale formats and whose Apex Classes, Apex Triggers, and Visualforce Pages are using API version 45 or higher.

Clear State and Country Picklist Mappings
To start the conversion process for unrecoverable state and country/territory picklist mappings, clear your picklist mappings. This ensures accurate and consistent data as you transition from text-based state and country fields to picklists. Clearing data mappings is only intended for use when individually editing your picklist mapping isn't possible.

Review Updated Label Translations
To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Arabic, Bulgarian, Chinese (Simplified), Chinese (Traditional), Croatian, Czech, Danish, Dutch, Finnish, French, German, Greek, Hebrew, Hungarian, Indonesian, Italian, Japanese, Korean, Polish, Portuguese (Brazil), Portuguese (European), Romanian, Russian, Slovak, Slovenian, Spanish, Spanish (Mexico), Swedish, Thai, Turkish, and Ukrainian.

Enable ICU Locale Formats (Release Update)

With this update, the International Components for Unicode (ICU) locale formats replace Oracle's Java Development Kit (JDK) locale formats in Salesforce. Locales control the format for dates, times, currencies, addresses, names, numeric values, and the start day of the week. ICU sets the international standard for these formats. The ICU locale formats provide a consistent experience across the platform and improve integration with ICU-compliant applications across the globe. This update was first made available in Winter '20 and will be enabled in Summer '25 on orgs that haven't already switched to ICU locale formats and whose Apex Classes, Apex Triggers, and Visualforce Pages are using API version 45 or higher.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions, except Database.com.

When: To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and then click the maintenance tab.

Who: Salesforce enables this update in Summer '25 on orgs whose Apex Classes, Apex Triggers, and Visualforce Pages are using API version 45 or higher.

How: To manually enable this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. To Enable ICU Locale Formats, follow the testing and activation steps.

The English (Canada) locale (en_CA) requires separate activation. From Setup, in the Quick Find box, enter *User Interface*, and select **User Interface**. Then select **Enable ICU formats for en_CA**, and save your changes.

To confirm whether your org is using ICU or JDK locale formats, from Setup, enter *Company Information* in the Quick Find box. On the Company Information page, locate the Locale Formats field.

After Summer '25, Salesforce is pausing enablement of this release update. If your org is already using ICU locale formats, those locale formats remain enabled. For any org still using JDK, we recommend that they use the release update to manually enable ICU locale formats.

See Also

Salesforce Help: Enable the ICU Locale Formats (can be outdated or unavailable during release preview)

Salesforce Knowledge Article: JDK Locale Format Retirement and the Enable ICU Locale Formats Release Update

Clear State and Country Picklist Mappings

To start the conversion process for unrecoverable state and country/territory picklist mappings, clear your picklist mappings. This ensures accurate and consistent data as you transition from text-based state and country fields to picklists. Clearing data mappings is only intended for use when individually editing your picklist mapping isn't possible.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions, except Database.com.

How: In Setup, find and select **State and Country/Territory Picklists**. From the State and Country/Territory Picklists page, locate the Enable State and Country/Territory Picklists section and select **Scan for State and Country Picklist data**. From the Scan for Affected Data and Customizations page, select **Clear Scanned and Mapped Data**.

See Also

Salesforce Help: Convert State and Country/Territory Data (can be outdated or unavailable during release preview)

Review Updated Label Translations

To improve accuracy and your users' experience, we updated the translations for some standard object, tab, and field names for these languages: Arabic, Bulgarian, Chinese (Simplified), Chinese (Traditional), Croatian, Czech, Danish, Dutch, Finnish, French, German, Greek, Hebrew, Hungarian, Indonesian, Italian, Japanese, Korean, Polish, Portuguese (Brazil), Portuguese (European), Romanian, Russian, Slovak, Slovenian, Spanish, Spanish (Mexico), Swedish, Thai, Turkish, and Ukrainian.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in all editions.

How: To review the changes, see Review Spring '25 Updated Label Translations and download the attached list of changes. If you want to use a different translation for tab and field labels, you can change the name.

See Also

Salesforce Help: Rename Object, Tab, and Field Labels (can be outdated or unavailable during release preview)

List Views

The Dynamic Related List - Single component now renders on mobile devices (beta). The list views dropdown menu for all objects uses Lightning Web Components (LWC). It's easier to configure a related-list quick filter for the Record Type field.

Delivered Idea: Get the Desktop Dynamic Related List Experience on Mobile (Beta)
Give your users the same great experience of Dynamic Related Lists on desktop and mobile. Previously, the Dynamic Related List - Single component rendered only on record pages on desktop, and you configured a Single Related List component to render on mobile devices. Now, you configure one component for both experiences. We delivered this feature thanks to your ideas on IdeaExchange.

Simplify Quick Filters for the Record Type Field
When you set up a related-list quick filter for the Record Type field, you now select the Value options from a multi-select picklist of available record types. Previously, you typed the Value options into a

free-form text field, which sometimes returned incorrect filtering results.

Enhance Accessibility with the Improved List Views Dropdown Menu
To improve accessibility and provide a more consistent user experience, the list views dropdown menu for all objects now uses Lightning Web Components (LWC). Overall, how your users work in list views hasn't changed, but the updated dropdown menu has some differences. Previously, the updated list views dropdown menu was available only for list views rendered with LWC and not for list views rendered with Aura.

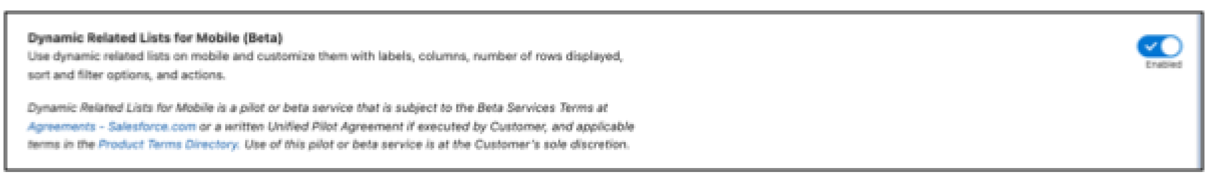
Get the Desktop Dynamic Related List Experience on Mobile (Beta)

Give your users the same great experience of Dynamic Related Lists on desktop and mobile. Previously, the Dynamic Related List - Single component rendered only on record pages on desktop, and you configured a Single Related List component to render on mobile devices. Now, you configure one component for both experiences. We delivered this feature thanks to your ideas on IdeaExchange.

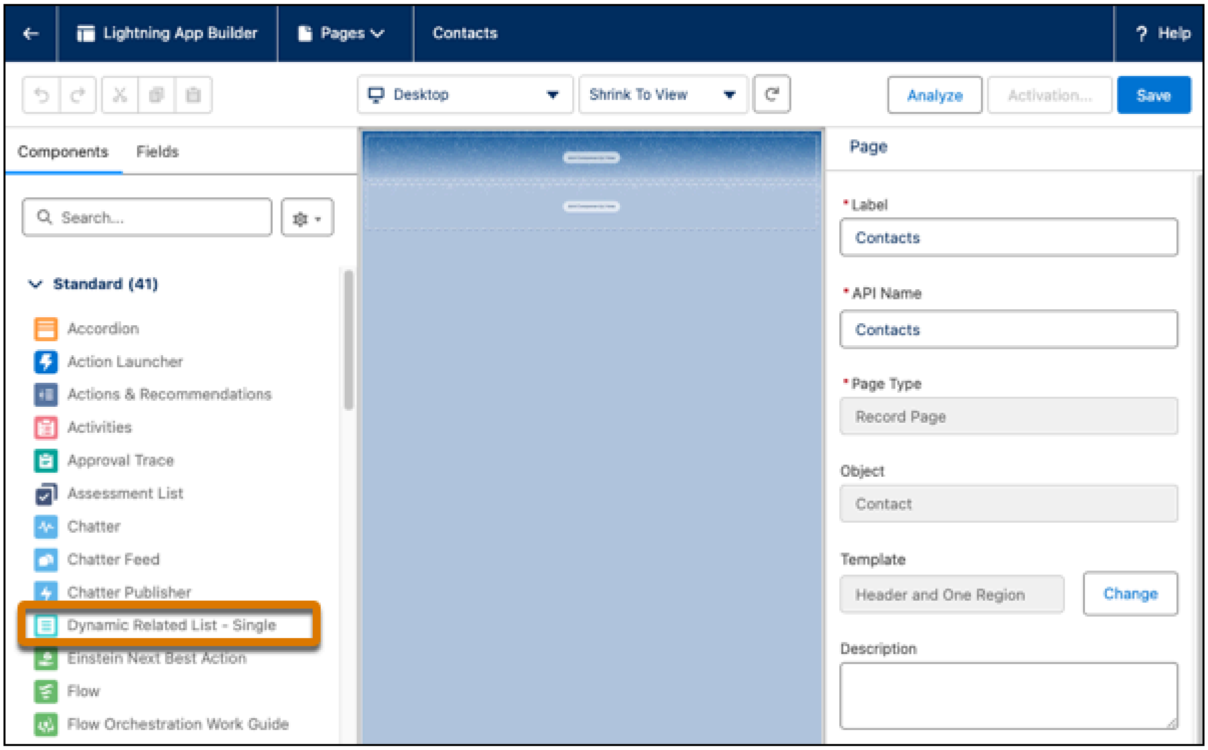
Where: This feature is available in Lightning Experience in all editions.

Dynamic Related Lists for Mobile is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

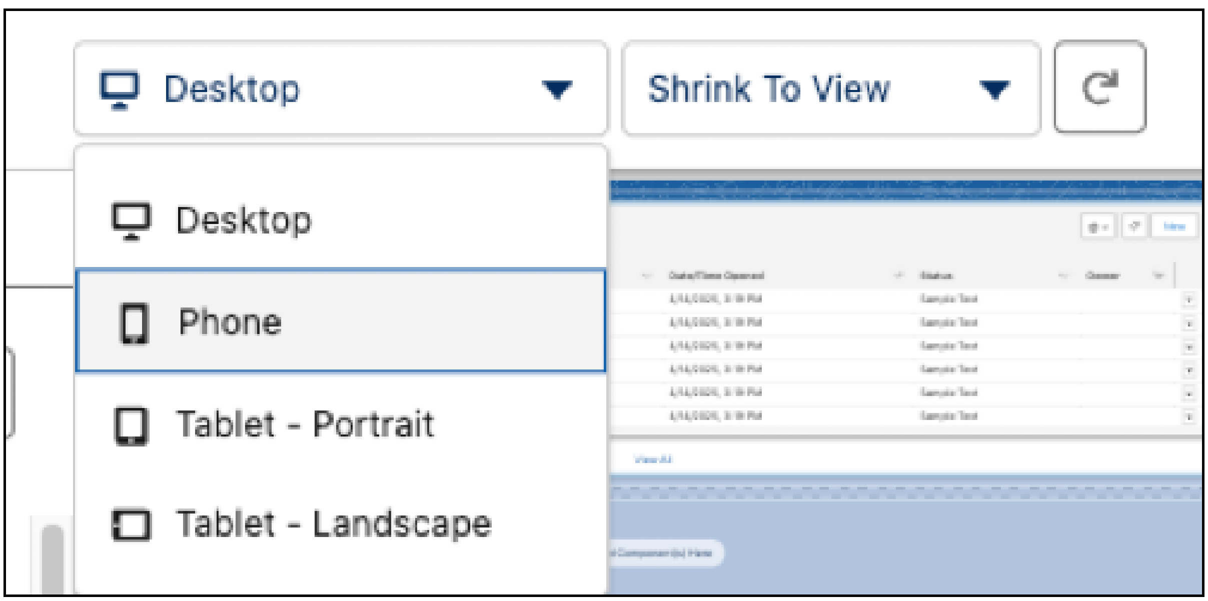
How: To use this feature, enable Dynamic Related Lists for Mobile in Salesforce Mobile App Setup. From Setup, in the Quick Find box, enter `Salesforce Mobile App` and select it. Enable Dynamic Related Lists for Mobile (Beta).



In Lightning App Builder, simply drag the Dynamic Related List - Single component onto the interactive canvas, and configure it in the properties pane.



Change the view from Desktop to Phone or Tablet to see your changes.



See Also

IdeaExchange: Dynamic Related Lists for use on mobile

Salesforce Help: Create Dynamic Related Lists in Lightning App Builder (can be outdated or unavailable during release preview)

Simplify Quick Filters for the Record Type Field

When you set up a related-list quick filter for the Record Type field, you now select the Value options from a multi-select picklist of available record types. Previously, you typed the Value options into a free-form text field, which sometimes returned incorrect filtering results.

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

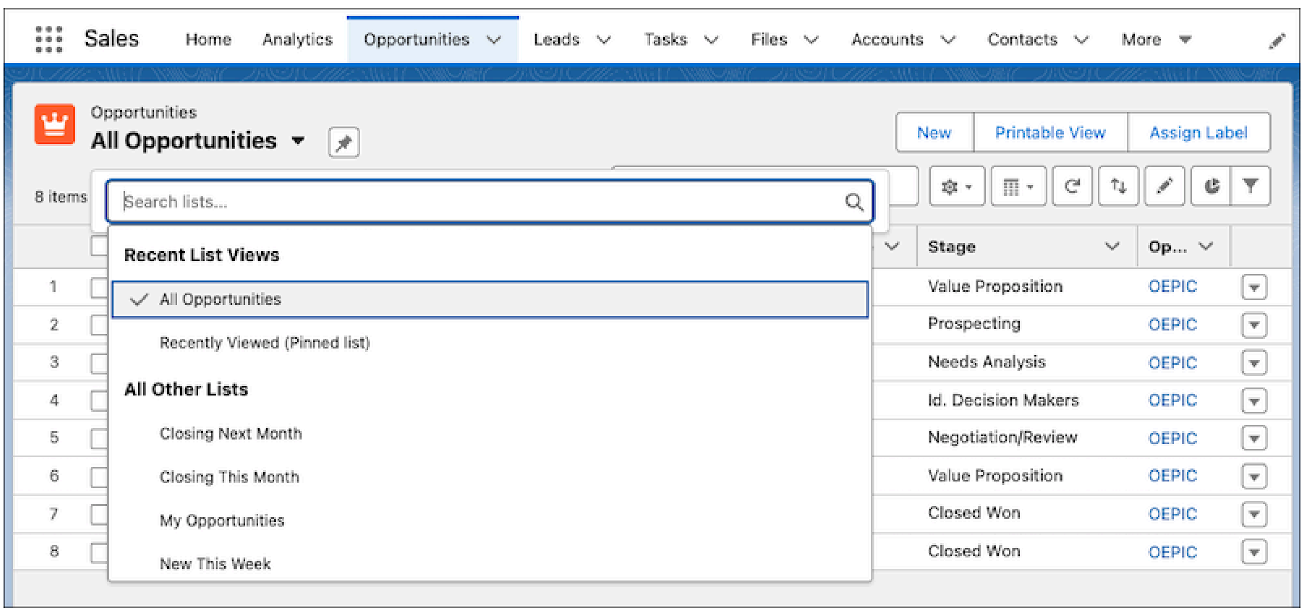
When: Released in Spring '25, this change was previously undocumented.

Enhance Accessibility with the Improved List Views Dropdown Menu

To improve accessibility and provide a more consistent user experience, the list views dropdown menu for all objects now uses Lightning Web Components (LWC). Overall, how your users work in list views hasn't changed, but the updated dropdown menu has some differences. Previously, the updated list views dropdown menu was available only for list views rendered with LWC and not for list views rendered with Aura.

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

How: The updated list views dropdown menu displays up to 100 lists. It also shows Recent List Views and the option to search your lists at the top of the dropdown. If you have more than 100 list views, use search terms to find a specific list. The keyboard focus for the list views dropdown menu starts with the focus on the top of the list rather than on the currently pinned list.



The updated list views dropdown menu uses a different Document Object Model (DOM) than the previous dropdown menu. The update to the menu's markup can affect custom functionality that relies on the list view dropdown menu's DOM structure, as well as the configuration of some built-in features, such as walkthroughs. To make sure that your list views continue to work as expected, review and test the updated dropdown menu.

Fields

Troubleshoot deployments that change the field type of a custom field. When you delete a custom object, UI changes alert you when another object has a lookup field that references that custom object.

Troubleshoot a Deployment That Contains a Custom Field Type Conversion
You can get an error when you use the metadata `deploy()` method or run a package upgrade and either of these deployments contains the conversion of a custom field from one data type to another. The error occurs if a deployment changes the data type of one or more custom fields and the objects that contain the affected custom fields contain a large amount of data. The limit is 85 million custom field type conversions.

Easily Remove Relationships Before Deleting a Custom Object
When you attempt to delete a custom object, if another standard object, custom object, or a Data Cloud data model object (DMO) contains a lookup field that references that custom object, you'll now see a more detailed page. This page includes a table that lists the objects that have relationships and now shows you the object API name and the field API name. The object API name is hyperlinked so you can go directly to the object and remove the relationship. If the object that contains the relationship field is a Data Cloud DMO, you can follow the provided help link to complete the process of removing the relationship.

Troubleshoot a Deployment That Contains a Custom Field Type Conversion

You can get an error when you use the metadata `deploy()` method or run a package upgrade and either of these deployments contains the conversion of a custom field from one data type to another. The error occurs if a deployment changes the data type of one or more custom fields and the objects that contain the affected custom fields contain a large amount of data. The limit is 85 million custom field type conversions.

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

How: In a deployment, if you're converting a custom field from text to picklist, the deployment could fail with this error.

`The deployment failed because we couldn't change the data type of one or more custom fields`. To resolve this error, see this knowledge article.

See Also

Salesforce Help: Considerations When Changing a Custom Field Type (can be outdated or unavailable during release preview)

Salesforce Help: Related Knowledge Article (can be outdated or unavailable during release preview)

Easily Remove Relationships Before Deleting a Custom Object

When you attempt to delete a custom object, if another standard object, custom object, or a Data Cloud data model object (DMO) contains a lookup field that references that custom object, you'll now see a more detailed page. This page includes a table that lists the objects that have relationships and now shows you the object API name and the field API name. The object API name is hyperlinked so you can go directly to the object and remove the relationship. If the object that contains the relationship field is a Data Cloud DMO, you can follow the provided help link to complete the process of removing the relationship.

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

See Also

Salesforce Help: Delete Custom Objects (can be outdated or unavailable during release preview)

AppExchange

Browse and deploy prebuilt solutions directly into Agentforce.

Boost Agentforce Capabilities with AgentExchange
Incorporate AI solutions from the AgentExchange marketplace. AgentExchange offers a variety of prebuilt prompts, actions, and topics designed to streamline your business workflows–all built by our trusted partners, Salesforce, and Agentblazers. With just a few clicks, you can browse, install, and deploy these solutions directly into Agentforce, with no coding required.

Boost Agentforce Capabilities with AgentExchange

Incorporate AI solutions from the AgentExchange marketplace. AgentExchange offers a variety of prebuilt prompts, actions, and topics designed to streamline your business workflows–all built by our trusted partners, Salesforce, and Agentblazers. With just a few clicks, you can browse, install, and deploy these solutions directly into Agentforce, with no coding required.

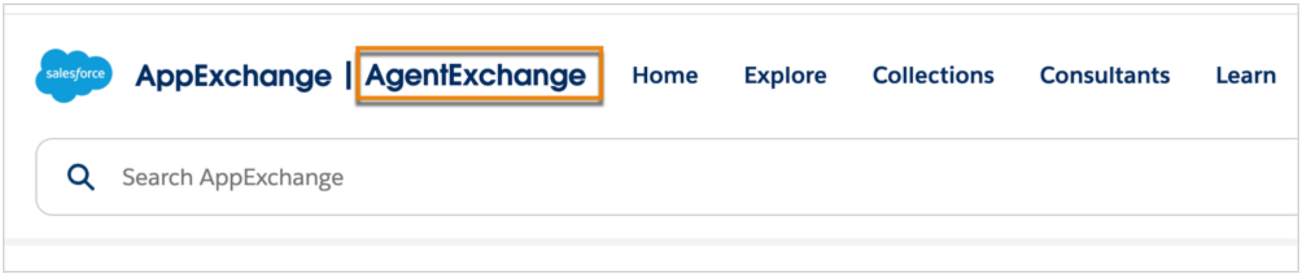
Where: This change applies to the AppExchange and AgentExchange websites.

Why: For example, let's say that a customer service team wants to improve response times and efficiency. They quickly deploy prebuilt AI agents and actions from AgentExchange into their Agentforce environment. These AI agents answer common questions, automate routine tasks, and share important information. The team is more productive and customers are happier.

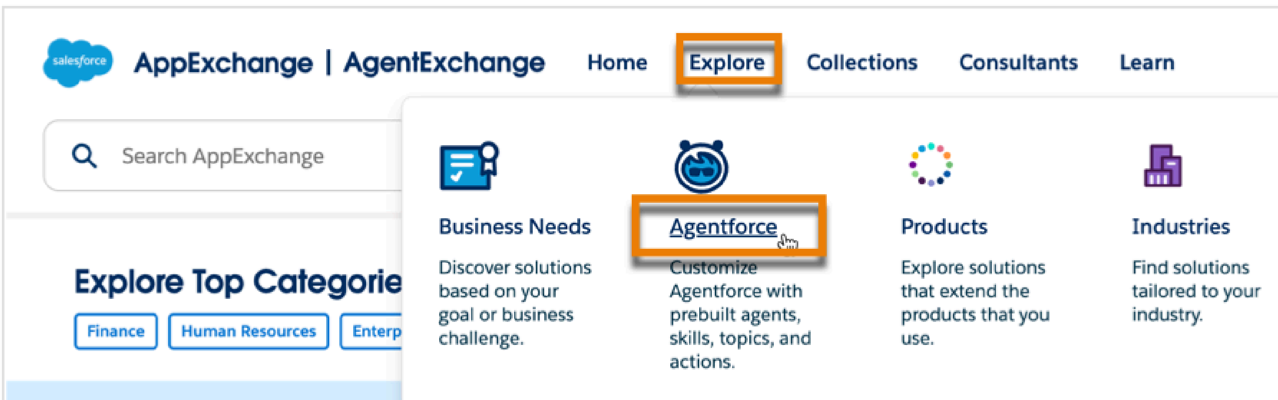
Likewise, sales productivity can be enhanced by providing closer guidance to prospects as they advance through the sales process. In marketing, optimizing lead qualification can enhance the overall effectiveness of the lead pipeline.

How: Here's how you can access AgentExchange.

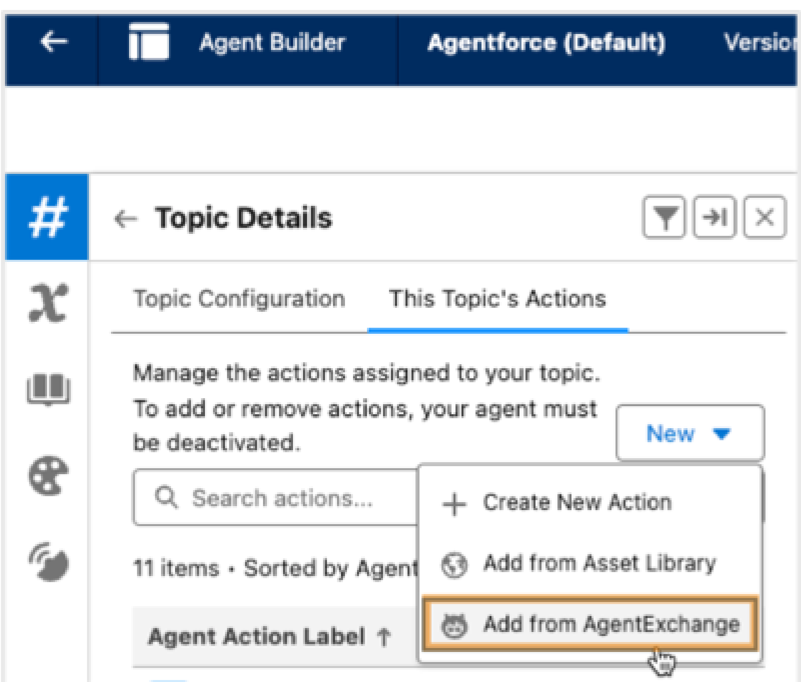
Click the **AgentExchange** link in the main navigation menu of AppExchange.



Check out the new **Explore** category for Agentforce.



From Agent Builder, go to **This Topic's Actions**, and then connect to AgentExchange.



See Also

Salesforce Blog: Everything You Need to Know About AgentExchange

AgentExchange

Agent Builder

General Setup

Some record page text has had its truncation removed at high zoom levels to improve accessibility. Navigate through Lightning App Builder more easily with improvements to keyboard command support.

Some Record Page Text Is No Longer Truncated
The truncation of some record page text, especially noticeable at high browser zoom levels, has been removed to improve accessibility. This change applies to most field types in the Highlights Panel and Dynamic Highlights Panel, and to the section header text in the Record Detail component and in Dynamic Forms field sections. Base component level truncation remains unaffected.

Select, Cut, and Paste Components More Easily When Using a Keyboard
In the Lightning App Builder, you can now use the Enter key to activate the component insertion icons before and after a component when cutting and pasting components with a keyboard. You can also use the Enter key to select a highlighted component on the canvas and navigate to its properties or delete it. Previously, although you could highlight the icons by tabbing through the canvas, you couldn't activate them to insert a component.

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

Select, Cut, and Paste Components More Easily When Using a Keyboard

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

See Also

Salesforce Help: Keyboard Navigation and Shortcuts in the Lightning App Builder (can be outdated or unavailable during release preview)

Data Cloud

Ingest, harmonize, unify, and analyze streaming and batch data with Data Cloud. Then use that data to unlock meaningful and intelligent experiences across Customer 360 applications and beyond.

Data Cloud Features Released by Month
Data Cloud features and changes are released as often as monthly, so check back again soon for the latest solutions. Changes included in the Summer ’25 release are generally listed under June ’25.

Cross Cloud Updates for Data Cloud
Our latest round of cross cloud features for Data Cloud.

Act on Data
Share your data with external data sources, create data actions, build flows, or enrich your Salesforce org with Data Cloud data.

See Also

Salesforce Help: Data Cloud Release Notes Changes

Data Cloud Features Released by Month

Data Cloud features and changes are released as often as monthly, so check back again soon for the latest solutions. Changes included in the Summer ’25 release are generally listed under June ’25.

KEY JOB AREA	Release Note
June ’25	
Act on Data	Create Related List Enrichments by Using Direct-DMO Relationships Deploy Related List Enrichments from a Data Cloud Sandbox Add Copy Field Enrichments to More Objects

Cross Cloud Updates for Data Cloud

Our latest round of cross cloud features for Data Cloud.

New and Changed Features

- Data Cloud and Account Engagement:
- Get More Out of Your Engagement Data
- Data Cloud and Analytics Cloud:
  - CRM Analytics: Reduce Data Cloud Direct Query Costs and Improve Performance with App-Level Caching
  - Data Cloud Reports and Dashboards

- Data Cloud and Consumer Goods Cloud:Improve Data Cloud Insights with New Data Streams and Mappings
- Data Cloud and Consumer Goods Cloud:Ingest Key Performance Indicator (KPI) Data from Processing Services to Data Cloud (Beta)
- Data Cloud and Experience Cloud: Partition Enhanced LWR Site Data with Custom Data Spaces
- Data Cloud and Field Service: Get More Insights with Data Cloud and Visual Remote Assistant (VRA) Integration
- Data Cloud with Net Zero Cloud Disclosure Authoring: Enhance Disclosure Reporting by Using Einstein Generative AI with Data Cloud
- Data Cloud and Shield Platform Encryption: Use External Key Management with Data Cloud
- Data Cloud and Loyalty Management: Find Members' Data Cloud Segment from Any Data Space
- Data Cloud and Context Service: Search Data Model Objects Faster with Data Space Filter
- Data Cloud and Data Processing Engine: Transform Complex Data by Using Data Cloud
- Data Cloud with Salesforce Flow: Log More Flow Data to Data Cloud

Act on Data

Share your data with external data sources, create data actions, build flows, or enrich your Salesforce org with Data Cloud data.

Create Related List Enrichments by Using Direct-DMO Relationships
You can now enrich accounts, cases, contracts, and vehicles with direct-DMO related lists. Direct-DMO related lists are based on direct relationships between DMOs and Salesforce objects and don't require identity resolution.

Deploy Related List Enrichments from a Data Cloud Sandbox
After you copy related list enrichments to a Data Cloud sandbox, you can deploy them to a CRM production org. The deployment makes the app development lifecycle easier and saves you time because you don't have to re-create the enrichments in production. This change doesn't apply to direct-DMO related lists.

Add Copy Field Enrichments to More Objects
You can now add copy field enrichments to cases, contracts, orders, products, and quotes. With the additional objects enabled, you can enrich more Salesforce objects with field data from Data Cloud.

Create Related List Enrichments by Using Direct-DMO Relationships

You can now enrich accounts, cases, contracts, and vehicles with direct-DMO related lists. Direct-DMO related lists are based on direct relationships between DMOs and Salesforce objects and don't require identity resolution.

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

When: This change is available starting in June 2025.

Deploy Related List Enrichments from a Data Cloud Sandbox

After you copy related list enrichments to a Data Cloud sandbox, you can deploy them to a CRM production org. The deployment makes the app development lifecycle easier and saves you time because you don't have to re-create the enrichments in production. This change doesn't apply to direct-DMO related lists.

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

When: This change is available starting in June 2025.

Deployment

New change set components are available.

New and Changed Components for Change Sets
The components available for a change set vary by edition.

New and Changed Components for Change Sets

The components available for a change set vary by edition.

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.

Lightning Components
LWC API version 64.0 has no versioned changes for custom components. Stricter access checks on imports in LWC can lead to errors that you must resolve. In the developer guides, base Lightning

components are now called Lightning base components. More Lightning base components have been adapted to support native shadow DOM. Lightning base components now support TypeScript.

Lightning Design System

The Salesforce Lightning Design System (SLDS) includes the resources to create user interfaces consistent with Salesforce Lightning principles, design language, and best practices.

Apex

Improve the readability of a dynamic formula by using template mode to evaluate the formula expression. Enable the generation of debug logs during metadata deployments at an org-wide level.

API

Get more visibility into composite API operations and query for all valid resources in sObjects REST API OpenAPI document generation in API version 64.0.

Development Environments

Development environments are full-featured Salesforce environments that you use to develop and test existing or new features and custom applications. They include Developer Edition orgs, sandboxes, and scratch orgs.

Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience for custom app development on Salesforce.

Salesforce Functions

Salesforce Functions is no longer available for purchase or renewal. Learn about the retirement plan for Salesforce Functions.

Change Data Capture

Receive change event notifications for more objects.

Platform Events

Check out Apex trigger configuration information in Setup and outbound message enhancements. Also, be aware of Streaming API disconnect messages.

Pub/Sub API

Pub/Sub API is available in all Hyperforce regions.

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

Lightning Components

LWC API version 64.0 has no versioned changes for custom components. Stricter access checks on imports in LWC can lead to errors that you must resolve. In the developer guides, base Lightning components are now called Lightning base components. More Lightning base components have been adapted to support native shadow DOM. Lightning base components now support TypeScript.

Note Looking for new and changed Lightning web components and Aura components? See the lists of new and changed items at the end of the Development section.

LWC API Version 64.0
Update the API version for your components to use new features and improvements. Versioning your Lightning web components ensures that your existing components aren't affected when Salesforce ships new features, bug fixes, and performance improvements that change existing behavior. Versioning also helps Salesforce deprecate legacy features.

Resolve Errors Related to Accessing Referenced Lightning Components
Salesforce performs strict access checks when Aura components and Lightning web components (LWC) import or reference other components or modules. If you receive a `No {COMPONENT or MODULE} named {component or module name} found` error, check your imports before deploying to an org. If you're an ISV partner, confirm that the Lightning components and modules in your managed packages are exposed to subscribers.

Preview a Single Lightning Web Component Using Local Dev (Beta)
You can now configure Local Dev to run a real-time preview of a single Lightning web component. Previously, you had to publish a component to an org before you could preview it using Local Dev.

Lightning Base Components Documentation Update
To make our terminology consistent, our documentation now uses the name "Lightning base components" instead of "base Lightning components."

Internal DOM Structure Is Changing for Lightning Base Components
Salesforce is preparing the base components for native shadow DOM to enhance performance and comply with Web Components standards. These updates change the internal DOM structure. Make sure that your tests don't rely on the previous internal structure of these components.

Use TypeScript with Lightning Base Components
Improve your LWC development experience using the type definitions for Lightning base components. TypeScript for LWC is in developer preview and has several limitations.

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.

See Also
- Lightning Web Components Developer Guide
- Lightning Aura Components Developer Guide

LWC API Version 64.0

Update the API version for your components to use new features and improvements. Versioning your Lightning web components ensures that your existing components aren't affected when Salesforce ships new features, bug fixes, and performance improvements that change existing behavior. Versioning also helps Salesforce deprecate legacy features.

Where: This change applies to custom Lightning web components in Lightning Experience, Experience Builder sites, and all versions of the Salesforce mobile app.

How: You can change a component's API version in its `.js-meta.xml` file.

```
<?xml version="1.0" encoding="UTF-8"?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
        <apiVersion>64.0</apiVersion>
</LightningComponentBundle>
```

Important We recommend that you upgrade your component API version one version at a time. For example, upgrade from 58.0 to 59.0, fix any errors or warnings you encounter, and then repeat until you get to the latest API version.

When a component's LWC API version is set to 59.0 or later, it uses that value for its LWC framework version. Components that specify LWC API version 58.0 and earlier continue to work based on LWC framework behavior in Summer '23 (API 58.0). When you set a component to use an earlier API version, you don't get new features, bug fixes, and enhancements that are available only with later LWC API versions.

LWC API version 64.0 has no version-specific changes. That makes this release a good one to update your existing components to the current API version.

See Also

Lightning Web Components Developer Guide: API Versioning (can be outdated or unavailable during release preview)

Resolve Errors Related to Accessing Referenced Lightning Components

Salesforce performs strict access checks when Aura components and Lightning web components (LWC) import or reference other components or modules. If you receive a `No {COMPONENT or MODULE} named {component or module name} found` error, check your imports before deploying to an org. If you're an ISV partner, confirm that the Lightning components and modules in your managed packages are exposed to subscribers.

Where: This change applies to custom Lightning Aura components, custom Lightning apps, and custom Lightning web components in Lightning Experience, Experience Sites, and all versions of the Salesforce mobile app in all editions.

How: If your Lightning component triggers a `No {COMPONENT or MODULE} named {name of the component or module name} found` error, then your component doesn't have access to the component or module specified in the error message.

- If the specified component or module is provided by Salesforce, remove references to that component or module from your code. Salesforce owns certain components that you can't directly access.
- If the referenced component or module is from a managed package provided by a source other than Salesforce, contact the package owner and follow their guidance.

If you're an ISV partner, confirm that the Lightning components and modules in your managed packages are properly exposed to subscribers. Review Component Access Control in the *Lightning Aura*

Components Developer Guide and Add Components to Managed Packages in the *Lightning Web Components Developer Guide*.

Preview a Single Lightning Web Component Using Local Dev (Beta)

You can now configure Local Dev to run a real-time preview of a single Lightning web component. Previously, you had to publish a component to an org before you could preview it using Local Dev.

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

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

How: After you install Local Dev, run `sf lightning dev component` on the command line. In the resulting CLI output, use your arrow keys to choose a component from the list of supported options. After you make a selection, Local Dev automatically opens your component in the new single component preview browser page.

For information about flags and limitations for this command, see Lightning Web Components Developer Guide: Preview a Single Component

See Also

Trailhead: Set Up Your Lightning Web Components Developer Tools
Salesforce Developers Blog: Develop LWC at Lightning Speed with the New Local Dev Experience

Lightning Base Components Documentation Update

To make our terminology consistent, our documentation now uses the name "Lightning base components" instead of "base Lightning components."

Why: In Winter '17, we introduced base Lightning components as the components that are available out-of-the-box for Aura Components. As of Spring '19, these base components are also available for Lightning Web Components (LWC). Then, Lightning Components became the framework name that encompasses the Aura Components and LWC programming models.

Here are our key terminology highlights.

- Lightning Base Components - Previously referred to in some documentation as base Lightning components. We use title case (Lightning Base Components) in headers and sentence case (Lightning base components) otherwise. On subsequent use, we usually shorten to "base components." You might also see the name shortened to LBC in some documentation. See the Component Reference for documentation on base components.
- Lightning Web Components - Capitalize each word in the name when referring to the programming model. On subsequent use, we usually abbreviate to LWC. To refer to a component that uses LWC, we

say *Lightning web component* and capitalize only Lightning. Lightning web components are sometimes referred to as LWC components.
- Aura Components - Capitalize each word in the name when referring to the programming model. To refer to a component, use *Aura component* and capitalize only Aura.

Some resources continue to use the old terminology.

- Blog posts in Spring ’25 and earlier
- Developer documentation in Spring ’25 and earlier
- Release notes in Spring ’25 and earlier
- Salesforce Developers YouTube videos in Spring ’25 and earlier

See Also

Component Library

Lightning Web Components Developer Guide: Work with Lightning Base Components (can be outdated or unavailable during release preview)

Internal DOM Structure Is Changing for Lightning Base Components

Salesforce is preparing the base components for native shadow DOM to enhance performance and comply with Web Components standards. These updates change the internal DOM structure. Make sure that your tests don’t rely on the previous internal structure of these components.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in all editions.

Why: Salesforce works continuously to align the base 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). Since the Spring ’23 release, more than 90 base components have been adapted to prepare for native shadow DOM.

In Summer ’25, these additional components have been adapted to prepare for native shadow DOM.

- `lightning-tree-grid`
- `lightning-user-consent-cookie`
- `lightning-quick-action-panel`

Salesforce documented that the internal component structure is protected. Salesforce may at any time redesign the internals of our components to improve performance, enhance functionality, and support accessibility. See Anti-Patterns for Styling Components.

Important If your tests rely on this protected internal DOM structure, rewrite your tests as soon as possible.

How: To make sure that your tests are ready for the internal DOM structure changes, review your integration tests and Selenium-based tests. Additionally, make sure that your component CSS follows best practices. For supported integration tests, use the UI Test Automation Model (UTAM) and UTAM Page Objects, which stay up to date with changes in component structure. For supported Selenium-based tests, see How to Automate Shadow DOM in Selenium WebDriver. For supported CSS styling, see Style Components with Lightning Design System in the *Lightning Web Components Developer Guide*.

Use TypeScript with Lightning Base Components

Improve your LWC development experience using the type definitions for Lightning base components. TypeScript for LWC is in developer preview and has several limitations.

Where: This change applies to Lightning Experience, Experience Builder sites, and all versions of the mobile app in all editions.

How: When using a base component, import its type definition in your component. Type definitions for base components are available in the @salesforce/lightning-types Node Package Manager (npm) package.

```
import { LightningElement } from 'lwc';
import '@salesforce/lightning-types';
import type LightningButton from 'lightning/button';

export default class ComponentExample extends LightningElement {
    submitLabel: string = 'Submit';
}
```

If you have defined your own type definitions for base components, we recommend using the npm package in your LWC project instead.

See Also

Lightning Web Components Developer Guide: TypeScript Type Definitions for LWC (Developer Preview) (can be outdated or unavailable during release preview)

API Distortion Changes in Lightning Web Security

Lightning Web Security includes new security protections with additional distortions for web APIs. ESLint rules matching the distortions are also available.

Where: This change applies to Lightning Experience in all editions, LWR-based Experience Cloud sites, and Lightning web components in Aura sites when LWS is enabled.

How: These APIs have new distortions documented in the LWS Distortion Viewer (can be outdated or unavailable during release preview). Corresponding ESLint rules are included in the ESLint package.

- `Document.parseHTMLUnsafe` static method

Lightning Design System

The Salesforce Lightning Design System (SLDS) includes the resources to create user interfaces consistent with Salesforce Lightning principles, design language, and best practices.

Lightning Design System Component Blueprints Updates
Get more out of SLDS component blueprints and utilities with recent enhancements and bug fixes.

Update Your Lightning Components to SLDS 2 with SLDS Linter (Beta)
Validate your code against Salesforce Lightning Design System 2 (SLDS 2 beta) rules with SLDS Linter (beta). Scan your code with SLDS Linter, then automatically fix your code and apply those suggestions in bulk across your repository.

Keep Up with the Latest SLDS Validator Enhancements
Use SLDS Validator to improve your Salesforce Lightning Design System (SLDS) code. Scan your code, validate it against a set of SLDS guidelines, and use SLDS Validator suggestions and its auto-fix capability to update your code.

Lightning Design System Component Blueprints Updates

Get more out of SLDS component blueprints and utilities with recent enhancements and bug fixes.

Where: These changes apply to Salesforce Lightning Design System (SLDS) and Lightning Experience.

When: These changes are in Summer ’25. We improve SLDS frequently. For the latest changes, see Release Notes in the Lightning Design System documentation. The page lists changes by the date they were completed. The changes are rolled up into the next major Salesforce release.

How: Improve your UI with these recent updates to SLDS component blueprints.

- To improve accessibility, we added a new Date Format Visible variation to the Datepicker and Datetime Picker blueprints. The variation displays a message to help users enter dates correctly. After the date field receives focus, a message appears under the field to show the expected date format. After focus is removed from the date field, the message is hidden and available as assistive text.
- To be compatible with the SLDS 2 default theme, Salesforce Cosmos, we removed the `slds-button__icon_large` class from the Toast component blueprint’s close button (X) icon. The default icon size is now 14x14.
- We updated the Modals blueprint in Winter ’25 to display a white background for the close button (X), which improves visibility for people with low vision. Specifically, we changed the close button color from white to gray by removing the `slds-button_icon-inverse` class. We also implemented a temporary fix to prevent the close button from appearing invisible. This temporary fix is scheduled for removal in Winter '26. To display the modal close button correctly, don't use the `slds-button_icon-inverse` class in your close-button markup. Refer to the Known Issue for more information.

See Also

Salesforce Lightning Design System 2

W3C: Web Content Accessibility Guidelines (WCAG)
Known Issue: Modal close button is not visible with the new white background after Winter '25 release

Update Your Lightning Components to SLDS 2 with SLDS Linter (Beta)

Validate your code against Salesforce Lightning Design System 2 (SLDS 2 beta) rules with SLDS Linter (beta). Scan your code with SLDS Linter, then automatically fix your code and apply those suggestions in bulk across your repository.

Where:

Note SLDS 2 and SLDS Linter are pilot or beta services that are subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of these pilot or beta services is at the Customer's sole discretion.

We release new versions of SLDS Linter frequently. To learn about recent updates, see the release notes.

Why: Although both SLDS Validator and SLDS Linter scan your code and offer suggestions for improvement, SLDS Linter provides these additional advantages:

- SLDS Linter is easier to set up than SLDS Validator, so you can get started faster.
- SLDS Linter is a command-line tool. SLDS Validator is a Visual Studio Code extension that you must install.
- With SLDS Linter, you can bulk fix your code with a single command.
- SLDS Linter is designed to uplift your existing code to the latest Salesforce design system, SLDS 2, and to make sure that any new code you write aligns with SLDS 2.

How: To learn how to use SLDS Linter, see the SLDS Linter github repository.

See Also
GitHub: SLDS Linter
Salesforce Lightning Design System 2: Developer Tools

Keep Up with the Latest SLDS Validator Enhancements

Use SLDS Validator to improve your Salesforce Lightning Design System (SLDS) code. Scan your code, validate it against a set of SLDS guidelines, and use SLDS Validator suggestions and its auto-fix capability to update your code.

Where: We release new versions of SLDS Validator on Visual Studio Marketplace throughout the year. To learn about recent updates, read the change log.

How: Install the SLDS Validator extension in Visual Studio Code.

See Also

Visual Studio Code Marketplace: SLDS Validator
Salesforce Lightning Design System 2: Developer Tools

Apex

Improve the readability of a dynamic formula by using template mode to evaluate the formula expression. Enable the generation of debug logs during metadata deployments at an org-wide level.

Evaluate Dynamic Formulas in Template Mode
Write more concise code by using the new `parseAsTemplate()` method in the FormulaBuilder class. The `parseAsTemplate()` method evaluates a dynamic formula in template mode. In template mode, you can create formula expressions where values are interpolated into a string by using the merge field syntax `{!Object_Name.Field_Name}`. Compared to traditional string concatenation, this syntax makes your code cleaner and more readable.

Specify an Org-Wide Enablement of Debug Logs During Metadata Deployment
Generating debug logs during a metadata deployment can cause longer test execution and is disabled by default. However, admins can choose to enable debug logs during metadata deployment via this setting, in conjunction with an active debug log trace flag. Enabling the debug log in the `DebuggingHeader` overrides this setting.

See Also
Apex: New and Changed Items

Evaluate Dynamic Formulas in Template Mode

Write more concise code by using the new `parseAsTemplate()` method in the FormulaBuilder class. The `parseAsTemplate()` method evaluates a dynamic formula in template mode. In template mode, you can create formula expressions where values are interpolated into a string by using the merge field syntax `{!Object_Name.Field_Name}`. Compared to traditional string concatenation, this syntax makes your code cleaner and more readable.

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

How: In this example, when building a formula instance, `true` is passed to the `parseAsTemplate()` method. The formula expression is evaluated in template mode, and the values of the `name` and `website` fields on the Account record are interpolated into the string. The output is equal to the expression `'name & " (" & website & ")"'`.

```
FormulaEval.FormulaInstance ff = Formula.builder()
    .withType(Schema.Account.class)
    .withReturnType(FormulaEval.FormulaReturnType.STRING)
    .withFormula('{!name} ({!website})')
```

```
    .parseAsTemplate(true)
    .build();
```

See Also

Apex Developer Guide: Formula Evaluation in Apex (can be outdated or unavailable during release preview)

Apex Reference Guide: FormulaBuilder Methods (can be outdated or unavailable during release preview)

Specify an Org-Wide Enablement of Debug Logs During Metadata Deployment

Generating debug logs during a metadata deployment can cause longer test execution and is disabled by default. However, admins can choose to enable debug logs during metadata deployment via this setting, in conjunction with an active debug log trace flag. Enabling the debug log in the `DebuggingHeader` overrides this setting.

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

How: From Setup, in the Quick Find box, enter *Apex Settings*, and then enable **Metadata Deployments can generate Debug Logs**. To enable this feature programmatically with Metadata API, see the `enableDebugLogsDuringDeployment` field in ApexSettings in the *Metadata API Developer Guide*.

API

Get more visibility into composite API operations and query for all valid resources in sObjects REST API OpenAPI document generation in API version 64.0.

Use Your Org's My Domain Login URL in API Calls (Release Update)
To prevent disruption after infrastructure updates that change your instance name, make sure that API traffic to your org uses the org's My Domain login URL. This update is available starting in Summer '25.

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. These API versions are 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.

Get Notified About Composite API Requests with EventLogFile Event Types
Query the EventLogFile object for the CompositeApi and CompositeApiSubrequest event types to get details about composite API and composite graph API requests and subrequests.

Other Improvements to Generating an OpenAPI Document for sObjects REST API (Beta)

With the latest version of the OpenAPI specification, you can query for all available resources and use a wildcard character in URIs.

Retrieve Metadata Types with Dependencies
When retrieving metadata types, use the new `rootTypesWithDependencies` parameter on the `RetrieveRequest` object to request metadata types and their dependencies.

Know When the Synchronous Compile on Deploy Setting Is Enabled in Sandboxes
The Deployment Status page in sandboxes now displays a banner when the Perform Synchronous Compile on Deploy setting for Apex is enabled.

New Metadata Coverage Report
The Metadata Coverage Report has been redesigned and moved to a new location. The old Metadata Coverage Report will be removed in the Summer '25 release.

Deploy and Retrieve Pilot Metadata Types
You can now enable developers working in your org to deploy and retrieve pilot metadata types. Pilot metadata types are only guaranteed to work with the current API version and can be changed or removed in future releases.

Use Your Org's My Domain Login URL in API Calls (Release Update)

To prevent disruption after infrastructure updates that change your instance name, make sure that API traffic to your org uses the org's My Domain login URL. This update is available starting in Summer '25.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions except Database.com.

When: To help you test, this change is enforced in sandbox orgs in Winter '26. Salesforce enforces this update in other orgs in Spring '26. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and then click the maintenance tab.

Why: Your org's My Domain login URL continues to work after your org is moved to another Salesforce instance. Also, because My Domain names are unique, using your org's My Domain login URL adds another layer of security.

How: To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Use Your Org's My Domain Login URL in API Calls, follow the testing and activation steps.

See Also
Release Updates

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. These API versions are not supported and won't be available starting in Summer '25. Applications consuming them are then disrupted. Requests fail with an error message indicating that the endpoint is deactivated. Upgrade all applications that use a legacy API version to a current version before this breaking change occurs.

Where: This change affects these API versions.

Bulk API

21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0

SOAP API

21.0, 22.0, 23.0, 24.0, 25.0, 26.0, 27.0, 28.0, 29.0, 30.0

REST API

v21.0, v22.0, v23.0, v24.0, v25.0, v26.0, v27.0, v28.0, v29.0, v30.0

Note This change affects all REST APIs that use URIs beneath `/services/data/vXX.X/`, including:

- Bulk API
- Connect REST API
- IoT REST API
- Lightning Platform REST API
- Metadata API
- Place Order REST API
- Reports and Dashboards REST API
- Tableau CRM REST API
- Tooling API

This change applies to Professional (with API access enabled), Enterprise, Performance, Unlimited, and Developer editions. It affects all API-enabled orgs, including sandboxes and scratch orgs.

How: Before the Summer '25 release, modify or upgrade all applications to function with current API versions. Newer API versions offer more capabilities and improved security and performance.

Identify requests made from older or unsupported API versions of SOAP API, REST API, and Bulk API by using the API Total Usage event.

You can enforce the retirement of these API versions ahead of Summer '25. In Setup, in Release Updates, find Salesforce Platform API Versions 21.0 Through 30.0 Retirement, and then click **Get Started**. To reject calls to the API versions scheduled for retirement, click **Enable Test Run**. To disable the enforcement, click **Disable Test Run**.

Get Notified About Composite API Requests with EventLogFile Event Types

Query the EventLogFile object for the CompositeApi and CompositeApiSubrequest event types to get details about composite API and composite graph API requests and subrequests.

Where: This change affects API version 64.0 and later. This feature is available in all Salesforce editions, sandboxes, and scratch orgs that have API Enabled.

Other Improvements to Generating an OpenAPI Document for sObjects REST API (Beta)

With the latest version of the OpenAPI specification, you can query for all available resources and use a wildcard character in URIs.

Where: These changes affect API version 64.0 and later. This beta feature is available in all Salesforce editions, sandboxes, and scratch orgs that have API Enabled.

Note OpenAPI document generation for sObjectds REST API is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Diretctory. Use of this pilot or beta service is at the Customer's sole discretion.

Why: The sObjects REST API OpenAPI document generation feature (beta) now:

- Includes the `/async/specifications/oas3` resource to return a list of all valid resources
- Allows the use of the wildcard character * to match single URI path segments or the remaining path when used at the end of a URI

Retrieve Metadata Types with Dependencies

When retrieving metadata types, use the new `rootTypesWithDependencies` parameter on the `RetrieveRequest` object to request metadata types and their dependencies.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Performance, and Unlimited editions.

Why: Some root metadata types require dependent metadata for the deploy to be successful. As metadata types become more complex and are generated by AI, it can be difficult to find the full list of dependent metadata to request for a root metadata type. Users can now request that metadata types be retrieved with all dependent metadata without specifying each metadata component specifically.

How: List root metadata types with dependencies by using the `rootTypesWithDependencies` field on the `RetrieveRequest` object.

Know When the Synchronous Compile on Deploy Setting Is Enabled in Sandboxes

The Deployment Status page in sandboxes now displays a banner when the Perform Synchronous Compile on Deploy setting for Apex is enabled.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Professional, Performance, and Unlimited editions.

New Metadata Coverage Report

The Metadata Coverage Report has been redesigned and moved to a new location. The old Metadata Coverage Report will be removed in the Summer ‘25 release.

See Also
Metadata Coverage Report

Deploy and Retrieve Pilot Metadata Types

You can now enable developers working in your org to deploy and retrieve pilot metadata types. Pilot metadata types are only guaranteed to work with the current API version and can be changed or removed in future releases.

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

Why: If you enable the deployment and retrieval of pilot metadata types, developers can try new metadata types while they’re in development. They can then provide feedback and be part of shaping how a pilot metadata type is implemented before it's generally available.

How: In Setup, go to **Settings | Deployment Settings**, and under Deployment Options, select **Use pilot metadata types**.

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.

Data Mask (Beta)
Click into specific information about each mask, Automate how frequently Data Mask runs. Enjoy faster job processing times, better handling of complex data, and protect your data with automation bypasses.

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Access Information About Specific Data Mask Job (Beta)

The Run Logs tab in Data Mask is now the Jobs tab. From a list view in the Jobs tab, you can click the Data Mask name to view specific information about each mask, such as configured objects, current job progress, and any errors thrown by the current job.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Data Mask is installed.

Who: This change is available in sandboxes created from production orgs where the latest Data Mask managed package is installed.

Automate the Running of Data Mask Processes with Job Scheduler (Beta)

Configure how frequently you run Data Mask, daily, weekly, or monthly, to mask all new data in your sandbox.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Data Mask is installed.

Who: This change is available in sandboxes created from production orgs where the latest Data Mask managed package is installed.

Other Improvements to Salesforce Data Mask (Beta)

We've optimized the record loading and transformation so Data Mask jobs complete faster. When it completes a job, Data Mask now bypasses automation rather than deactivating or reactivating when a job is complete. Data Mask deletes field-history tracking instead of turning it off for the masking process. Serial mode is removed as jobs automatically retry records when row-locked.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Data Mask is installed.

Who: This change is available to customers who want to install the latest managed package.

Platform Development Tools

Build applications collaboratively and deliver continuously with Salesforce Developer Experience (DX), the open and integrated experience for custom app development on Salesforce.

Agentforce DX

Create and test agents directly in a Salesforce DX project with Agentforce DX's pro-code tools, such as

Salesforce CLI and VS Code.

We release updates of Agentforce DX as needed. Read the weekly Salesforce CLI release notes for more information.

See Also

Agentforce Developer Guide: Agentforce DX

Salesforce CLI

Use Salesforce CLI to create environments for development and testing, synchronize source code, run tests, and control your application lifecycle.

We release new versions of Salesforce CLI weekly. Read the weekly release notes to learn about recent updates.

Keep Up with the Latest Salesforce CLI Enhancements
Stay up to date with recent Salesforce CLI enhancements so that you can learn about better ways to work with your Salesforce DX projects.

See Also

GitHub: Salesforce CLI Release Notes
Salesforce CLI Setup Guide
Salesforce CLI Command Reference
Salesforce DX Developer Guide

Keep Up with the Latest Salesforce CLI Enhancements

Stay up to date with recent Salesforce CLI enhancements so that you can learn about better ways to work with your Salesforce DX projects.

Where: These changes apply to Salesforce CLI version 2.71.6 (January 8, 2025) and later.

How: Read the Salesforce CLI weekly release notes for detailed information about all the new and changed features and issue fixes in recent releases.

Generate Better Manifest Files

Generating a manifest file has been significantly improved with these new features.

Exclude Metadata Components

Use the `--excluded-metadata` flag to exclude specific metadata types when generating a manifest from an org.

```
sf project generate manifest --from-org my-org --excluded-metadata Stand
```

```
ardValueSet
```

Unlike `--metadata`, you can't use `--excluded-metadata` to exclude individual components, such as `--metadata ApexClass:Test*`.

Target Specific Metadata in Local Directories

Combine the `--metadata` flag with `--source-dir` to target specific metadata components in your local package directory.

```
sf project generate manifest --metadata CustomObject --source-dir force-
app
```

Similarly, combine `--excluded-metadata` with `--source-dir` to exclude specific metadata components from your local package directory.

```
sf project generate manifest --excluded-metadata StandardValueSet --sour
ce-dir force-app
```

Limit Concurrent API Calls

Control the number of concurrent API calls made during manifest generation by setting the `SF_LIST_METADATA_BATCH_SIZE` environment variable. For example, to limit the number of concurrent API calls to 20:

```
export SF_LIST_METADATA_BATCH_SIZE=20
```

Decompose the ExternalServiceRegistration Metadata Component (Beta)

The ExternalServiceRegistration metadata component can now be decomposed into two source files when retrieved into your Salesforce DX project, making it easier to manage and edit metadata files.

Decomposed files:

- `BankService.yaml`: Contains the contents of the schema field, converted to YAML format.
- `BankService.externalServiceRegistration-meta.xml`: Standard Metadata API XML file that contains all the other fields except the schema.

To enable this feature, run this command in your DX project.

```
sf project convert source-behavior --behavior decomposeExternalServiceRegistra
tionBeta
```

This command updates your `sfdx-project.json` file to always decompose ExternalServiceRegistration components. Existing source files in your local package directories are converted to the new format. To preview the changes without applying them, use the `--dry-run` flag.

Get Better Apex Test Output

The `project deploy start` command now provides more detailed test results when used with `--test-level` and `--verbose`. The human-readable output now includes the duration of each Apex test in milliseconds, as shown in this sample output.

```
Test Success [11]
✓ GeocodingServiceTest.blankAddress (159ms)
✓ FileUtilitiesTest.createFileFailsWhenIncorrectBase64Data (263ms)
✓ FileUtilitiesTest.createFileFailsWhenIncorrectFilename (227ms)
✓ FileUtilitiesTest.createFileFailsWhenIncorrectRecordId (481ms)
```

This information is already available in the JSON output.

Create a Snapshot Org More Easily

Creating a scratch org from a snapshot is now simpler with the new `--snapshot` flag of the `org create scratch` command. This flag eliminates the need for a definition file when creating a scratch org from a snapshot.

For example, if you have a snapshot named `NightlyBranch`, you can create a new scratch org with this command.

```
sf org create scratch --alias my-scratch-org --target-dev-hub MyHub --snapshot
NightlyBranch --wait 10
```

The `MyHub` Dev Hub org must be associated with the `NightlyBranch` snapshot. We recommend increasing the `--wait` time to account for the longer creation process.

Wait for `org resume scratch` to Complete

If the `org create scratch` command times out before the scratch org is ready, you run the `org resume scratch` command to poll for completion and see the results. With the new `--wait` flag, you can specify how long the command waits before returning control of the terminal to you. Previously, you had to repeatedly run the `org resume scratch` command until the scratch org was ready.

For example, to wait for 10 minutes before the command returns control to you, run this command.

```
sf org resume scratch --job-id 2SRfakefake000345 --wait 10
```

See Also

Salesforce CLI Command Reference: project generate manifest
Salesforce DX Developer Guide: Decompose Metadata Types
Salesforce DX Developer Guide: Scratch Org Snapshots
Salesforce DX Developer Guide: Create Scratch Orgs

Salesforce Extensions for Visual Studio Code

The Salesforce Extension pack includes tools for developing on the Salesforce platform in the lightweight, extensible VS Code editor. These tools provide features for working with development orgs (scratch orgs, sandboxes, and DE orgs), Apex, Lightning web components, Aura components, and Visualforce.

We release new versions of the extensions weekly. Read the weekly release notes to learn about recent updates.

See Also

Salesforce Extensions for Visual Studio Code

Code Builder

Code Builder is a web-based integrated development environment that has all the power and flexibility of Visual Studio Code, Salesforce Extensions for VS Code, and Salesforce CLI in your web browser.

We release new versions of Code Builder, as needed.

See the off-cycle Code Builder release notes on GitHub.

See Also

Code Builder Developer Guide

Agentforce for Developers

Agentforce for Developers is an AI-powered developer tool that's available as a Visual Studio Code extension in VS Code desktop and Code Builder. Agentforce for Developers is built using `CodeGen` and `xGen-Code`, secure and custom AI models from Salesforce. It's enabled by default in Enterprise, Performance, Unlimited, Partner Developer, and Developer editions.

Read the weekly release notes to learn about recent updates.

See Also

Agentforce for Developers

Scalability

Optimize and test your implementations. Troubleshoot errors, identify issues with application performance, and improve how you scale.

Book Sandbox Slots for Peak Load Testing with Scale Test
DevOps Testing now includes Scale Test as a test provider after you purchase Scale Test days and turn on its features in your Full sandbox. The Scale Test booking flow supports up to 50,000 requests per second (RPS) and unlimited user logins. During testing, use Live Test View to generate reports with key insights.

Generate Improved Apex Investigations, Provide In-App Feedback, and View Search Insights with Scale Center
Improve Apex performance with prescriptive guidance and actionable insights. Provide feature feedback using the Feedback button. Get search insights for recommendations to improve search performance.

Optimize Code with ApexGuru
Antipattern detection features optimize Apex code and improve performance. View SOQL queries in loops, identify inefficient query filters and operations, and get recommendations for reducing expensive string operations and debug statements.

Book Sandbox Slots for Peak Load Testing with Scale Test

DevOps Testing now includes Scale Test as a test provider after you purchase Scale Test days and turn on its features in your Full sandbox. The Scale Test booking flow supports up to 50,000 requests per second (RPS) and unlimited user logins. During testing, use Live Test View to generate reports with key insights.

Where: This change applies to Lightning Experience in all editions. Scale Test is available for customers with a Full sandbox in all Hyperforce regions, except Singapore. To get access, contact your customer success representative or account executive.

How: From Setup, in the Quick Find box, enter *`Scale`*, and then click **Scale Test**.

Generate Improved Apex Investigations, Provide In-App Feedback, and View Search Insights with Scale Center

Improve Apex performance with prescriptive guidance and actionable insights. Provide feature feedback using the Feedback button. Get search insights for recommendations to improve search performance.

Where: This change applies to Lightning Experience in Unlimited Edition. Scale Center isn’t supported in Government Cloud Plus. Scale Center is generally available at no additional cost for all Unlimited Edition Full sandbox, Signature, and Scale Test customers. You can enable Scale Center for five Standard (non-SysAdmin) users per org.

How: From Setup, in the Quick Find box, enter *`Scale`*, and then click **Scale Center**.

Optimize Code with ApexGuru

Antipattern detection features optimize Apex code and improve performance. View SOQL queries in loops, identify inefficient query filters and operations, and get recommendations for reducing expensive string operations and debug statements.

Where: These updates apply to Full sandbox and production environments with ApexGuru enabled. ApexGuru is generally available at no additional cost for all Unlimited Edition Full Sandbox, Signature, and Scale Test customers.

How: From Setup, in the Quick Find box, enter *`Scale`*, and then click **Scale Center**. Navigate to Scale Insights, and then click **ApexGuru Insights**.

Remove Shift_JIS to Windows-31J Character Mapping

The system property sun.nio.cs.map for Japanese character mapping from Shift_JIS to Windows-31J is no longer available.

Where: This change applies to Java environments. Known impact areas include Apex EncodingUtil, Visualforce CSV, and External Services.

Why: The Internet Assigned Numbers Authority (IANA) has updated the definition of the Shift_JIS character set to exclude characters from the Windows-31J character set. The system property `sun.nio.cs.map` was provided to help applications migrate to the new definitions. By removing it, we can comply with the correct IANA definitions.

How: The system will remove the `sun.nio.cs.map` system property by default in all customer environments.

Salesforce Functions

Salesforce Functions is no longer available for purchase or renewal. Learn about the retirement plan for Salesforce Functions.

Salesforce Functions Is Being Retired

Salesforce Functions is no longer available for purchase or renewal. You can continue using your subscription through your existing order term. To preserve the capabilities that Salesforce Functions provided to your org, deploy an alternative solution before your existing order term ends.

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

For the end-of-life timeline and more information on migrating your functions, see Salesforce Functions Retirement on the Heroku Dev Center.

See Also

Developer Doc: Salesforce Functions Release Notes

Change Data Capture

Receive change event notifications for more objects.

Receive Change Event Notifications for More Objects
With Change Data Capture, you can now receive notifications of record changes for more objects.

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 for which you want to get notifications on the Change Data Capture page in Setup or create a custom channel. You can now receive change events for these objects.

Commerce

- PaymentPage

Platform Events

Check out Apex trigger configuration information in Setup and outbound message enhancements. Also, be aware of Streaming API disconnect messages.

Discover Your Apex Trigger Batch Size and User
You can now view your Apex platform event trigger’s configuration in Setup by checking the new Batch Size and User columns. Having this information available in the UI makes it easier to monitor your trigger’s configuration and fine-tune it. Previously, the batch size and user information were available only via Tooling API or Metadata API in PlatformEventSubscriberConfig.

The Timeout of Outbound Messages Is Reduced to 20 Seconds from 60 Seconds
With the lower timeout value, the system makes better use of resources and can process more messages. Also, the lower timeout value prevents long-running messages from delaying the processing of other messages in the queue.

Identify Outbound Messages in Queue with a Renamed Heading
We renamed the "Oldest failures in queue" heading to "Oldest messages in queue" on the Outbound Messages page in Setup. The renamed heading helps you identify the queued messages. The queue contains messages that didn't fail but haven't been delivered yet, in addition to messages that failed delivery.

Streaming API Clients Can Receive Disconnect Messages from Salesforce App Servers
In Streaming API version 64.0 and later, clients can sometimes be disconnected and must reconnect to the Streaming API endpoint. The disconnects, which happen more frequently when using a Hyperforce instance, are due to infrastructure auto-scaling. To keep the subscription active, add a listener for the `/meta/disconnect` channel and reconnect after receiving a disconnect message.

Discover Your Apex Trigger Batch Size and User

You can now view your Apex platform event trigger's configuration in Setup by checking the new Batch Size and User columns. Having this information available in the UI makes it easier to monitor your trigger's configuration and fine-tune it. Previously, the batch size and user information were available only via Tooling API or Metadata API in PlatformEventSubscriberConfig.

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

How: To view the trigger batch size and user for an Apex trigger in Setup, enter *`Platform Events`* in the Quick Find box, click **Platform Events**, and then click your platform event. On the Platform Event detail page, check out the Subscriptions related list.

The Timeout of Outbound Messages Is Reduced to 20 Seconds from 60 Seconds

With the lower timeout value, the system makes better use of resources and can process more messages. Also, the lower timeout value prevents long-running messages from delaying the processing of other messages in the queue.

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

See Also

Salesforce Help: Considerations for Outbound Messages

Identify Outbound Messages in Queue with a Renamed Heading

We renamed the "Oldest failures in queue" heading to "Oldest messages in queue" on the Outbound Messages page in Setup. The renamed heading helps you identify the queued messages. The queue contains messages that didn't fail but haven't been delivered yet, in addition to messages that failed delivery.

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

Pub/Sub API

Pub/Sub API is available in all Hyperforce regions.

Pub Sub API Is Available in All Hyperforce Regions
Requests to the Pub/Sub API global endpoint are processed in any region that Hyperforce supports. Previously, requests were processed in a subset of Hyperforce regions.

Pub Sub API Is Available in All Hyperforce Regions

Requests to the Pub/Sub API global endpoint are processed in any region that Hyperforce supports. Previously, requests were processed in a subset of Hyperforce regions.

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

When: This change is available as of April 2025.

See Also
Hyperforce: Public Cloud Infrastructure

New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

Lightning Components: New and Changed Items
Build UI easily with these new and changed resources.

Apex: New and Changed Items
These classes, enums, and interfaces are new or have changes.

ConnectApi (Connect in Apex): New and Changed Classes and Enums
Create custom experiences in Salesforce using Connect in Apex.

API: New and Changed Items
Access more data objects and metadata types in API version 64.0.

Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

New and Changed Lightning Web Components
Build UI easily with these new and changed components.

Changed Modules for Lightning Web Components
These modules have changes.

New Targets for Lightning Web Components
These targets are new.

New and Changed Aura Components
Build UI easily with these new and changed components.

New and Changed Lightning Web Components

Build UI easily with these new and changed components.

Changed Lightning Web Components

These components have changed.

lightning-accordion

This attribute has changed.

- `allow-multiple-sections-open`–If the accordion has one accordion section only, and this attribute isn't specified or is set to false, the accordion section can now be closed. Previously, the single accordion section always remained open even if this attribute isn't specified.

lightning-datatable

These methods are new.

- `focus()`–Places focus on the active cell in the datatable.
- `scrollToTop()`–Scrolls to the first row of the datatable.

This column property is new.

- `imgSrc`–The URI for a custom icon. The icon is displayed before the header label. If `hideLabel` is provided, only the icon displays in the column header. If there's an error loading the URI, the icon specified with `iconName` is displayed instead as a fallback.

lightning-input

For all input types except `type="search"`, the error icon is displayed on fields that are in an invalid state.

For `type="date"` input fields and date fields in `type="datetime"` input fields, the message that appears under the date field to show the expected format has changed. The message now shows the date format instead of a sample date.

- For example, for a user in the `en_US` locale, these messages are displayed.
  - `date-style="medium"` (default) displays `Format: MMM d, yyyy`
  - `date-style="short"` displays `Format: M/d/yyyy`
  - `date-style="long"` displays `Format: MMMM d, yyyy`
- When focus is removed from the date field, the message is hidden and available as assistive text.

Similarly, the error messages have changed for `type="date"` input fields and date fields in `type="datetime"` input fields.

- The error message for the `valueMissing` attribute includes the expected date format. The listed date format in the message is determined by the user's locale and the `date-style` attribute. For example in the `en_US` locale: "Complete this field with format MMM d, yyyy."
- Custom error messages are appended with text in parentheses, indicating the expected date format. The listed date format in the appended text is determined by the user's locale and the `date-style` attribute. For example in the `en_US` locale: "This is a custom message (Use format MMM d, yyyy)."

lightning-input-address

These attributes are new.

- `hide-province`–Hides the province field from the component's fields layout for locales that don't require it. For example, you can use `hide-province` when the `locale` is `fr-FR` or `zh-CN`.
- `country-lookup-filter`–A list of ISO 3166-1 Alpha-2 country codes to filter the address by when you use the `show-address-lookup` attribute. Country codes are case-insensitive. You can specify up to five country codes.

lightning-menu-item

This attribute is new.

- `icon-type`–Determines the background color of the icons in the menu item. Accepted values include `standard` and `color`. This attribute doesn't apply to utility and doctype icons.
  - `standard`–Displays the icon on the menu item in grayscale. This is the default value.
  - `color`–Displays the icon on the menu item with a background color. Action icons and object icons (standard and custom) display a white glyph on a colored background that's defined for the icon in SLDS.

lightning-tree-grid

Custom data types are supported. You can now extend the component class and define static and dynamic custom data types.

This attribute is new.

- `column-widths-mode`–Specifies how column widths are calculated. Set to `fixed` for columns with equal widths. Set to `auto` for column widths that are based on the width of the column content and the table width. The default is `fixed`.

  This column property is new.
- `sortable`–Specifies whether the column can be sorted. The default is `false`.

  This custom event is new.
- `sort`–The event fired when a column is sorted.

See Also
Component Reference

Changed Modules for Lightning Web Components

These modules have changes.

lightning/mediaUtils
This module is now generally available.

lightning/platformResourceLoader
To improve the stability and reliability of your LWC, you must statically import the `platformResourceLoader` module by using the `import` declaration. Dynamic imports of this module that use the `import()` syntax are no longer allowed. If you attempt to dynamically import this module, you receive the error message `Module import blocked: lightning/platformResourceLoader could not be imported`.

See Also
Component Reference

New Targets for Lightning Web Components

These targets are new.

lightning__AgentforceInput
Enables a Lightning web component to be used in agent actions. Use this target to configure components that can accept input data from a user in an agent action.

lightning__AgentforceOutput
Enables a Lightning web component to be used in agent actions. Use this target to configure components that can display output data from an agent action.

See Also

Agentforce & Einstein Platform
Lightning Web Components Developer Guide: XML Configuration File Elements (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

These components have changed.

lightning:datatable

This method is new.

- `focus()` –Places focus on the active cell in the datatable.
- `scrollToTop()` –Scrolls to the first row the datatable.

This column property is new.

- `imgSrc` –The URI for a custom icon. The icon is displayed before the header label. If `hideLabel` is provided, only the icon displays in the column header. If there's an error loading the URI, the icon specified with `iconName` is displayed instead as a fallback.

lightning:input

For all input types except `type="search"`, the error icon is displayed on fields that are in an invalid state.

For `type="date"` input fields and date fields in `type="datetime"` input fields, the message that appears under the date field to show the expected format has changed. The message now shows the date format instead of a sample date.

- For example, for a user in the `en_US` locale, these messages are displayed.
  - `dateStyle="medium"` (default) displays `Format: MMM d, yyyy`
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  - `dateStyle="long"` displays `Format: MMMM d, yyyy`
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Similarly, the error messages have changed for `type="date"` input fields and date fields in `type="datetime"` input fields.

- The error message for the `valueMissing` now includes the expected date format. The listed date format in the message is determined by the user’s locale and the `dateStyle` attribute. For example in the `en_US` locale: "Complete this field with format MMM d, yyyy."
- Custom error messages are appended with text in parentheses, indicating the expected date format. The listed date format in the appended text is determined by the user’s locale and the `dateStyle` attribute. For example in the `en_US` locale: "This is a custom message (Use format

MMM d, yyyy)"

lightning:inputAddress

This attribute is new.

- `hideProvince`–Hides the province field from the component's fields layout for locales that don't require it. For example, you can use `hideProvince` when the `locale` is `fr-FR` or `zh-CN`.
- `countryLookupFilter`–A list of ISO 3166-1 Alpha-2 country codes to filter the address by when you use the `showAddressLookup` attribute. Country codes are case-insensitive. You can specify up to five country codes.

lightning:treeGrid

This attribute is new.

- `columnWidthsMode`–Specifies how column widths are calculated. Set to `fixed` for columns with equal widths. Set to `auto` for column widths that are based on the width of the column content and the table width. The default is `fixed`.

This column property is new.

- `sortable`–Specifies whether the column can be sorted. The default is false.

This custom event is new.

- `sort`–The event fired when a column is sorted by ascending or descending order.

See Also
Component Reference
Lightning Web Components Developer Guide
Lightning Aura Components Developer Guide

Apex: New and Changed Items

These classes, enums, and interfaces are new or have changes.

For more information on these enhancements, see the Apex Developer Guide and the Apex Reference Guide.

Auth Namespace
The Auth namespace has these new and changed classes.

ConnectApi Namespace
The ConnectApi namespace (Connect in Apex) has new or changed classes, methods, or enums.

Flowtesting Namespace
The new flowtesting namespace provides dynamically generated Apex classes for flow tests that are created in Flow Builder.

FormulaEval Namespace

The FormulaEval namespace has new or changed classes, methods, interfaces, enums, or exceptions.

Process Namespace
The Process namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

See Also
Apex: New Features

Auth Namespace

The Auth namespace has these new and changed classes.

New Classes

Create and update user records with specific attributes retrieved from the identity provider in authentication provider user registration flows

The new `JsonValueOutput` class stores the output of the Get User Data from JSON String invocable action in Flow Builder. This action retrieves a specific attribute from the user info response or ID token returned by the identity provider during single sign-on (SSO). Each instance of this class stores a single attribute. Use this class as an Apex-defined variable in user registration flows to create and update user records with information from the identity provider.

Create user records with placeholder user data in authentication provider user registration flows

The new `GeneratedUserData` class stores the output of the Generate User Data invocable action in Flow Builder. This action generates placeholder values for fields that are required to create a user. Use this class as an Apex-defined variable in user registration flows to create user records for SSO use cases where the identity provider doesn't return enough information to populate all required fields.

New or Changed Constructors in Existing Classes

Store and access the ID token from the identity provider in responses from the `AuthProviderPluginClass.handleCallback` and `AuthProviderPlugin.handleCallback` methods

Use the new `AuthProviderTokenResponse(provider, oauthToken, oauthSecretOrRefreshToken, state, idToken)` constructor in the `AuthProviderTokenResponse` class.

Use the new `idToken` property in the `AuthProviderTokenResponse` class.

Store and access the user info response and ID token returned from the identity provider during authentication provider SSO

Use the new `UserData(identifier, firstName, lastName, fullName, email, link, username, locale, provider, siteLoginUrl, attributeMap, idToken,` `userInfoJSONString)` constructor in the `UserData` class.

Use the new `idToken`, `idTokenJSONString`, and `userInfoJSONString` properties in the `UserData` 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.

Flowtesting Namespace

The new flowtesting namespace provides dynamically generated Apex classes for flow tests that are created in Flow Builder.

The flowtesting namespace doesn't define a fixed set of classes. The namespace reflects flows and flow tests that are created in Flow Builder. You can run flow tests with the Salesforce CLI command *`sf flow run test`*. For more details about the command, use the Salesforce CLI *`–help`* flag.

See Also

Test Flows Faster with Integrated Tests

FormulaEval Namespace

The FormulaEval namespace has new or changed classes, methods, interfaces, enums, or exceptions.

New or Changed Methods in Existing Classes

Evaluate a formula expression in template mode

Use the new `FormulaBuilder.parseAsTemplate(Boolean templateMode)` method. In template mode, values are interpolated into a string by using merge fields instead of traditional string concatenation.

Process Namespace

The Process namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

Changed Enums

Specify a time value as a parameter for the `Process.PluginDescribeResult.InputParameter` and the `Process.PluginDescribeResult.OutputParameter` classes

Use the new `TIME` value on the existing `Process.PluginDescribeResult.ParameterType` enum.

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*.

ConnectApi Rate Limit Changes
To avoid potentially restrictive per user, per namespace, per hour ConnectApi rate limits, we're migrating orgs to the per org, per 24-hour Salesforce Platform API rate limit. Orgs created in Summer '24 and later are already using the Salesforce Platform API rate limit. For migrated and new orgs, only method calls that require Chatter are subject to the per user, per namespace, per hour rate limit.

New Connect in Apex Classes
These classes are new.

Changed Connect in Apex Input Classes
These input classes have changes.

Changed Connect in Apex Output Classes
These output classes have changes.

See Also
Connect REST API
Apex Reference Guide: ConnectApi Namespace
Connect REST API Developer Guide

ConnectApi Rate Limit Changes

To avoid potentially restrictive per user, per namespace, per hour ConnectApi rate limits, we're migrating orgs to the per org, per 24-hour Salesforce Platform API rate limit. Orgs created in Summer '24 and later are already using the Salesforce Platform API rate limit. For migrated and new orgs, only method calls that require Chatter are subject to the per user, per namespace, per hour rate limit.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions in all API versions.

When: Org migrations to the Salesforce Platform API rate limit continue on a rolling basis. Migrations occur in the background without notification.

New Connect in Apex Classes

These classes are new.

Salesforce CMS

These new methods are in the `ConnectApi.ManagedContentSpaces` class.

Get a managed content space

- `getManagedContentSpace(contentSpaceId)`

  The `getManagedContentSpace(contentSpaceId)` method in the `ConnectApi.ManagedContent` class is no longer available. Use this new method instead.

Get managed content spaces

- `getManagedContentSpaces(pageParam, pageSize, nameFragment)`

  New output class: `ConnectApi.ManagedContentSpaceCollectionRepresentation`

Update the name or description of a managed content space

- `patchManagedContentSpace(contentSpaceId, ManagedContentSpaceUpdateInput)`

  New input class: `ConnectApi.ManagedContentSpaceUpdateInput`

Create a managed content space

- `postManagedContentSpace(ManagedContentSpaceInput)`

  New input class: `ConnectApi.ManagedContentSpaceInput`

Changed Connect in Apex Input Classes

These input classes have changes.

Commerce

`ConnectApi.AbstractCartItem`

This input class has this new property.

- `subType` –Specifies whether the cart item is a Bonus or Gift item.

`ConnectApi.PromotionCartItemInput`

This input class has this new property.

- `subType` –Specifies whether the cart item is a Bonus or Gift item.

`ConnectApi.OCIGetInventoryAvailabilityInputRepresentation`

This input class has this new property.

- `includeRelatedProducts`–Specifies whether the returned inventory level includes variant products if the given product has variants.

Changed Connect in Apex Output Classes

These output classes have changes.

Commerce

ConnectApi.AbstractCartItem

This response body has these new properties.

- `isShippingChargeNotApplicable`–Specifies whether the shipping charge for the cart item is waived (`true`) or not (`false`). If the value is `true`, the cart item is classified as a digital product.
- `promotionDisplayName`–Promotion display name for a bonus product.
- `subType`–Subtype of item in a cart.

ConnectApi.CartSummary

This response body has this new property.

- `hasGift`–Specifies whether the cart contains a gift (`true`) or not (`false`).

ConnectApi.ProductAttributeInfo

This response body has this new property.

- `isGroupedBy`–Indicates if product variations are grouped by a specific attribute.

Salesforce CMS

`ConnectApi.ManagedContentDocument`

This output class has this new property.

- `contentFqn`–Fully qualified name (FQN) of the managed content.

`ConnectApi.ManagedContentSpace`

This output class has this new property.

- `spaceType`–Base type of the managed content space.

`ConnectApi.ManagedContentVariant`

This output class has this new property.

- `contentFqn`–Fully qualified name (FQN) of the managed content.

Search

`ConnectApi.SearchResult`

This output class has this new property.

- `apiName` –The object API name for the object search.

`ConnectApi.SearchResultGroups`

This output class has these new and changed properties.

- `queryInfo` –Search query execution information.
- `resultGroups` –Record results from a keyword search.
- `searchObject` –This property is no longer available. Use `resultGroups` instead.

`ConnectApi.ScopedSearchResults`

This output class has these new and changed properties.

- `objectQueryInfo` –Query execution information for the object.
- `results` –Record results for the keyword search.
- `searchObject` –This property is no longer available. Use `results` instead.

API: New and Changed Items

Access more data objects and metadata types in API version 64.0.

New and Changed Objects
Access more data through these new and changed standard objects.

Connect REST API
Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

CRM Analytics REST API
Using the CRM Analytics REST API, set external filters on dashboard steps, add interactions to more widget types, and configure table header properties.

Metadata API
Access more metadata through these new and changed metadata types.

Tooling API New and Changed Objects
Access more metadata through these new and changed Tooling API objects.

User Interface API
Batch requests support default assignment rules, and User Interface API supports more objects.

New and Changed Objects

Access more data through these new and changed standard objects.

Salesforce Overall

Understand behavior change for UsedLicenses field on the UserLicense object

The **UsedLicenses** field on the UserLicense object isn't filterable in API version 64.0 or later when using it in a WHERE clause in a SOQL query. Instead, you have to process the data after fetching all the records.

Commerce

Indicate if product variations are grouped by a specific attribute

Use the new **IsGroupedBy** field on the existing ProductAttributeSetItem object.

Show an approaching discount message for a promotion and set a threshold value for when it's displayed

Use the new **IsApproachingDiscountApplicable** field on the existing Promotion object and the new **ApproachingDiscountThreshold** field on the existing PromotionQualifier object.

Provide a free gift with a bonus product promotion

Use the new **BonusProduct** value on the existing **AdustmentType** field on the PromotionTarget object.

Create a user-defined collection of featured products to cross-sell or upsell with your product

Use the new ProductFeaturedProduct object.

Indicate whether a cart item is a bonus product or gift wrapped product

Use the new **SubType** field on the existing CartItem object.

Indicate if a cart delivery group is a gift and specify the gift message and recipient

Use the new **GiftMessage**, **GiftToName**, and **IsGift** fields on the existing CartDeliveryGroupMethod object.

DEPRECATED: The DeliveryMethodId field on the CartDeliveryGroup object is deprecated in API version 64.0 and will be removed in API version 66.0.

Instead, use the **DeliveryMethodId** field on the CartDeliveryGroupMethod object.

Event Monitoring

Get details about blocked redirections from hyperlinks in Salesforce Classic

Use the existing Blocked Redirect event type. Previously, this event type captured blocked redirections that originated only within pages and components.

Mobile

Access file attachments in the Offline App (generally available)

Use the new **OptionsIsRelatedFilesRule** field on the existing BriefcaseRule object. Available only for the Offline App (Salesforce Mobile App Plus).

Sales

Capture, store, and manage insights from email interactions, including their origins and associated actions

Use the new EmailInsight and EmailInsightAction objects. These objects are available when Sync Email as Salesforce Activity is enabled.

Track where email was captured

Use the new **Source** field on the existing EmailMessage object.

Salesforce Flow

Match email addresses with relevant user, contact, lead, account, and opportunity records after Einstein Activity Capture captures an email message

Use the new **ActvtyObjectMtchNoTrg** value in the existing **FlowType** field on the FlowRecord object.

Configure a flow for authentication provider user registration

Use the new `IdentityUserRegistrationFlow` value in the existing **ProcessType** field on the FlowDefinitionView and the FlowVersionView objects.

Security and Identity

Identify blocked redirections from hyperlinks in Salesforce Classic

Use the existing BrowserPolicyViolation object. Previously, BrowserPolicyViolations with a **ViolationType** of `MalformedUrl` or `Redirect` originated only within pages and components.

Monitor actions invoked during Agentforce flows

Use the new Invocable Action Event Type of the EventLogFile object.

Surface more event data stored in standard objects

Use the new event log objects: LightningErrorEventLog, DatabaseSaveEventLog, GroupMembershipEventLog, UiTelemetryNavTmEventLog, UiTelemetryRsrcTmEventLog, and InvocableActionEventLog.

Set a default account for new external users during an authentication provider user registration flow

Use the new **FlowDefaultAccountId** field on the existing AuthProvider object.

Set a default profile for new users during an authentication provider user registration flow

Use the new **FlowDefaultProfileId** field on the existing AuthProvider object.

See which sessions are associated with JSON Web Token (JWT)-based access tokens

Use the new **IsAssociatedWithJwtAccessToken** field on the existing AuthSession object.

Service

Add more participants to a conversation in Bring Your Own Channel

Use the new **IsConferenceSupported** and **MaxParticipantsForCnfrOverride** fields on the existing ConversationChannelDefinition object.

Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API.

Connect REST API Rate Limit Changes
To avoid potentially restrictive per user, per application, per hour Connect REST API rate limits, we're migrating orgs to the per org, per 24-hour Salesforce Platform API rate limit. Orgs created in Summer '24 and later are already using the Salesforce Platform API rate limit. For migrated and new orgs, only requests that require Chatter are subject to the per user, per application, per hour rate limit.

New and Changed Connect REST API Resources
These resources are new or have changes.

Changed Connect REST API Request Bodies
These request bodies have changes.

Changed Connect REST API Response Bodies
These response bodies have changes.

See Also

ConnectApi (Connect in Apex): New and Changed Classes and Enums
Connect REST API Developer Guide
Apex Reference Guide: ConnectApi Namespace
Salesforce Platform API Versions 21.0 Through 30.0 Retirement (Release Update)

Connect REST API Rate Limit Changes

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Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce mobile app in all editions in all API versions.

When: Org migrations to the Salesforce Platform API rate limit continue on a rolling basis. Migrations occur in the background without notification.

New and Changed Connect REST API Resources

These resources are new or have changes.

Commerce

Get a compact cart summary

Make a GET request to the new `/commerce/webstores/webstoreId/carts/compact-summary` resource.

New response body: Cart Compact Summary

Get search term and popular product suggestions

Make a GET request to the existing `commerce/webstores/webstoreId/search/suggestions` resource.

New request parameters: `includeSuggestedTerms` and `popularProductsCategoryId`.

Mobile

Get notification app settings for the org

Make a GET request to the existing `/connect/notifications/app-settings/organization` resource.

Existing request parameter: **applicationId** with an external client app ID as the value.

Get a notification app setting with an external client app

Make a GET request to the existing `/connect/notifications/app-settings/organization/notificationTypeOrId` resource.

Existing request parameter: **applicationId** with an external client app ID as the value.

Set a notification app setting with an external client app

Make a POST request to the existing `/connect/notifications/app-settings/organization/notificationTypeOrId` resource.

Existing request body: Notification App Setting Input with an external client app ID as the value for the **applicationId** property.

OR

Existing request parameter: **applicationId** with an external client app ID as the value.

Reset a notification app setting with an external client app

Make a DELETE request to the existing `/connect/notifications/app-settings/organization/notificationTypeOrId` resource.

Existing request parameter: **applicationId** with an external client app ID as the value.

Platform

Get a list of all standard and custom Lightning types

Make a GET request to the new `/connect/lightning-types` resource.

New response body: Lightning Type Collection

Get detailed information about a standard or custom Lightning type

Make a GET request to the new `/connect/lightning-types/fullyQualifiedName` resource.

New response body: Lightning Type Detail

Get detailed information about standard and custom Lightning types and Apex class types

Make a POST request to the new `/connect/lightning-model/types` resource.

New request body: Lightning Model Types Input

New response body: Lightning Model Types Collection

Salesforce CMS

Search managed content in a channel

Make a POST request to the new `/connect/cms/delivery/channels/channelId/contents/enhanced-search` resource.

New request body: Managed Content Delivery Search Input

New response body: Managed Content Delivery Search Result Collection

Search managed content in an Experience Cloud site

Make a POST request to the new `/connect/sites/siteId/cms/delivery/contents/enhanced-search` resource.

New request body: Managed Content Delivery Search Input

New response body: Managed Content Delivery Search Result Collection

Get managed content spaces

Make a GET request to the new `/connect/cms/spaces` resource.

New response body: Managed Content Space Collection

Create a managed content space

Make a POST request to the new `/connect/cms/spaces` resource.

New request body: Managed Content Space Input

Update the name or description of a managed content space

Make a PATCH request to the existing `/connect/cms/spaces/spaceId` resource.

New request body: Managed Content Space Update Input

Service Cloud

Start the AWS Root User Email Address Update Process

Make a POST request to the new `/connect/voice/root-email-address-update/start` resource to update the AWS root user email address of the AWS account that's provisioned for Voice.

New request body: Voice Root Email Address Update Start Input

New response body: Voice Root Email Address Update Status

Accept the AWS Root User Email Address Update

Make a POST request to the new `/connect/voice/root-email-address-update/accept` resource to accept the AWS root user email address change.

New request body: Voice Root Email Address Update Accept Input

New response body: Voice Root Email Address Update Status

Changed Connect REST API Request Bodies

These request bodies have changes.

Commerce

OCI Get Inventory Availability Input

This request body has this new property.

- `includeRelatedProducts`–Specifies whether the returned inventory level includes variant products if the given product has variants.

Product Attribute Set Input

This request body has this new property.

- `isGroupedBy`–Indicates if variation products are grouped by a specific attribute.

Product Variation Input

This request body has this new property.

- `isGroupedBy`–Indicates if variation products are grouped by a specific attribute.

Composite Promotion Input

This request body has this new property.

- `isApproachingDiscountApplicable`–Indicates if the promotion is an approaching discount promotion.

Composite Promotion Qualifier Input

This request body has this new property.

- `approachingDiscountThreshold`–Indicates the amount a cart total has to reach before an approaching discount message is shown.

Cart Item Input

This request body has this new property.

- `subType`–Indicates if the cart item is a Bonus or Gift item.

Mobile

Notification App Setting Input

This request body supports a new property value.

- `applicationId`–This property now supports external client apps, in addition to connected apps.

Changed Connect REST API Response Bodies

These response bodies have changes.

Commerce

Cart Item

This response body has these new properties.

- `isShippingChargeNotApplicable`–Specifies whether the shipping charge for the cart item is waived (`true`) or not (`false`). If the value is `true`, the cart item is classified as a digital product.
- `promotionDisplayName`–Promotion display name for a bonus product.
- `subType`–Subtype of item in a cart.

Cart Output

This response body has this new property.

- `approachingDiscounts`–Includes the qualifying contents for a promotion with an approaching discount.

Cart Summary

This response body has this new property.

- `hasGift`–Specifies whether the cart contains a gift (`true`) or not (`false`).

Composite Promotion

This response body has this new property.

- `isApproachingDiscountApplicable`–Indicates if the promotion is an approaching discount promotion.

Composite Promotion Qualifier

This response body has this new property.

- `approachingDiscountThreshold`–Indicates the amount a cart total has to reach before an approaching discount message is shown.

Delivery Group

This response body has these new properties.

- `giftMessage`–Personalized gift message for the delivery group.
- `giftToName`–The name of the recipient for a gift delivery group.
- `isAllDigitalCartItems`–Indicates whether the delivery group contains only digital products.
- `isGift`–Indicates if the delivery group is a gift.

Product Attribute Info

This response body has this new property.

- `GroupedBy` –Indicates if the attribute is used to determine grouping.

Promotion Cart Item

This response body has this new property.

- `subType` –Indicates if the cart item is a Bonus or Gift item.

Salesforce CMS

Managed Content Document

This response body has this new property.

- `contentFqn` –Fully qualified name (FQN) of the managed content.

Managed Content Space

This response body has this new property.

- `spaceType` –Base type of the managed content space.

Managed Content Variant

This response body has this new property.

- `contentFqn` –Fully qualified name (FQN) of the managed content.

Salesforce Files

File Upload Config

This response body has these new properties.

- `allowedFileExtensions` –File extensions that are allowed for upload.
- `maxFileSize` –Maximum file size for upload.

Search

Search Result

This response body has this new property.

- `apiName` –The object API name for the object search.

Search Result Groups

This response body has these new and changed properties.

- `queryInfo` –Search query execution information.
- `resultGroups` –Record results from a keyword search.
- `searchObject` –This property is no longer available. Use `resultGroups` instead.

Scoped Search Results

This response body has these new and changed properties.

- `objectQueryInfo` –Query execution information for the object.

- `results` –Record results for the keyword search.
- `searchObject` –This property is no longer available. Use `results` instead.

CRM Analytics REST API

Using the CRM Analytics REST API, set external filters on dashboard steps, add interactions to more widget types, and configure table header properties.

Changed CRM Analytics REST API Request Bodies

These request bodies have changes.

Cell Properties Text Parameters Input

The request body has this new property.

- `interactions` –the list of interactions for the widget.

List Selector Widget Parameters Input

The request body has this new property.

- `interactions` –the list of interactions for the widget.

Pill Box Widget Parameters Input

The request body has this new property.

- `interactions` –the list of interactions for the widget.

Repeater Widget Parameters Input

The request body has these new properties.

- `headerCellProperties` –a map of the header cell properties.
- `showHeader` –Indicates whether to show the header in this widget (`true`) or not (`false`).

Step Input

The request body has these new properties.

- `sortable`–Indicates whether this step supports quick sorting in dashboard preview mode (`true`) or not (`false`).
- `useExternalFilters`–Indicates whether this step takes external filters (`true`) or not (`false`).

Table Widget Parameters Input

The request body has these new properties.

- `assistiveText`–the table description for screen readers.
- `headerProperties`–a map of the header properties.

Changed CRM Analytics REST API Response Bodies

These response bodies have changes.

Cdp Step

The response body has this new property.

- `useExternalFilters`–Indicates whether this step takes external filters (`true`) or not (`false`).

Cell Properties Text Parameters

The response body has this new property.

- `interactions`–the list of interactions for the widget.

List Selector Widget Parameters

The response body has this new property.

- `interactions`–the list of interactions for the widget.

Multi Query Step

The response body has this new property.

- `interactions`–the list of interactions for the widget.

Pill Box Widget Parameters

The response body has this new property.

- `interactions`—the list of interactions for the widget.

Query Step

The response body has these new properties.

- `sortable`—Indicates whether this step supports quick sorting in dashboard preview mode (`true`) or not (`false`).
- `useExternalFilters`—Indicates whether this step takes external filters (`true`) or not (`false`).

Repeater Widget Parameters

The response body has these new properties.

- `headerCellProperties`—a map of the header cell properties.
- `showHeader`—Indicates whether to show the header in this widget (`true`) or not (`false`).

Saql Step

The response body has these new properties.

- `sortable`—Indicates whether this step supports quick sorting in dashboard preview mode (`true`) or not (`false`).
- `useExternalFilters`—Indicates whether this step takes external filters (`true`) or not (`false`).

Soql Step

The response body has this new property.

- `useExternalFilters`—Indicates whether this step takes external filters (`true`) or not (`false`).

Sql Step

The response body has this new property.

- `useExternalFilters`—Indicates whether this step takes external filters (`true`) or not (`false`).

Static Flex Step

The response body has this new property.

- `useExternalFilters`—Indicates whether this step takes external filters (`true`) or not (`false`).

Static Step

The response body has this new property.

- `useExternalFilters`—Indicates whether this step takes external filters (`true`) or not (`false`).

Table Widget Parameters

The response body has these new properties.

- `assistiveText`—the table description for screen readers.
- `headerProperties`—a map of the header properties.

Metadata API

Access more metadata through these new and changed metadata types.

Salesforce Overall

Specify which Salesforce Lightning Design System (SLDS) version a theme uses

Use the new **designSystemVersion** field on the existing LightningExperienceTheme metadata type. Introduced in API version 63.0, this field has been added to the *Metadata API Developer Guide*.

Programmatically manage advanced color settings for Salesforce Lightning Design System (SLDS) 2 themes (beta)

Use the new properties on the BrandingSetProperty subtype of the BrandingSet metadata type. This update makes SLDS 2 themes packageable by Salesforce ISV partners.

- **ACCENT_COLOR_1**
- **ACCENT_COLOR_2**
- **ACCENT_COLOR_3**
- **CONTAINER_ACCENT_COLOR_1**
- **CONTAINER_ACCENT_COLOR_2**
- **CONTAINER_ACCENT_COLOR_3**
- **BORDER_ACCENT_COLOR_1**
- **BORDER_ACCENT_COLOR_2**

- **BORDER_ACCENT_COLOR_3**

  Note SLDS 2 themes is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Analytics

Retrieve and deploy new Tableau Next workspaces, dashboards, and visualizations assets

Use the new AnalyticsDashboard, AnalyticsVisualization, AnalyticsWorkspace, and InvocableActionType metadata types.

Enable new CRM Analytics features for including confidential data disclaimers

Use the new **enableIncludeDisclaimerMessage** field on the existing AnalyticsSettings metadata type.

Enable new Lightning Reports and Dashboards features for using unique org emails for dashboard subscriptions, using the enhanced custom report type setup page, enabling dashboard component refreshes, and using the content delivery network (CDN)

Enable these features using new fields on the AnalyticsSettings metadata type.

- To enable unique org emails for Lightning dashboard subscriptions, use the new **enableDashboardSubOrgEmailPref** field.
- To enable the enhanced custom report type setup page, use the new **enableCrtSetupLightningUiPref** field.
- To enable dashboard component refreshes, use the new **enableDashboardCmpRefreshPref** field.
- To enable the CDN for Lightning reports and dashboards, use the new **enableReportCdnPref** field.

Customization

Access Lightning Experience transition tools through the External Application Settings page in Setup

Use the new **canUseAdoptionApps** field on the existing UserEngagementSettings metadata type.

REMOVED: The canGovCloudUseAdoptionApps field on the UserEngagementSettings metadata type is removed

Instead, use the new **canUseAdoptionApps** field on the UserEngagementSettings metadata type.

Development

Block API traffic that uses an instanced URL

Use the new **isInstancedApiTrafficBlocked** on the existing MyDomainSettings metadata type.

Customize the UI of Agent Actions Input and Output in Agentforce (Default)

Use the new `LightningTypeBundle` metadata type.

Mobile

Access file attachments in the Offline App (generally available)

Use the new **isRelatedFilesRule** field on the existing BriefcaseRule metadata type. Available only for the Offline App (Salesforce Mobile App Plus).

Configure mobile app settings using the External Client App framework (beta)

Use the new ExtlClntAppMobileSettings metadata type.

Configure mobile app policies using the External Client App framework (beta)

Use the new ExtlClntAppMobileConfigurablePolicies metadata type.

Configure mobile notification subscriptions using the External Client App framework (beta)

Use the new ExtlClntAppNotificationSettings metadata type.

Configure push notification settings using the External Client App framework (beta)

Use the new ExtlClntAppPushSettings metadata type.

Configure push notification policies using the External Client App framework (beta)

Use the new ExtlClntAppPushConfigurablePolicies metadata type.

Sales

Get conversation transcripts of video and voice calls

Use the new **getConversationTranscript** value in the existing InvocableActionType field type on the existing Flow metadata type. Introduced in version 64.0, this value has been added to the *Metadata API Developer Guide*.

Salesforce Flow

Specify the translated label for a stage in an orchestration or a flow approval process

Use the new FlowOrchestrationStageTranslation subtype of the FlowTranslation type.

Specify the style properties of a screen component

Use the new **styleProperties** field on the existing FlowScreenField subtype of the Flow metadata type.

Display an icon for a choice resource

Use the new **choiceIcon** field on the existing FlowChoice subtype of the Flow metadata type.

Get related records in Flow Builder's Get Records element (beta)

Use the new **relatedRecords** field on the existing FlowRecordLookup subtype of the Flow metadata type.

Specify a flow that triggers when a relevant change happens in an external system

Use the new **ExternalSystemChange** value on the existing triggerType subtype of the FlowStart metadata type.

Determine the path of a flow based on a user's email engagement with the new Einstein Decision element

Use the new **einsteinDecidePath** value in the existing actionType field and the new **actionCallPaths** field in the existing FlowActionCall subtype of the Flow metadata type.

Specify a flow resource and its fields to reference in a flow

Use the new `FieldReferenceValue` value in the existing **complexValueType** field, which is on the FlowElementReferenceOrValue subtype of the Flow metadata type.

BEHAVIOR CHANGE: The valid value in the existing complexValue field now includes more values. The complexValue field is on the FlowElementReferenceOrValue subtype of the Flow metadata type.

Use the **complexValue** field to specify flow resources, fields, objects, and object types in the data structure. Existing packages that have set the API version to `63.0` continue to function normally.

Specify a negative assertion in a flow test

Use the new `HasError` value in the existing **operator** field, which is on the FlowTestCondition subtype of the FlowTest metadata type.

Check whether specific flow elements have an error in a flow

Use the new `HasError` value in the existing **operator** field, which is on the FlowCondition subtype of the FlowTest metadata type.

Specify a flow that matches email addresses with relevant user, contact, lead, account, and opportunity records after Einstein Activity Capture captures an email message.

Use the new **ActivityObjectMatchingFlow** value, which is in the existing **processType** field on the Flow metadata type.

Get user records with email addresses in the To, From, or CC address fields of a sent email captured by Einstein Activity Capture.

Use the new **getUsersFromEmailAddresses** value in the existing **actionType** field, which is on the FlowActionCall subtype of the Flow metadata type.

Get contact and lead records from email addresses or from active user records.

Use the new **getContcLeadsFromEmailAddr** value in the existing **actionType** field, which is on the FlowActionCall subtype of the Flow metadata type.

Get an account or opportunity record from email addresses or from contacts.

Use the new **getAcctOpptyFromEmailAddr** value in the existing **actionType** field, which is on the FlowActionCall subtype of the Flow metadata type.

Associate an email message to an account, an opportunity, contacts, leads, and users.

Use the new **associateRecordsWithActivity** value in the existing **actionType** field, which is on the FlowActionCall subtype of the Flow metadata type.

Build a flow for authentication provider user registration

Use the new `IdentityUserRegistrationFlow` value in the existing **processType** field on the Flow metadata type.

Generate placeholder user data to create a user during authentication provider registration

Use the new `generateUserData` value in the existing **actionType** field, which is on the FlowActionCall subtype of the Flow metadata type.

Get an attribute value from a complex JSON structure during authentication provider user registration

Use the new `getUserDataFromJsonString` value in the existing **actionType** field, which is on the FlowActionCall subtype of the Flow metadata type.

Security and Identity

Maintain legacy hostname redirections during the Winter ’26 upgrade

Use the new **areLgcyRdirMaintainedWntr26** field on the existing MyDomainSettings metadata type.

Secure redirections to untrusted URLs for users who accesses Salesforce via Lightning Experience (beta)

Use the new **untrustedRedirect** field on the existing SessionSettings metadata type.

Configure a flow as the registration handler in an authentication provider definition

Use the new **flow** field in the existing AuthProvider metadata type.

Set a default account for new external users during an authentication provider user registration flow

Use the new **flowDefaultAccount** field on the existing AuthProvider metadata type.

Set a default profile for new users during an authentication provider user registration flow

Use the new **flowDefaultProfile** field on the existing AuthProvider metadata type.

DEPRECATED: The isNamedUserJwtEnabled field on the ExtlClntAppOauthConfigurablePolicies metadata type is deprecated

Now, to enable JWT-based access tokens, only the **isNamedUserJwtEnabled** field on the ExtlClntAppGlobalOauthSettings metadata type must be set to `true`.

Service

Add more participants to a conversation in Bring Your Own Channel

Use the new **IsConferenceSupported** and **MaxParticipantsForCnfrOverride** fields on the existing ConversationChannelDefinition metadata type.

Grant Access to Service Presence Statuses

Use the new **ServicePresenceStatusAccesses** field on the existing Profile and PermissionSet metadata types.

Assign reps to supervisor configurations

Use the new **omniSupervisorConfigUser** field on the existing OmniSupervisorConfig metadata type.

Set the paused capacity

Use the new **PausedCapacityPercentage** and **PausedCapacityWeight** fields on the existing QueueRoutingConfig metadata type.

Tooling API New and Changed Objects

Access more metadata through these new and changed Tooling API objects.

Commerce

Get information about the view type assigned to product attribute custom fields

Use the new CustomFieldDisplay object.

Sales

Authorize a domain for user email verification

Use the new AuthorizedEmailDomain object.

Security and Identity

Set up a flow for authentication provider user registration

Use the new `IdentityUserRegistrationFlow` value in the existing **ProcessType** field on the Flow object.

Service

Add more participants to a conversation in Bring Your Own Channel

Use the new **IsConferenceSupported** and **MaxParticipantsForCnfrOverride** fields on the existing ConversationChannelDefinition object.

User Interface API

Batch requests support default assignment rules, and User Interface API supports more objects.

New and Changed User Interface API Resources
These resources are new or have changes.

Changed User Interface API Response Bodies
These response bodies have changes.

Supported Objects
All new standard objects are auto-enabled for use with User Interface API.

See Also
User Interface API Developer Guide

New and Changed User Interface API Resources

These resources are new or have changes.

Records

Create or update a batch of records and use default assignment rules

Make a POST request to the existing `/ui-api/records/batch` resource.

New request parameter: Set `useDefaultRule` to `true` to use the default active assignment rule for cases and leads and the default territory assignment rules for accounts.

Changed User Interface API Response Bodies

These response bodies have changes.

Apps

App

This response body has this changed property.

- `type` –This property now supports the `ExternalClient` value.

Lists

List Object Column

This response body has these new properties.

- `quickFilterOperators` –Operator to use for quick filters on the column.
- `quickFilterOverrides` –Optional overrides to use for quick filters on the column.
- `quickFilterable` –Indicates whether the column can have quick filters or not.

Supported Objects

All new standard objects are auto-enabled for use with User Interface API.

To view new objects that are auto-enabled for User Interface API, see New and Changed Objects.

These standard objects aren't new to your org but are new for User Interface API.

- FieldPermissions
- ObjectPermissions
- PaymentAuthorization
- PermissionSetGroup
- UserAccessPolicy
- UserAppMenuItem

These standard objects are already supported in User Interface API, and they're newly supported for list views and most recently used list views.

- AddOnDefinition
- AssetDowntimePeriod
- CloudServiceProvider
- DigitalSignature
- EditionDefinition
- GeoCountry

- GeoState
- IncludedLicenseDefinition
- PlatformLicenseDefinition
- ProductLicenseMap
- ReturnOrderLineItem
- SettingUsageDefinition
- SettingUsageMap
- UsageFactor
- UserLicenseDefinition

These standard objects are already supported in User Interface API and for list views, and they're newly supported for most recently used list views.

- PaymentGatewayProvider
- ProductRequired
- Tenant

See Also

User Interface API Developer Guide: Supported Objects

Experience Cloud

Create content for your enhanced LWR site with Agentforce (beta). Improve the organization and security of user engagement data on sites connected to Data Cloud. Help LWR site visitors view records more easily with the new Record List component. Salesforce CDN customers who use Cloudflare have enhanced security protection against malicious traffic. Simplify the process of building a registration handler for single sign-on to your site by using Flow Builder.

Aura and LWR Sites

Use generative AI to create content for your enhanced LWR site (beta). Improve the organization and security of your user engagement data on sites connected to Data Cloud. Give authenticated LWR site visitors a heads-up that their session is about to end, so they can save their work. Information icons on Aura record field components default to gray for improved accessibility.

Components in Experience Builder

Help LWR site visitors view records more easily with the new Record List component. To improve the accessibility and performance of Aura sites, upgrade the Create Record Form, Record Banner, and Record Detail components to run on Lightning Web Components technology.

Mobile for Experience Cloud

Use External Client Apps to manage your app's push notifications. Landscape mode is now supported for all Mobile Publisher apps. Android users can preview PDFs after downloading them.

Security and Sharing

To enhance security, email verification is now mandatory when you create a new Aura or LWR site. Salesforce CDN customers who use Cloudflare have enhanced security that protects against malicious traffic. Use Flow Builder to simplify the process of building a registration handler for single sign-on into your Aura, LWR, or Visualforce site.

Aura and LWR Sites

Use generative AI to create content for your enhanced LWR site (beta). Improve the organization and security of your user engagement data on sites connected to Data Cloud. Give authenticated LWR site visitors a heads-up that their session is about to end, so they can save their work. Information icons on Aura record field components default to gray for improved accessibility.

Use Agentforce to Draft Text for Enhanced LWR Sites (Beta)
Use generative AI to create and revise content in a flash for any Text Block component on your site with the Experience Builder Agent (beta). The new Brand Identity field in Experience Builder Settings helps the agent draft text suited to your company's style. You can also ask the agent general questions about how to use Experience Builder and get answers based on Salesforce Help documentation.

Partition Enhanced LWR Site Data with Custom Data Spaces
For sites that you connect to Data Cloud, improve the organization and security of your user engagement data by using a custom data space. Previously, Data Cloud integrations used the default data space, so partitioning data from different areas of your business required separate Data Cloud instances. With custom data spaces, you can partition data from multiple LWR sites within the same Data Cloud instance. To increase data security, use permission sets to assign users access to specific data spaces.

Let Users Know When Their Session Is About to End
A new session timeout notification for LWR and enhanced LWR sites notifies authenticated users 5 minutes before their session is due to end. The notification gives users time to save their work and avoid being logged out unexpectedly. If they click Cancel, they're redirected to the login page when the session ends.

Aura Record Field Information Icons in Experience Builder Sites Have Changed
To improve accessibility, the information icon on Aura record field components now defaults to a gray color, regardless of the site's theme. When site visitors hover over the icon, its color changes to the site's Action Color. This change aligns the icon's behavior with that of the Lightning record field experience. Previously, the information icon on Aura record fields appeared in the site's Detail Text Color on both display and hover. On mobile devices, information icon text now opens in a tooltip, matching desktop behavior.

Use the File Upload Enhanced Lightning Web Component with Aura and LWR Sites (Beta)
To upload files to Aura and Lightning Web Runtime (LWR) sites, and Lightning Experience, use the new File Upload Enhanced (Beta) flow screen component. To require users to upload a file, set the Required field to true. Previously, there was no File Upload component available for LWR sites.

Upgrade to Enhanced LWR Sites (Release Update)
Upgrade existing LWR sites to enhanced LWR sites to take advantage of the latest features, including partial deployment, enhanced CMS workspaces and channels, expression-based visibility, and more. This update was first available in Spring '25.

Use Agentforce to Draft Text for Enhanced LWR Sites (Beta)

Use generative AI to create and revise content in a flash for any Text Block component on your site with the Experience Builder Agent (beta). The new Brand Identity field in Experience Builder Settings helps the agent draft text suited to your company's style. You can also ask the agent general questions about how to use Experience Builder and get answers based on Salesforce Help documentation.

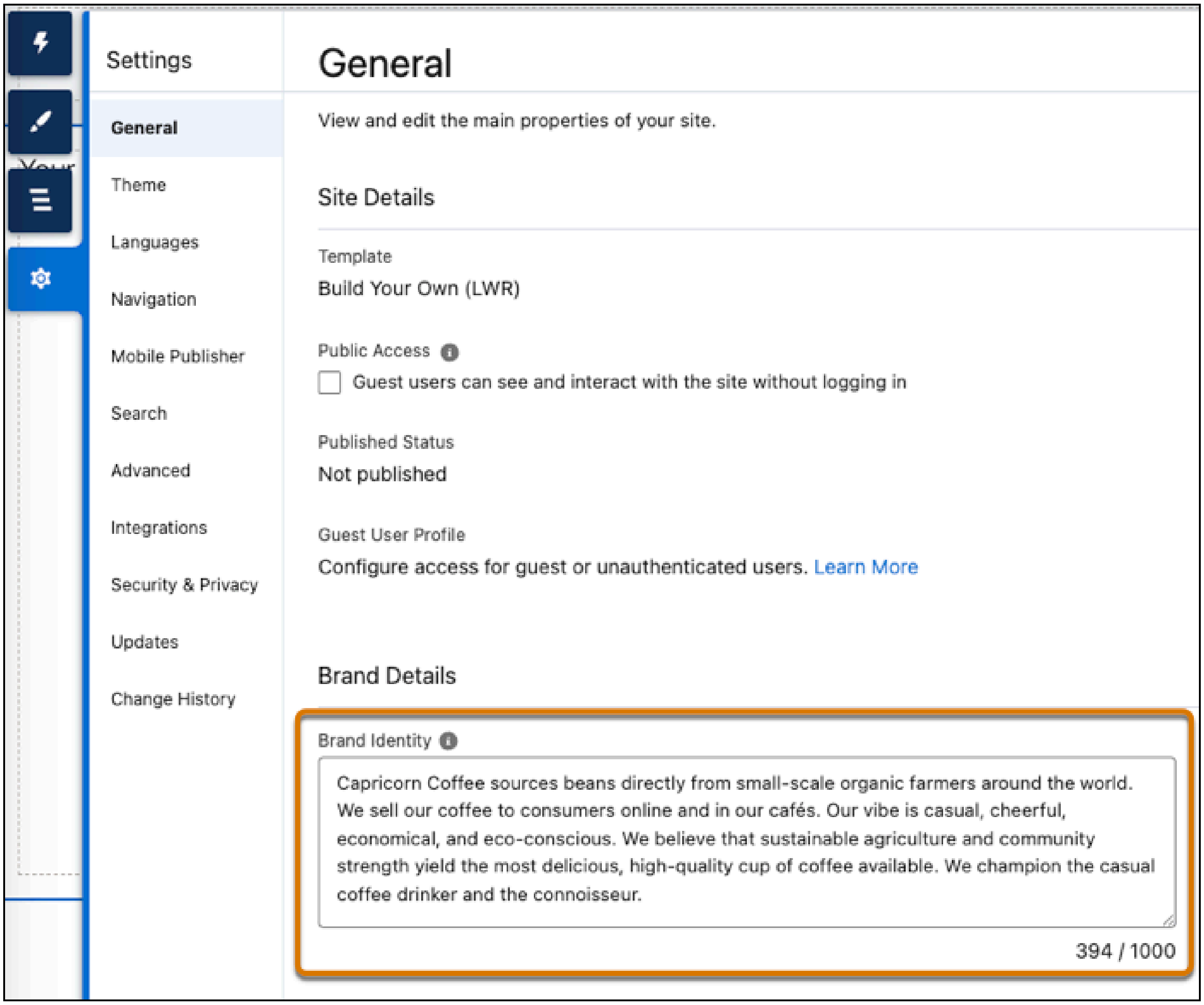
Where: This change applies to LWR sites accessed through Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein Platform add-on. Einstein generative AI is available in Lightning Experience. To purchase the Einstein for Sales, Einstein for Service, or Einstein Platform add-on, contact your Salesforce account executive.

> **Note** Agentforce for enhanced LWR sites is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.The Non-GA Services are used in conjunction with GA Services which consume paid credits or entitlements ("entitlements"). Any corresponding consumption of entitlements arising from Customer's use of the Non-GA Services shall not give rise to any refund or credit rights.

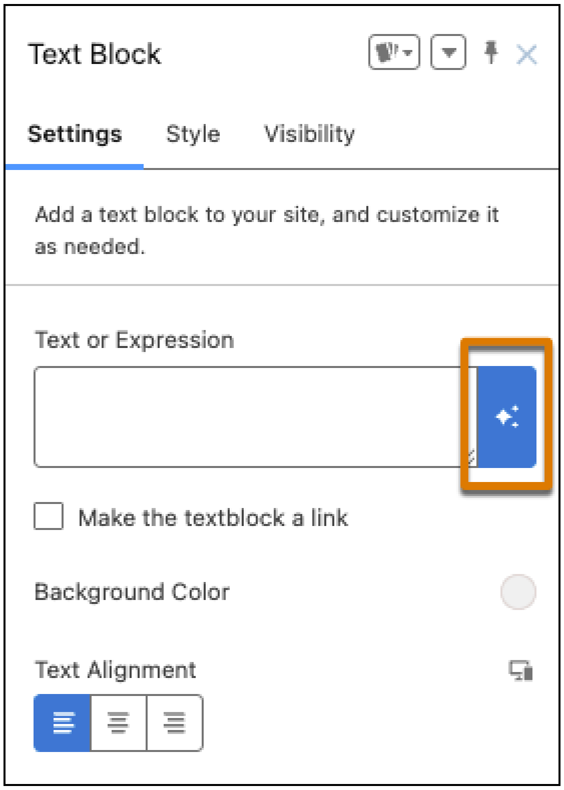
When: This feature is available in June 2025.

How: In **Setup | Digital Experiences | Settings**, select **Enable Agentforce (Beta) in Experience Builder for enhanced LWR sites**. Then, from **Setup | Agentforce Agents**, use the Experience Builder Agent template to create and activate the agent.

On your enhanced LWR site in Experience Builder, open **Settings | General** and enter a description of your company in the Brand Identity field. For example, explain what your company offers and what sets it apart. Also summarize your company's voice and tone or general vibe.



Add a Text Block component to the canvas for any page on your site. In the component property panel, click the sparkle button in the Text or Expression field. The AI agent creates text for your component, and you can chat with the agent in the Agentforce panel to refine the text until it's just right.



To ask the AI agent a general question, like “How do I allow guest users to access my site?” enter your question in the Agentforce panel. The agent searches Salesforce Help and delivers an answer.

Partition Enhanced LWR Site Data with Custom Data Spaces

For sites that you connect to Data Cloud, improve the organization and security of your user engagement data by using a custom data space. Previously, Data Cloud integrations used the default data space, so partitioning data from different areas of your business required separate Data Cloud instances. With custom data spaces, you can partition data from multiple LWR sites within the same Data Cloud instance. To increase data security, use permission sets to assign users access to specific data spaces.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions. To connect an LWR site to a custom data space, a Data Cloud license with the Data Spaces add-on license is required.

How: To configure a Data Cloud integration, in Experience Builder, go to **Settings** and select **Integrations**. On the Data Cloud card, select **Add to Site** and select **Share site data with Data Cloud**. From the dropdown menu, select a data space. To start sending user engagement data to Data Cloud, configure user consent options and publish your site.

See Also

Salesforce Help: Connect Experience Cloud to Data Cloud (can be outdated or unavailable during release preview)
Salesforce Help: Manage Data Spaces (can be outdated or unavailable during release preview)
LWR Sites for Experience Cloud: Manage Data in LWR Sites (can be outdated or unavailable during

release preview)

Let Users Know When Their Session Is About to End

A new session timeout notification for LWR and enhanced LWR sites notifies authenticated users 5 minutes before their session is due to end. The notification gives users time to save their work and avoid being logged out unexpectedly. If they click Cancel, they're redirected to the login page when the session ends.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Aura Record Field Information Icons in Experience Builder Sites Have Changed

To improve accessibility, the information icon on Aura record field components now defaults to a gray color, regardless of the site's theme. When site visitors hover over the icon, its color changes to the site's Action Color. This change aligns the icon's behavior with that of the Lightning record field experience. Previously, the information icon on Aura record fields appeared in the site's Detail Text Color on both display and hover. On mobile devices, information icon text now opens in a tooltip, matching desktop behavior.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

Use the File Upload Enhanced Lightning Web Component with Aura and LWR Sites (Beta)

To upload files to Aura and Lightning Web Runtime (LWR) sites, and Lightning Experience, use the new File Upload Enhanced (Beta) flow screen component. To require users to upload a file, set the Required field to true. Previously, there was no File Upload component available for LWR sites.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

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

Upgrade to Enhanced LWR Sites (Release Update)

Upgrade existing LWR sites to enhanced LWR sites to take advantage of the latest features, including partial deployment, enhanced CMS workspaces and channels, expression-based visibility, and more. This update was first available in Spring ’25.

Where: This change applies to LWR sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce enforces this release update in Spring ’26. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: The enhanced sites and content platform is a flexible system that brings together Salesforce CMS and LWR sites. Since Winter ’23, enhanced LWR sites and enhanced CMS workspaces that you create are hosted together on this redesigned platform. Now, as part of the continued move to the enhanced platform, you can upgrade existing LWR sites to access features that are available only with enhanced LWR sites, including:

- Expression-based visibility and variations: Create several versions of the same component, and then use visibility rules to determine who sees what.
- Component-specific Style tab: Apply custom CSS from a component’s Style tab for more granular control over the look of each component.
- Site content search: Use the Search Bar and Results Layout components to add search functionality that includes content results from enhanced CMS workspaces.
- Data Cloud integration: Connect enhanced LWR sites to Data Cloud for a complete understanding of who’s visiting your site and how you can best engage with them.
- Enhanced CMS workspaces: Avail of role-based workflows and approvals, content variations, collections, and workspace sharing.

How: Previously, admins couldn’t upgrade LWR sites that included `/s` in the site URL. Now you can update the site URL to remove `/s` before upgrading to an enhanced LWR site.

To upgrade an LWR site, in Experience Builder, select **Settings | Updates**, and click **Upgrade**. After you upgrade your site to an enhanced LWR site, the site’s metadata changes. Unlike non-enhanced LWR sites, which use the ExperienceBundle metadata type, enhanced LWR sites use the DigitalExperienceBundle and the DigitalExperienceConfig types.

Note Upgrading to an enhanced LWR site introduces new features, changes the metadata of your site, and affects the site deployment process. Before you upgrade the site, we recommend creating a backup copy of your non-enhanced LWR site and working in a sandbox environment to test any changes.

See Also

Salesforce Help: Upgrade to Enhanced LWR Sites (can be outdated or unavailable during release preview)

Salesforce Help: Update Your LWR Site URL to Remove /s (can be outdated or unavailable during release preview)

Components in Experience Builder

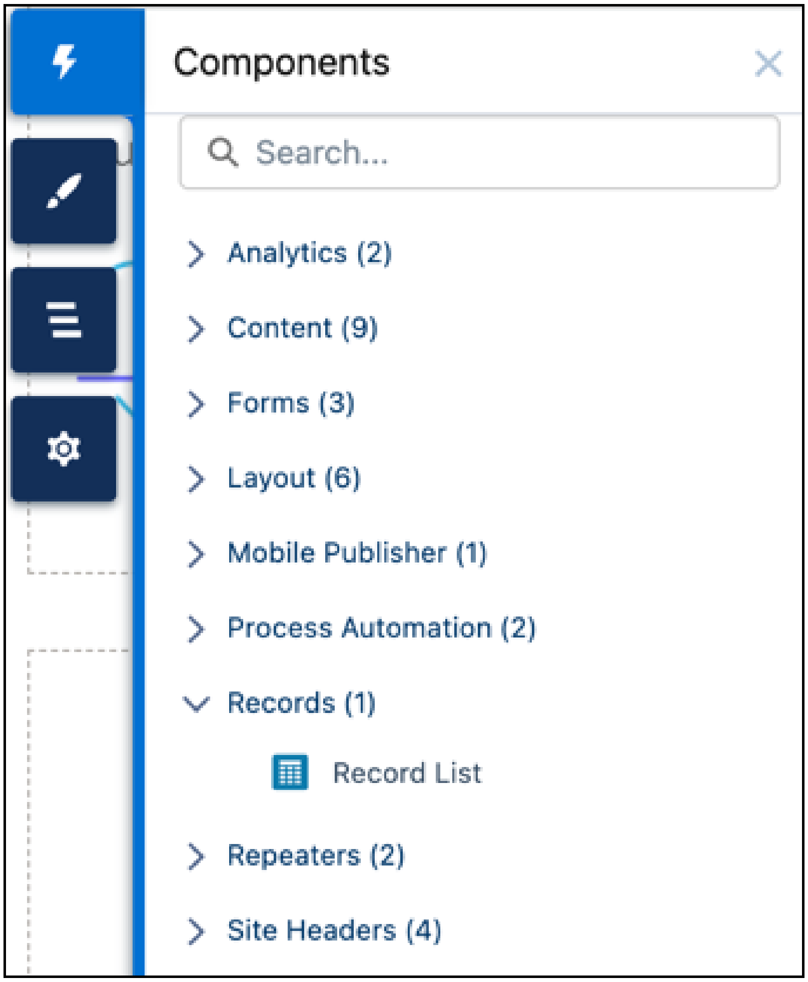
Help LWR site visitors view records more easily with the new Record List component. To improve the accessibility and performance of Aura sites, upgrade the Create Record Form, Record Banner, and Record Detail components to run on Lightning Web Components technology.

Help Your Site Visitors View Records More Easily with the New Record List Component

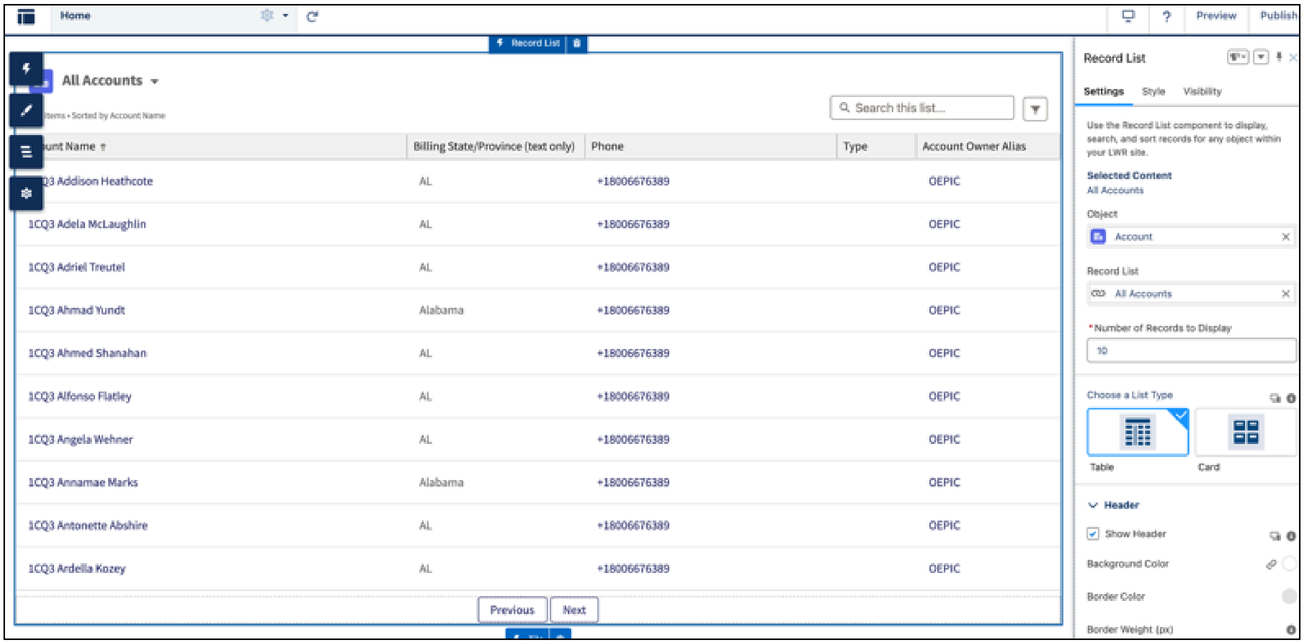
The Record List component for LWR sites helps your site visitors view, search, and sort their accounts, cases, and other data. With properties for component customization and styling, you can make sure that your visitors have a smooth and responsive experience across desktop, tablet, and mobile devices.

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: To enable navigation between and within objects, in Experience Builder, create a record detail page. Drag the Record List component to the canvas, select your object and list view, and then configure your settings.



For example, an account list can include several details, such as name, billing information, state or province, phone number, and type. Site builders can adjust the display settings for the lists, such as header visibility, colors, and border weight. Add pagination to the lists so that visitors can browse long lists in manageable chunks.



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

Upgrade the Create Record Form, Record Banner, and Record Detail components to run on Lightning Web Component technology, which improves accessibility and performance. In Summer ’25, the upgrade is enforced for all orgs. We strongly recommend that you test all customized record components before the update.

Where: This change applies to Aura sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce enforces this update in Summer ’25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: When the Use Lightning web components on your record pages in Aura sites setting is enabled, the Create Record Form, Record Banner, and Record Detail components show minor style changes. New Aura sites created after Summer ’24 automatically include upgraded record components. Here are some potential changes.

- Buttons are center-aligned. Previously, they were right-aligned.
- Text in the record window is indented compared to the title. Previously, the text and title were aligned with one another.
- If a form includes required fields, there’s now an explanation that an asterisk indicates a required field. Previously, there was no explanation.
- If a required field is left blank, users now see a red outline around the required field and an inline error message telling them to complete the field.
- Error messages are displayed at the bottom of the record form. Previously, errors were displayed at the top.
- Field focus is highlighted with a yellow background.

- Page headers scroll with the page rather than remaining frozen at the top.
- Success toast messages can refer to Salesforce IDs.
- New icons appear next to various fields and certain icons remain visible without mouseover.
- Links appear in various places where they were previously not included.

How: From Experience Builder, open **Setup | Digital Experiences** and go to **Settings**.

Under Experience Management Settings, select **Use Lightning web components on your record pages in Aura sites** to upgrade your components.

Mobile for Experience Cloud

Use External Client Apps to manage your app's push notifications. Landscape mode is now supported for all Mobile Publisher apps. Android users can preview PDFs after downloading them.

Take Advantage of the Latest Features from Mobile Publisher for Experience Cloud
Use External Client Apps to manage your app's push notifications. Landscape mode is now supported in Mobile Publisher, making it easier to view and interact with your content. Android users can now preview PDFs after downloading them. You're now notified in-app when a new version of Mobile Publisher is available. Mobile Publisher is transitioning from its own internal release numbering system to align with Salesforce's internal release numbering scheme.

Take Advantage of the Latest Features from Mobile Publisher for Experience Cloud

Use External Client Apps to manage your app's push notifications. Landscape mode is now supported in Mobile Publisher, making it easier to view and interact with your content. Android users can now preview PDFs after downloading them. You're now notified in-app when a new version of Mobile Publisher is available. Mobile Publisher is transitioning from its own internal release numbering system to align with Salesforce's internal release numbering scheme.

Where: These changes apply to apps created with Mobile Publisher for Aura and LWR sites in Enterprise, Performance, Unlimited, and Developer editions.

See Also

Use External Client Apps to Manage Your App's Push Notifications (Generally Available)
View Mobile Publisher Content in Landscape Mode
Align Mobile Publisher Release Numbering with Salesforce
Get Notified of New Mobile Publisher Version Release Notes

Security and Sharing

To enhance security, email verification is now mandatory when you create a new Aura or LWR site. Salesforce CDN customers who use Cloudflare have enhanced security that protects against malicious traffic. Use Flow Builder to simplify the process of building a registration handler for single sign-on into your Aura, LWR, or Visualforce site.

Verify Sender Email Addresses for New Aura and LWR Sites
To enhance security, email verification is now mandatory for users creating new sites. Email verification makes sure that new sites are associated only with a verified sender's email address. The email address of the sender must also be verified to send welcome emails to new members of a site.

Enhanced Security for Sites Using the Salesforce CDN
Salesforce CDN customers now have enhanced security that automatically protects against malicious traffic and other threats while still allowing access to legitimate bots and search engine crawlers.

Simplify Single Sign-On Registration with Flow Builder
To simplify the process of building a registration handler for single sign-on (SSO) into your Experience Cloud site, use Flow Builder instead of Apex. Customize the new Authentication Provider User Registration flow template to create and update users who log in to your site via a third-party identity provider.

Verify Sender Email Addresses for New Aura and LWR Sites

To enhance security, email verification is now mandatory for users creating new sites. Email verification makes sure that new sites are associated only with a verified sender's email address. The email address of the sender must also be verified to send welcome emails to new members of a site.

Where: This change applies to new Aura and LWR sites accessed through Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions.

How: To verify the sender's email address, from the site in Experience Builder, go to **Workspace | Settings** and select **Verify**. A verification email, which includes a verification link, is sent to the sender's email address.

See Also

Salesforce Help: Customize Email Sent from Experience Cloud Sites for Email Verification (can be outdated or unavailable during release preview)

Enhanced Security for Sites Using the Salesforce CDN

Salesforce CDN customers now have enhanced security that automatically protects against malicious traffic and other threats while still allowing access to legitimate bots and search engine crawlers.

Where: This change applies to LWR sites using the CDN accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Why: Salesforce CDN customers now benefit from enhanced security that provides comprehensive site protection. These enhancements, managed centrally by Salesforce, operate automatically to defend against malicious traffic, crawlers, scrapers, bots, and DDoS attacks. At the same time, legitimate bots and engine crawlers, such as those that index search results and monitor for threats, are preserved. This multi-layered protection ensures consistent security standards across all customer sites and automatically adjusts to respond to new threats.

See Also

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

Simplify Single Sign-On Registration with Flow Builder

To simplify the process of building a registration handler for single sign-on (SSO) into your Experience Cloud site, use Flow Builder instead of Apex. Customize the new Authentication Provider User Registration flow template to create and update users who log in to your site via a third-party identity provider.

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

Build Single Sign-On Registration Handlers Without Code

Field Service

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

Agentforce for Field Service
Discover innovative Agentforce features to help your teams deliver exceptional service.

Einstein for Field Service
Discover innovative, AI-based features to help your teams deliver exceptional service.

Field Service Go
Discover and implement Field Service features with Salesforce Go.

Field Service Scheduling and Optimization
Explore the latest features to help dispatchers create, manage, and optimize your team's schedule.

Field Service Operations
Streamline, extend, and customize your Field Service operations with these new additions.

Field Service Customer Engagement
Enhance and elevate your customer interactions with several new features.

Field Service Mobile
Explore what's new in Field Service mobile, designed to help mobile workers provide outstanding service.

Agentforce for Field Service

Discover innovative Agentforce features to help your teams deliver exceptional service.

Rebook Appointments Easily with Proactive Scheduling Outreach
Free up dispatchers to work on more complex tasks by streamlining the process of rebooking appointments. Dispatchers can now rebook appointments from the dispatcher console or by conversing with the AI agent in natural language. Agentforce then contacts the customer so that they can coordinate the appointment at a time that suits them.

Maintain Assets Efficiently with Proactive Asset Service Scheduling
Free up your operations managers to deal with other tasks by streamlining the process of scheduling maintenance appointments. Agentforce autonomously contacts the customer so that they can coordinate the appointment and make sure assets are scheduled for maintenance on time.

Experience Smarter Interactions with Context-Aware Agentforce
Agentforce now takes action intuitively based on the record you're viewing, so you get more efficient interactions. For example, if a mobile worker has a work order open and then launches Agentforce to ask for a summary, Agentforce infers that the worker is referring to the open work order without specifying the record ID. Previously, Agentforce didn't understand the context of the request and asked for the record ID.

Rebook Appointments Easily with Proactive Scheduling Outreach

Free up dispatchers to work on more complex tasks by streamlining the process of rebooking appointments. Dispatchers can now rebook appointments from the dispatcher console or by conversing with the AI agent in natural language. Agentforce then contacts the customer so that they can coordinate the appointment at a time that suits them.

Where: This feature is available in Lightning Experience. For purchasing options, contact your Salesforce account executive.

When: This feature is available later in Summer '25.

Who: Agentforce is available to users with the Use Agentforce Default Agent user permission.

Maintain Assets Efficiently with Proactive Asset Service Scheduling

Free up your operations managers to deal with other tasks by streamlining the process of scheduling maintenance appointments. Agentforce autonomously contacts the customer so that they can coordinate the appointment and make sure assets are scheduled for maintenance on time.

Where: This feature is available in Lightning Experience. For purchasing options, contact your Salesforce account executive.

When: This feature is available later in Summer '25.

How: Use the Maintenance Plans object to trigger Agentforce, which then proactively notifies customers and autonomously schedules service appointments.

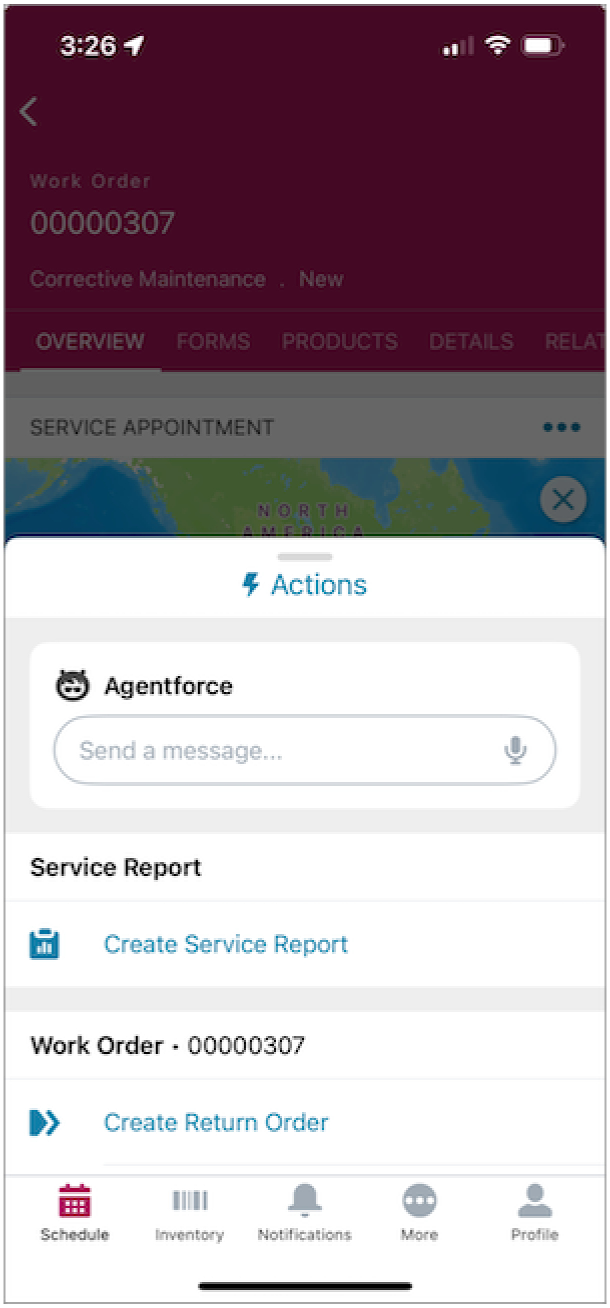
Experience Smarter Interactions with Context-Aware Agentforce

Agentforce now takes action intuitively based on the record you're viewing, so you get more efficient interactions. For example, if a mobile worker has a work order open and then launches Agentforce to ask for a summary, Agentforce infers that the worker is referring to the open work order without specifying the record ID. Previously, Agentforce didn't understand the context of the request and asked for the record ID.

Where: The feature is available in the Field Service mobile app for Android and iOS. For purchasing options, contact your Salesforce account executive.

Who: Agentforce is available to users with the Use Agentforce Default Agent user permission.

How: When a mobile worker views a record and taps **Actions**, Agentforce is automatically aware of the record context, just like when you use other quick actions.



See Also

Salesforce Help: Field Service Mobile App (can be outdated or unavailable during release preview)

Einstein for Field Service

Discover innovative, AI-based features to help your teams deliver exceptional service.

Access Pre-Work Briefs On the Go
Mobile workers can access important information hands-free and boost their productivity by asking Siri to read their next pre-work brief out loud. Previously, they had to manually open a work order and tap a button to listen to the brief.

Access Pre-Work Briefs On the Go

Mobile workers can access important information hands-free and boost their productivity by asking Siri to read their next pre-work brief out loud. Previously, they had to manually open a work order and tap a button to listen to the brief.

Where: This feature is available in the Field Service mobile app for iOS. For purchasing options, contact your Salesforce account executive.

How: To access pre-work briefs, mobile workers must be logged in to the Field Service mobile app. Instruct your iOS mobile workers to make sure that the Shortcuts app is installed. Mobile workers can say, “Hey Siri, tell me about my next job in Field Service.” Siri then opens the next work order and starts the playback of the pre-work brief in the app or lets them know that there aren’t any upcoming work orders. Mobile workers can also run the shortcut with the action button or add the shortcut to their home screen.

See Also

Salesforce Help: Field Service Mobile App (can be outdated or unavailable during release preview)

Field Service Go

Discover and implement Field Service features with Salesforce Go.

Simplify Field Service Feature Discovery and Setup
With Salesforce Go, you can discover, set up, configure Field Service features, and track feature usage, all from a single location in Setup. Learn more about features and get help with configuration by accessing content resources and links. Explore more Field Service products and features, and if you’ve turned on the Your Account app, you can purchase add-on licenses for some features directly from Salesforce Go.

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With Salesforce Go, you can discover, set up, configure Field Service features, and track feature usage, all from a single location in Setup. Learn more about features and get help with configuration by accessing content resources and links. Explore more Field Service products and features, and if you’ve turned on the Your Account app, you can purchase add-on licenses for some features directly from Salesforce Go.

See Also

Salesforce Help: Simplify Feature Discovery and Setup with Salesforce Go (can be outdated or unavailable during release preview)

Field Service Scheduling and Optimization

Explore the latest features to help dispatchers create, manage, and optimize your team’s schedule.

Enhanced Scheduling and Optimization
Benefit from advanced features and better schedule quality with Enhanced Scheduling and Optimization.

Manage Crew Member Absences More Efficiently with Color Coding
Easily identify the type of absence scheduled for a crew member with color-coded absence types in the Crew Management tool. The colors you set up for absence types on the Gantt are now also shown in the Crew Management tool, so you can quickly decide whether absences can be removed or rescheduled.

Enhanced Scheduling and Optimization

Benefit from advanced features and better schedule quality with Enhanced Scheduling and Optimization.

Get Additional Guidance When Transitioning to Enhanced Scheduling and Optimization
Easily upgrade all service territories to use Enhanced Scheduling and Optimization with guided steps comprising a readiness check and links to Salesforce Help. This transparency helps users adopt Enhanced Scheduling and Optimization and benefit from innovative features, more efficient services, and improved scalability, performance, and schedule quality. To ensure accuracy, the readiness check now only considers feature usage and configurations from the last 3 months. It also includes additional tests to make sure your configuration of crew size, scheduled jobs, and scheduling dependencies between appointments in a complex work chain meet the requirements for Enhanced Scheduling and Optimization. For a smooth transition to the enhanced engine, the readiness check provides the necessary guidelines. To see if you're ready to transition after making configuration changes, you can also rerun the readiness check.

Improve Usability of Resource Schedule Optimization with Reduced Data Loading
Avoid optimization failures and schedule more efficiently with fewer appointments in a resource optimization request. During resource optimization, the engine now loads only service appointments for the resource based on the database work rules in the scheduling policy. Previously, all unscheduled appointments were loaded without considering work rules. For example, service appointments from all service territories and appointments that require certain skills that the service resource doesn't have were also loaded. This behavior caused the engine to quickly reach its limit of 5,000 service appointments per optimization request and unnecessarily consumed the limit of optimized service appointments per rolling 24 hours.

Streamline Scheduling and Improve Operational Efficiency with Smarter Schedule Conflict Management
Reduce scheduling conflicts and get the full benefits of workforce optimization with improved conflict management. When running optimization, if the Rollback mode is selected, dispatchers and scheduling operations can now change the service appointment Status, Arrival Window Start, or Arrival Window End fields without causing a conflict with the optimization process that's running. Instead, the optimization result is committed. Previously, changes to these fields caused discrepancies between the schedule at the start of optimization and the schedule upon completion. Optimization rolled back to the original schedule without making any changes. Additionally, with the Always Commit mode selected, if a dispatcher schedules an appointment that the optimization engine recommends

scheduling to a different resource, the optimization run ignores the dispatcher's decision and commits the recommended solution. Previously, this appointment was assigned to both service resources, which is invalid.

Create More Precise Travel Time Estimations by Including a Buffer Time on Service Appointments (Generally Available)
Align travel time estimations with your company's business needs by adding a buffer to the estimated travel time, now available also on the Service Appointment object. The buffer accounts for additional arrival time considerations, such as parking or unloading assets, for improved travel time accuracy. This feature, which is now generally available, includes some changes since the pilot release. Previously, you added buffer time from the Field Service Settings or on the Service Territory.

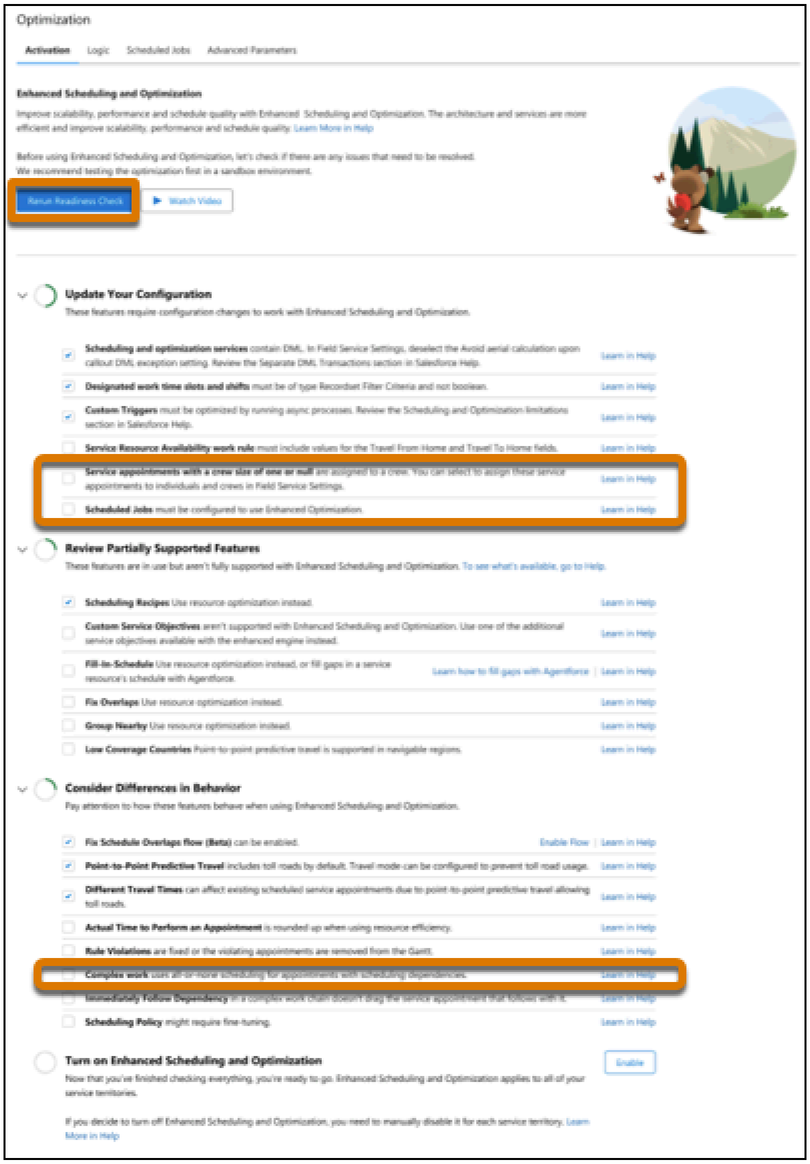
Get Better Optimization Results by Using Priorities to Schedule Complex Work Chains
Meet your business KPIs more efficiently by scheduling complex work chains based on priority. The Enhanced Scheduling and Optimization engine now considers the defined priorities of all service appointments, including those that are part of a complex work chain. High-priority appointments take precedence, regardless of whether they're part of a chain. When resource availability is limited, the engine unschedules low-priority complex work chains and replaces them with high-priority appointments. Previously, complex work chains were always scheduled first, regardless of their priority, and low-priority chains couldn't be unscheduled and replaced.

Get Additional Guidance When Transitioning to Enhanced Scheduling and Optimization

Easily upgrade all service territories to use Enhanced Scheduling and Optimization with guided steps comprising a readiness check and links to Salesforce Help. This transparency helps users adopt Enhanced Scheduling and Optimization and benefit from innovative features, more efficient services, and improved scalability, performance, and schedule quality. To ensure accuracy, the readiness check now only considers feature usage and configurations from the last 3 months. It also includes additional tests to make sure your configuration of crew size, scheduled jobs, and scheduling dependencies between appointments in a complex work chain meet the requirements for Enhanced Scheduling and Optimization. For a smooth transition to the enhanced engine, the readiness check provides the necessary guidelines. To see if you're ready to transition after making configuration changes, you can also rerun the readiness check.

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 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 enable Enhanced Scheduling and Optimization for all service territories.



See Also

Salesforce Help: Transition to Enhanced 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)

Salesforce Help: Work Rule Type: Service Crew Resources Availability (can be outdated or unavailable during release preview)

Salesforce Help: Manage Scheduled Jobs in Field Service (can be outdated or unavailable during release preview)

Salesforce Help: Reserve Time Slots for Designated Types of Work (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Complex Work (can be outdated or unavailable during release preview)

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Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled.

See Also

Salesforce Help: Optimize a Single Field Service Resource's Schedule (can be outdated or unavailable during release preview)

Salesforce Help: Limits and Limitations for Enhanced Scheduling and Optimization (can be outdated or unavailable during release preview)

Streamline Scheduling and Improve Operational Efficiency with Smarter Schedule Conflict Management

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Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled. Create and manage scheduling policies from the Field Service Admin app in the Field Service settings tab. Click **Go to Guided Setup** under Getting Started, or click **New** in the Scheduling Policies tab. Then select the scheduling policy **Commit Mode**. Always Commit is the default for Salesforce orgs created before Summer '23. Rollback is the default for orgs created in Summer '23 and later, where Enhanced Scheduling and Optimization is enabled by default.

See Also

Salesforce Help: Guidelines for Using the Scheduling Policy Commit Mode (can be outdated or unavailable during release preview)

Create More Precise Travel Time Estimations by Including a Buffer Time on Service Appointments (Generally Available)

Align travel time estimations with your company's business needs by adding a buffer to the estimated travel time, now available also on the Service Appointment object. The buffer accounts for additional arrival time considerations, such as parking or unloading assets, for improved travel time accuracy. This feature, which is now generally available, includes some changes since the pilot release. Previously, you added buffer time from the Field Service Settings or on the Service Territory.

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. In the Field Service Admin app, go to Field Service Settings, select **Scheduling**, and then select **Routing**. Enter the number of minutes for the buffer. You can also set the buffer on specific service territories or service appointments.

Get Better Optimization Results by Using Priorities to Schedule Complex Work Chains

Meet your business KPIs more efficiently by scheduling complex work chains based on priority. The Enhanced Scheduling and Optimization engine now considers the defined priorities of all service appointments, including those that are part of a complex work chain. High-priority appointments take precedence, regardless of whether they're part of a chain. When resource availability is limited, the engine unschedules low-priority complex work chains and replaces them with high-priority appointments. Previously, complex work chains were always scheduled first, regardless of their priority, and low-priority chains couldn't be unscheduled and replaced.

Where: This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: In Setup, go to Field Service Settings and verify that Field Service Enhanced Scheduling and Optimization is enabled.

See Also

Salesforce Help: Complex Work in Field Service (can be outdated or unavailable during release preview)

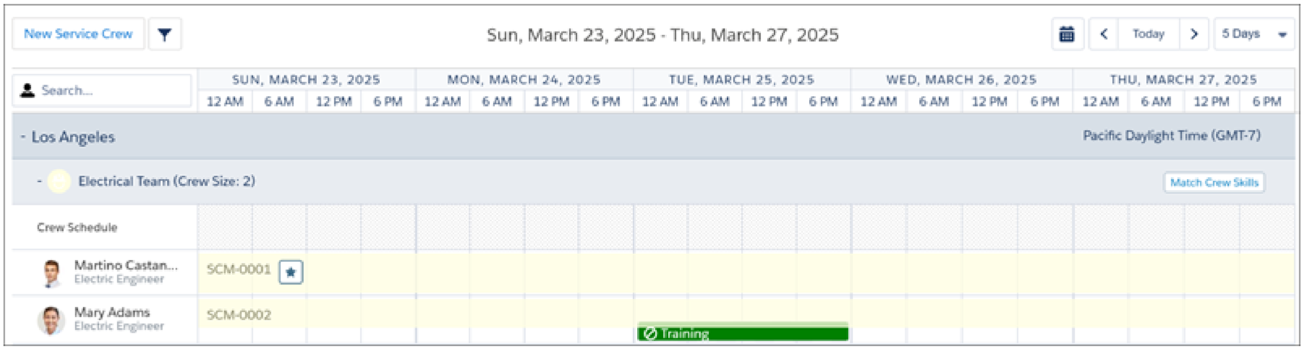
Salesforce Help: Optimize Field Service Appointments by Using Priorities (can be outdated or unavailable during release preview)

Manage Crew Member Absences More Efficiently with Color Coding

Easily identify the type of absence scheduled for a crew member with color-coded absence types in the

Crew Management tool. The colors you set up for absence types on the Gantt are now also shown in the Crew Management tool, so you can quickly decide whether absences can be removed or rescheduled.

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: Manage Field Service Crew Membership (can be outdated or unavailable during release preview)

Field Service Operations

Streamline, extend, and customize your Field Service operations with these new additions.

Improve Visibility into Resource Distribution and Demand with Capacity Visualization
Give operations managers, planners, and dispatchers clear insights into resource distribution and demand. By addressing demand and capacity gaps that can lead to over- or underutilization of resources and negatively impact service delivery, capacity visualization makes sure that resources are used effectively. Previously, operations managers, planners, and dispatchers had limited visibility into resource distribution and demand, making it difficult to make informed decisions about resource allocation.

Upgrade Your Field Service Insights with Tableau Next (Generally Available)
Field Service Intelligence and the Operations Home, now powered by Tableau Next, provide access to cutting-edge platform features and operations monitoring, such as Demand Forecasting. Harness the power of Demand Forecasting to predict demand and balance resources effectively. Additionally, the enhanced Einstein dashboards provide your teams with customizable data, visualizations, and KPIs to improve operations and reduce expenses. You can also dive into detailed work order and service appointment trends to enhance efficiency and service quality.

Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)
This update was canceled. The Frequency and Frequency Type fields on the Maintenance Plan are no longer being retired. You can continue to use the frequency fields or maintenance work rules to set up maintenance plans based on your organizational needs.

Improve Visibility into Resource Distribution and Demand with Capacity Visualization

Give operations managers, planners, and dispatchers clear insights into resource distribution and demand. By addressing demand and capacity gaps that can lead to over- or underutilization of resources and negatively impact service delivery, capacity visualization makes sure that resources are used effectively. Previously, operations managers, planners, and dispatchers had limited visibility into resource distribution and demand, making it difficult to make informed decisions about resource allocation.

Where: This feature is available in Lightning experience in Einstein 1. Einstein 1 access includes the necessary permissions to customize dashboards. This feature is also available in Lightning Experience in the Unlimited edition. To customize dashboards in the Unlimited edition, contact your Salesforce Account Representative to purchase Tableau Next.

How: From the App Launcher, find and select **Field Service Home**, and then click a capacity planning insight.

See Also

Salesforce Help: Field Service Operations Home (can be outdated or unavailable during release preview)

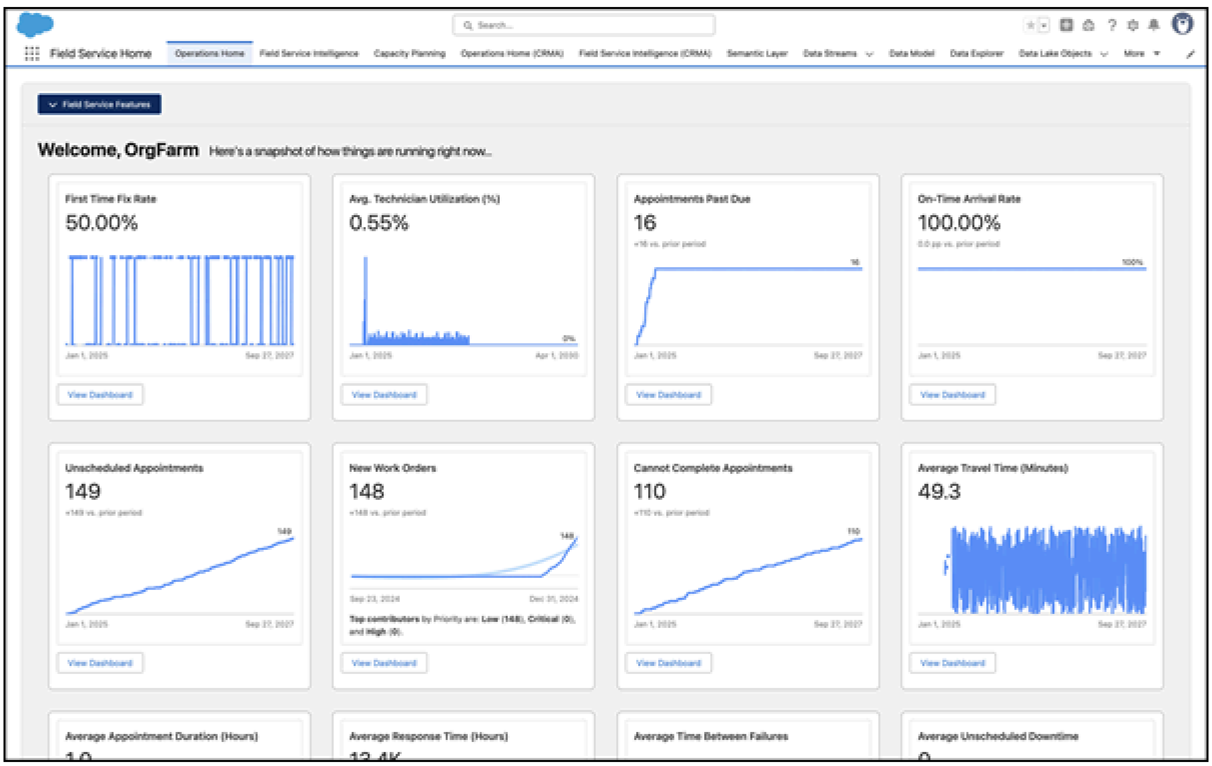
Upgrade Your Field Service Insights with Tableau Next (Generally Available)

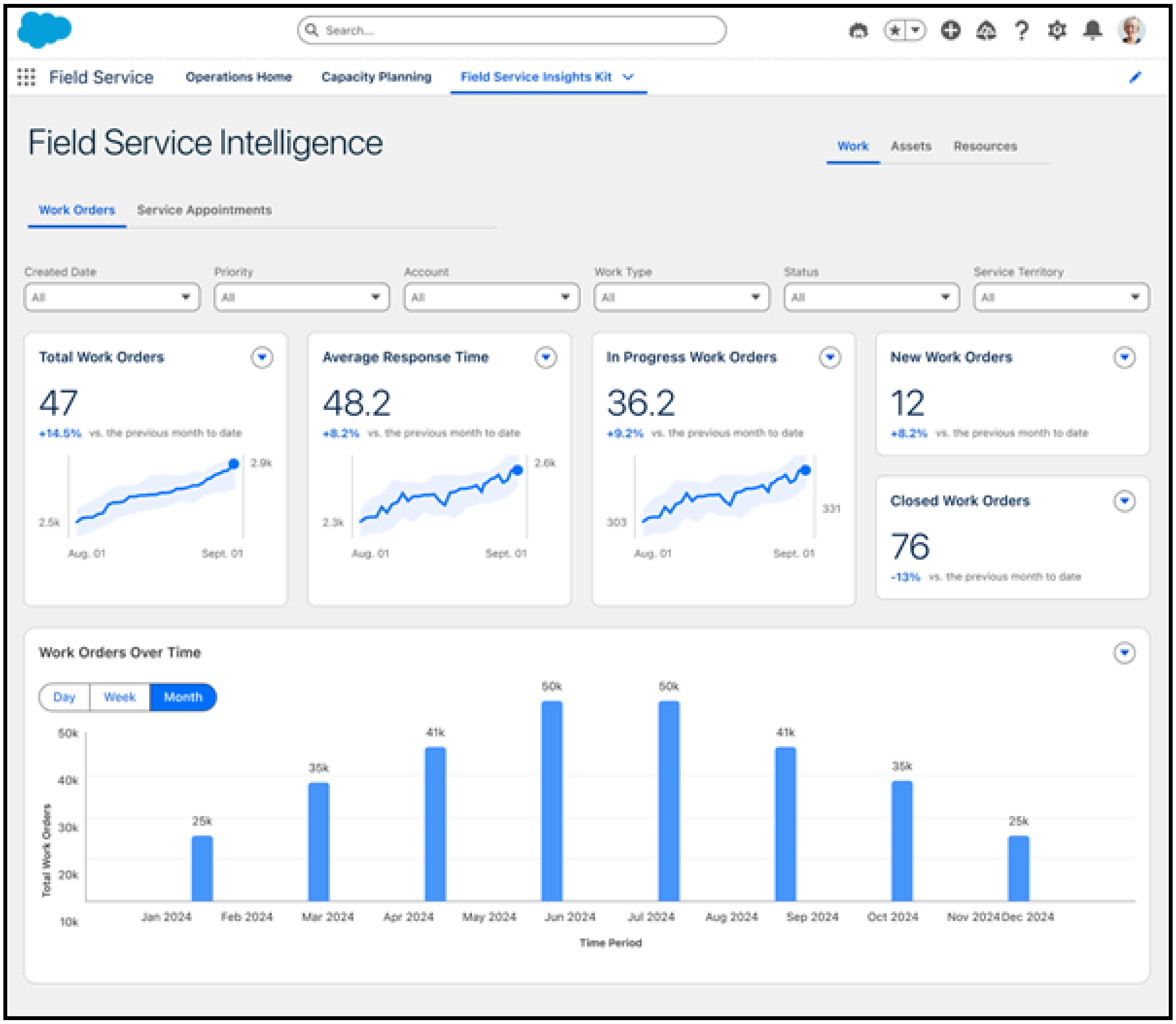
Field Service Intelligence and the Operations Home, now powered by Tableau Next, provide access to cutting-edge platform features and operations monitoring, such as Demand Forecasting. Harness the power of Demand Forecasting to predict demand and balance resources effectively. Additionally, the enhanced Einstein dashboards provide your teams with customizable data, visualizations, and KPIs to improve operations and reduce expenses. You can also dive into detailed work order and service appointment trends to enhance efficiency and service quality.

Where: This feature is available in Lightning experience in Einstein 1. Einstein 1 access includes the necessary permissions to customize dashboards. This feature is also available in Lightning Experience in the Unlimited edition. To customize dashboards in the Unlimited edition, contact your Salesforce Account Representative to purchase Tableau Next.

Who: To use the Field Service Intelligence dashboards, you need the Tableau Einstein Included App Business User permission set. To manage the Field Service Intelligence dashboards, you need the Tableau Included App Manager permission set.

How: To enable Field Service Intelligence, from **Setup**, in the Quick Find box, enter `Field Service Operations`, and then select **Field Service Operations**. Follow the setup steps and enable Tableau Einstein.





See Also

Salesforce Help: Improve Customer Experience with Field Service Operations (can be outdated or unavailable during release preview)

Salesforce Help: Field Service Operations Home (can be outdated or unavailable during release preview)

Migrate from Maintenance Plan Frequency Fields to Maintenance Work Rules (Release Update)

This update was canceled. The Frequency and Frequency Type fields on the Maintenance Plan are no longer being retired. You can continue to use the frequency fields or maintenance work rules to set up maintenance plans based on your organizational needs.

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

When: This update was canceled and no longer appears in the Release Update page in Setup.

See Also

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

Field Service Customer Engagement

Enhance and elevate your customer interactions with several new features.

Manage Visual Remote Assistant (VRA) Sessions from the Mobile App
Mobile workers can now send invites for VRA sessions to customers or call center reps directly from the mobile app for a more streamlined process. This seamless workflow within the app makes it easy for mobile workers to troubleshoot issues remotely. All session details are automatically saved in the associated work order or case record. Mobile workers can access this data to review previous interactions and ensure service continuity. Previously, they had to initiate VRA sessions through a separate interface outside the mobile app and enter data manually to link sessions with work orders or cases.

Get More Insights with Data Cloud and Visual Remote Assistant (VRA) Integration
Combine service interactions with more customer data for a more complete view of engagement and operational efficiency with Data Cloud integration. VRA session data is now automatically saved in Data Cloud for enhanced analytics, AI, and automation. With more data, you get deeper insights into your customer interactions, improve service recommendations, and optimize automation. Previously, VRA session data was saved only in work order or case records. This limitation made it difficult to analyze and use the data effectively for automation.

Set Up Recording Rules Easily for Visual Remote Assistant (VRA) Sessions
Comply with business policies and manage how VRA records your remote support sessions. Configure session recording rules based on customized session parameters. For example, set it to record sessions based on session settings, such as customer type, case priority, or regulatory requirements. When a mobile worker initiates a session, the system applies the predefined recording rules that align with regulatory and operational requirements. Previously, session recordings were either manually controlled by mobile workers or recorded by default, which led to inconsistencies and compliance risks. With configurable recording rules, you can now automate compliance and reduce the need for manual oversight.

Manage Visual Remote Assistant (VRA) Sessions from the Mobile App

Mobile workers can now send invites for VRA sessions to customers or call center reps directly from the mobile app for a more streamlined process. This seamless workflow within the app makes it easy for mobile workers to troubleshoot issues remotely. All session details are automatically saved in the associated work order or case record. Mobile workers can access this data to review previous interactions and ensure service continuity. Previously, they had to initiate VRA sessions through a separate interface outside the mobile app and enter data manually to link sessions with work orders or cases.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Mobile workers can send VRA session invites via SMS or email from the work order or case record in the mobile app. The customer or call center rep gets a secure link to join the live video session. When the session ends, details such as timestamps, session duration, and any associated notes, are saved.

See Also

Salesforce Help: Set Up Visual Remote Assistant for Field Service (can be outdated or unavailable during release preview)

Get More Insights with Data Cloud and Visual Remote Assistant (VRA) Integration

Combine service interactions with more customer data for a more complete view of engagement and operational efficiency with Data Cloud integration. VRA session data is now automatically saved in Data Cloud for enhanced analytics, AI, and automation. With more data, you get deeper insights into your customer interactions, improve service recommendations, and optimize automation. Previously, VRA session data was saved only in work order or case records. This limitation made it difficult to analyze and use the data effectively for automation.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: VRA session data is mapped to relevant Data Cloud objects. You can access this data through Customer Data Platform (CDP) dashboards, analytics reports, and AI-powered automation workflows. To easily retrieve data for reporting, service optimization, and personalized customer engagement, set up Data Cloud connectors to link session records to customer profiles.

See Also

Salesforce Help: Set Up Visual Remote Assistant for Field Service (can be outdated or unavailable during release preview)

Set Up Recording Rules Easily for Visual Remote Assistant (VRA) Sessions

Comply with business policies and manage how VRA records your remote support sessions. Configure session recording rules based on customized session parameters. For example, set it to record sessions based on session settings, such as customer type, case priority, or regulatory requirements. When a mobile worker initiates a session, the system applies the predefined recording rules that align with regulatory and operational requirements. Previously, session recordings were either manually controlled by mobile workers or recorded by default, which led to inconsistencies and compliance risks. With configurable recording rules, you can now automate compliance and reduce the need for manual oversight.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions with the Field Service managed package installed.

How: Go to the App Launcher and search for Visual Remote Assistant Configuration. In the Session Recording Settings section, define an Autolaunched Flow with flexible recording logic based on session parameters.

See Also

Salesforce Help: Set Up Visual Remote Assistant for Field Service (can be outdated or unavailable during release preview)

Field Service Mobile

Explore what's new in Field Service mobile, designed to help mobile workers provide outstanding service.

Data Capture
Discover what's new for Data Capture and Discovery Framework-Based Data Capture.

Get Feedback from Mobile Workers On the Go with Mobile Net Promoter Score (NPS) Surveys
Mobile users can now easily share feedback about their Field Service Mobile app experience by completing an NPS survey. Feedback is critical in helping Salesforce improve the Field Service Mobile app and making sure the app meets mobile workers' needs.

Create and Update Field Service Records Quickly and Efficiently
Create and update record pages on the Field Service mobile app with improved performance and user experience. The record edit experience is migrated to be natively built into iOS and Android, while the user interface remains the same.

Work More Efficiently with the Revamped Work Order Overview Page
Boost performance with the fast-loading work order overview screen. Each tab and card on the overview page now loads independently, so you can access critical information faster. The modernized user interface has a sleeker look and feel and optimized screen space, so you now see more content at a glance. Previously, you had to wait for all the tabs to load before seeing the entire user interface.

Data Capture

Discover what's new for Data Capture and Discovery Framework-Based Data Capture.

Improve Work Plan Efficiency with Data Capture Forms
Launch Data Capture forms directly from work steps to streamline your work plans. This integration makes sure that mobile workers can complete assignments more efficiently and accurately, reducing guesswork and improving consistency.

Streamline Workflow with PDFs of Completed Data Capture Forms
Boost your workflow and get tasks done faster by creating PDFs directly from completed Data Capture forms. With this streamlined process, you can quickly collect data and make sure that the information is accurate, readily available, and professionally presented.

Improve Work Plan Efficiency with Data Capture Forms

Launch Data Capture forms directly from work steps to streamline your work plans. This integration makes sure that mobile workers can complete assignments more efficiently and accurately, reducing guesswork and improving consistency.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions and in the Field Service mobile app for Android and iOS.

How: After you create your Data Capture flow, go to the work step from which you want to launch your Data Capture form. Select a flow from the dropdown list on the Action Definition field. The Process Type field shows Data Capture Flow.

After the feature is configured, mobile workers tap the flow icon on the work step to launch the corresponding Data Capture form in the Field Service mobile app. The form auto-saves, and the status of the work step is updated automatically to reflect the progress of the form.

See Also

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

Streamline Workflow with PDFs of Completed Data Capture Forms

Boost your workflow and get tasks done faster by creating PDFs directly from completed Data Capture forms. With this streamlined process, you can quickly collect data and make sure that the information is accurate, readily available, and professionally presented.

Where: This feature is available in Lightning Experience in the Unlimited Edition and in the Field Service mobile app for Android and iOS.

How: Use Document Builder to set up PDF generation for completed Data Capture forms. First, go to Document Builder and create a template and select the Form object. Use out-of-the-box components or custom Lightning web components to design the template, and drag field values from the completed form into the template. Save the template and note its ID. On the form record page, enter this ID in the Service Document Template field and save the record.

After the feature is configured, mobile workers see a Create PDF button next to a completed Data Capture flow. Tapping this button initiates PDF generation. After the PDF is generated, the device receives a push notification (if enabled) or the user can manually refresh to view the PDF. The form then shows a View PDF button, and the user can access the generated document.

See Also

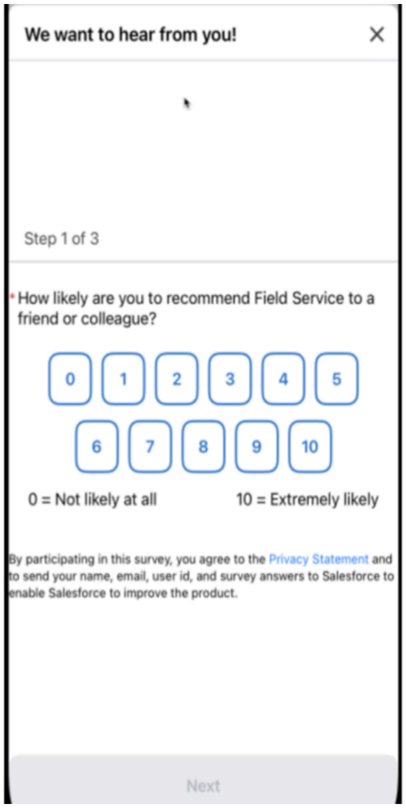
Salesforce Help: Data Capture (can be outdated or unavailable during release preview)

Get Feedback from Mobile Workers On the Go with Mobile Net Promoter Score (NPS) Surveys

Mobile users can now easily share feedback about their Field Service Mobile app experience by completing an NPS survey. Feedback is critical in helping Salesforce improve the Field Service Mobile app and making sure the app meets mobile workers’ needs.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions, and in the Field Service mobile app for iOS.

How: The survey starts automatically when the mobile worker updates the status category of the service appointment on the Work Order screen to Completed, Canceled, or Cannot Complete.



Create and Update Field Service Records Quickly and Efficiently

Create and update record pages on the Field Service mobile app with improved performance and user experience. The record edit experience is migrated to be natively built into iOS and Android, while the user interface remains the same.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions, and in the Field Service mobile app for Android and iOS.

When: The Record Edit create experience is available in the Summer '25 beta release. Let us know what you think of the create record edit experience revamp by joining our Salesforce mobile app beta program here. You can test this feature through the Salesforce mobile app beta program using a preview sandbox that'll be available six weeks ahead of the Summer '25 release.

See Also

Update Field Service Records Quickly and Easily (can be outdated or unavailable during release preview)

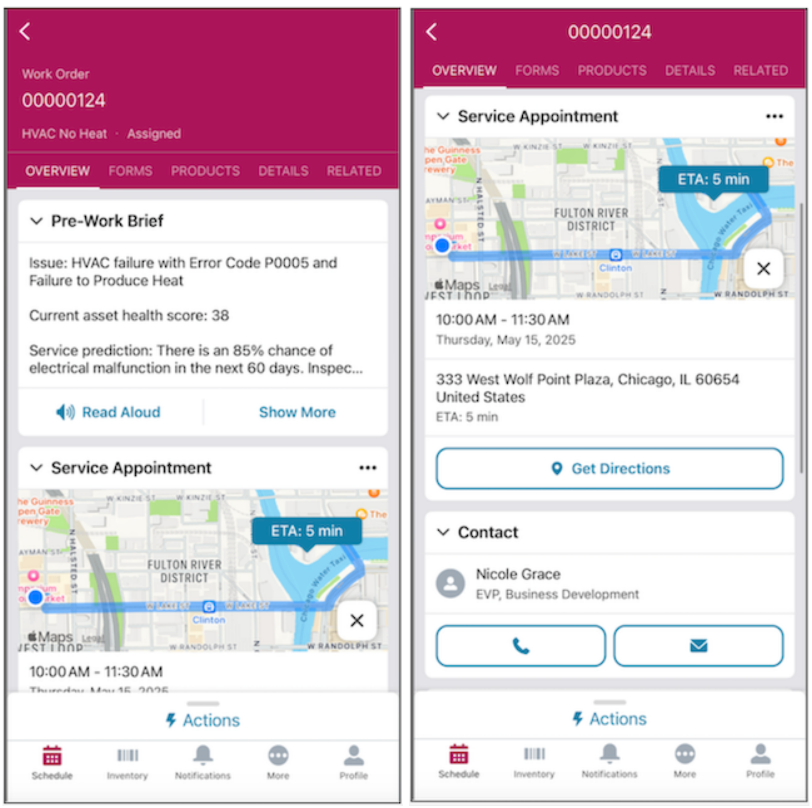
Work More Efficiently with the Revamped Work Order Overview Page

Boost performance with the fast-loading work order overview screen. Each tab and card on the overview page now loads independently, so you can access critical information faster. The modernized user interface has a sleeker look and feel and optimized screen space, so you now see more content at a glance. Previously, you had to wait for all the tabs to load before seeing the entire user interface.

Where: This change applies to the Lightning Experience in Enterprise, Unlimited, and Developer editions, and in the Field Service mobile app for Android and iOS.

When: The new Work Order Overview UI is available in the Summer ’25 beta release. Let us know what you think of the Work Order Overview UI revamp by joining our Salesforce mobile app beta program here. You can test this feature through the Salesforce mobile app beta program using a preview sandbox that’ll be available six weeks ahead of the Summer ’25 release.

How: This change is reflected on the Work Order Overview tab.



See Also

Salesforce Help: Customize the Layout of the Work Order Overview Screen (can be outdated or unavailable during release preview)

Hyperforce

Hyperforce is now available in Hyderabad, India. Tableau and Data Cloud are available in more regions, expanding global data residency options. Salesforce Shield now offers critical event data with Event Log Objects.

Access Salesforce in More Regions with Hyperforce
Hyperforce is available in 17 countries, giving you more choice and control over data residency. Salesforce opened a new Hyperforce region in Hyderabad, India, in April 2025.

Query Event Data with Salesforce Shield Event Log Objects
With the Event Log Objects framework, which captures event data in standard objects, Hyperforce customers can store event data for the past 30 days and query any 15-day window within the stored data via the API.

Access Salesforce in More Regions with Hyperforce

Hyperforce is available in 17 countries, giving you more choice and control over data residency. Salesforce opened a new Hyperforce region in Hyderabad, India, in April 2025.

Where: Delivery of the Salesforce Customer 360 application suite via Hyperforce, including Sales Cloud, Service Cloud, B2B Commerce, Platform, and Industries Cloud is automatically available in Australia, Brazil, Canada, France, Germany, India, Indonesia, Israel, Italy, Japan, Singapore, South Korea, Sweden, Switzerland, the United Arab Emirates, the United Kingdom, and the United States. For the most up-to-date list of products and regions, see the Salesforce Trust and Compliance Documentation and the Hyperforce Security, Privacy and Architecture documents.

These clouds and products recently expanded into new Hyperforce regions.

Cloud	Product or Feature	Description	Available In
Data Cloud	Agentforce, Data Cloud, UMA, and Einstein	The Hyperforce Geo Expansion for Data Residency provides in-country data residency for these Data Cloud products.	Now available in Singapore and Switzerland. Also available in Australia, Brazil, Canada, Germany, India, Japan, the United Kingdom, and the United States.
Tableau	Tableau Cloud	Tableau Cloud is a fully-hosted, cloud-based,	Now available in Australia, Indonesia,

Cloud	Product or Feature	Description	Available In
		enterprise-grade analytics solution designed to empower organizations with intelligent tools and insights. Learn more in Introducing Tableau on Hyperforce - General Information and FAQ.	and Japan. Also available in Canada, Germany, Singapore, the United Kingdom, and the United States.

Query Event Data with Salesforce Shield Event Log Objects

With the Event Log Objects framework, which captures event data in standard objects, Hyperforce customers can store event data for the past 30 days and query any 15-day window within the stored data via the API.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, and Unlimited editions where Event Monitoring is enabled.

Note Event Log Objects isn't yet available in these regions: Asia Pacific (Jakarta, Hyderabad, Mumbai, Osaka, Singapore, and Seoul), Canada (Central), South America (São Paulo), and Middle East (UAE and Israel).

Who: This change is available to Hyperforce customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions. Not available to Government Cloud customers.

See Also

Salesforce Help: Store and Query Log Data with Event Log Objects (can be outdated or unavailable during release preview)

Industries

Salesforce introduces a range of enhancements to streamline operations and improve productivity across industries. Asset Management simplifies inventory processes, while Automotive Cloud enhances financial updates, vehicle inspections, and lending optimization. Channel Revenue Management improves partner inventory tracking and minimizes overpayment, and Communications Cloud streamlines billing inquiries and automates quoting. Consumer Goods Cloud simplifies deliveries, payments, and data sync, while Energy and Utilities Cloud tracks consumption, summarizes chats, and creates timesheets. Financial Services Cloud enhances client interactions and operational efficiency through real-time data refresh, and streamlines loan and policy management. Health Cloud improves financial control and appointment scheduling, and Life Sciences enhances therapy management, participant recruitment, and site management. Loyalty Management engages customers with interest-based clubs, personalized promotions, and point transfers, while Manufacturing Cloud integrates AI for asset services, manages program forecasts, and minimizes revenue leakage. Net Zero Cloud simplifies snippet drafting and expands carbon accounting. Public Sector Solutions automates tasks, improves productivity, and enhances search capabilities. Salesforce for Education automates advising, improves application review, and enhances registration. Vlocity Contract Lifecycle Management automates document generation. We also bring exciting changes in Insurance, Media Cloud, Nonprofit Cloud, Referral Marketing, and other industry-specific features.

Asset Management

Streamline, simplify, and upgrade your inventory operations and enhance service efficiency with the Asset Management features. Get easy service work estimation for partners, quick return and replacement process, and a simplified depot repair workflow to boost overall service performance. Create timesheets in bulk, allocate vehicle usage with ease, and track vehicle time for labor cost optimization.

Automotive Cloud

Optimize rehashing for vehicle and asset lending without having to set it up from scratch, managing duplicate records, and simplifying loan or lease approvals through interaction summaries. Conduct thorough vehicle and asset inspections by using dynamic questionnaires and prebuilt Omniscripts for virtual or on-site evaluations. Enhance user experience with customized paths and softphone layouts. Personalize user interactions on Experience Cloud sites through page variations. Help guest users access lead line items and preferred sellers. Track public complaints related to vehicles, assets, and financial accounts. Provide an identifier for a vehicle in an external system.

Channel Revenue Management

Get greater control and visibility into channel sales and inventory. Bring greater accuracy to your partner inventory tracking with capabilities such as partner inventory reconciliation, manual adjustments, partner return tracking, and end-customer return tracking. Minimize ship and debit claim overpayments by validating and calculating claims based on partner inventory.

Communications Cloud

Enable automated quoting and ordering with invocable cart actions for Agentforce, helping sales reps perform essential cart operations with prebuilt Industries CPQ invocable actions. Get a complete view of customer information such as service and billing accounts, orders, assets viewer, and cases through Communications Cloud Agent Console. Use Communications Cloud Sales to improve quote line item scalability, usability, and performance by managing an offer for a group of recipients. Enhance sales efficiency with streamlined workflows, reduce manual actions, and improve data accuracy with Enterprise Sales Management. The partner community can now use Work Order Estimation to estimate the field service work.

Consumer Goods Cloud

Manage deliveries efficiently by adjusting preordered product quantities and collecting cash or partial payments. Handle visit activities along with delivery tasks and as a hybrid user. Configure Consumer Goods (CG) Cloud mobile app to print documents on the go from a Bluetooth thermal printer. Exchange data between internal and external apps via mobile linking and use Salesforce Platform features through Lightning Web Components (LWCs) in online mode on CG Cloud mobile app. Control sync frequency when the CG Cloud mobile app is opened. Capture actuals from leftover inventory of discontinued products in customer business and account plans. Use TPM Data Connector to easily ingest data to Data Cloud. Include forward buy to improve sales uplift predictions in Trade Promotion Optimization (TPO)

Energy and Utilities Cloud

Summarize and email chat and voice transcript to customers for clear communication and shared understanding. Track and compare monthly consumption details of service locations. Enable supervisors, time clerks, and crew leads to bulk create timesheets and set up options for mobile workers to search and easily select vehicles. Enable mobile workers to effortlessly search for vehicles, allocate vehicle usage, and review their time-off balance.

Financial Services Cloud

Discover, set up, and configure Financial Services Cloud features with Salesforce Go. Refresh the details of a client and their related records in real-time by using API. Gain more flexibility over your financial plans and goals data model by using standard objects. Improve the client experience during a financial planning meeting by refreshing household details in near real-time. Streamline loan origination by using new loan-related integrations that improve applicant verification and simplify payment setup. Capture data from policyholders to end an insurance policy by using the Cancel Insurance Policy service process.

Health Cloud

Enhance financial control with Home Health's flexible workflows for budget management. Streamline appointment scheduling with new waitlist management and time zone capabilities.

Insurance

Renew or cancel multiple insurance policies in a single action. Assign flat amounts to producer split arrangement line items. Boost accuracy and transparency with a new field for rounded commission amounts.

Life Sciences Cloud

Improve the transition process between advanced therapy stages or steps by using the enhanced orchestrator, which allows Advanced Therapy Management to handle larger transactions more efficiently. Manually restart any stalled stages and steps in Advanced Therapy Management to minimize the need for admin user interventions. Simplify the process of recruiting and enrolling participants by creating research studies with the available details. View a summary of key information for clinical trial sites and investigators directly on the search results page. Use the new Site Selection console app to streamline the selection and activation of clinical trial sites by consolidating all required features and reports in one place.

Loyalty Management

Engage with your customers through interest and affinity-based clubs. Offer personalized promotion recommendations to customers. Query across data spaces to find segments that members are a part of. Transfer points to your family and friends. Get your processes up and running quicker by using field aliases in every rule action.

Manufacturing Cloud

Minimize revenue leakage by specifying the precise quantities of configured products in sales agreements. Improve inventory traceability with depot repairs and advanced exchanges.

Media Cloud

Create proposals and generate pitch decks that help you stand out from your competition while responding to requests for proposals (RFPs). Keep track of the revenue received from advertisers and agencies for each ad placement or service in an opportunity across scheduled periods.

Net Zero Cloud

Simplify snippet drafting by providing context on how topics and snippets in the information library are connected to CSRD and custom disclosure frameworks and disclosure requirements. Enhance Einstein generative AI capabilities with near real-time file indexing by using Salesforce Data Cloud. Easily and efficiently identify gaps in emissions data and use estimated methods to fill these gaps. Expand carbon accounting to cover extended organizational boundaries across multiple levels of hierarchy.

Public Sector Solutions

Make more informed hiring decisions by capturing additional candidate details such as skills, disabilities, certifications, and examination scores. Improve grant manager productivity and efficiency with Einstein-powered summaries of key information. Help employees easily locate information in the Employee Experience Cloud site by using the new search capabilities. Manage user access easily through the new and updated permission set groups and permission sets, and also create more comprehensive custom reports.

Referral Marketing

Offer a variety of rewards to advocates and their referred friends.

Salesforce for Education

Provide students with a unified course registration experience and let registrars define and place holds for students. Use Agentforce to automate advising tasks, conduct philanthropic research, and support student recruitment. Assign specialized rubrics to different application stages and let applicants select their preferred schools and programs. Empower advisors to track student involvement on campus. Reduce the problems and risks of manual processes and scattered data by combining different aspects of gift planning into a single platform.

Salesforce for Nonprofits

Use Agentforce to summarize and get insights into philanthropic and wealth data in Fundraising. Create and manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one place. Quickly and accurately enter single or batch gifts using the new Gift Entry Grid. Simplify the management of complex gift planning processes using new Gift Planning objects. In Program and Case Management, track the referrals originating from within your organization from one program to another to better understand the resources you're providing to your clients. Log benefits directly from the participant record to save time and make it easier to track the benefits that were delivered. Make sure that all services and goods are tracked and accounted for by easily creating ad hoc benefit disbursements in bulk, even if the benefit is tied to a schedule. Automate the creation and scheduling of funding award requirements and disbursements to reduce manual effort and errors in Grantmaking. Generate progress reports from predefined templates to save time and improve consistency. Reduce the time and effort required to manage volunteer programs and improve the volunteer experience by using the new Volunteer Management data model. Manage volunteer initiatives, track volunteer hours, and report on volunteer metrics using the data model. Create a volunteer management portal in Experience Cloud to share volunteer opportunities with constituents. Give volunteers the opportunity to browse, search, and register for volunteer opportunities using Volunteer Management in Experience Cloud.

Vlocity Contract Lifecycle Management

Upgrading to the Summer ’25 managed package automatically enables Document Generation 2.0 and doesn't require in-app consent. Increase file size limit for custom fonts in the Docgen Custom Fonts Library with a support request.

Industries Common Features

Some Salesforce Industries products share features. Business Rules Engine components are now available in Partial, Developer, or Developer Pro sandbox copies. Data Processing Engine leverages Data Cloud for complex data processing. Fundraising introduces the Gift Entry Grid to simplify gift management. Grantmaking automates creation and scheduling of funding award requirements. Industry Integration Solutions keeps your data secure with prebuilt MuleSoft integrations. Process Compliance Navigator helps you meet regulatory requirements, internal policies, and industry standards. Program and Case Management streamlines client services and improves tracking. We've also made enhancements to the Action Launcher, Actionable Relationship Center, Batch Management, Compliant Data Sharing, Interest Tags, Omnistudio Document Generation, Omnistudio for Industries, and Rollup Definitions features.

Asset Management

Streamline, simplify, and upgrade your inventory operations and enhance service efficiency with the Asset Management features. Get easy service work estimation for partners, quick return and replacement process, and a simplified depot repair workflow to boost overall service performance. Create timesheets in bulk, allocate vehicle usage with ease, and track vehicle time for labor cost optimization.

Enable Work Order Estimation for Partner Community

Help your partners seamlessly estimate the field service work by enabling Work Order Estimation on Experience Cloud sites. They can estimate and provide quotes before they create the work orders.

Guarantee Faster Returns and Replacements with Advanced Exchange

Enhance service efficiency by enabling your field technicians to quickly request the return and replacement of damaged products or parts during a service appointment. Advanced Exchange offers a unified process that saves time, improves visibility, and accelerates product replacement by capturing details and initiating return and replacement requests on the go.

Track Depot Repairs of Returned Assets

Simplify the repair and return process for assets and parts with Depot Repair. When a repair request is initiated using Depot Repair, relevant observations and asset details can be easily captured along with the specific depot location. Streamline the tracking and management of each repair stage with improved visibility. Effortlessly track progress and stay in control, leading to quicker resolutions, higher service quality, and a more streamlined workflow.

Timesheets and Labor Cost Optimization Enhancements

Enable supervisors, time clerks, and crew leads to bulk create timesheets and set up options for mobile workers to search and easily select vehicles. Enable mobile workers to effortlessly search for vehicles, allocate vehicle usage, and review their time-off balance.

Enable Work Order Estimation for Partner Community

Help your partners seamlessly estimate the field service work by enabling Work Order Estimation on Experience Cloud sites. They can estimate and provide quotes before they create the work orders.

Where: This change applies to Lightning Experience in Automotive Cloud, Partner Community for Experience cloud sites, Communications Cloud, Energy and Utilities Cloud, Manufacturing Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available for Work Order Estimation Experience users.

Guarantee Faster Returns and Replacements with Advanced Exchange

Enhance service efficiency by enabling your field technicians to quickly request the return and replacement of damaged products or parts during a service appointment. Advanced Exchange offers a unified process that saves time, improves visibility, and accelerates product replacement by capturing details and initiating return and replacement requests on the go.

Where: This feature is available in Lightning Experience in Automotive Cloud, Manufacturing Cloud, Communications Cloud, Energy and Utilities Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Service Part Return Management permission set.

How: On a work order, select **Advanced Exchange** from the action menu. Then create an advanced exchange request with the return product details and the replacement product information.

Track Depot Repairs of Returned Assets

Simplify the repair and return process for assets and parts with Depot Repair. When a repair request is initiated using Depot Repair, relevant observations and asset details can be easily captured along with the specific depot location. Streamline the tracking and management of each repair stage with improved visibility. Effortlessly track progress and stay in control, leading to quicker resolutions, higher service quality, and a more streamlined workflow.

Where: This feature is available in Lightning Experience in Automotive Cloud, Manufacturing Cloud, Communications Cloud, Energy and Utilities Cloud, and Media Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Service Part Return Management and Context Service Runtime permission sets.

How: On a return order, select one or more return order line items and create a work order with Depot Repair as the process type.

Timesheets and Labor Cost Optimization Enhancements

Enable supervisors, time clerks, and crew leads to bulk create timesheets and set up options for mobile workers to search and easily select vehicles. Enable mobile workers to effortlessly search for vehicles, allocate vehicle usage, and review their time-off balance.

Manage Timesheets Quickly
Field technicians can copy approved and submitted timesheets and the timesheet entries to new timesheets for a future date. They can also delete timesheets and review their time-off balance. Supervisors and crew leaders can create timesheets in bulk for crew members.

Allocate Vehicle Time Easily
Admins can set up either vehicle or vehicle definition selection for the field technicians. The technicians can search a vehicle by model, Vehicle Identification Number, and vehicle name or they can search a vehicle definition by vehicle model name. They can then associate the vehicle with a timesheet to effortlessly allocate time to the vehicle's usage.

New and Changed Objects for Timesheets and Labor Cost Optimization
Do more with the new and updated objects for the Timesheets and Labor Cost Optimization app.

Manage Timesheets Quickly

Field technicians can copy approved and submitted timesheets and the timesheet entries to new timesheets for a future date. They can also delete timesheets and review their time-off balance. Supervisors and crew leaders can create timesheets in bulk for crew members.

Where: This change applies to Lightning Experience for all editions of Field Service Plus for Energy & Utilities, and all editions of Asset Service Lifecycle Management.

Who: Field service supervisors or crew leaders with desktop access to the Timesheets Management app and with the Labor Cost Optimization Supervisor permission set can create timesheets in bulk for crew members. To copy and delete timesheets, you need the Labor Cost Optimization Resource and FieldServiceMobileStandardPermSet permission sets.

How: In Setup, enable the features of the Timesheets and Labor Cost Optimization. Then, to access the Timesheets and Labor Cost Optimization app, from the App Launcher, find and select **Timesheet Management**.

Allocate Vehicle Time Easily

Admins can set up either vehicle or vehicle definition selection for the field technicians. The technicians can search a vehicle by model, Vehicle Identification Number, and vehicle name or they can search a vehicle definition by vehicle model name. They can then associate the vehicle with a timesheet to effortlessly allocate time to the vehicle's usage.

Where: This change applies to Lightning Experience for all editions of Field Service Plus for Energy & Utilities, and all editions of Asset Service Lifecycle Management.

Who: Salesforce admins with the Labor Cost Optimization Admin permission set can configure the Timesheets and Labor Cost Optimization app. To select a vehicle in the Salesforce Field Service Mobile App, you need the Labor Cost Optimization Resource and FieldServiceMobileStandardPermSet permission sets.

How: In Setup, enable the features of the Timesheets and Labor Cost Optimization. Then, to access the Timesheets and Labor Cost Optimization app, from the App Launcher, select **Timesheet Management**.

New and Changed Objects for Timesheets and Labor Cost Optimization

Do more with the new and updated objects for the Timesheets and Labor Cost Optimization app.

Track the leave balances of service resources

Use the new ServiceResourceLeaveBalance object.

Track the leave balance history of service resources

Use the new Service ResourceLeaveBalanceHistory object.

Specify timesheet entry item calculation as the rule type

Use the new **TimesheetEntryItemCalculation** value on the existing **RuleType** field on the ServiceResourceCostRule object

Specify the Standard Apex class of the service resource cost rule

Use the new **StandardApexClass** field on the ServiceResourceCostRule object.

Automotive Cloud

Optimize rehashing for vehicle and asset lending without having to set it up from scratch, managing duplicate records, and simplifying loan or lease approvals through interaction summaries. Conduct thorough vehicle and asset inspections by using dynamic questionnaires and prebuilt Omniscripts for virtual or on-site evaluations. Enhance user experience with customized paths and softphone layouts. Personalize user interactions on Experience Cloud sites through page variations. Help guest users access lead line items and preferred sellers. Track public complaints related to vehicles, assets, and financial accounts. Provide an identifier for a vehicle in an external system.

Vehicle and Asset Lending Enhancements
Streamline vehicle and asset lending processes by leveraging a predefined context definition for rehashing loan or lease proposals, reducing setup time. Prevent duplicate applicant records by creating duplicate rules, ensuring data accuracy and an enhanced customer experience. Use interaction summary related lists to simplify loan or lease approvals.

Streamline Vehicle and Asset Inspections Through Assessment Questionnaires
Perform vehicle and asset service inspections by capturing vehicle and asset information through dynamic assessment questionnaires. Use prebuilt Omniscripts to conduct virtual or on-site investigations and evaluations to identify the defects in a vehicle or an asset. Evaluate the cosmetic

and mechanical condition of a vehicle before delivery, during appraisal, or for repairs.

Enhance User Experience by Using Paths and Softphone Layouts
Provide a customized experience to users by creating paths on the Vehicle and Financial Account pages. Improve the visualization of an automotive process for the picklist fields of a vehicle or a financial account. Enhance customer service efficiency at call centers by creating softphone layouts for vehicle and financial account record pages.

Improve Customer Satisfaction Through Page Variations
Personalize and improve user experience by creating page variations for automotive objects. Customize the look and feel of record pages on an Experience Cloud site by creating conditions based on record fields. Show tailored information on record pages such as Account, Fleet, Applicant, or Vehicle based on a customer's indicated preferences or past interactions.

Give Guest Users Access to Enhanced Lead Management
Enhance the self-service lead management experience by specifying the level of access that guest users have for lead line items, lead preferred sellers and opportunity preferred sellers. Previously, unauthenticated guest users could only manage leads which prevented them from accessing line items such as vehicles, accessories, parts or preferred dealers. Now they can use the enhanced lead management capability on Automotive Experience Cloud sites to get visibility into the products and the preferred dealerships for a lead or an opportunity.

Easily Capture Public Complaints for Assets and Financial Products
Users at automotive companies can track public complaints that are related to vehicles, assets, financial accounts and other products for their customers. Use the Reference Record field on the Public Complaint object to relate the complaint information to these objects. Track information such as the type of complaint, the date of the incident, the status and the priority of a complaint.

Changed Objects for Automotive Cloud
Do more with the new and changed Automotive Cloud objects.

Vehicle and Asset Lending Enhancements

Streamline vehicle and asset lending processes by leveraging a predefined context definition for rehashing loan or lease proposals, reducing setup time. Prevent duplicate applicant records by creating duplicate rules, ensuring data accuracy and an enhanced customer experience. Use interaction summary related lists to simplify loan or lease approvals.

Set Up Rehashing for Vehicle and Asset Lending Faster
Reduce the time and effort required to set up rehashing for vehicle and asset lending by using the AssetLendingRehashingContext context definition with predefined field mappings. Users don't have to create their own context definition from scratch anymore. Leverage the existing product configurator's data structure to streamline rehashing automotive loans, leases or other financial products.

Resolve and Prevent Duplicate Applicant Records
Preserve data quality and enhance customer experience by preventing the creation of duplicate applicant records for vehicle and asset lending. Maintain the accuracy of customer data through matching rules and duplicate rules by using Duplicate Management.

Simplify Approval Processes Through Interaction Summaries

Simplify communication for loan or lease approvals by using interaction summary related lists on the application form product and application form product proposal objects. Underwriters can reduce turnaround time and increase dealer and customer satisfaction by viewing dealer conversations aligned with the application form for loan or lease proposals.

Set Up Rehashing for Vehicle and Asset Lending Faster

Reduce the time and effort required to set up rehashing for vehicle and asset lending by using the AssetLendingRehashingContext context definition with predefined field mappings. Users don't have to create their own context definition from scratch anymore. Leverage the existing product configurator's data structure to streamline rehashing automotive loans, leases or other financial products.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: To use this feature, users need the Vehicle and Asset Lending permission set.

Resolve and Prevent Duplicate Applicant Records

Preserve data quality and enhance customer experience by preventing the creation of duplicate applicant records for vehicle and asset lending. Maintain the accuracy of customer data through matching rules and duplicate rules by using Duplicate Management.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: To use this feature, users need the Vehicle and Asset Lending permission set.

How: In Setup, in Matching Rules under Duplicate Management, create and activate a matching rule for the Applicant object and define your matching criteria to check for duplicate records. In Duplicate Rules under Duplicate Management, create a duplicate rule to define the actions to be taken when a user tries to create a duplicate applicant record. In Report Types, under Reports and Dashboards, create a custom report type to create reports for viewing the duplicate applicant records.

Simplify Approval Processes Through Interaction Summaries

Simplify communication for loan or lease approvals by using interaction summary related lists on the application form product and application form product proposal objects. Underwriters can reduce turnaround time and increase dealer and customer satisfaction by viewing dealer conversations aligned with the application form for loan or lease proposals.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Digital Lending and Vehicle and Asset Lending.

Who: To use this feature, users need the Vehicle and Asset Lending permission set.

How: In Setup, in Object Manager, drag and drop the Interaction Summary related list into the related lists section of the page layout for the application form product and application form product proposal objects.

Streamline Vehicle and Asset Inspections Through Assessment Questionnaires

Perform vehicle and asset service inspections by capturing vehicle and asset information through dynamic assessment questionnaires. Use prebuilt Omniscripts to conduct virtual or on-site investigations and evaluations to identify the defects in a vehicle or an asset. Evaluate the cosmetic and mechanical condition of a vehicle before delivery, during appraisal, or for repairs.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Automotive, Appraisal Management, Automotive Components for Appraisal Management, Discovery Framework, Enhanced Options, Import or Export, and Sample Templates.

Who: To use assessment questionnaires, users need the Automotive Foundation User permission set.

How: Deploy the four sample templates for vehicle appraisal inspection, vehicle service inspection, asset service inspection, and pre-delivery inspection to create the Omni Assessment Tasks for the corresponding inspection questionnaires.

Fill an inspection questionnaire from its Omni Assessment Task on the related list of a Vehicle page for pre-delivery inspection and vehicle service inspection, an Appraisal Item page for a vehicle appraisal inspection, or a Visit page for an asset service inspection.

Enhance User Experience by Using Paths and Softphone Layouts

Provide a customized experience to users by creating paths on the Vehicle and Financial Account pages. Improve the visualization of an automotive process for the picklist fields of a vehicle or a financial account. Enhance customer service efficiency at call centers by creating softphone layouts for vehicle and financial account record pages.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Automotive and Vehicle and Asset Finance.

Who: To use the Path Component feature, users need the Automotive Foundation User, Vehicle and Asset Finance Foundation, and Customize Application permission sets. To use the Softphone Layouts feature, users need the Automotive Foundation User, Vehicle and Asset Finance Foundation, and Manage Call Centers permission sets.

How: In Setup, from Path Settings, create a new path for the Vehicle or Financial Account object.

In Setup, from Softphone Layouts, create a softphone layout for the Vehicle and Financial Account objects.

Improve Customer Satisfaction Through Page Variations

Personalize and improve user experience by creating page variations for automotive objects. Customize the look and feel of record pages on an Experience Cloud site by creating conditions based on record fields. Show tailored information on record pages such as Account, Fleet, Applicant, or Vehicle based on a customer's indicated preferences or past interactions.

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

Who: To use this feature, users need the Automotive Foundation for Experience Cloud permission set.

How: Log in to Experience Cloud. Go to the site builder. For a record detail page, on the page variations tab, click the Manage Audiences icon beside the **+ New Page Variation**Button. Then click **New Audience** and select **Record** from the criteria list.

Give Guest Users Access to Enhanced Lead Management

Enhance the self-service lead management experience by specifying the level of access that guest users have for lead line items, lead preferred sellers and opportunity preferred sellers. Previously, unauthenticated guest users could only manage leads which prevented them from accessing line items such as vehicles, accessories, parts or preferred dealers. Now they can use the enhanced lead management capability on Automotive Experience Cloud sites to get visibility into the products and the preferred dealerships for a lead or an opportunity.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Partner Lead Management.

Who: To use this feature, users need the Partner Lead Management permission set.

How: In Setup, create lead sharing rules for partner lead management site guest users with Read Only access for the Lead Line Item, Lead Preferred Seller, and Opportunity Preferred Seller objects. In an Experience Cloud site, provide public access by selecting **Guest users can see and interact with the site without logging in** for the partner lead management site. In page settings, update the page access to Public.

Easily Capture Public Complaints for Assets and Financial Products

Users at automotive companies can track public complaints that are related to vehicles, assets, financial accounts and other products for their customers. Use the Reference Record field on the Public Complaint object to relate the complaint information to these objects. Track information such as the type of complaint, the date of the incident, the status and the priority of a complaint.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Automotive and Vehicle and Asset Finance.

Who: To use this feature, users need the Automotive Foundation User and the Vehicle and Asset Finance Foundation permission sets.

Changed Objects for Automotive Cloud

Do more with the new and changed Automotive Cloud objects.

Specify the unique identifier of a vehicle in an external system.
Use the new **External System Vehicle Identifier** field on the Vehicle object.

Channel Revenue Management

Get greater control and visibility into channel sales and inventory. Bring greater accuracy to your partner inventory tracking with capabilities such as partner inventory reconciliation, manual adjustments, partner return tracking, and end-customer return tracking. Minimize ship and debit claim overpayments by validating and calculating claims based on partner inventory.

Channel Partner Inventory Tracking
Reconcile partner-reported and calculated inventory data using predefined templates to ensure accuracy in downstream processes like ship and debit claims. Adjust calculated partner inventory to resolve discrepancies, correct errors, and track partner and end-customer returns, and manage inventory transfers across unsold inventories and locations.

Ship and Debit Process Management
Minimize overpayment and revenue leakage by automating ship and debit processing based on partner unsold inventory. Validate key details and apply special pricing terms for accurate claim calculations by using preconfigured templates.

Channel Partner Inventory Tracking

Reconcile partner-reported and calculated inventory data using predefined templates to ensure accuracy in downstream processes like ship and debit claims. Adjust calculated partner inventory to resolve discrepancies, correct errors, and track partner and end-customer returns, and manage inventory transfers across unsold inventories and locations.

Streamline the Reconciliation of Calculated and Reported Partner Inventory Levels
Maintain an accurate picture of your channel partners' inventories by reconciling calculated and reported levels. With partner inventory reconciliation, manufacturers can identify discrepancies between calculated and reported inventory, and ensure accuracy in downstream processes, such as ship and debit claim processing. Effectively capture partners' reported inventory details, including product, location, quantity, and unit price. Automatically match partner inventory reports with your calculated inventory and determine inventory level differences by using predefined data processing engine (DPE) templates.

Address Discrepancies by Adjusting Partner Unsold Inventory

Resolve discrepancies between calculated and reported partner inventory levels, correct data entry errors, and account for inventory loss or damage by adjusting your calculated partner inventory data. Additionally, transfer inventory and readjust ledgers across partner unsold inventories to reflect actual stock positions and track movement across locations.

Ensure Accurate Channel Inventory with Automated Partner Return Debits
Reduce manual effort and maintain channel inventory levels by automatically debiting inventory based on partner returns. Improve accuracy by debiting from the corresponding Partner Unsold Inventory (PUI) when a partner return references the original sales document.

Optimize Customer Return Accuracy Through Channel Inventory Reconciliation
Ensure inventory accuracy by adjusting calculated channel inventory based on end-customer returns. Credit returns to the appropriate Partner Unsold Inventory (PUI), even when the original Point of Sale (POS) has been split across multiple PUIs. Maintain consistency by matching returns without a POS reference by using criteria similar to those used for regular POS records.

Streamline the Reconciliation of Calculated and Reported Partner Inventory Levels

Maintain an accurate picture of your channel partners' inventories by reconciling calculated and reported levels. With partner inventory reconciliation, manufacturers can identify discrepancies between calculated and reported inventory, and ensure accuracy in downstream processes, such as ship and debit claim processing. Effectively capture partners' reported inventory details, including product, location, quantity, and unit price. Automatically match partner inventory reports with your calculated inventory and determine inventory level differences by using predefined data processing engine (DPE) templates.

Where: This change applies to Lightning Experience in Sales Cloud or Industries Cloud with the Channel Revenue Management add-on.

Who: This feature is available to users with the Channel Partner Inventory Tracking Admin permission set.

How: Capture the reported inventory data in the Partner Staged Data object. Create partner inventory reconciliations based on valid partner staged data by using the Create Partner Inventory Reconciliations DPE template. Update calculated inventory details in partner inventory reconciliations by using the Upsert Partner Inventory Reconciliations Based on Unsold Inventory DPE template.

Address Discrepancies by Adjusting Partner Unsold Inventory

Resolve discrepancies between calculated and reported partner inventory levels, correct data entry errors, and account for inventory loss or damage by adjusting your calculated partner inventory data. Additionally, transfer inventory and readjust ledgers across partner unsold inventories to reflect actual stock positions and track movement across locations.

Where: This change applies to Lightning Experience in Sales Cloud or Industries Cloud with the Channel Revenue Management add-on.

Who: This feature is available to users with the Channel Partner Inventory Tracking Admin permission set.

How: To address inventory discrepancies, use the Adjust Partner Unsold Inventory invocable action.

Ensure Accurate Channel Inventory with Automated Partner Return Debits

Reduce manual effort and maintain channel inventory levels by automatically debiting inventory based on partner returns. Improve accuracy by debiting from the corresponding Partner Unsold Inventory (PUI) when a partner return references the original sales document.

Where: This change applies to Lightning Experience in Sales Cloud or Industries Cloud with the Channel Revenue Management add-on.

Who: This feature is available to users with the Channel Partner Inventory Tracking Admin permission set.

How: To automatically adjust channel inventory by using partner return data from a transaction journal, use the enhanced Create Partner Unsold Inventory Records DPE template or the Create Partner Unsold Inventory Records Based On Eligible Programs DPE template.

Optimize Customer Return Accuracy Through Channel Inventory Reconciliation

Ensure inventory accuracy by adjusting calculated channel inventory based on end-customer returns. Credit returns to the appropriate Partner Unsold Inventory (PUI), even when the original Point of Sale (POS) has been split across multiple PUIs. Maintain consistency by matching returns without a POS reference by using criteria similar to those used for regular POS records.

Where: This change applies to Lightning Experience in Sales Cloud or Industries Cloud with the Channel Revenue Management add-on.

Who: This feature is available to users with the Channel Partner Inventory Tracking Admin permission set.

How: To automatically adjust channel inventory by using end-customer POS return data from transaction journals, use the Process Point of Sale Return Transactions for End Customer Returns DPE template.

Ship and Debit Process Management

Minimize overpayment and revenue leakage by automating ship and debit processing based on partner unsold inventory. Validate key details and apply special pricing terms for accurate claim calculations by using preconfigured templates.

Automate Ship and Debit Claim Processing Based on Partner Inventory
Reduce overpayment and prevent revenue leakage by processing ship and debit claims based on partner unsold inventory. Easily automate claim validation and calculation based on partner unsold inventory by using preconfigured, scalable templates for flows and Business Rules Engine expression

sets. Verify details such as claimed quantities, member eligibility, and claim dates using Point of Sale (POS) journals, ensuring accurate calculation of partner claim amounts based on special pricing terms and current unsold inventory.

Automate Ship and Debit Claim Processing Based on Partner Inventory

Reduce overpayment and prevent revenue leakage by processing ship and debit claims based on partner unsold inventory. Easily automate claim validation and calculation based on partner unsold inventory by using preconfigured, scalable templates for flows and Business Rules Engine expression sets. Verify details such as claimed quantities, member eligibility, and claim dates using Point of Sale (POS) journals, ensuring accurate calculation of partner claim amounts based on special pricing terms and current unsold inventory.

Where: This change applies to Lightning Experience in Sales Cloud or Industries Cloud with the Channel Revenue Management add-on.

Who: This feature is available to users with the Channel Partner Inventory Standard User or Channel Partner Inventory Tracking Admin and the Ship and Debit Process Management Admin permission sets.

How: To manage end-to-end claim processing, use the Process Ship and Debit Claim with Partner Inventory flow template. The flow invokes the Validate Ship and Debit Claim with Partner Inventory expression set to validate the claims. For existing implementations, ensure that no other flows and expression sets are used for ship and debit claim processing.

Communications Cloud

Enable automated quoting and ordering with invocable cart actions for Agentforce, helping sales reps perform essential cart operations with prebuilt Industries CPQ invocable actions. Get a complete view of customer information such as service and billing accounts, orders, assets viewer, and cases through Communications Cloud Agent Console. Use Communications Cloud Sales to improve quote line item scalability, usability, and performance by managing an offer for a group of recipients. Enhance sales efficiency with streamlined workflows, reduce manual actions, and improve data accuracy with Enterprise Sales Management. The partner community can now use Work Order Estimation to estimate the field service work.

Enterprise Sales Management
Streamline quoting workflows, reduce manual steps, and improve data accuracy with updates to attribute editing, MACD undo functionality, asset management, and working cart controls. These enhancements help sales reps work faster and with greater accuracy by reducing rework, preventing duplicate actions, and providing better visibility and flexibility during quote creation.

Invocable Cart Actions for Agentforce
Boost the efficiency of your sales reps with automated quoting and ordering in Communications Cloud. Create agentic flows and actions in Agentforce to perform essential cart operations by using prebuilt Industries CPQ Invocable Actions.

Communications Cloud Agent Console

Empower your sales and customer service teams to deliver fast, accurate, and personalized services through an Agentforce-embedded console. Enhance the customer experience by using the assistive and autonomous capabilities of the tool. Quickly resolve service issues by using the agent's consistent troubleshooting and diagnostic tools.

Communications Cloud Sales

Improve quote line item scalability, usability, and performance by efficiently managing an offer for a group of recipients without cloning the offer for each recipient individually. Your sales reps can add multiple recipients during the onboarding and sales processes. Accelerate product launches through reusable orchestration models by automating order submissions and streamlining fulfillment by using a record-triggered flow in Dynamic Revenue Orchestrator.

Enterprise Sales Management

Streamline quoting workflows, reduce manual steps, and improve data accuracy with updates to attribute editing, MACD undo functionality, asset management, and working cart controls. These enhancements help sales reps work faster and with greater accuracy by reducing rework, preventing duplicate actions, and providing better visibility and flexibility during quote creation.

Streamline Attribute Updates in the Working Cart with Real-Time and On-Demand Modes

Enhance your working cart experience with faster and more flexible attribute updates through improved Rapid Attributes Configuration (RAC). Choose between real-time pricing and validation for instant updates or the on-demand mode for bulk edits with the CPQ Multi-Edit API. Make sure the Standard Cart API is enabled in your Salesforce org to use this feature.

Undo Asset Changes During MACD Operations

Sales reps can now undo changes to individual assets in an Enterprise quote during Move, Add, Change, Delete (MACD) operations, restoring them to their original state. The undo option is available within the ESM working cart when attributes are modified or pricing is updated. This feature applicable to both root and child product levels. Apart from restoring the changes, the disconnected line items can also be restored in the working cart or from the summary tab. Certain exceptions are applicable in the Undo workflow.

Add Assets Directly to Enterprise Quotes

Sales reps can now add assets directly to Enterprise quotes from within the quote interface, bypassing the full asset-to-quote workflow. When adding the assets, the system automatically filters out assets already present in the Enterprise quote by marking them as nonselectable in the list. Batch processing behavior depends on the configurable asset limits set by your Salesforce admin.

Find Existing Quotes Faster with Type-Ahead Search

Sales reps migrating assets to Enterprise quotes can find existing quotes faster using type-ahead search, eliminating the need for manual scrolling through a list.

Accelerate Working Cart Navigation with Enhanced Data Table Controls

Sales reps can now use column header tooltips, navigate faster with hyperlinks, and identify required fields using mandatory field markers in the Locations and Subscribers tables. This update also includes global expand and collapse controls for the working cart UI, improving visibility of large product bundles and speeding up quote creation.

Get Failure Notifications for Bulk Edits

Sales reps now receive specific failure notifications during bulk edits, making it easier to identify and resolve issues before finalizing quotes.

Quick Navigation from Enterprise Quotes to Related Records

Jump directly to related Accounts, Opportunities, or Quotes from the Enterprise Quote page using quick links. Configure which links appear to streamline navigation and improve access to key records.

Enable Console Support for Enterprise Quotes

Enterprise quotes are now fully supported in the ESM console app, restoring access to a consolidated workspace for managing quotes without navigating away from the console.

Streamline Attribute Updates in the Working Cart with Real-Time and On-Demand Modes

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Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

Why: This enhancement reduces the number of clicks required for attribute updates, improving workflow efficiency. You can manage your working cart attributes more effectively, whether you need immediate validation and pricing or prefer to make bulk changes and validate later.

Undo Asset Changes During MACD Operations

Sales reps can now undo changes to individual assets in an Enterprise quote during Move, Add, Change, Delete (MACD) operations, restoring them to their original state. The undo option is available within the ESM working cart when attributes are modified or pricing is updated. This feature applicable to both root and child product levels. Apart from restoring the changes, the disconnected line items can also be restored in the working cart or from the summary tab. Certain exceptions are applicable in the Undo workflow.

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Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

Why: This feature simplifies asset addition with these benefits:

- Reduces the asset addition process from multiple steps to a single action
- Prevent duplicate entries while maintaining flexibility

How: This feature is automatically enabled. Use the new Add Assets button in the quote toolbar.

Find Existing Quotes Faster with Type-Ahead Search

Sales reps migrating assets to Enterprise quotes can find existing quotes faster using type-ahead search, eliminating the need for manual scrolling through a list.

Where: This feature is available in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Enterprise Sales Management.

Why: Quickly find the correct quote during asset migration using the new type-ahead search. This enhancement replaces manual list scrolling with an instant search experience. The new search functionality:

- Shows real-time quote matches as the sales rep types.
- Maintains all existing quote selection rules and logic.

Accelerate Working Cart Navigation with Enhanced Data Table Controls

Sales reps can now use column header tooltips, navigate faster with hyperlinks, and identify required fields using mandatory field markers in the Locations and Subscribers tables. This update also includes global expand and collapse controls for the working cart UI, improving visibility of large product bundles and speeding up quote creation.

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Get Failure Notifications for Bulk Edits

Sales reps now receive specific failure notifications during bulk edits, making it easier to identify and resolve issues before finalizing quotes.

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Enterprise quotes are now fully supported in the ESM console app, restoring access to a consolidated workspace for managing quotes without navigating away from the console.

Where: This feature is available in Lightning Experience in Enterprise Performance, Unlimited, and Developer editions with Enterprise Sales Management.

Invocable Cart Actions for Agentforce

Boost the efficiency of your sales reps with automated quoting and ordering in Communications Cloud. Create agentic flows and actions in Agentforce to perform essential cart operations by using prebuilt Industries CPQ Invocable Actions.

Automate Cart Operations by Using Invocable Actions for Agentic Flows

Simplify the quoting and ordering process through the seamless integration of CPQ Cart APIs with Agentforce. Enhance customer experience by enabling your sales reps to efficiently manage quotes and orders directly with Agentforce, eliminating the need for custom Apex. Create agent actions by using the invocable action and invoke actions with specific instructions.

Where: This change to applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Communications, Media, and Energy Managed Package.

Who: To use this feature, users need the licenses for Communications, Media, and Energy & Utilities Managed Package.

How: From the App Launcher, find and select **Vlocity CMT Administration**. Click **CPQ Configuration Setup** under Custom Settings section. Add the CpqCartAgentInvocableAction parameter, and set its value to **ON**.

See Also

Salesforce Help: *Setup Invocable Cart Actions for Communications Cloud*
Salesforce Help: *Invocable Actions Reference* (can be outdated or unavailable during release preview)
Salesforce Help: *Invoke CPQ Invocable Methods in a Flow* (can be outdated or unavailable during release preview)
Salesforce Help: *Invoke CPQ Invocable Methods Using Agentforce Actions* (can be outdated or unavailable during release preview)

New Invocable Actions in Industries CPQ

Use the new invocable actions in Industries Configure, Price, Quote (CPQ).

Add a product as a quote line item to a quote or as an order product to an order
Use the new CpqCartAddProductInvocable action.

Update the fields of a quote line item or order product
Use the new CpqCartUpdateProductFieldInvocable action.

Update an attribute of a quote line item or order product
Use the new CpqCartUpdateProductAttributeInvocable action.

Activate a draft order and create assets for each order product
Use the new CpqCartSubmitDraftOrderInvocable action.

Get line item details such as price and discount for a quote or an order
Use the new CpqCartGetCartItemsInvocable action.

Create a quote or an order
Use the new CpqCartCreateCartInvocable action.

Adjust a line item of a quote or an order
Use the new CpqCartApplyAdjustmentInvocable action.

Get a list of the offers for a party based on the party's context and search criteria
Use the new CpqCartGetOffersInvocable action.

Get a list of the offers for an asset in a cart
Use the new CpqCartGetTargetOfferInvocable action.

Replace an offer in a cart with another offer
Use the new CpqCartReplaceOfferInvocable action.

See Also
Salesforce Help: *Invocable Actions Reference* (can be outdated or unavailable during release preview)

Communications Cloud Agent Console

Empower your sales and customer service teams to deliver fast, accurate, and personalized services through an Agentforce-embedded console. Enhance the customer experience by using the assistive and autonomous capabilities of the tool. Quickly resolve service issues by using the agent's consistent troubleshooting and diagnostic tools.

Improve the Efficiency and Quality of Customer Service
Sales reps and service reps can get a comprehensive view of customer details such as service and billing accounts, orders, assets viewer, and cases. Use the new actions in action launcher to streamline service additions and troubleshooting, and leverage enhanced flexipages to support detailed asset management, including service contracts and warranties.

Improve the Efficiency and Quality of Customer Service

Sales reps and service reps can get a comprehensive view of customer details such as service and billing accounts, orders, assets viewer, and cases. Use the new actions in action launcher to streamline service additions and troubleshooting, and leverage enhanced flexipages to support detailed asset management, including service contracts and warranties.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Sales and Customer Service Management.

Who: To use this feature, users need the licenses for Communications Cloud Agent Console, Communications Cloud Sales, Asset Service Lifecycle Management, Revenue Cloud, and Dynamic Revenue Orchestrator.

How: On the Communications Service Console app, open a customer account from the Account tab. On the customer account page, view the customer details on the various tabs, such as **Overview**, **Orders**, **Assets**, and **Cases**.

See Also

Salesforce Help: *Get Started with Communications Cloud Agent Console* (can be outdated or unavailable during release preview)
Salesforce Help: *View Account Details in Communications Cloud Agent Console* (can be outdated or unavailable during release preview)
Salesforce Help: *View Assets Record Details in Communications Cloud Agent Console* (can be outdated or unavailable during release preview)
Salesforce Help: *View Order Record Details in Communications Cloud Agent Console* (can be outdated or unavailable during release preview)

Communications Cloud Sales

Improve quote line item scalability, usability, and performance by efficiently managing an offer for a group of recipients without cloning the offer for each recipient individually. Your sales reps can add multiple recipients during the onboarding and sales processes. Accelerate product launches through reusable orchestration models by automating order submissions and streamlining fulfillment by using a record-triggered flow in Dynamic Revenue Orchestrator.

Create and Manage a Group of Recipients for Offers

Sales reps can configure and apply an offer to a group of recipients without cloning the offer for each recipient individually. Improve scalability, usability, and performance of quote line items by managing the offer in a single representation of the quote line items associated with multiple recipients.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Communications Cloud Sales.

Who: To use this feature, users need the Revenue Cloud license–RevenueLifecycleManagementAddOn or RevenueCloudPlusAddOn, and the CommsCloudRLMAddOn license.

How: Enable Revenue Settings. Open a quote, select locations from the Locations tab, and click **Group Locations**. Then add the locations to a new group or to an existing group.

See Also

Salesforce Help: *Enable Revenue Settings*
Salesforce Help: *Manage Your Group of Recipients to Configure Offers*
Salesforce Help: *New Objects in Communications Cloud Sales*

Use Multi-Locations Quoting in Onboarding and Sales Journey

Improve your onboarding and sales processes through multi-locations quoting. Users can add multiple locations manually or by selecting service accounts. Improve efficiency and accuracy by reducing the need for configuring offers for each location individually.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Communications Cloud Sales.

Who: To use this feature, users need the Revenue Cloud license–RevenueLifecycleManagementAddOn or RevenueCloudPlusAddOn, and the CommsCloudRLMAddOn license.

How: Enable Revenue Settings. To add multiple service accounts or locations, on the Locations tab, click **Add**.

See Also

Salesforce Help: *Enable Revenue Settings*
Salesforce Help: *Add Multiple Locations to New and Existing Quotes and Orders*
Salesforce Help: *Add Locations Manually*

Automate Order Submissions with Dynamic Revenue Orchestrator

Sales reps can streamline fulfillment by invoking Dynamic Revenue Orchestrator through a record-triggered flow. Accelerate the launch of new products by using reusable orchestration models across multiple systems.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Communications Cloud Sales.

Who: To use this feature, users need the licenses for Communications Cloud Agent Console, Communications Cloud Sales, Asset Service Lifecycle Management, Revenue Cloud, and Dynamic Revenue Orchestrator.

How: Enable Dynamic Revenue Orchestrator, and create a record-triggered flow that automatically submits orders to Dynamic Revenue Orchestrator when the orders are activated.

See Also

Salesforce Help: *Get Started with Dynamic Revenue Orchestrator*
Salesforce Help: *Example of How to Automate Order Submission for Fulfillment*
Salesforce Help: *Set Up Dynamic Revenue Orchestrator for Communications Cloud*

New Objects in Communications Cloud Sales

Do more with the new Communications Cloud Sales objects.

Add offers or products with the same configuration across different recipients
Use the new QuoteRecipientGroup object.

Add a recipient to multiple quote recipient groups
Use the new QuoteRecipientGroupMbr object.

Consumer Goods Cloud

Manage deliveries efficiently by adjusting preordered product quantities and collecting cash or partial payments. Handle visit activities along with delivery tasks and as a hybrid user. Configure Consumer Goods (CG) Cloud mobile app to print documents on the go from a Bluetooth thermal printer. Exchange data between internal and external apps via mobile linking and use Salesforce Platform features through Lightning Web Components (LWCs) in online mode on CG Cloud mobile app. Control sync frequency when the CG Cloud mobile app is opened. Capture actuals from leftover inventory of discontinued products in customer business and account plans. Use TPM Data Connector to easily ingest data to Data Cloud. Include forward buy to improve sales uplift predictions in Trade Promotion Optimization (TPO)

Get an exclusive, in-depth look at the new features by tuning into the Summer '25 Consumer Goods Cloud Release Panel Webinar on May 20, 2025, at 12:00 PM EDT.

Retail Execution
Adjust preordered product quantities, add or scan products, and collect cash or partial payments during deliveries. Use the hybrid user persona to complete delivery tasks and perform visit activities such as store or shelf compliance checks and retail order creation. Share data between Consumer Goods Cloud mobile app and external apps with mobile linking. Print documents on the go on Bluetooth thermal printers and use Salesforce Platform features by integrating Lightning Web Components (LWCs) in the Consumer Goods Cloud mobile app.

Sync Management
Configure sync frequency settings to control data sync when the Consumer Goods Cloud mobile app starts and measure the first sync request time in milliseconds.

Visual Studio Code Based Modeler
Use safer alternatives for the eval function in your projects, set up objects for quick actions, and activate actions in the process flow.

Plan for Windows Server Based Modeler's Retirement
The Windows Server Based Modeler is scheduled to be retired in Winter '26 (October 2025), and will be in maintenance mode until then. We recommend that you switch to Visual Studio (VS) Code Based Modeler. VS Code based Modeler offers similar modeling capabilities without the need for a separate Windows server and database. VS Code based Modeler includes the Consumer Goods Cloud Modeler command line interface (CLI) plugin that's fully integrated into the Salesforce CLI. Use the Modeler CLI plugin to perform various Modeler operations, such as validate contracts, build custom apps, run a simulation of your custom CG Cloud mobile app directly on your machine, and create deployment packages.

Trade Promotion Management
Make sure that the actuals data from leftover inventory of discontinued products is captured in your customer business plan and account plan. Use the Trade Promotion Management (TPM) data connector to sync KPI data from processing services to Data Cloud. In Trade Promotion Optimization (TPO), adjust for Forward Buy and generate more precise sales uplift predictions.

Retail Execution

Adjust preordered product quantities, add or scan products, and collect cash or partial payments during deliveries. Use the hybrid user persona to complete delivery tasks and perform visit activities such as store or shelf compliance checks and retail order creation. Share data between Consumer Goods Cloud mobile app and external apps with mobile linking. Print documents on the go on Bluetooth thermal printers and use Salesforce Platform features by integrating Lightning Web Components (LWCs) in the Consumer Goods Cloud mobile app.

Receive and Process Data from External Apps in Consumer Goods Cloud Mobile App
Receive and send data to third-party apps through mobile linking. Tailor the handling of incoming data and app behavior by customizing the app flows and business logic. For example, let's say your merchandisers conduct planogram check tasks, such as price, distribution, and availability, on an external app during store visits. When the Consumer Goods (CG) Cloud mobile app and external app communicate through mobile linking, the customization passes the product-related KPIs to the product survey page in the CG Cloud mobile app.

Customize Consumer Goods Cloud Mobile App Faster with LWC Quick Actions (Beta)
Make customizations for online scenarios faster and easier using Lightning Web Components (LWCs) and integrate them with quick actions on iOS devices. Implement custom mobile processes, such as contract management and case handling, without modeling the app offline or synchronizing data.

Enable Quantity Adjustments and Cash Collection During Deliveries
Give tour drivers the flexibility to adjust preordered product quantities during deliveries. After the driver adds or scans products from the stock available in the vehicle, they can also collect cash or partial payment for deliveries.

Drive Retail Execution During Delivery Visits
Use the hybrid user persona to perform retail visit tasks in addition to the tour driver tasks. Hybrid users can perform and streamline store or shelf compliance checks, track assets, and create retail orders during deliveries.

Print Paper Invoices and Reports On the Go with a Bluetooth Thermal Printer
Connect mobile devices to a Bluetooth thermal printer and print documents on the go on 3-inch endless paper from the Consumer Goods mobile app. During store visits, sales reps can quickly produce hard copies of invoices, documents, and reports to provide to customers.

Complete Audits with Optimized Layout
Help users easily finish store and Point Of Sale (POS) audits with the new layout on the Consumer Goods Cloud mobile app by improving readability and adding visual cues to highlight conditional questions.

Find Records Faster in Consumer Goods Cloud
Use global search to find specific records within searchable objects in Salesforce org and quickly locate the information you need to make smart, informed decisions.

Visualize Relevant Customers on the Map
Hide planned customer visit locations and view only the customers matching the search criteria on the map. Eliminate the tedious zooming and panning, and quickly identify relevant customers on the map.

Improve Data Cloud Insights with New Data Streams and Mappings

Retail Enhanced data kit now consists of new mappings for Data Lake Object (DLO) that connect to preconfigured Data Model Objects (DMOs) in Data Cloud. Benefit from the updated and the new mappings for entities such as Order Item, Account Extension, Promotion Store, Account Receivables, Job Definition Template, and Assortment Product.

Authenticate to Consumer Goods Mobile App on iOS Devices with Native Mobile SDK (Beta)
Use all features of the Consumer Goods Cloud mobile app for iOS, whether you're online or offline, with the new unified authentication. The native Salesforce Mobile SDK helps the app run smoother and more reliably.

Use Flexible Approval Processes for Consumer Goods Cloud
Enable users other than the creator to submit an order or task for approval. All Direct Store Delivery and Van Sales orders are now set to Ready status after drivers complete their orders and the order's approval processes are done. Review the approval processes and if necessary, tailor them based on business needs. We recommend keeping the Initial Submitters field as Group: All Internal Users for the approval processes.

Penny Perfect Pricing V1 Is Being Retired
The Penny Perfect Pricing V1 batch process is scheduled for retirement in Spring ’26. After upgrading to Spring ’26, you can't schedule or run the Penny Perfect Pricing V1 batch process through an Apex class in Consumer Goods Cloud managed package. To process pricing conditions, use the enhanced Penny Perfect Pricing V2 batch process. The V2 process improves logging, supports rebuild mode, and provides better scalability for the processed pricing conditions.

Get Updated Permission Sets for Direct Store Delivery
If you’re upgrading to Summer ’25 and use managed permission sets, field permissions for newly introduced fields for the Direct Store Delivery feature are automatically added to your existing managed permission sets and profiles when you upgrade. If you’re using the CGCloud Analytics User unmanaged permission set and want to use the newly introduced fields, remember to manually provide fields permissions for the fields.

Other Improvements in Retail Execution
A minor change to Retail Execution includes use of the sales org to decide the calculation schema and arrive at accurate calculations for an order in Summer ’25.

Changed Objects for Retail Execution
Collect cash or partial payments, update purchase number, create hybrid users and more with the changed Retail Execution objects. Changes span across areas such as fields, page layouts, custom permissions, picklist values, and validation rules across features such as Direct Store Delivery and hybrid users.

Receive and Process Data from External Apps in Consumer Goods Cloud Mobile App

Receive and send data to third-party apps through mobile linking. Tailor the handling of incoming data and app behavior by customizing the app flows and business logic. For example, let's say your merchandisers conduct planogram check tasks, such as price, distribution, and availability, on an external app during store visits. When the Consumer Goods (CG) Cloud mobile app and external app communicate through mobile linking, the customization passes the product-related KPIs to the product survey page in the CG Cloud mobile app.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: To set up a mobile link between the CG Cloud mobile app and an external or internal app, in Visual Studio Code Based Modeler, add a `linklaunch` type of external event and define an action in the CG Cloud mobile app process contract. In the CG Cloud mobile app's business logic, define the `event.success` and `event.data` parameters to set up the new action. To pass a payload as a URL query parameter in the mobile link to the CG Cloud mobile app, encode the payload with Base-64.

See Also

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

Customize Consumer Goods Cloud Mobile App Faster with LWC Quick Actions (Beta)

Make customizations for online scenarios faster and easier using Lightning Web Components (LWCs) and integrate them with quick actions on iOS devices. Implement custom mobile processes, such as contract management and case handling, without modeling the app offline or synchronizing data.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

Note The integration of Consumer Goods Cloud mobile app with Lightning Web Components (LWCs) is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

How: Turn on the feature with the **Integrate LWC with CG offlinemobile app** setting in Sync Settings.

In Salesforce, create global quick actions and object-specific quick actions and share context information between the mobile app and LWC, such as the account details from the visit.

When sales reps log in to the CG Cloud mobile app in online mode and sync the app, the Quick Actions card shows up on all cockpit pages of the CG Cloud mobile app unless configured otherwise.

See Also

Salesforce Help: Set Up Quick Actions in Consumer Goods Mobile App (Beta) (can be outdated or unavailable during release preview)

Enable Quantity Adjustments and Cash Collection During Deliveries

Give tour drivers the flexibility to adjust preordered product quantities during deliveries. After the driver adds or scans products from the stock available in the vehicle, they can also collect cash or partial payment for deliveries.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where

Consumer Goods Cloud Retail Execution is enabled.

Who:

- To set up delivery documents for adjustments through the Consumer Goods Cloud desktop app, you need the Direct Store Delivery for Consumer Goods Cloud Offline Mobile App permission set.
- To adjust deliveries on the Consumer Goods Cloud offline mobile app, your users need the CGCloud Tour Driver permission set, OR (CGCloud Retail Tour Driver AND CGCloud Retail User) permission sets.

How: On the Consumer Goods Cloud desktop app, configure the settings for order and order item object templates. To set up cash float transactions, configure the settings for order payment, inventory control, and inventory transaction templates.

Tour drivers can use the Delivery Documents card on the Delivery Cockpit of the Consumer Goods Cloud offline mobile app for completing deliveries.

See Also

Salesforce Help: Delivery Execution with Delivery Documents (can be outdated or unavailable during release preview)
Salesforce Help: Configurations for Delivery Documents on the Consumer Goods Cloud Desktop App (can be outdated or unavailable during release preview)
Salesforce Help: Configurations for End of Tour Activities on the Consumer Goods Cloud Desktop App(can be outdated or unavailable during release preview)
Salesforce Help: Cash Float Transactions (can be outdated or unavailable during release preview)
Get Updated Permission Sets for Direct Store Delivery

Drive Retail Execution During Delivery Visits

Use the hybrid user persona to perform retail visit tasks in addition to the tour driver tasks. Hybrid users can perform and streamline store or shelf compliance checks, track assets, and create retail orders during deliveries.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

Who: If you're a new customer, to perform retail store activities during a tour, users need the CGCloud Retail Hybrid User permission set in addition to the permission sets for Retail Execution.

If you're upgrading to Consumer Goods Cloud Summer '25 managed package and want to implement the hybrid user feature, users need the CGCloud Retail Hybrid User managed permission set. If you're using unmanaged permission sets, then your users need the CGCloud Hybrid User permission set. After you upgrade to Consumer Goods Cloud Summer '25 managed package, the CGCloud_Hybrid_User custom permission is automatically added to the existing CGCloud Retail Business Admin permission set and the System Administrator profile.

How: To turn on this feature, add the permission sets needed through Setup, upload the static resource data, and assign the new hybrid sync profile to the hybrid user.

Tour drivers can use the Activities card within the Delivery Cockpit on the Consumer Goods Cloud offline mobile app to complete retail store tasks during deliveries.

See Also

- Salesforce Help: Hybrid User Retail Merchandizing Activities (can be outdated or unavailable during release preview)
- Salesforce Help: Manage Permission Set Assignments (can be outdated or unavailable during release preview)
- Salesforce Help: Set up a Hybrid User (can be outdated or unavailable during release preview)
- Salesforce Help: Upload Hybrid Persona Static Resource Data (can be outdated or unavailable during release preview)

Print Paper Invoices and Reports On the Go with a Bluetooth Thermal Printer

Connect mobile devices to a Bluetooth thermal printer and print documents on the go on 3-inch endless paper from the Consumer Goods mobile app. During store visits, sales reps can quickly produce hard copies of invoices, documents, and reports to provide to customers.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: From the Sync Settings, select **Bluetooth Thermal Printer**, and then enable this feature for either all users or specific users. In Visual Studio Code Based Modeler, admins configure a custom print layout suitable for a 3-inch wide paper and deploy the customized contracts to the Consumer Goods mobile app users.

To print a document, sales reps connect their mobile device to a Bluetooth thermal printer. On the PDF preview page, select the paired Bluetooth thermal printer and confirm the print action.

You can print documents from the CG mobile app on Bluetooth thermal printers with ESC/POS raster protocol support. For further information on supported Bluetooth thermal printer devices and considerations to use this feature, see Considerations and Guidelines for Bluetooth Thermal Printer and Print Layout Setup.

See Also

- Salesforce Help: Bluetooth Thermal Printer Configuration (can be outdated or unavailable during release preview)

Complete Audits with Optimized Layout

Help users easily finish store and Point Of Sale (POS) audits with the new layout on the Consumer Goods Cloud mobile app by improving readability and adding visual cues to highlight conditional questions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

How: If you're upgrading to Consumer Goods Cloud Summer '25 managed package, to make sure your existing contract customizations are preserved, review the latest Modeler Content Package (MCP) and Modeler Design Contracts, and make any necessary adjustments.

Find Records Faster in Consumer Goods Cloud

Use global search to find specific records within searchable objects in Salesforce org and quickly locate the information you need to make smart, informed decisions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

See Also

- Salesforce Help: Global Searchable Objects in Consumer Goods Cloud (can be outdated or unavailable during release preview)
- Salesforce Help: Search for Records in Lightning Experience

Visualize Relevant Customers on the Map

Hide planned customer visit locations and view only the customers matching the search criteria on the map. Eliminate the tedious zooming and panning, and quickly identify relevant customers on the map.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

How: To view relevant customers on the map, users can now apply the Exclude Planned Visits filter during map based visit planning.

See Also

- Salesforce Help: Create Map-Based Visits (can be outdated or unavailable during release preview)

Improve Data Cloud Insights with New Data Streams and Mappings

Retail Enhanced data kit now consists of new mappings for Data Lake Object (DLO) that connect to preconfigured Data Model Objects (DMOs) in Data Cloud. Benefit from the updated and the new mappings for entities such as Order Item, Account Extension, Promotion Store, Account Receivables, Job Definition Template, and Assortment Product.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions with Consumer Goods Cloud Retail Execution.

Authenticate to Consumer Goods Mobile App on iOS Devices with Native Mobile SDK (Beta)

Use all features of the Consumer Goods Cloud mobile app for iOS, whether you're online or offline, with the new unified authentication. The native Salesforce Mobile SDK helps the app run smoother and more reliably.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

Note This authentication mechanism in Consumer Goods Cloud mobile app on iOS devices is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

How: After you upgrade the Consumer Goods Cloud mobile app, restart the app on your iOS mobile device. Then, reauthenticate to access the production organization, sandbox, custom domain, or custom connected app and use the app.

See Also

Salesforce Help: Install the Consumer Goods Cloud Offline Mobile App on iOS (can be outdated or unavailable during release preview)

Use Flexible Approval Processes for Consumer Goods Cloud

Enable users other than the creator to submit an order or task for approval. All Direct Store Delivery and Van Sales orders are now set to Ready status after drivers complete their orders and the order's approval processes are done. Review the approval processes and if necessary, tailor them based on business needs. We recommend keeping the Initial Submitters field as Group: All Internal Users for the approval processes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

How: Group: All Internal Users is now the default value in the Initial Submitter field for approval processes of Orders and Customer Tasks. If you're new customer, turn on the CGCloud: Order Approval for Mobility Flow. The Flow starts the approval process for orders that are created and synced from the Consumer Goods Cloud offline mobile app.

If you’re upgrading to Consumer Goods Cloud Summer ’25 managed package, in addition to turning on the Flow, in Approval Processes under Setup, review the Initial Submitter field and update the Initial Submitters field from Record Creator to Group: All Internal Users for Orders and Customer Tasks.

See Also

Salesforce Help: Specify Who Can Submit Records to an Approval Process
Salesforce Help: Approval Processes for Direct Store Delivery (DSD) and Van Sales (can be outdated or unavailable during release preview)
Salesforce Help: Process Builder to Flow Mapping

Penny Perfect Pricing V1 Is Being Retired

The Penny Perfect Pricing V1 batch process is scheduled for retirement in Spring '26. After upgrading to Spring '26, you can't schedule or run the Penny Perfect Pricing V1 batch process through an Apex class in Consumer Goods Cloud managed package. To process pricing conditions, use the enhanced Penny Perfect Pricing V2 batch process. The V2 process improves logging, supports rebuild mode, and provides better scalability for the processed pricing conditions.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

How: Penny Perfect Pricing V2 batch process runs automatically with the pricing conditions batch. If you're using the managed package of Consumer Goods Cloud Spring '25 or earlier, in Setup, manually create the CGCloudServiceComplexPricing custom setting to run the Penny Perfect Pricing V2 batch.

See Also

Salesforce Help: Manage Custom Setting for Penny Perfect Pricing V2 Batch

Get Updated Permission Sets for Direct Store Delivery

If you're upgrading to Summer '25 and use managed permission sets, field permissions for newly introduced fields for the Direct Store Delivery feature are automatically added to your existing managed permission sets and profiles when you upgrade. If you're using the CGCloud Analytics User unmanaged permission set and want to use the newly introduced fields, remember to manually provide fields permissions for the fields.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

How: The managed CGCloud Retail Business Admin, CGCloud Retail Data Analytics, CGCloud Retail Sales User, CGCloud Retail Supervisor User, and CGCloud Retail Tour Driver permission sets now have read and edit access for the Purchase number update allowed and Partial payment allowed fields.

The System Administrator, CGCloud_Batch_User, CGCloud_User_Profile, and CGCloud_User_Profile_Non_Sales profiles now have read and edit access to the Purchase number update allowed and Partial payment allowed fields.

To edit the CGCloud Analytics User unmanaged permission set, go to Setup. Under Permission Sets, manually add the Read and Edit permissions for the Purchase number update allowed and Partial payment allowed fields.

See Also

Salesforce Help: Manage Permission Set Assignments (can be outdated or unavailable during release preview)

Changed Objects for Retail Execution

Other Improvements in Retail Execution

A minor change to Retail Execution includes use of the sales org to decide the calculation schema and arrive at accurate calculations for an order in Summer ’25.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud Retail Execution is enabled.

Why: Retail Execution offers a new enhancement for calculation schema determination.

- Advanced Orders on the Consumer Goods Cloud desktop app now uses the Sales Org field defined in Order Template as one of the criteria to decide the suitable calculation schema for an order. See Create a Calculation Schema Determination.

Changed Objects for Retail Execution

Collect cash or partial payments, update purchase number, create hybrid users and more with the changed Retail Execution objects. Changes span across areas such as fields, page layouts, custom permissions, picklist values, and validation rules across features such as Direct Store Delivery and hybrid users.

Field Changes

To use the new fields, add them to page layouts and make sure your users have edit access to them.

Collect partial payment for a cash delivery
: Use the new **cgcloud__Is_Partial_Payment_Allowed__c** field on the existing cgcloud__Order_Template__c object.

Update purchase number while reviewing a delivery
: Use the new **cgcloud__Can_Purchase_Number_Update_Allowed__c** field on the existing cgcloud__Order_Template__c object.

Page Layout Changes

Order Template Changes
: Add the new **cgcloud__Is_Partial_Payment_Allowed__c**, **cgcloud__Can_Purchase_Number_Update_Allowed__c** fields to the existing Order Template Layout.

Tour Layout and Tour Layout Read Only Changes
: Add the existing **cgcloud__Vehicle_Details_Reviewed__c**, **cgcloud__Has_End_Tour_Veh_Details_Rvw__c** fields to the existing Tour Layout and Tour Layout Read Only.

Custom Permission Changes

Verify the creation of custom permission user role mapping for a hybrid user persona

A new **CGCloud_Hybrid_User** custom permission is added to the cgcloud__Custom_Permission_User_Role_Mapping__c object when you upload static resources while upgrading Consumer Goods Cloud managed package.

Picklist Value Changes

To make use of the new picklist value, add it to the specified field and record types.

Include hybrid user in the user roles for order and visit templates

Add the new **CGCloud_Hybrid_User** picklist value in the **cgcloud__User_Roles__c** picklist field on the cgcloud__Order_Template__c and cgcloud__Visit_Template__c objects.

Include hybrid user in the user roles for various record types of an order template

Add the new **CGCloud_Hybrid_User** picklist value in the **cgcloud__User_Roles__c** picklist for the **cgcloud_Cash_Document__c**, **cgcloud_Order_Entry__c**, and **cgcloud_Truck_Load__c** record types on the cgcloud__Order_Template__c object.

Validation Rule Changes

Enable creation of cash inventory transactions for tour and vehicle anchor types

Use the existing **cgcloud__User_Check_Inventory_Transaction** validation rule on the cgcloud__Inventory_Transaction__c object.

For changes in static resources, see Salesforce Help: Additional Steps to Upgrade Managed Packages to Spring '26 (can be old or unavailable during release preview).

See Also

- Salesforce Developer Guide: cgcloud__Custom_Permission_User_Role_Mapping__c
- Salesforce Developer Guide: cgcloud__Order_Template__c
- Salesforce Developer Guide: cgcloud__Order_Item_Template__c
- Salesforce Developer Guide: cgcloud__Tour__c

Sync Management

Configure sync frequency settings to control data sync when the Consumer Goods Cloud mobile app starts and measure the first sync request time in milliseconds.

Control Sync Frequency on Consumer Goods Cloud Mobile App

Help sales reps use the Consumer Goods Cloud mobile app without interruption by regulating the frequency of the app's data sync. You can configure the mobile app to trigger a data sync after a certain duration from the last successful sync.

Changed Objects for Sync Management
Set sync frequency on mobile app start, trigger sync after a set duration, and measure the first sync request time with the new fields in Sync objects.

Control Sync Frequency on Consumer Goods Cloud Mobile App

Help sales reps use the Consumer Goods Cloud mobile app without interruption by regulating the frequency of the app's data sync. You can configure the mobile app to trigger a data sync after a certain duration from the last successful sync.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

How: To turn on this feature, select **Configure app startup sync frequency** in Sync Settings. To configure data synchronization frequency on app startup, go to the Sync Configuration tab in the Sync Management app. Select your preferred sync option in **App Startup Sync Frequency**. To trigger data sync at specific intervals from the last successful sync, select the **Time threshold** option. You can specify a time interval of 10- 1440 minutes. The default time interval for new installations is 30 minutes.

See Also
Salesforce Help: Sync Settings (can be outdated or unavailable during release preview)

Changed Objects for Sync Management

Set sync frequency on mobile app start, trigger sync after a set duration, and measure the first sync request time with the new fields in Sync objects.

Configure the frequency of data sync when the Consumer Goods mobile app starts
Use the new `Sync_At_App_Start__c` field in the existing cgcloud__Sync_Config__c object. Valid values for this field are: Always, Time Interval, and No Sync.

Trigger a data sync after a certain duration from the last successful sync
Use the new `Time_Interval_For_Sync_At_App_Start__c` field in the existing cgcloud__Sync_Config__c object.

Determine the time taken, in milliseconds, to queue the first sync request
Use the new `Get_First_Sync_Request_Queued_Time__c` field in the existing cgcloud__Sync_Client_Registration__c object.

See Also
Salesforce Help: cgcloud__Sync_Config__c (can be outdated or unavailable during release preview)
Salesforce Help: cgcloud__Sync_Client_Registration__c (can be outdated or unavailable during release preview)

Visual Studio Code Based Modeler

Use safer alternatives for the eval function in your projects, set up objects for quick actions, and activate actions in the process flow.

Other Improvements in Visual Studio Code Based Modeler
Replace eval instances in your customization projects with safer options and define object for quick actions by using the platformObject attribute in business object contract.

Other Improvements in Visual Studio Code Based Modeler

Replace eval instances in your customization projects with safer options and define object for quick actions by using the platformObject attribute in business object contract.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions where Consumer Goods Cloud is enabled.

Why: Visual Studio Code Based Modeler these enhancements.

- Eval function validation to protect Consumer Goods Cloud mobile app: If your custom contracts use the `eval` function, the build contracts action in Visual Studio Code based Modeler fails. Replace the `eval` instances with more safer alternatives in your customization projects to ensure successful builds.
- Object definition for quick actions in business object contracts: Use the `platformObject` property in the business object contract header to define the object for which quick actions are shown on the Consumer Goods Cloud mobile cockpit pages.
- Register action for inbound mobile link: Trigger actions in the process flow in the Consumer Goods Cloud mobile app by using `linkLaunchEvent` to register and respond to incoming mobile link data.

See Also
Salesforce Help: Business Object Contract Definition (can be outdated or unavailable during release preview)

Plan for Windows Server Based Modeler’s Retirement

The Windows Server Based Modeler is scheduled to be retired in Winter '26 (October 2025), and will be in maintenance mode until then. We recommend that you switch to Visual Studio (VS) Code Based Modeler. VS Code based Modeler offers similar modeling capabilities without the need for a separate Windows server and database. VS Code based Modeler includes the Consumer Goods Cloud Modeler command line interface (CLI) plugin that's fully integrated into the Salesforce CLI. Use the Modeler CLI plugin to perform various Modeler operations, such as validate contracts, build custom apps, run a simulation of your custom CG Cloud mobile app directly on your machine, and create deployment packages.

How: As part of this product retirement, the Modeler Contract Packages (MCP), Modeler Update

Packages (MUP), and Framework Update Packages (FUP) for this product will become unavailable. To get new Modeler features and better support for your customization projects, migrate to Visual Studio (VS) Code based Modeler for Consumer Goods Cloud. To learn more, see Migrate Windows Server Based Modeler Contracts to Visual Studio Code Based Modeler or contact Salesforce for assistance.

Trade Promotion Management

Make sure that the actuals data from leftover inventory of discontinued products is captured in your customer business plan and account plan. Use the Trade Promotion Management (TPM) data connector to sync KPI data from processing services to Data Cloud. In Trade Promotion Optimization (TPO), adjust for Forward Buy and generate more precise sales uplift predictions.

Get More Accurate Account Plans and Customer Business Plans

A discontinued product can still generate sales through leftover inventory. Get a more accurate view of your profit and loss (P&L) and plan better by making sure that the actuals, such as sales, revenue, and spend, are still captured for the discontinued products in your customer business plan (CBP) and account plan.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions with Trade Promotion Management.

How: In your Sales organization settings, select **Include Discontinued Products** in the Customer Business Plan section. Enter a lookback period of 1 or 2 years. The lookback period goes back from the start of the customer business plan or account plan. It goes back by 380 days for a 1-year period and 760 days for a 2-year period. Discontinued products with end dates within the lookback period are included in your CBP and account plan.

Ingest Key Performance Indicator (KPI) Data from Processing Services to Data Cloud (Pilot)

Use the Trade Promotion Management (TPM) data connector to sync KPI data directly from Consumer Goods Processing Services. Get KPI data from objects for daily measure integer and daily measure real, promotions, and payment tactics. Use the Data Explorer to view the data or the Query Editor to run SQL-like queries for performing advanced analyses.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions with Trade Promotion Management and Data Cloud.

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

How: The connector is automatically installed within 24 hours if Connectors (Beta) is enabled in your Data Cloud setup.

Improve Sales Uplift Predictions with Forward Buy

Enhance trade promotion strategies by considering the forward buy effect in sales uplift predictions. Estimate the forward buy, adjust the uplift value, and train the model on this adjusted data to achieve more precise uplift predictions and optimize ROI on trade promotion spending.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Trade Promotion Management, CRM Analytics for Consumer Goods Cloud, and Scoring Framework.

Who: This feature 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 include Forward Buy details in your predictions, go to the Scoring Framework page in Setup. Create a CRM Analytics template configuration by using the Forecast Baseline Sales Volume (Trade Promotion Optimization) template configuration type, where you can select Forward Buy.

Simplify Adding Tactics to Promotions

Choose the order in which tactic templates appear when you add them to a promotion. View the most relevant tactic templates first.

Where: These changes apply to Lightning Experience in Enterprise and Unlimited editions with Trade Promotion Management.

How: To define the order in which the tactic templates appear, enter a number in the Sort field on the Promotion Template Tactic Template object. When you add tactics to a promotion, the dropdown menu shows the tactic templates in that order.

New and Changed Objects in Trade Promotion Management

Do more with the new and updated Trade Promotion Management objects.

Indicate whether discontinued products are included in the account plan and customer business plan (CBP). After you've included discontinued products, you can't exclude them

Use the new **cgcloud__Should_Include_Discontinued_Products__c** field on the cgcloud__Sales_Organization__c object.

Specify a lookback period to include discontinued products whose end dates fall within that period. A single lookback period spans 380 days. The lookback period goes back from the start of the customer business plan or account plan. It goes back by 380 days for a 1-year period and 760 days for a 2-year period

Use the `1` and `2` picklist values in the **cgcloud__Lookback_Period_In Years__c** field on the cgcloud__Sales_Organization__c object.

Set the order you want your tactic templates to show in the dropdown menu when you add a tactic to a promotion

Use the new **Sort__c** field on the cgcloud__Promotion_Template_Tactic_Template__c object.

Page Layout Changes

Set the order that you want your tactic templates to appear in the dropdown menu when you add a tactic to a promotion

Add the new **Sort__c** field to the to the existing Promotion Template Tactic Template Layout.

New Validation Rules

After you select the option to include discontinued products, don't deselect it

This is enforced by the new validation rule **cgcloud__Disable_Discontinued_Products** on the cgcloud__Sales_Organization__c object.

Enter the lookback period when you select the option to include discontinued products

This is enforced by the new validation rule **Lookback_Period_Required** on the cgcloud__Sales_Organization__c object.

Include discontinued products when you specify a lookback period

This is enforced by the new validation rule **cgcloud__Include_Discontinued_Products_Disabled** on the cgcloud__Sales_Organization__c object.

New and Changed APIs in Trade Promotion Management

Do more with the new and changed APIs in v64.

When you retrieve a list of products using the GetProductsCallout APEX request

Use the new **DISCONTINUEDPRODUCTSFILTER** process step in ProductResolutionConfiguration to include discontinued products in the results.

Energy and Utilities Cloud

Summarize and email chat and voice transcript to customers for clear communication and shared understanding. Track and compare monthly consumption details of service locations. Enable supervisors, time clerks, and crew leads to bulk create timesheets and set up options for mobile workers to search and easily select vehicles. Enable mobile workers to effortlessly search for vehicles, allocate vehicle usage, and review their time-off balance.

Timesheets and Labor Cost Optimization Enhancements

Supervisors can configure vehicle search options by model or ID number for sales field technicians. Supervisors can also create timesheets and timesheet entries in bulk. Field technicians can review their time-off balance and copy or delete timesheets.

Where: This change applies to Lightning Experience for all editions of Field Service Plus for Energy & Utilities and all editions of Asset Service Lifecycle Management.

Who: To configure vehicle selection options and to create bulk timesheets and timesheet entries, you need the Supervisor permission set.

Summarize Chat and Voice Call Transcripts

Enhance your post-call workflow with the voice transcript feature in the Agent Console. Get an accurate record of every customer conversation with automatic transcriptions delivered after each call. Summarize and email the transcript to customers for clear communication and shared understanding.

Where: This change is available in Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer editions with Agent Console.

Who: Salesforce admins and service reps with access to the Agent Console can use this feature.

Track and Compare Monthly Consumption Details

Use predefined calculated insights to track the total amount of commodities used at each service location, grouped by month, year, and unit of measure (UOM). Track the percentage change in consumption at service locations between the current and previous years.

Where: This change applies to Lightning Experience for all editions of Field Service Plus for Energy & Utilities and all editions of Asset Service Lifecycle Management.

How: In Data Cloud, on the Calculated Insights tab, go to the **All list view** and select **Monthly Consumption By Service Point** or **Comparative Monthly Consumption**.

Financial Services Cloud

Discover, set up, and configure Financial Services Cloud features with Salesforce Go. Refresh the details of a client and their related records in real-time by using API. Gain more flexibility over your financial plans and goals data model by using standard objects. Improve the client experience during a financial planning meeting by refreshing household details in near real-time. Streamline loan origination by using new loan-related integrations that improve applicant verification and simplify payment setup. Capture data from policyholders to end an insurance policy by using the Cancel Insurance Policy service process.

Simplify Financial Services Cloud Feature Discovery and Setup
With Salesforce Go, you can discover, set up, and configure Financial Services Cloud features, and track feature usage, all from a single location in Setup. Learn more about features and get help with configuration by accessing content resources and links.

Show Near Real-Time Client Details
Improve client experience by refreshing details in near real-time with Apex. Previously, rollups were completed in batches every 12 or more hours and users couldn't view updated client details.

Financial Plans and Goals
View financial goal funding financial accounts without installing the Financial Services Cloud managed

package and refresh household details in near real-time.

Simplify the Policy Cancellation Service Process

By using the Cancel Insurance Policy service process, your service reps can easily and quickly capture data from policyholders to end an insurance policy. The service process features an Omniscript for request intake, suitable for both assisted and self-service channels. With self-service channels, policyholders can submit requests to end their insurance policies directly, saving time for your service reps to focus on other critical tasks.

New and Enhanced Common Features for Financial Services Cloud

Financial Services Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Financial Services Cloud based on your business needs.

- Cross-Object Field History (Generally Available)
  Track and visualize field changes across related objects in a single view.
- Data Consumption Framework
  Integrate your Salesforce org with Equifax to access consumer credit history by using an integration definition template.
- Discovery Framework
  Users can save drafts of Discovery Framework-based assessments they aren't ready to submit. Provide a consolidated view of all assessments to your users, making it easier to track their progress.
- Stage Management
  Create stage definitions faster by using templates. Make workflows more context-aware by assigning tasks to users or queues associated with reference object. Help users understand and resolve issues during record stage transition by adding error messages that appear when criteria aren't met.
- Record Rollup Definitions
  Business executives can make more informed decisions with on-demand record rollup and by viewing multiple record rollup definitions in one place.
- Collections and Recovery
  Configure an Experience Cloud site portal by using the Collections and Recovery portal template. Minimize regulatory violations with configurable call compliance checks. Collections specialists can log customer meeting outcomes with a quick action.
- Process Compliance Navigator
  Make sure that your organization meets regulatory requirements, internal policies, and industry standards by using the compliance management solution, Process Compliance Navigator.
- Actionable Relationship Center
  View many-to-one relationship type records on an ARC graph.
- Compliant Data Sharing
  Delete custom object participant records by using a new setting.
- Interest Tags
  Use sharing rules to extend sharing access to users for Tag Categories.

Simplify Financial Services Cloud Feature Discovery and Setup

With Salesforce Go, you can discover, set up, and configure Financial Services Cloud features, and track feature usage, all from a single location in Setup. Learn more about features and get help with configuration by accessing content resources and links.

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

See Also
Simplify Feature Discovery and Setup with Salesforce Go

Show Near Real-Time Client Details

Improve client experience by refreshing details in near real-time with Apex. Previously, rollups were completed in batches every 12 or more hours and users couldn't view updated client details.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need Financial Services Cloud Extension.

How: Set up On-Demand Record Rollup and then create a household API definition that refreshes details and related records for a client.

Financial Plans and Goals

View financial goal funding financial accounts without installing the Financial Services Cloud managed package and refresh household details in near real-time.

View Financial Goal Funding with Standard Objects
Gain more flexibility over your financial plans and goals data model by using standard objects. The Financial Account Management Standard Objects setting uses the Financial Account and related standard objects to model financial accounts and related information on financial plans and goals Flexcards. Previously, you had to install the Financial Services Cloud managed package to view financial account information on the Flexcards.

Show Near Real-Time Household Details
Improve client experience during a financial planning meeting by refreshing household details in near real-time. Show the most recent financial data so that wealth advisors can execute financial planning in the third-party financial planning tool via the Financial Plan Details Flexcard. Retrieve household details and related records with Connect API calls. Previously, rollups were completed in batches every 12 or more hours and wealth advisors couldn't view updated household details during a client meeting.

View Financial Goal Funding with Standard Objects

Gain more flexibility over your financial plans and goals data model by using standard objects. The Financial Account Management Standard Objects setting uses the Financial Account and related standard objects to model financial accounts and related information on financial plans and goals Flexcards. Previously, you had to install the Financial Services Cloud managed package to view financial account information on the Flexcards.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need Financial Services Cloud Extension.

How: From Setup, turn on Financial Account Management Standard Objects.

Show Near Real-Time Household Details

Improve client experience during a financial planning meeting by refreshing household details in near real-time. Show the most recent financial data so that wealth advisors can execute financial planning in the third-party financial planning tool via the Financial Plan Details Flexcard. Retrieve household details and related records with Connect API calls. Previously, rollups were completed in batches every 12 or more hours and wealth advisors couldn’t view updated household details during a client meeting.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Who: To use this feature, users need Financial Services Cloud Extension.

How: Create a household API definition that retrieves household details and related records for a client, and then add the API definition to the Financial Plan Details Flexcard. Set up On-Demand Record Rollup. On the Flexcard, click **Sync** to refresh the data for the household.

Simplify the Policy Cancellation Service Process

By using the Cancel Insurance Policy service process, your service reps can easily and quickly capture data from policyholders to end an insurance policy. The service process features an Omniscript for request intake, suitable for both assisted and self-service channels. With self-service channels, policyholders can submit requests to end their insurance policies directly, saving time for your service reps to focus on other critical tasks.

Where: This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

Why: Customize the Omniscript effortlessly with a low-code approach to suit your business needs. Use the process attributes, intake form, and fulfillment flows in the prebuilt service process template to accelerate the customization of the service process.

How: In Setup, find and select **Service Process Studio**. Click **New Service Process** and select **Create from Template**. Select the cancel insurance policy template and follow the on-screen instructions to set up your process.

Health Cloud

Enhance financial control with Home Health's flexible workflows for budget management. Streamline appointment scheduling with new waitlist management and time zone capabilities.

Disease Surveillance Enhancements
Reduce setup time and ensure compliance with the new guided setup for Disease Surveillance. Boost productivity and reduce navigation time with the Disease Surveillance console app, which provides a single, intuitive interface for all disease surveillance tasks and details. Enhance the accuracy and efficiency of disease investigations by capturing comprehensive health-related details by using the Health Risk Evaluation object and Health Cloud Disease Surveillance assessments. Use a guided setup to quickly and easily configure inspections for thorough on-site investigations. Help third-party field inspectors securely manage and record inspection findings, ensuring better compliance and privacy with the Health Inspections app.

Home Health Enhancements
Promote effective and tailored financial management by customizing the budgeting process through flexible flows and integrations. Use the updated guided setup to boost operational efficiency and ensure a seamless implementation of Home Health's latest enhancements.

Integrated Care Management Enhancements
Authenticated Experience Cloud site users can now create and update care plans from your site, making it easier for patients to be more engaged in their care management. Users who work with care plans can easily view all the components of a care plan in a single click.

Intelligent Appointment Management Enhancements
Automatically send appointment invitations to patients on a waitlist when existing appointments are canceled. Make appointment scheduling easier and more accurate by showing appointment time slots in the patient's time zone.

Utilization Management Enhancements
Quickly notify subscribers about changes in events that they're subscribed to by using the FHIR subscription framework. Enhancements to the Omnistudio components used in Coverage Requirement Discovery (CRD) make it easier to validate members and check documentation requirements. The integration procedure for Documentation Templates and Rules (DTR) now has a more accurate output structure.

New and Changed Objects in Health Cloud
Store and access more data with these new and changed Health Cloud objects.

New and Enhanced Common Features for Health Cloud

Health Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Health Cloud based on your business needs.

Disease Surveillance Enhancements

Reduce setup time and ensure compliance with the new guided setup for Disease Surveillance. Boost productivity and reduce navigation time with the Disease Surveillance console app, which provides a single, intuitive interface for all disease surveillance tasks and details. Enhance the accuracy and efficiency of disease investigations by capturing comprehensive health-related details by using the Health Risk Evaluation object and Health Cloud Disease Surveillance assessments. Use a guided setup to quickly and easily configure inspections for thorough on-site investigations. Help third-party field inspectors securely manage and record inspection findings, ensuring better compliance and privacy with the Health Inspections app.

Accelerate Disease Surveillance Configuration Through a Guided Setup
Configure Disease Surveillance effortlessly and efficiently with straightforward, easy steps for prerequisite checks and process configurations. Stay focused and on track by using the links to the in-app setup pages and comprehensive help articles.

Simplify Disease Surveillance with the All-In-One Console App
Case managers and investigators can efficiently manage and track disease surveillance activities by accessing various details such as disease definitions, cases, received documents, outbreaks, and investigations on a single, intuitive interface. Save navigation time by quickly performing tasks such as managing cases, uploading documents, and screening cases. Enhance productivity and user experience by customizing the layout and content of the landing page to meet specific needs.

Set Up Inspections Easily with a Guided Setup
Use a guided setup to easily configure Inspections to support on-site inspection visits and ensure thorough disease investigations. Enhance your productivity by performing all required steps on a single, intuitive page. Stay focused and on track by using the links to other in-app setup pages and detailed help articles.

Streamline Field Inspections with Health Inspection Console App
Help your third-party field inspectors manage and record inspection findings. Ensure better compliance and privacy for your organization by providing the field inspectors with a dedicated platform for accessing visit information and submitting reports securely.

Enhance Disease Investigations with Health Cloud Disease Surveillance Assessments
Public health investigators can assess and classify cases easily and accurately by using the Health Cloud Disease Surveillance discovery framework assessment forms to capture essential data points related to a patient's case. Streamline data collection, ensure compliance with public health guidelines, and reduce manual entries and errors. Ensure comprehensive data for each case by customizing these forms to efficiently capture key indicators, such as patient demographics, symptoms, lab results, and exposures.

Enhance Disease Surveillance with the Health Risk Evaluation Object
Capture comprehensive health risk evaluation details, including risk probabilities, family history, observations, procedures, and medical conditions. Improve public health significantly with more precise and timely investigations by using risk outcome codes, risk values, and date ranges.

Accelerate Disease Surveillance Configuration Through a Guided Setup

Configure Disease Surveillance effortlessly and efficiently with straightforward, easy steps for prerequisite checks and process configurations. Stay focused and on track by using the links to the in-app setup pages and comprehensive help articles.

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 and Disease Surveillance permission sets.

How: On the Public Health Settings page in Setup, turn on Disease Surveillance, and then follow the guided setup.

Simplify Disease Surveillance with the All-In-One Console App

Case managers and investigators can efficiently manage and track disease surveillance activities by accessing various details such as disease definitions, cases, received documents, outbreaks, and investigations on a single, intuitive interface. Save navigation time by quickly performing tasks such as managing cases, uploading documents, and screening cases. Enhance productivity and user experience by customizing the layout and content of the landing page to meet specific needs.

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 and Disease Surveillance permission sets.

How: From the App Launcher, find and select **Disease Surveillance**.

Set Up Inspections Easily with a Guided Setup

Use a guided setup to easily configure Inspections to support on-site inspection visits and ensure thorough disease investigations. Enhance your productivity by performing all required steps on a single, intuitive page. Stay focused and on track by using the links to other in-app setup pages and detailed help articles.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Industries LPI license, and the Health Cloud Foundation and Disease Surveillance permission sets.

How: On the Industries Licensing, Permitting, and Inspections (LPI) Settings page in Setup, turn on Inspection, and then follow the guided setup.

Streamline Field Inspections with Health Inspection Console App

Help your third-party field inspectors manage and record inspection findings. Ensure better compliance and privacy for your organization by providing the field inspectors with a dedicated platform for accessing visit information and submitting reports securely.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Industries LPI license, and the Health Cloud Foundation and Disease Surveillance permission sets.

How: From the App Launcher, find and select **Health Inspection**.

Enhance Disease Investigations with Health Cloud Disease Surveillance Assessments

Public health investigators can assess and classify cases easily and accurately by using the Health Cloud Disease Surveillance discovery framework assessment forms to capture essential data points related to a patient's case. Streamline data collection, ensure compliance with public health guidelines, and reduce manual entries and errors. Ensure comprehensive data for each case by customizing these forms to efficiently capture key indicators, such as patient demographics, symptoms, lab results, and exposures.

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, Disease Surveillance, OmniStudio Admin, and OmniStudio User permission sets.

How: From Setup, go to the Discover Framework General Settings page and turn on Discovery Framework, Import or Export, and Sample Templates options. Then, deploy the sample assessment from the Discovery Framework Sample Templates page.

Enhance Disease Surveillance with the Health Risk Evaluation Object

Capture comprehensive health risk evaluation details, including risk probabilities, family history, observations, procedures, and medical conditions. Improve public health significantly with more precise and timely investigations by using risk outcome codes, risk values, and date ranges.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This object is available to users with the Health Cloud Foundation and Disease Surveillance permission sets.

Home Health Enhancements

Promote effective and tailored financial management by customizing the budgeting process through flexible flows and integrations. Use the updated guided setup to boost operational efficiency and ensure a seamless implementation of Home Health's latest enhancements.

Gain Flexibility with Customized Budget Management for Home Healthcare
Give your home health agency enhanced visibility and greater control over the quoting, funding, and budgeting of home healthcare services. Use custom flows and custom objects along with Home Health's built-in integrations to help care coordinators get the patient's additional benefits and quotes from invoices or other sources. With this flexible approach to home visit budgeting, foster greater independence and help agencies manage benefits and quotes based on their unique business needs and preferences.

Accelerate Your Home Health Setup
Configure a customized budgeting process by using the new steps in Home Health's guided setup. Reduce implementation time by following the simple, clear steps for tasks such as prerequisite checks and process setups, all from one place. Stay focused by using the links to the in-app setup pages and detailed help articles.

Gain Flexibility with Customized Budget Management for Home Healthcare

Give your home health agency enhanced visibility and greater control over the quoting, funding, and budgeting of home healthcare services. Use custom flows and custom objects along with Home Health's built-in integrations to help care coordinators get the patient's additional benefits and quotes from invoices or other sources. With this flexible approach to home visit budgeting, foster greater independence and help agencies manage benefits and quotes based on their unique business needs and preferences.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

Who: This feature is available to users with the Home Health Quote and Health Cloud Foundation permission sets.

How: From Setup, go to Object Manager, and create custom objects to store information on additional benefits and quotes. Go to Flows, and create custom flows for getting additional benefits and quotes. In the Lightning App Builder, place the Home Health Budget Lightning component on the Person Account record page and configure the component to use the custom flows.

See Also

Salesforce Help: Set Up Home Health
Salesforce Help: Set Up Quoting and Budgeting for Home Visits

Accelerate Your Home Health Setup

Configure a customized budgeting process by using the new steps in Home Health's guided setup. Reduce implementation time by following the simple, clear steps for tasks such as prerequisite checks and process setups, all from one place. Stay focused by using the links to the in-app setup pages and detailed help articles.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Health Cloud and the Home Health add-on licenses.

How: To find the updated guided setup, go to the Home Health Settings page from Setup.

See Also

Salesforce Help: Set Up Home Health

Integrated Care Management Enhancements

Authenticated Experience Cloud site users can now create and update care plans from your site, making it easier for patients to be more engaged in their care management. Users who work with care plans can easily view all the components of a care plan in a single click.

Enhance Patient Collaboration with Care Plan Creation in Experience Cloud Sites
Promote patient collaboration and streamlined care management by enabling authenticated community users to create care plans directly from Experience Cloud sites. Patients and their care team can use Discovery Framework-based assessments, external assessments, and care plan templates to create and update the problems, goals, and interventions in care plans. Patients can easily access their care plans from anywhere and track their progress, leading to improved outcomes.

View All Care Plan Components Easily with a Single Click
Use the new Expand All button in the care plan interface to instantly view the problems, goals, and interventions in a care plan. Users who work with care plans can improve their efficiency by quickly accessing critical patient information through the smooth workflow.

Enhance Patient Collaboration with Care Plan Creation in Experience Cloud Sites

Promote patient collaboration and streamlined care management by enabling authenticated community users to create care plans directly from Experience Cloud sites. Patients and their care team can use Discovery Framework-based assessments, external assessments, and care plan templates to create and update the problems, goals, and interventions in care plans. Patients can easily access their care plans from anywhere and track their progress, leading to improved outcomes.

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, Omnistudio Experience Cloud User, and Integrated Care Management for Experience Cloud Sites permission sets and the HealthCloud for

Community permission set license. Users also need the Customer Community and Customer Community Plus licences.

How: In Setup, enable Digital Experiences. Assign the required permissions and create sharing rules so that Experience site users can access the Omnistudio components. Then, configure the IndustriesHCCarePlanManager Flexcard on your site.

View All Care Plan Components Easily with a Single Click

Use the new Expand All button in the care plan interface to instantly view the problems, goals, and interventions in a care plan. Users who work with care plans can improve their efficiency by quickly accessing critical patient information through the smooth workflow.

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.

How: The Expand All button is available by default in the care plan interface. Click > to expand a care plan and access its problems, goals, and interventions.

Intelligent Appointment Management Enhancements

Automatically send appointment invitations to patients on a waitlist when existing appointments are canceled. Make appointment scheduling easier and more accurate by showing appointment time slots in the patient's time zone.

Manage Patient Appointment Waitlists Efficiently
Reduce delays and improve access to care by automatically sending appointment invitations to patients on a waitlist when existing appointments are canceled. Add patients to the waitlist quickly and easily, and prioritize the patients based on patient wait time. Patients can accept or decline appointment invitations from your patient self-scheduling portal.

Improve Appointment Accuracy with Time Zone Management
Make appointment scheduling easier and more accurate by showing appointment time slots in the patient's time zone during scheduling. Schedulers such as customer care reps can select the patient's time zone instead of their own time zone. Easily coordinate with patients and avoid missed appointments due to time zone confusion or errors. Schedulers can also update the time zone used to update the appointment.

Manage Patient Appointment Waitlists Efficiently

Reduce delays and improve access to care by automatically sending appointment invitations to patients on a waitlist when existing appointments are canceled. Add patients to the waitlist quickly and easily, and prioritize the patients based on patient wait time. Patients can accept or decline appointment invitations from your patient self-scheduling portal.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Appointment Management permission set. To configure flows, users need the Manage Flow permission. To customize an Experience Cloud site, users need the Create and Set Up Experiences permission or the View Setup and Configuration permission. To accept or decline appointment invitations, users need the Run Flow permission.

How: Before you set up Waitlist Management, set up Intelligent Appointment Management and set up patient self-scheduling via an Experience Cloud site. Then, in Setup, go to Waitlist Management Settings, and turn on the Waitlist Management setting. Follow the guided setup steps to complete the setup. The out-of-the-box flows support Salesforce Scheduler only.

See Also

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

Improve Appointment Accuracy with Time Zone Management

Make appointment scheduling easier and more accurate by showing appointment time slots in the patient's time zone during scheduling. Schedulers such as customer care reps can select the patient's time zone instead of their own time zone. Easily coordinate with patients and avoid missed appointments due to time zone confusion or errors. Schedulers can also update the time zone used to update the appointment.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Appointment Management permission set.

How: The Time Zone setting is visible for all appointment-scheduling types, such as single-resource appointments, multiresource appointments, recurring appointments, and multistep appointments. This setting is available with Salesforce Scheduler and with an external scheduler.

See Also

Salesforce Help: Manage Time Zones During Patient Scheduling (can be outdated or unavailable during release preview)

Utilization Management Enhancements

Quickly notify subscribers about changes in events that they're subscribed to by using the FHIR subscription framework. Enhancements to the Omnistudio components used in Coverage Requirement Discovery (CRD) make it easier to validate members and check documentation requirements. The integration procedure for Documentation Templates and Rules (DTR) now has a more accurate output structure.

Promptly Alert Subscribers with FHIR Subscription Notifications

Facilitate prompt communication with subscribers by sending real-time notifications of event changes. Publish subscription topics that clients can subscribe to. When an event change occurs in a subscribed topic, subscribers proactively receive updates to their registered endpoints. The FHIR subscription framework supports a responsive and efficient workflow that quickly delivers critical clinical information, enabling timely action.

Accelerate Prior Authorization Requirement Checks with the Enhanced Data Model
Expedite claim approvals by using the new Preauthorization Type Code field on the Plan Benefit Item object to check prior authorization requirements. This field is a lookup to Codeset and stores FHIR-defined codes that indicate if specific services and medications need prior authorization. Improve efficiency by checking if prior authorization is needed based on purchaser plans instead of individual member plans.

Identify Documentation Requirements Easily with the Enhanced Integration Procedure Output
The HlsDTRRetrieveQuestionnaire integration procedure now offers a streamlined and more accurate output structure. To simplify the identification of the relevant data points, the dtrmetricId parameter is renamed as requestId, and questionnaireIds:Id is renamed as questionnaires:id.

Quickly Validate Members by Using Member Number Identifier or Subscriber ID
Accurately identify members by using the Member Number (MB) Identifier or Subscriber ID when processing coverage requirement discovery (CRD) requests. The prefetch information of the CRD request payload contains the MB Identifier and Subscriber ID attributes in the coverage resource, which can be validated against member records in your org.

Coverage Requirement Discovery No Longer Supports HasHistoricDiagnosis Parameter
Coverage Requirement Discovery (CRD) components such as the HlsCDSValidateCoverageExtension integration procedure and CDS_DetermineCoverageExtensions expression set no longer support the HasHistoricDiagnosis parameter. The member's past diagnoses are no longer required to determine the relevant documentation and URLs to provide coverage.

Promptly Alert Subscribers with FHIR Subscription Notifications

Facilitate prompt communication with subscribers by sending real-time notifications of event changes. Publish subscription topics that clients can subscribe to. When an event change occurs in a subscribed topic, subscribers proactively receive updates to their registered endpoints. The FHIR subscription framework supports a responsive and efficient workflow that quickly delivers critical clinical information, enabling timely action.

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, Health Cloud Utilization, and FHIR Subscription permission sets.

Why: Payer organizations can use the FHIR subscription framework to publish subscription topics that providers can subscribe to. For example, a provider can subscibe to get notified when the statuses of their submitted care requests are updated. Timely and proactive notifications help the provider to quickly deliver the care that patients need.

How: In Setup, turn on the FHIR Subscription setting. In Object Manager, create a PreAuthorization record type in the Case, Care Request, Care Request Extension, Care Request Item, and Care Request Drug objects. Then, clone and configure the FHIR Subscription: Publish Platform Event flow.

Accelerate Prior Authorization Requirement Checks with the Enhanced Data Model

Expedite claim approvals by using the new Preauthorization Type Code field on the Plan Benefit Item object to check prior authorization requirements. This field is a lookup to Codeset and stores FHIR-defined codes that indicate if specific services and medications need prior authorization. Improve efficiency by checking if prior authorization is needed based on purchaser plans instead of individual member plans.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Utilization Management, Hls Clinical Decision Support, Omnistudio Admin, and Omnistudio User permission sets.

How: In Setup, turn on the Clinical Decision Support setting. Then, clone and configure the prebuilt HlsClinicalDecisionSupportProcessOrderEcho integration procedure. This parent integration procedure contains the new ValidatePACoverageExtension integration procedure and the CDSFetchPlanBenefitItem data mapper that are used to determine whether prior authorization is needed.

Identify Documentation Requirements Easily with the Enhanced Integration Procedure Output

The HlsDTRRetrieveQuestionnaire integration procedure now offers a streamlined and more accurate output structure. To simplify the identification of the relevant data points, the dtrmetricId parameter is renamed as requestId, and questionnaireIds:Id is renamed as questionnaires:id.

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Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

Who: This feature is available to users with the Health Cloud Utilization Management, HIs Clinical Decision Support permission set, Omnistudio Admin, and Omnistudio User permission sets.

How: The MB Identifier and Subscriber ID attributes are available by default in the Coverage resource of the CRD request payload.

Coverage Requirement Discovery No Longer Supports HasHistoricDiagnosis Parameter

Coverage Requirement Discovery (CRD) components such as the HlsCDSValidateCoverageExtension integration procedure and CDS_DetermineCoverageExtensions expression set no longer support the HasHistoricDiagnosis parameter. The member's past diagnoses are no longer required to determine the relevant documentation and URLs to provide coverage.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Health Cloud.

New and Changed Objects in Health Cloud

Store and access more data with these new and changed Health Cloud objects.

Coverage Requirement Discovery

Represent the identifier of the user who sent the request, as recorded in an external system
Use the new **RequesterExternalIdentifier** field on the ServiceInformationRequest object.

Represent the identifier of the organization that sent the request, as recorded in an external system
Use the new **RequesterOrgExtlIdentifier** field on the ServiceInformationRequest object.

Clinical Data Model

Represent the evaluation of health risks
Use the new **HealthRiskEvaluation** object.

Represent additional details of a health risk evaluation, including the basis and reason for the evaluation
Use the new **HealthRiskEvalDetail** object.

Represent the outcome of a risk evaluation, such as the probability of disease occurrence
Use the new **HealthRiskEvalOutcome** object.

Specify the usage type of the document extraction request
Use the new **UsageType** field in the DocumentExtractionRequest object.

Represent each step involved in the document extraction request process

Use the new **DocumentExtractionRqstStep** object.

Specify the category of a patient's diagnosis status

Use the new **DiagnosticStatusCategory** field in the HealthCondition object.

FHIR Subscription

Represent the interoperability topic for which notifications are sent to subscribers

Use the new **InteropTopic** object.

Represent the details of an interoperability topic

Use the new **InteropTopicDetail** object.

Represent the criteria that trigger a notification for an interoperability topic

Use the new **InteropTopicTriggerCriteria** object.

Represent the properties by which an interoperability topic's notification can be filtered

Use the new **InteropTopicFilter** object.

Represent the notification resource for an interoperability topic

Use the new **InteropTopicNtfcnResource** object.

Represent a subscription to an interoperability topic

Use the new **InteropTopicSubscription** object.

Represent the details of an interoperability topic subscription

Use the new **InteropTopicSubscriptionDtl** object.

Represent the subscriber's criteria for filtering the interoperability topic subscription event

Use the new **InteropTopicSubcrFilter** object.

Represent the structure of the interoperability topic subscription event that's sent from the publisher to Mulesoft

Use the new **InteropTopicSubcrEvent** object.

Represent the parameters added to an interoperability topic subscription

Use the new **InteropTopicSubcrParameter** object.

Health Insurance

Represent the category of insurance policy that the purchaser plan belongs to
Use the new **LineOfBusiness** field on the PurchaserPlan object.

Represent the type of sponsor for the plan
Use the new **SponsorType** field on the PurchaserPlan object.

Represent the code of the plan benefit item
Use the new **ItemCode** field on the PlanBenefitItem object.

Represent the code which represents the type of preauthorization that the plan benefit item requires
Use the new **PreauthorizationTypeCode** field on the PlanBenefitItem object.

Represent the date from which preauthorization for the plan benefit item is required or not
Use the new **PauthRequirementStartDate** field on the PlanBenefitItem object.

Represent the last date for which preauthorization for the plan benefit item is required or not
Use the new **PauthRequirementEndDate** field on the PlanBenefitItem object.

Insurance

Renew or cancel multiple insurance policies in a single action. Assign flat amounts to producer split arrangement line items. Boost accuracy and transparency with a new field for rounded commission amounts.

Brokerage

Streamline the management of insurance policies and commission distributions. Handle multiple policy renewals or cancelations at the same time. Tailor commission splits by using both percentages and flat amounts. Use the new Receive Rounded Amount field to streamline and improve the accuracy of commission allocations.

Customize the commission distribution by assigning both percentages and flat amounts to producer split arrangement line items. Structure producer compensation with greater flexibility.

Control Rounded Amounts on Split Arrangements More Easily
Use the new Receive Rounded Amount field on the Producer Split Arrangement Line Item record page to specify the specific split arrangement line item that must receive the rounded commission amount. Save time, reduces errors, and improves the accuracy and transparency of commission allocations with this new field. Previously, you had to manage rounded amounts in split arrangements with custom rounding logic.

Renew or Cancel Insurance Policies in Bulk

Your account managers and customer service agents can now easily and quickly renew or cancel multiple insurance policies in a single action.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Service Cloud and Insurance Brokerage are enabled.

How: From an account record page, select multiple insurance policy records in the list view and then use the Renew with Same Carrier or Cancel Policies action to renew or cancel them all at once.

Assign Flat Amounts to Producer Split Arrangement Line Items

Customize the commission distribution by assigning both percentages and flat amounts to producer split arrangement line items. Structure producer compensation with greater flexibility.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Service Cloud and Insurance Brokerage are enabled.

Control Rounded Amounts on Split Arrangements More Easily

Use the new Receive Rounded Amount field on the Producer Split Arrangement Line Item record page to specify the specific split arrangement line item that must receive the rounded commission amount. Save time, reduces errors, and improves the accuracy and transparency of commission allocations with this new field. Previously, you had to manage rounded amounts in split arrangements with custom rounding logic.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Service Cloud and Insurance Brokerage are enabled.

How: On the split arrangement line item record page, select the **Receive Rounded Amount** field.

Life Sciences Cloud

Improve the transition process between advanced therapy stages or steps by using the enhanced orchestrator, which allows Advanced Therapy Management to handle larger transactions more efficiently.

Manually restart any stalled stages and steps in Advanced Therapy Management to minimize the need for admin user interventions. Simplify the process of recruiting and enrolling participants by creating research studies with the available details. View a summary of key information for clinical trial sites and investigators directly on the search results page. Use the new Site Selection console app to streamline the selection and activation of clinical trial sites by consolidating all required features and reports in one place.

Advanced Therapy Management Enhancements
With the improved orchestrator, enhance the transition process between advanced therapy stages or steps to handle larger transaction volumes more efficiently. Quickly resume stages from the Care Program Enrollee page, eliminating the need for complex workarounds and admin user interventions.

Site Management Enhancements
Improve the speed and efficiency of site identification and feasibility for clinical trials by showing key information directly in site and investigator search results. View summaries of site and investigator data, including location, accreditation, therapeutic areas, investigator experience, and compliance metrics, without leaving the search page. Speed up the recruitment and enrollment of participants by using a streamlined screen flow for creating research studies with the necessary details. Use the new Site Selection console app to access the site management features in one place.

Set Up a Research Study Faster
Create or update a research study by using a single, intuitive flow. Study managers and clinical trail managers can create and update study details faster without updating the object records separately.

New and Changed Objects in Life Sciences Cloud
Store and access more data with the new and changed Life Sciences Cloud objects.

Advanced Therapy Management Enhancements

With the improved orchestrator, enhance the transition process between advanced therapy stages or steps to handle larger transaction volumes more efficiently. Quickly resume stages from the Care Program Enrollee page, eliminating the need for complex workarounds and admin user interventions.

Optimize Advanced Therapy Management Transition
Enhance the transition process between advanced therapy stages and steps by using the improved Advanced Therapy Management orchestrator to handle larger transaction volumes more efficiently. The improved orchestrator uses conditional logic and record change listeners, eliminating the need for previous evaluation flows.

Resume Stalled Processes Instantly
Standard users can manually restart the stalled stages and steps in Advanced Therapy Management from the Care Program Enrollee page. Eliminate the need for admin users to intervene and resume stalled processes.

Optimize Advanced Therapy Management Transition

Enhance the transition process between advanced therapy stages and steps by using the improved Advanced Therapy Management orchestrator to handle larger transaction volumes more efficiently. The improved orchestrator uses conditional logic and record change listeners, eliminating the need for previous evaluation flows.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud.

Who: This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

How: In Setup, find and select **Change Data Capture**. On the Change Data Capture setup page, in Available Entities, move the Care Program Enrollee Work Order and Care Program Enrollee Work Order Step objects to Selected Entities. In Setup, find and select **Advanced Therapy Management Settings**. In the Advanced Therapy Management guided setup, optionally disable Configure Flow Events for Advanced Therapy Management. Set up a work procedure for Advanced Therapy Management by using the healthcloud_ato_flows__ATMOrchCnd flow.

Resume Stalled Processes Instantly

Standard users can manually restart the stalled stages and steps in Advanced Therapy Management from the Care Program Enrollee page. Eliminate the need for admin users to intervene and resume stalled processes.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud or Health Cloud.

Who: This feature is available to users with the Health Cloud Advanced Therapy Orchestration permission set and the Health Cloud Advanced Therapy Orchestration permission set license.

How: On the Care Program Enrollees page, from the dropdown, select **Resume Process Transition**.

Site Management Enhancements

Improve the speed and efficiency of site identification and feasibility for clinical trials by showing key information directly in site and investigator search results. View summaries of site and investigator data, including location, accreditation, therapeutic areas, investigator experience, and compliance metrics, without leaving the search page. Speed up the recruitment and enrollment of participants by using a streamlined screen flow for creating research studies with the necessary details. Use the new Site Selection console app to access the site management features in one place.

Quickly Access Critical Site and Investigator Information
Eliminate additional navigation to the site and investigator record pages and related lists by showing a summary of critical information for clinical trial sites and investigators directly on the sites and investigators search results page.

Select and Activate Sites Faster
Use the Site Selection console app to streamline the selection and activation of clinical trial sites by accessing the required features and reports in one place. Get a comprehensive view of research

studies on the Home page. Access related objects faster. Use criteria-based search to efficiently search for sites and investigators.

Quickly Access Critical Site and Investigator Information

Eliminate additional navigation to the site and investigator record pages and related lists by showing a summary of critical information for clinical trial sites and investigators directly on the sites and investigators search results page.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with the Life Sciences Cloud, Einstein GPT Platform, and the Industries Generative AI Platform licenses.

Who: This feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) with Study Manager for Site Management, Criteria-Based Search and Filter, Context Service Runtime, and the Prompt Template User permission sets.

Why: Study managers can view the basic details of a site, such as the name, location, type, network affiliations, accreditation, and the operational and therapeutic features. The details also include supported therapeutic areas, supported clinical trial types and phases, past clinical trial performance, and compliance and quality metrics associated with the site. Study managers can also view the details of an investigator, such as a professional overview, research experience, Good Clinical Practice (GCP) trainings, and research contributions.

How: To summarize the site information, on the sites and investigators search results page, from the dropdown next to the healthcare facility and the investigator, select **Summarize Site**. To summarize the investigator information, select **Summarize Investigator**.

Select and Activate Sites Faster

Use the Site Selection console app to streamline the selection and activation of clinical trial sites by accessing the required features and reports in one place. Get a comprehensive view of research studies on the Home page. Access related objects faster. Use criteria-based search to efficiently search for sites and investigators.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Life Sciences Cloud license.

Who: This feature is available to users with the Health Cloud Starter (for Life Sciences Cloud) and the Study Manager for Site Management permission sets.

How: From the App Launcher, find and select **Site Selection**.

Set Up a Research Study Faster

Create or update a research study by using a single, intuitive flow. Study managers and clinical trail managers can create and update study details faster without updating the object records separately.

Where: This change applies to Lightning Experience in Enterprise and Unlimited Editions with Life Sciences Cloud or Health Cloud and the Participant Enrollment Add-On license.

Who: This feature is available to Site Management users with Study Manager for Site Management and Health Cloud Starter (for Life Sciences Cloud) permission sets. This feature is also available to Participant Management users with Clinical Trial Manager and Health Cloud Starter (for Life Sciences Cloud) or Health Cloud Foundation (for Health Cloud) permission sets.

How: To add a research study, from the App Launcher, find and select **Research Studies**, and then click **Create Research Study**. To update a research study, open the research study, and select **Update Study Details**.

New and Changed Objects in Life Sciences Cloud

Store and access more data with the new and changed Life Sciences Cloud objects.

Advanced Therapy Management

Determine whether all the custody chain entries for the work order are completed (true) or not (false)

Use the new **IsCustodyCompleted** field on the Care Program Enrollee Work Order object.

Determine whether all the custody chain entries for the step and the related tasks are completed (true) or not (false)

Use the new **IsCustodyCompleted** field on the Care Program Enrollee Work Order Step object.

Determine whether all the child tasks for the step are completed (true) or not (false)

Use the new **AreAllTasksCompleted** field on the Care Program Enrollee Work Order Step object.

Site Management

Represent the date when the site was identified for the feasibility for conducting research study

Use the new **SiteIdentifiedDate** field on the CareProgramSite object.

Represent the date when the clinical trial agreement for the site was signed

Use the new **ClnclTrialAgreeSignedDate** field on the CareProgramSite object.

Represent the date when the site was activated for the research study

Use the new **SiteActivatedDate** field on the CareProgramSite object.

Represent the date when the site was closed out for the research study

Use the new **SiteClosedOutDate** field on the CareProgramSite object.

Represent the predicted rate of participant enrollment at the site

Use the new **PredictedPtcpEnrollmentRate** field on the CareProgramSite object.

Represent the planned rate of participant enrollment, based on the estimates by the investigator at the site

Use the new **PlannedPtcpEnrollmentRate** field on the CareProgramSite object.

Represent the actual rate of participant enrollment at the site

Use the new **ActualPtcpEnrollmentRate** field on the CareProgramSite object.

Represent the projected date when the first participant enrolls in the study at the site

Use the new **ForcstFirstPtcpEnrlDate** field on the CareProgramSite object.

Represent the projected date when the first enrolled participant at the site has their initial study visit, such as a screening or a baseline visit

Use the new **ForcstFstPtcpFstVstDate** field on the CareProgramSite object.

Represent the initially projected date when the first enrolled participant at the site completes their final scheduled study visit, as defined in the study protocol

Use the new **ForcstFstPtcpLastVstDate** field on the CareProgramSite object.

Represent the actual date when the first participant was enrolled in the study at the site

Use the new **ActlFirstPtcpEnrlDate** field on the CareProgramSite object.

Represent the actual date when the first enrolled participant at the site had their initial study visit, as specified in the study protocol

Use the new **ActlFstPtcpFstVstDate** field on the CareProgramSite object.

Represent the actual date when the first enrolled participant at the site completed their final scheduled study visit, as outlined in the study protocol

Use the new **ActlFstPtcpLastVstDate** field on the CareProgramSite object.

Represent the projected date when the final participant enrolls in the study at the site

Use the new **ForcstLastPtcpEnrlDate** field on the CareProgramSite object.

Represent the projected date when the last enrolled participant at the site has their initial study visit, as defined by the study protocol

Use the new **ForcstLastPtcpFstVstDate** field on the CareProgramSite object.

Represent the initially projected date when the last enrolled participant at the site completes their final scheduled study visit, as outlined in the study protocol

Use the new **ForcstLastPtcpLastVstDate** field on the CareProgramSite object.

Represent the actual date when the last participant was enrolled in the study at the site

Use the new **ActlLastPtcpEnrlDate** field on the CareProgramSite object.

Represent the actual date when the last enrolled participant at the site had their initial study visit, as defined by the study protocol

Use the new **ActlLastPtcpFstVstDate** field on the CareProgramSite object.

Represent the actual date when the last enrolled participant at the site completed their final scheduled study visit, as outlined in the study protocol

Use the new **ActlLastPtcpLastVstDate** field on the CareProgramSite object.

Represent the planned date when the final database lock is implemented across the clinical trial sites

Use the new **PlannedFinalDbLockDate** field on the ResearchStudy object.

Represent the actual date when the final database lock is implemented across the clinical trial sites

Use the new **ActualFinalDbLockDate** field on the ResearchStudy object.

Represent the projected date when the first participant enrolls in the study at a participating clinical trial site

Use the new **ForcstFirstPtcpEnrlDate** field on the ResearchStudy object.

Represent the projected date when the first enrolled participant across all sites has their initial study visit, such as a screening or baseline visit

Use the new **ForcstFstPtcpFstVstDate** field on the ResearchStudy object.

Represent the initially projected date when the first enrolled participant across all sites completes their final scheduled study visit, as defined in the study protocol

Use the new **ForcstFstPtcpLastVstDate** field on the ResearchStudy object.

Represent the actual date when the first participant was enrolled in the study at a participating clinical trial site

Use the new **ActlFirstPtcpEnrlDate** field on the ResearchStudy object.

Represent the actual date when the first enrolled participant across all sites had their initial study visit, as specified in the study protocol

Use the new **ActlFstPtcpFstVstDate** field on the ResearchStudy object.

Represent the actual date when the first enrolled participant across all sites completed their final scheduled study visit, as outlined in the study protocol

Use the new **ActlFstPtcpLastVstDate** field on the ResearchStudy object.

Represent the projected date when the final participant enrolls in the study across all participating

clinical trial sites. This forecast is based on the planned sample size and recruitment rate

Use the new **ForcstLastPtcpEnrlDate** field on the ResearchStudy object.

Represent the projected date when the last enrolled participant across all sites has their initial study visit, as defined by the study protocol

Use the new **ForcstLastPtcpFstVstDate** field on the ResearchStudy object.

Represent the initially projected date when the last enrolled participant across all sites completes their final scheduled study visit, as outlined in the study protocol

Use the new **ForcstLastPtcpLastVstDate** field on the ResearchStudy object.

Represent the actual date when the final participant was enrolled in the study across all participating clinical trial sites

Use the new **ActlLastPtcpEnrlDate** field on the ResearchStudy object.

Represent the actual date when the last enrolled participant across all sites had their initial study visit, as defined by the study protocol

Use the new **ActlLastPtcpFstVstDate** field on the ResearchStudy object.

Represent the actual date when the last enrolled participant across all sites completed their final scheduled study visit, as outlined in the study protocol

Use the new **ActlLastPtcpLastVstDate** field on the ResearchStudy object.

Loyalty Management

Engage with your customers through interest and affinity-based clubs. Offer personalized promotion recommendations to customers. Query across data spaces to find segments that members are a part of. Transfer points to your family and friends. Get your processes up and running quicker by using field aliases in every rule action.

Build Customer Advocacy and Engagement with Clubs

Supercharge customer engagement with clubs that offer benefits and exclusive promotions based on customers' interests and affinities. Bring exclusivity to your clubs by setting eligibility criteria that are tailored to your club’s goals. Generate new revenue streams by offering memberships through club subscriptions.

Promotions

Provide personalized promotion recommendations to your customers based on their purchase and browsing history. Optimize your storage requirements for Engagement Trail promotions. Find members' associated segments from any data space. Track the number of times a promotion is used overall and by each customer.

Points Management

Empower your members to transfer their points to their family and friends. Transfer points in real-time from members' point balances to their associated membership groups.

Use Field Aliases in All Rule Actions
Loyalty program managers can create process rules faster and more intuitively by using aliases in rule actions. When adding actions to a process rule, use aliases to quickly and easily specify object fields as resources.

Removed: Buy X (Bundle or Product Variants), Get Discounts + Reward Promotion Template
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.

New and Changed Objects in Loyalty Management
Do more with the new and updated Loyalty Management objects.

New Metadata Types in Loyalty Management
Make the most of the new metadata types in Loyalty Management.

Build Customer Advocacy and Engagement with Clubs

Supercharge customer engagement with clubs that offer benefits and exclusive promotions based on customers' interests and affinities. Bring exclusivity to your clubs by setting eligibility criteria that are tailored to your club's goals. Generate new revenue streams by offering memberships through club subscriptions.

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

How: From the Clubs related list of a loyalty program, click **New Club**.

Promotions

Provide personalized promotion recommendations to your customers based on their purchase and browsing history. Optimize your storage requirements for Engagement Trail promotions. Find members' associated segments from any data space. Track the number of times a promotion is used overall and by each customer.

Maximize Revenue with Personalized Promotion Recommendations
Use the Promotion Recommendations API to offer personalized promotions to your customers. The API utilizes Salesforce Personalization's machine learning capabilities to recommend promotions based on the products each customer is most likely to purchase. Show the recommended promotions on your site quickly using the configurable and ready-to-use Recommended Promotion widget.

Optimize Data Storage for Engagement Trail Promotions
Enhance long-term member engagement with Engagement Trail promotions, which use Promotion Party Usage records to track members' progress. Optimize data storage by reducing the number of records needed to track members' progress towards multiple milestones.

Find Members' Data Cloud Segment from Any Data Space
Run promotions that target members across your company's different brands. Use segments from any data space as your promotion's target audience. When the Promotion Eligibility component and Loyalty Process Rules check a member's promotion eligibility, Query API checks segments across data

spaces to verify eligibility. Previously, Query API looked only at the segments that were part of the default data space to verify the promotion eligibility of members.

Manage Promotion Budgets Better with Enhanced Promotion Limits
Set limits on the number of times a promotion can be availed overall and the number of times each customer can use a promotion. Use the Use Per Customer option to set the limit for a customer and the Total Use option to set the limit for the entire promotion. Previously, the User per Customer limit was available as an overall promotion limit.

Maximize Revenue with Personalized Promotion Recommendations

Use the Promotion Recommendations API to offer personalized promotions to your customers. The API utilizes Salesforce Personalization's machine learning capabilities to recommend promotions based on the products each customer is most likely to purchase. Show the recommended promotions on your site quickly using the configurable and ready-to-use Recommended Promotion widget.

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

- Loyalty Management - Growth or Loyalty Management - Advanced
- Data Cloud
- Personalization

See Also

Salesforce Help: Personalized Promotion Recommendations (can be outdated or unavailable during release preview)

Optimize Data Storage for Engagement Trail Promotions

Enhance long-term member engagement with Engagement Trail promotions, which use Promotion Party Usage records to track members' progress. Optimize data storage by reducing the number of records needed to track members' progress towards multiple milestones.

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

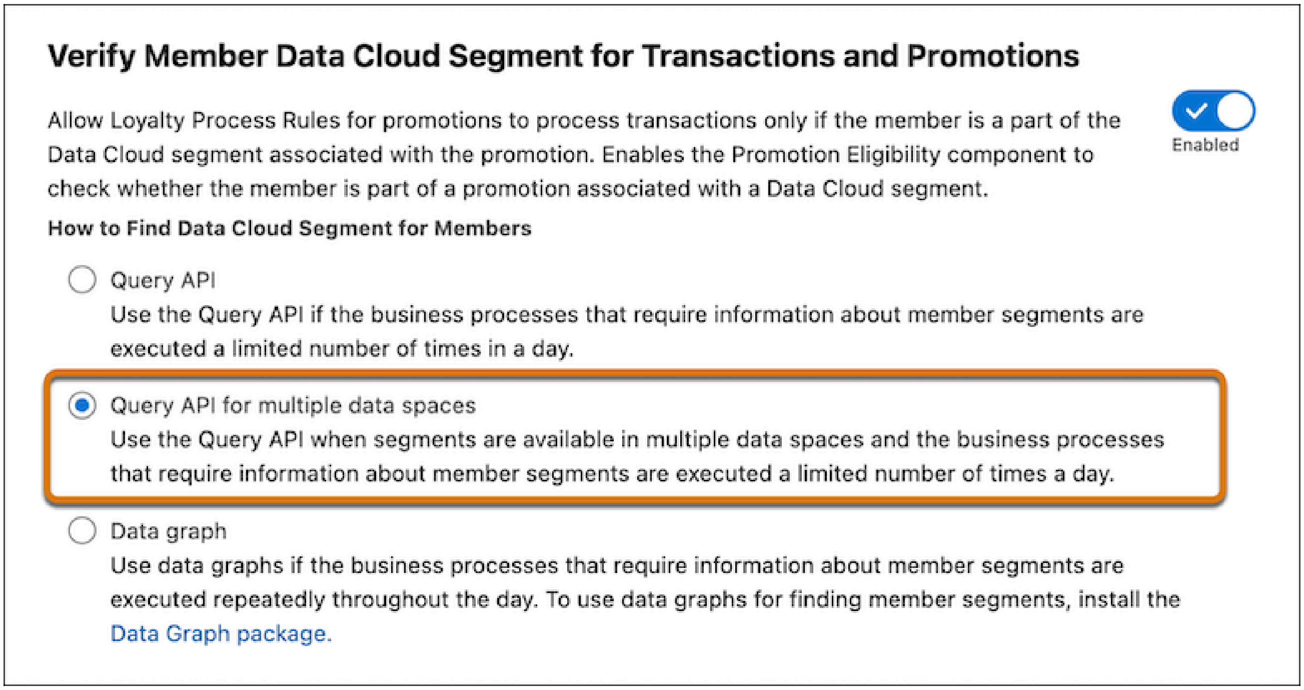
How: On the Loyalty Management Settings page in Setup, turn on Track Member Progress for Engagement Trails Using Promotion Party Usage. This setting is turned on by default in new orgs.

Find Members' Data Cloud Segment from Any Data Space

Run promotions that target members across your company's different brands. Use segments from any data space as your promotion's target audience. When the Promotion Eligibility component and Loyalty Process Rules check a member's promotion eligibility, Query API checks segments across data spaces to verify eligibility. Previously, Query API looked only at the segments that were part of the default data space to verify the promotion eligibility of members.

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

How: After you install Loyalty Management's standard data bundles, set up your loyalty program-specific segments. Next, on the Loyalty Management Settings page in Setup, turn on Verify Member Data Cloud Segment for Transactions and Promotions, and then select **Query API for multiple data spaces**.



See Also

Salesforce Help: Find Member Segments with Query API (can be outdated or unavailable during release preview)

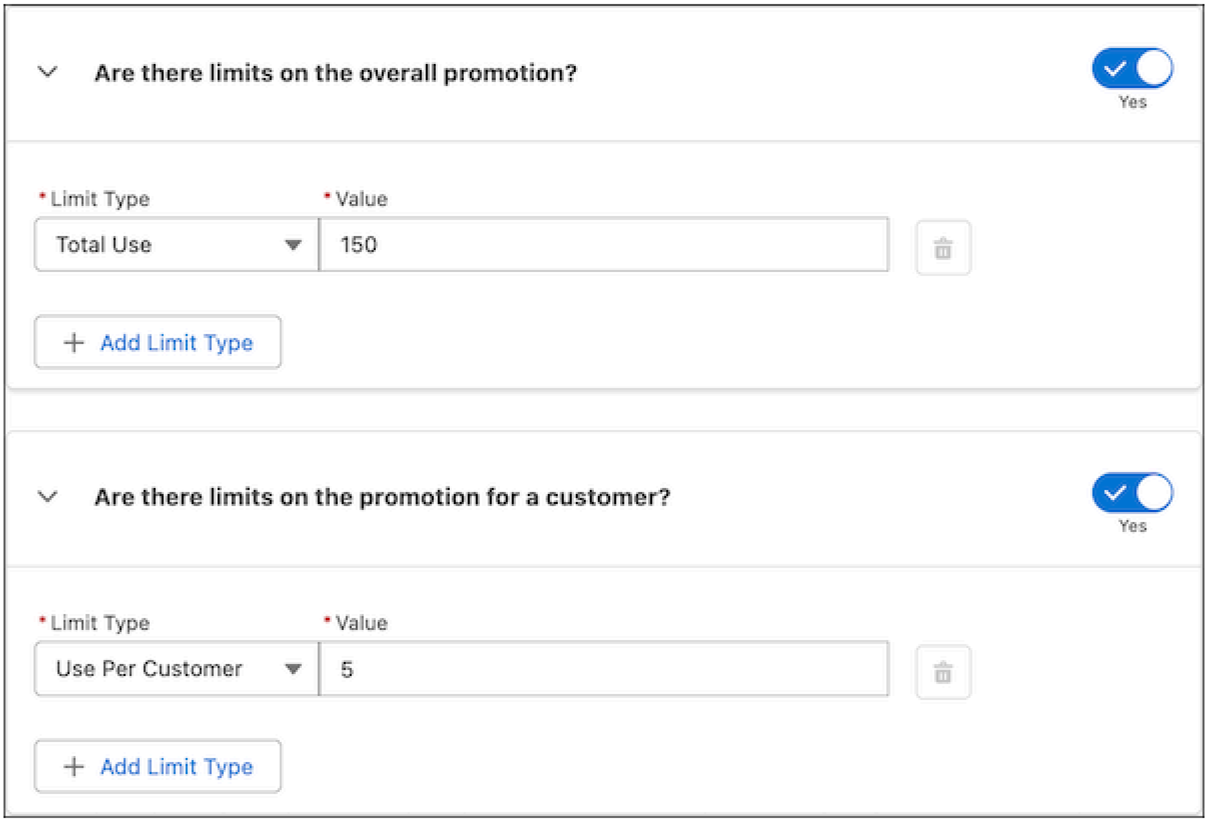
Manage Promotion Budgets Better with Enhanced Promotion Limits

Set limits on the number of times a promotion can be availed overall and the number of times each customer can use a promotion. Use the Use Per Customer option to set the limit for a customer and the Total Use option to set the limit for the entire promotion. Previously, the User per Customer limit was available as an overall promotion limit.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Loyalty Management is available and Global Promotions Management is enabled.

How: Go to the Add Promotion Limits step on the Quick Promotions guided flow.

- To limit the number of times the promotion can be used overall, turn on Are there limits on the overall promotion, and select the **Total Use** limit type.
- To limit the number of times a customer can use the promotion, turn on Are there limits on the promotion for a customer, and select the **Use Per Customer** limit type.



See Also

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

Salesforce Help: Transaction Journal Execution API (can be outdated or unavailable during release preview)

Points Management

Empower your members to transfer their points to their family and friends. Transfer points in real-time from members' point balances to their associated membership groups.

Share Your Points with Friends and Family

Give members the flexibility to manually transfer their redeemable points to other members of the loyalty program. Members can effectively consume reward points, and the loyalty program retains liability as the points' expiration dates don't change. For example, if a member's points are about to expire and they have no plans to use them, they can transfer the points to family and friends, making sure that the points are used effectively.

Automate Points Transfer to Membership Groups

Automate the process of transferring points from members to their associated membership groups as soon as points are credited to them. The automation calculates and transfers points to each group based on the member's contribution percentage for each group.

Share Your Points with Friends and Family

Give members the flexibility to manually transfer their redeemable points to other members of the loyalty program. Members can effectively consume reward points, and the loyalty program retains liability as the points' expiration dates don't change. For example, if a member’s points are about to expire and they have no plans to use them, they can transfer the points to family and friends, making sure that the points are used effectively.

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

How: On the Flow Builder canvas, click **Add Element**, and select **Action**. Search for and select **Transfer Points**.

Automate Points Transfer to Membership Groups

Automate the process of transferring points from members to their associated membership groups as soon as points are credited to them. The automation calculates and transfers points to each group based on the member’s contribution percentage for each group.

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

How: On the Loyalty Management Settings page in Setup, turn on Transfer Points to Member Group Automatically.

Use Field Aliases in All Rule Actions

Loyalty program managers can create process rules faster and more intuitively by using aliases in rule actions. When adding actions to a process rule, use aliases to quickly and easily specify object fields as resources.

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

Removed: Buy X (Bundle or Product Variants), Get Discounts + Reward Promotion Template

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.

New and Changed Objects in Loyalty Management

Do more with the new and updated Loyalty Management objects.

Set limits on the number of times a promotion can be used overall and per customer

Use the new `TotalUsage` and `UsagePerCustomer` values in the **Type** field on the

PromotionLimit object.

Configure the customer groups that are eligible for club membership
Use the new LoyaltyTierEligibilitySrc object.

Pay for tier or club membership using different payment models
Use the new LoyaltyTierMshpFeeOption object.

Associate a member tier and a loyalty promotion
Use the new LoyaltyTierPromotion object.

Track the number of times a customer has used a promotion
Use the new **UsageCount** field on the existing PromotionPartyUsage object.

Specify the details of the additional promotional attribute for contact, account or a member in JSON format.
Use the new **AdditionalAttributeInfo** field on the existing PromotionPartyUsage object.

Verify if a loyalty program member is automatically enrolled in a promotion
Use the new **IsAutomaticallyEnrolled** field on the existing LoyaltyProgramMbrPromotion object.

Automatically generate the referral code of the loyalty program member promotion
Use the new **ReferralCode** field on the existing LoyaltyProgramMbrPromotion object.

Track the type of enrollment for which a member is eligible
Use the new **EligibleEnrollmentType** field on the existing LoyaltyTier object.

Track the loyalty member tier associated with loyalty membership lifecycle
Use the new **LoyaltyMemberTierId** field on the existing LoyaltyMembershipLifecycle object.

Specify the type of enrollment for a loyalty member tier
Use the new **EnrollmentType** field on the existing LoyaltyMemberTier object.

See Also

Loyalty Management Developer Guide: Loyalty Management Standard Objects (can be outdated or unavailable during release preview)

New Metadata Types in Loyalty Management

Make the most of the new metadata types in Loyalty Management.

Settings

Enable marketing managers to create and run clubs

Use the **enableConfigureClubs** field on the IndustriesLoyaltySettings metadata type.

Transfer members' non-qualifying points in real-time to their associated groups

Use the **enableTransferPointsToMemberGroupsRealtime** field on the IndustriesLoyaltySettings metadata type.

Enable the Query API to search across data spaces to verify the Data Cloud segments that members are a part of

Use the **enableSegmentQueryApiMultipleDataSpace** field on the IndustriesLoyaltySettings metadata type.

Use Promotion Party Usage records to store members' progress towards attaining milestones of Engagement Trail promotions

Use the **enableUsePromPtyUsageForEngmtTrail** field on the IndustriesLoyaltySettings metadata type.

See Also

Loyalty Management Developer Guide: IndustriesLoyaltySettings (can be outdated or unavailable during release preview)

Manufacturing Cloud

Minimize revenue leakage by specifying the precise quantities of configured products in sales agreements. Improve inventory traceability with depot repairs and advanced exchanges.

Prevent Revenue Leakage for Configured Products in Sales Agreements

Key account managers can now specify quantities with decimal values in the product configurator when they add products with attributes to sales agreements. Previously, users could use only integer values for quantities, which resulted in discrepancies due to rounding and revenue leakage. Manufacturers that sell configured products in fractional units, such as process manufacturers that sell chemicals, paints, and pharmaceuticals, can reflect the precise agreed-upon quantities and reduce the likelihood of payment issues and lost business.

Minimize Downtime for Faulty Products with Advanced Exchanges

When on-site repair or immediate return of faulty products isn't possible, service managers or technicians can quickly request returns and replacements with Advanced Exchange. Initiate a guided workflow to return faulty parts for repair to a manufacturer, while simultaneously dispatching a replacement to the customer. Keep production lines running smoothly and ensure continuous operations.

Get Visibility Into Depot Repairs for Faulty Assets

Streamline the repair, refurbishment, or return of an asset with enhanced visibility and traceability.

Easily create work orders from return orders, and capture repair-specific data for technicians at manufacturing depot locations. Use a predefined context definition to automatically populate work order details based on the return order details. Drive execution of depot repairs with rule-based stage transitions that guide technicians at every step of the way leading to improved service quality.

Prevent Revenue Leakage for Configured Products in Sales Agreements

Key account managers can now specify quantities with decimal values in the product configurator when they add products with attributes to sales agreements. Previously, users could use only integer values for quantities, which resulted in discrepancies due to rounding and revenue leakage. Manufacturers that sell configured products in fractional units, such as process manufacturers that sell chemicals, paints, and pharmaceuticals, can reflect the precise agreed-upon quantities and reduce the likelihood of payment issues and lost business.

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

How: In Setup, in the Sales Agreement settings, specify the default decimal scale for quantities of configured products in sales agreements. To change the decimal scale for a sales agreement, update the record's Decimal Scale field.

Minimize Downtime for Faulty Products with Advanced Exchanges

When on-site repair or immediate return of faulty products isn't possible, service managers or technicians can quickly request returns and replacements with Advanced Exchange. Initiate a guided workflow to return faulty parts for repair to a manufacturer, while simultaneously dispatching a replacement to the customer. Keep production lines running smoothly and ensure continuous operations.

Where: This feature is available in Lightning Experience in Manufacturing Cloud where Asset Service Lifecycle Management is enabled.

Who: This feature is available to users with the Service Part Return Management permission set.

How: On a work order, select **Advanced Exchange** from the action menu. Then create an advanced exchange request.

Get Visibility Into Depot Repairs for Faulty Assets

Streamline the repair, refurbishment, or return of an asset with enhanced visibility and traceability. Easily create work orders from return orders, and capture repair-specific data for technicians at manufacturing depot locations. Use a predefined context definition to automatically populate work order details based on the return order details. Drive execution of depot repairs with rule-based stage transitions that guide technicians at every step of the way leading to improved service quality.

Where: This feature is available in Lightning Experience in Manufacturing Cloud.

Who: This feature is available to users with the Service Part Return Management and Context Service Runtime permission sets.

How: On a return order, select one or more return order line items and create a work order with Depot Repair as the process type.

Media Cloud

Create proposals and generate pitch decks that help you stand out from your competition while responding to requests for proposals (RFPs). Keep track of the revenue received from advertisers and agencies for each ad placement or service in an opportunity across scheduled periods.

Media Proposals
Create media proposals that clearly communicate your strategy for incoming request for proposals (RFPs). Generate branded pitch decks that illustrate your value proposition to advertisers and agencies.

Keep Track of the Revenue Generated from Advertisement Opportunities
Publishers can now easily track the revenue realized for their committed ad placements and services. Use Generate Revenue Schedule Business API to generate broadcast calendar-based or Gregorian calendar-based revenue schedules for each opportunity line item. Decide the duration of each schedule, and whether the expected revenue is distributed equally across the schedules or is prorated. After the schedules are generated, sales reps can track the booked, billed, and delivered revenue for each opportunity line item schedule.

New and Changed Objects in Media Cloud
Do more with the new and updated Media Cloud objects.

Media Proposals

Create media proposals that clearly communicate your strategy for incoming request for proposals (RFPs). Generate branded pitch decks that illustrate your value proposition to advertisers and agencies.

Design Proposals Tailored to Your Advertiser's Campaign Objectives
Media planners and sales reps can get ahead of their competition with proposals that clearly communicate their value proposition and competitive advantage to advertisers and agencies. The Proposal Builder enables media planners and sales reps to quickly create media proposals without moving across multiple pages in Salesforce or across multiple external systems. Create media proposals that map the advertiser's campaign requirements to your ad product offerings and easily split the campaign's budget across proposed line items. Include targeting criteria in the proposal that match the campaign's intended audience.

Convey Your Value Proposition with Engaging Visual Presentations
Media planners and sales reps can generate branded pitch decks for their media proposals. The pitch decks automatically contain the details of the media proposal, including the proposed ad products,

budget split across the line items, and the targeting criteria. The sales team can collaborate with admins to create pitch deck templates that align with the publisher's branding guidelines and include the content that advertisers and agencies look for the most.

Design Proposals Tailored to Your Advertiser's Campaign Objectives

Media planners and sales reps can get ahead of their competition with proposals that clearly communicate their value proposition and competitive advantage to advertisers and agencies. The Proposal Builder enables media planners and sales reps to quickly create media proposals without moving across multiple pages in Salesforce or across multiple external systems. Create media proposals that map the advertiser's campaign requirements to your ad product offerings and easily split the campaign's budget across proposed line items. Include targeting criteria in the proposal that match the campaign's intended audience.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Media Cloud - Growth or Media Cloud - Advanced.

How: To open the Proposal Builder, click **Manage Media Proposals** on an opportunity. On the Proposal Builder, add the details of the proposal, including the ad products, the budget split, and the targeting criteria.

Convey Your Value Proposition with Engaging Visual Presentations

Media planners and sales reps can generate branded pitch decks for their media proposals. The pitch decks automatically contain the details of the media proposal, including the proposed ad products, budget split across the line items, and the targeting criteria. The sales team can collaborate with admins to create pitch deck templates that align with the publisher's branding guidelines and include the content that advertisers and agencies look for the most.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Media Cloud - Growth or Media Cloud - Advanced, and Omnistudio Document Generation.

Keep Track of the Revenue Generated from Advertisement Opportunities

Publishers can now easily track the revenue realized for their committed ad placements and services. Use Generate Revenue Schedule Business API to generate broadcast calendar-based or Gregorian calendar-based revenue schedules for each opportunity line item. Decide the duration of each schedule, and whether the expected revenue is distributed equally across the schedules or is prorated. After the schedules are generated, sales reps can track the booked, billed, and delivered revenue for each opportunity line item schedule.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with Media Cloud.

New and Changed Objects in Media Cloud

Do more with the new and updated Media Cloud objects.

Track the revenue generated for opportunity line items across schedules
Use the OpportunityLineItemSchdActual object.

Net Zero Cloud

Simplify snippet drafting by providing context on how topics and snippets in the information library are connected to CSRD and custom disclosure frameworks and disclosure requirements. Enhance Einstein generative AI capabilities with near real-time file indexing by using Salesforce Data Cloud. Easily and efficiently identify gaps in emissions data and use estimated methods to fill these gaps. Expand carbon accounting to cover extended organizational boundaries across multiple levels of hierarchy.

Enhance Information Library Context by Linking Snippets with Disclosure Framework
Simplify snippet drafting by providing context on how topics and snippets in the information library are linked to CSRD and custom disclosure frameworks and disclosure requirements. Assign information library snippets directly to disclosures and disclosure requirements to easily track progress and provide contextual assistance during content creation. Improve efficiency, ensure compliance, and reduce the time and effort needed to manually search for and link information, by accessing detailed guidance from the frameworks to draft accurate and compliant content.

Einstein for Net Zero Cloud
Use the vector database and hybrid search features in Salesforce Data Cloud to generate your environmental, social, and governance (ESG) reports faster.

Identify the Emissions Data Gaps and Use Estimated Ways to Fill The Gaps
Automate the identification of missing or incomplete energy consumption data across multiple stationary assets and enter the missing data to ensure accurate carbon accounting. View the percentage of missing data for each building on the Data Gap View page. Save time and resources and ensure accurate emission calculations by filling these gaps.

Improve Carbon Accounting to Support Multilevel Organizational Hierarchy
Accurately reflect your real-world organizational structure, including support for creating and managing complex company structures with more than two levels of hierarchy. Perform carbon accounting for organizational structures with more than two levels of hierarchy by managing data for multiple entities within a single Salesforce org. For a multilevel organizational hierarchy, tailor your accounting rollups to your specific needs by writing a custom code.

Simplify Emissions Factor Management for Stationary Assets
Simplify the process of finding the right emissions factors for stationary asset energy use records. Ensure accuracy and compliance in emissions reporting, by easily identifying and applying the right emissions factors based on the reporting year, country, zip code, and fuel type.

New and Changed Objects in Net Zero Cloud
Do more with the new and changed Net Zero Cloud objects.

Enhance Information Library Context by Linking Snippets with Disclosure Framework

Simplify snippet drafting by providing context on how topics and snippets in the information library are linked to CSRD and custom disclosure frameworks and disclosure requirements. Assign information library snippets directly to disclosures and disclosure requirements to easily track progress and provide contextual assistance during content creation. Improve efficiency, ensure compliance, and reduce the time and effort needed to manually search for and link information, by accessing detailed guidance from the frameworks to draft accurate and compliant content.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Growth license.

How: In Setup, find and select **Disclosure and Compliance Hub Settings**. Turn on Information Library.

See Also

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

Einstein for Net Zero Cloud

Use the vector database and hybrid search features in Salesforce Data Cloud to generate your environmental, social, and governance (ESG) reports faster.

Enhance Disclosure Reporting by Using Einstein Generative AI with Data Cloud
Boost productivity, improve collaboration, and accelerate compliance for ESG reporting by leveraging Salesforce Data Cloud's vector database and hybrid search capabilities. Enhance Einstein generative AI capabilities with near real-time file indexing, improved search result ranking, and support for data sources such as Google Drive and Microsoft SharePoint.

Enhance Disclosure Reporting by Using Einstein Generative AI with Data Cloud

Boost productivity, improve collaboration, and accelerate compliance for ESG reporting by leveraging Salesforce Data Cloud's vector database and hybrid search capabilities. Enhance Einstein generative AI capabilities with near real-time file indexing, improved search result ranking, and support for data sources such as Google Drive and Microsoft SharePoint.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Growth license.

See Also

Salesforce Help: ESG Report Generation with Einstein Generative AI (can be outdated or unavailable during release preview)
Salesforce Help: Data Cloud for Net Zero Cloud(can be outdated or unavailable during release preview)
Salesforce Help: Vector Search(can be outdated or unavailable during release preview)

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

Identify the Emissions Data Gaps and Use Estimated Ways to Fill The Gaps

Automate the identification of missing or incomplete energy consumption data across multiple stationary assets and enter the missing data to ensure accurate carbon accounting. View the percentage of missing data for each building on the Data Gap View page. Save time and resources and ensure accurate emission calculations by filling these gaps.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Growth license.

How: In Setup, find and select **Net Zero Settings**. Turn on Manage Data Gaps.

See Also

Salesforce Help: Carbon Footprint Data Gaps (can be outdated or unavailable during release preview)

Improve Carbon Accounting to Support Multilevel Organizational Hierarchy

Accurately reflect your real-world organizational structure, including support for creating and managing complex company structures with more than two levels of hierarchy. Perform carbon accounting for organizational structures with more than two levels of hierarchy by managing data for multiple entities within a single Salesforce org. For a multilevel organizational hierarchy, tailor your accounting rollups to your specific needs by writing a custom code.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Growth license.

How: In Setup, find and select **Net Zero Settings**, and then turn on Manage Carbon Accounting. To create organizational hierarchy for a parent organization and one level of child organizations, turn on Two-Level Organizational Hierarchy. To create organizational hierarchy for a parent organization and multiple levels of child organizations, turn on Multilevel Organizational Hierarchy.

See Also

Salesforce Help: Enable Net Zero Cloud Features (can be outdated or unavailable during release preview)

Salesforce Help: Carbon Accounting for Extended Organizational Boundaries (can be outdated or unavailable during release preview)

Simplify Emissions Factor Management for Stationary Assets

Simplify the process of finding the right emissions factors for stationary asset energy use records. Ensure accuracy and compliance in emissions reporting, by easily identifying and applying the right emissions factors based on the reporting year, country, zip code, and fuel type.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions with the Net Zero Growth license.

See Also

Salesforce Help: Create a Stationary Asset Energy Use Record (can be outdated or unavailable during release preview)

New and Changed Objects in Net Zero Cloud

Do more with the new and changed Net Zero Cloud objects.

Changed Objects

Note If you're an existing customer and if you don't see the new or changed fields, then ask your Salesforce admin to add the fields in the page layout of the respective objects.

Specify the predefined disclosure definition version associated with the assessment question

Use the new **DisclosureDefinitionVer** field on the existing AssessmentQuestion object.

New Objects

Create a junction between a document clause set and an assessment question

Use the new Document Clause Set Assessment Question object.

Create a junction between a materiality topic and an assessment question

Use the new Assessment Question Materiality Topic object.

Store information about the gap in the tracking of fuel usage data for the month

Use the new Monthly Usage Tracking Data Gap object.

Store information about the percentage of gaps in the fuel usage data in a year

Use the new Yearly Usage Tracking Data Gap object.

Store information about the stakeholder for sustainability data, such as stakeholder for environmental, social, and governance data

Use the new Sustainability Stakeholder object.

Store information about the group of sustainability tasks

Use the new Sustainability Task Group object.

Store information about the tasks that the sustainability stakeholder does for a sustainability task group

Use the new Sustainability Task object.

Public Sector Solutions

Make more informed hiring decisions by capturing additional candidate details such as skills, disabilities, certifications, and examination scores. Improve grant manager productivity and efficiency with Einstein-powered summaries of key information. Help employees easily locate information in the Employee Experience Cloud site by using the new search capabilities. Manage user access easily through the new and updated permission set groups and permission sets, and also create more comprehensive custom reports.

Recruit Smartly with Comprehensive Candidate Data

Help recruiters and hiring managers efficiently match candidates to roles by capturing their skills, disabilities, certifications, and examination scores in the Talent Recruitment Management data model. Make data-driven, merit-based hiring decisions, ensure compliance, promote inclusivity, validate qualifications, and reduce onboarding costs.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Public Sector Solutions is enabled.

See Also

Salesforce Help: Capture More Details About Candidates (can be outdated or unavailable during release preview)

Einstein Generative AI for Public Sector Solutions

Efficiently summarize grant status data and generate concise versions of grant applications for board member reviews by using Einstein.

Create a Funding Award Summary with Einstein (Beta)
To inform engagement, disbursement, and future funding awards decisions, get a summary of current grant status data. This summary is based on the Funding Award, Funding Award Requirement, Indicator Performance Period, Indicator Results, and Funding Disbursement objects.

Generate a Specialized Version of a Grant Application for Board Review (Beta)
Use Einstein to create a concise version of the grant application for board member review. This version of the application is based on the Individual Application and Application Review objects.

See Also

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

Create a Funding Award Summary with Einstein (Beta)

To inform engagement, disbursement, and future funding awards decisions, get a summary of current grant status data. This summary is based on the Funding Award, Funding Award Requirement, Indicator Performance Period, Indicator Results, and Funding Disbursement objects.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Public Sector Solutions is enabled, with the Einstein Platform add-on. To purchase the Einstein Platform add-on, contact your Salesforce account executive. Einstein Funding Award Summary is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Generate a Specialized Version of a Grant Application for Board Review (Beta)

Use Einstein to create a concise version of the grant application for board member review. This version of the application is based on the Individual Application and Application Review objects.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Public Sector Solutions is enabled, with the Einstein Platform add-on. To purchase the Einstein Platform add-on, contact your Salesforce account executive. Einstein Board Version of Grant Application is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

User Access Management Enhancements

With new permission sets and permission set groups, quickly give users the access they need, reduce configuration errors, and improve user access audits and updates. Also constituents, providers, and agency employees access to data in more Public Sector Solutions objects with new and updated permission sets.

Seamlessly Manage User Access by Persona
Quickly give users access to Public Sector Solutions objects and features by assigning them a predefined permission set group based on their persona. Make sure that users have only the necessary and correct access for the tasks they do. Reduce configuration errors and audit user access more easily by assigning users a permission set group instead of multiple permission sets. Update permission set groups to conveniently broaden or limit access to users with a specific persona when their job functions change.

Set Up User Access Faster with New Standard Permission Sets
Assign new preconfigured permission sets to users to give them the required permissions from related permission set licenses. Previously, you created permission sets for these permission set licenses and turned on specific permissions and settings for users.

Give Users Access to Licensing and Permitting Sites Easily
Give constituents and partners access to Licensing, Permitting, and Inspections data and features on Experience Cloud sites by assigning them predefined permission sets. Previously, you cloned and customized the Customer Community User and Partner Community User profiles to give constituents and partners access to the features and data.

Other Changes in User Access Management
Give constituents, providers, and agency employees access to data in more Public Sector Solutions objects. Help them do more on your Experience Cloud sites by building custom workflows with these objects.

Seamlessly Manage User Access by Persona

Quickly give users access to Public Sector Solutions objects and features by assigning them a predefined permission set group based on their persona. Make sure that users have only the necessary and correct access for the tasks they do. Reduce configuration errors and audit user access more easily by assigning users a permission set group instead of multiple permission sets. Update permission set groups to conveniently broaden or limit access to users with a specific persona when their job functions change.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Why: Give users the access they need based on their persona by assigning them these permission set groups.

Permission Set Group	User Persona
Talent_Recruitment_Management_Specialist	A recruiter or HR specialist
Talent_Recruitment_Management_Hiring_Manager	A hiring manager
Talent_Recruitment_Management_Employee	An interviewer or employee applying to internal job openings
Talent_Recruitment_Management_Applicant	A job seeker who applies for a position
Licensing_Permitting_Officer	A compliance officer for licensing and permitting management
Licensing_Permitting_Constituent	A constituent who applies for a trade or business licenses and permits
Grantmaking_Manager	A grant maker who creates and manages funding opportunities and grant submissions
Grantmaking_Applicant	A grant seeker who finds, applies for, and reports back on funding opportunities and budgets
Benefit_Management_Caseworker	A caseworker who reviews benefit applications, determines eligibility, and assigns benefits
Benefit_Management_Constituent	A constituent who applies for benefits
Investigative_Case_Management_Officer	An investigator or complaint intake officer
Investigative_Case_Management_Constituent	A constituent who files complaints, submits evidence, and participates in case proceedings
Social_Program_Management_Caseworker	A caseworker who manages programs, referrals, complaints, and care plans for social care
Social_Program_Management_Constituent	A constituent who files complaints, referrals, and receives social care benefits
Social_Program_Management_Provider	A provider user who manages referrals and offers services to constituents
Employee_Experience_User	An employee who accesses data and features on an employee experience site
Public_Sector_Solutions_Admin	An admin who configures and manages Public Sector Solutions features

See Also

Salesforce Help: View and Assign Permission Set Groups in Public Sector Solutions (can be outdated or unavailable during release preview)

Set Up User Access Faster with New Standard Permission Sets

Assign new preconfigured permission sets to users to give them the required permissions from related permission set licenses. Previously, you created permission sets for these permission set licenses and turned on specific permissions and settings for users.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Why: Give users the access they need by assigning them these new permission sets.

Permission Set	Description	Permission Set License
Compliant Data Sharing Manager	Gives users the ability to configure and manage participant roles and participant groups for Compliant Data Sharing.	Compliant DataSharing
Compliant Data Sharing User	Gives users the ability to share records with others and access records shared with them through Compliant Data Sharing.	Compliant DataSharing
Industries Assessment	Gives users access to Assessment features and objects.	Industries Assessment
Licensing, Permitting, and Inspections for Community User	Gives community users access to use Licensing, Permitting, and Inspections features and objects.	Licensing and Permitting Management For Communities
Licensing, Permitting, and Inspections for Partner	Gives partner users access to Licensing, Permitting, and Inspections features and objects.	Licensing, Permitting, and Inspections for Partner
Omnistudio Experience Cloud User	Gives users the ability to use Omniscripts, Data Mappers, Flexcards, and Integration Procedures in Experience Cloud.	Omnistudio Runtime for Communities
Public Sector Access for Community User	Gives community users access to Public Sector Solutions features and objects.	Public Sector Community

Give Users Access to Licensing and Permitting Sites Easily

Give constituents and partners access to Licensing, Permitting, and Inspections data and features on Experience Cloud sites by assigning them predefined permission sets. Previously, you cloned and customized the Customer Community User and Partner Community User profiles to give constituents and partners access to the features and data.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Why: Give constituents and partners access to Licensing, Permitting, and Inspections data and features by assigning them these new permission sets.

Permission Set	Description	Permission Set License
Licensing, Permitting, and Inspections for Community User	Gives community users access to the Licensing, Permitting, and Inspections features and objects.	Licensing and Permitting Management For Communities
Licensing, Permitting, and Inspections for Partner	Gives partner users access to the Licensing, Permitting, and Inspections features and objects.	Licensing, Permitting, and Inspections for Partner

See Also

Salesforce Help: License and Permit Site Prerequisites (can be outdated or unavailable during release preview)

Other Changes in User Access Management

Give constituents, providers, and agency employees access to data in more Public Sector Solutions objects. Help them do more on your Experience Cloud sites by building custom workflows with these objects.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled, with the Customer Community for Public Sector, Customer Community Plus for Public Sector, Employee Experience for Public Sector, and Provider Self-Service for Public Sector add-on licenses.

Why:

- Give constituents with the Customer Community or Customer Community Plus user license access to additional Public Sector Solutions objects when you assign them these permission sets.

Permission Set	Object
Composable Case Management Community Access	- Accreditation - Award - Benefit Item Code - Benefit Schedule - Benefit Session - Benefit Specialty - Board Certification - Care Provider Adverse Action - Care Provider Facility Specialty - Care Specialty - Code Set - Code Set Bundle - Healthcare Facility - Healthcare Practitioner Facility - Healthcare Provider - Healthcare Provider NPI - Healthcare Provider Specialty - Operating Hours - Party Financial Asset - Person Disability - Public Complaint - Recurrence Schedule - Regulatory Code Violation - Time Slot - Unit of Measure
Licensing, Permitting, and Inspections for Community User	- Business Regulatory Authorization Type Dependency - Person Employment

- Give employees with the Salesforce Platform user license access to additional Public Sector Solutions objects when you assign them these permission sets or the Employee_Experience_User permission set group.

Permission Set	Object
Benefits and Care Plans for Employee Community	- Benefit Provider Searchable Field - Care Provider Adverse Action - Code Set - Code Set Bundle - Healthcare Facility - Healthcare Provider NPI - Operating Hours - Party Certified Capacity

Permission Set	Object
	- Time Slot - Unit of Measure
Employee Experience for Public Sector	- Accreditation - Award - Board Certification - Business Regulation Authority Type Dependency - Public Application Participant - Regulatory Transaction Fee - Volunteer Project

- Give providers with the Partner Community user license to give them access to additional Public Sector Solutions objects when you assign them these permission sets.

Permission Set	Object
Benefit Management for Partners	- Care Taxonomy - Care Specialty Taxonomy - Healthcare Provider Taxonomy - Party Certified Capacity - Party Expense - Party Financial Asset - Party Profile - Person Disability - Time Slot - Unit of Measure
Licensing, Permitting, and Inspections for Partner	- Account - Address - Assessment Indicator Definition - Assessment Task - Asset - Authorization Application Asset - Authorization Application Place - Authorization Location Access Schedule - Business License - Business License Application - Business Profile - Business Type - Business Regulatory Authorization Type - Business Regulatory Authorization Type Dependency - Case - Contact

Permission Set	Object
	- Course Offering - Examination - Individual Application - Inspection Assessment Indicator - Inspection Type - Location - Person Education - Person Employment - Person Examination - Polygon - Preliminary Application Reference - Public Complaint - Regulatory Authorization Type Product - Regulatory Authority - Regulatory Authorization Type - Regulatory Code - Regulatory Code Assessment Indicator - Regulatory Code Violation - Regulatory Transaction Fee - Regulatory Transaction Fee Item - Training Course Participant - Training Course - Violation Enforcement Action - Violation Type - Violation Type Assessment Indicator - Volunteer Project
Provider Management For Partner	Regulatory Authorization Type

Build More Comprehensive Custom Reports

Enrich your reports with more data by creating custom report types that feature additional objects and fields, including polymorphic fields. Design specialized reports that combine data from multiple related objects for a holistic view of your agency's activities and impact.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled.

Empower Employees to Do More on the Employee Experience Cloud Site

Add a custom search experience to your employee Experience Cloud site to make it easy for employees to find information spread across multiple objects and fields based on specific search and filter criteria. Help employees to report data for the indicators assigned to them and track program outcomes.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Public Sector Solutions is enabled, with the Employee Experience for Public Sector add-on license.

Who: To use the search experience, employees need the Criteria-Based Search and Filter for Experience Cloud permission set or the Employee_Experience_User permission set group. To report indicator results and track outcomes, employees need the Outcome Management for Experience Cloud permission set.

See Also

Salesforce Help: Employee Experience for Public Sector Solutions (can be outdated or unavailable during release preview)

New and Changed Objects in Public Sector Solutions

Do more with the new and changed Public Sector Solutions objects.

Capture information about a skill, subject matter expertise, or behavior required for a job or role

Use the new Competency object.

Capture information about a person's competency

Use the new PersonCompetency object.

Capture a static list of taxonomy codes for classifying providers and their specialties

Use the new CareTaxonomy object.

Associate a care specialty with a care taxonomy for classification

Use the new CareSpecialtyTaxonomy object.

Associate a healthcare provider with a care taxonomy for classification

Use the new HealthcareProviderTaxonomy object.

Share an intake form section with a user or group

Use the new IntakeFormSectionPtcp object.

Capture the summary of an application

Use the new **ApplicationSummary** field on the existing ApplicationForm object.

Capture how well an application matches the requirements for a job position

Use the new **Score** field on the existing ApplicationForm object.

Capture an explanation of the score for an application form

Use the new **ScoreReason** field on the existing ApplicationForm object.

Capture how the score is used for an application form

Use the new **ScoreType** field on the existing ApplicationForm object.

Specify the sequence number for an assessment question in an assessment question set

Use the new **SequenceNumber** field on the existing AssessmentQuestionAssignment object.

Specify the date when a board certification was verified

Use the new **VerificationDate** field on the existing BoardCertification object.

Specify the status of a board certification's verification

Use the new **VerificationStatus** field on the existing BoardCertification object.

Specify the priority for resolving a complaint

Use the new **ResolutionPriority** field on the existing PublicComplaint object.

Capture the summary of a complaint

Use the new **ComplaintSummary** field on the existing PublicComplaint object.

Referral Marketing

Offer a variety of rewards to advocates and their referred friends.

Enhance Your Referral Program with Rewards of Your Choice

You can have the flexibility to design reward types for your company's referral program, including gift cards and cashback for both advocates and referrals. Tailor rewards based on the preferences of the promotion's target audience while making it simple for marketing managers to easily manage the various reward options. Use services like Flows or Apex to define processes for integrating with external downstream rewarding systems.

Easily View the Referrals and Extended Rewards

Internal users can now view the referrals provided and rewards earned by advocates through the Referrals and Extended Rewards related lists on the Contacts and Accounts entities.

Automatically Enroll Advocates

Brands can automatically enroll advocates and assign them unique referral codes. The advocates become active once a referred friend makes a first purchase. Marketing managers can easily access the unique referral codes of active advocates in their Loyalty Program Member Promotion records, ensuring effective use of referral codes in member promotions.

Other Improvements in Referral Marketing

Help users manage their referrals more effectively.

New and Changed Objects in Referral Marketing

Do more with the new and updated Referral Marketing objects.

Enhance Your Referral Program with Rewards of Your Choice

You can have the flexibility to design reward types for your company's referral program, including gift cards and cashback for both advocates and referrals. Tailor rewards based on the preferences of the promotion's target audience while making it simple for marketing managers to easily manage the various reward options. Use services like Flows or Apex to define processes for integrating with external downstream rewarding systems.

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

How: On the Extended Reward Definitions related list of your referral program, click **New**. When you create a custom promotion template, select the extended rewards you want to offer as part of the promotion.

Easily View the Referrals and Extended Rewards

Internal users can now view the referrals provided and rewards earned by advocates through the Referrals and Extended Rewards related lists on the Contacts and Accounts entities.

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

How: Go to **Setup | Object Manager** and select the object. From Lightning App Builder, edit the relevant record page layout.

Automatically Enroll Advocates

Brands can automatically enroll advocates and assign them unique referral codes. The advocates become active once a referred friend makes a first purchase. Marketing managers can easily access the unique referral codes of active advocates in their Loyalty Program Member Promotion records, ensuring effective use of referral codes in member promotions.

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

Other Improvements in Referral Marketing

Help users manage their referrals more effectively.

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

Why:

- Marketing managers can add these Transaction Journal fields as merge fields in promotion emails:
  - Activity Date
  - Journal Subtype Name
  - Loyalty Program Name
  - Promotion Name
  - Quantity
  - Transaction Amount
  - Transaction Amount ISO Code
- Flexibility to choose the template type based on the target markets when creating a new promotion template.
- Seamlessly process the referral events when a friend signs up using a referral code and completes their first purchase on Experience Cloud sites.

New and Changed Objects in Referral Marketing

Do more with the new and updated Referral Marketing objects.

Define the extended rewards associated with a referral program
Use the new ExtendedRewardDefinition object.

Issue extended rewards to a customer, a partner, or a member
Use the new ExtendedReward object.

Associate a promotion template with an extended reward definition
Use the new PromTmplExtdRewardDef object.

Specify the type of promotion template based on target markets
Use the **Type** field on the existing PromotionTemplate object.

See Also

Referral Marketing Developer Guide: Referral Marketing Standard Objects (can be outdated or unavailable during release preview)

Salesforce for Education

Provide students with a unified course registration experience and let registrars define and place holds for students. Use Agentforce to automate advising tasks, conduct philanthropic research, and support student recruitment. Assign specialized rubrics to different application stages and let applicants select their preferred schools and programs. Empower advisors to track student involvement on campus. Reduce the problems and risks of manual processes and scattered data by combining different aspects of gift planning into a single platform.

Use Different Rubrics to Assess Each Application Stage
Improve your application review process by assigning individualized rubrics to each stage.

Administrators can assign customized rubrics based on the internal status of an individual application. For example, you can create and assign different rubrics for application reviews, phone interviews, and in-person interviews. The different rubrics help you use the right criteria to assess each stage.

Transform Student Recruitment with Agentforce for Education: Student Recruitment (Beta)

Handle escalations, create Academic Interest records, register prospects for campus tours and events, and start the application process by using the new topics and actions in the Student Recruitment Agent.

Gain Insights into Applicant Campus Preferences

Let applicants rank preferred campus locations during the application process. This data helps admissions teams to make more informed offer decisions. Increase applicant retention within your multicampus system by offering placements at alternative campuses and schools.

Enhance Students' Campus and Program Search with Detailed Profiles

Use new objects and fields to describe campuses and schools, and relate them to program and learning program offerings within the Education Cloud data model. Use this data to help prospective students research schools and programs in the Campus and Program Finder. Provide detailed profiles, including locations, formats, and fields of study. Help students identify and apply for the learning programs that specific campuses offer.

Connect Students to Nearby Schools and Programs with Campus and Program Finder

Make it easy for students and families to browse and filter campuses and programs in their area. Create an Experience Cloud site for applicants to filter by location, learning program, campus or school, grade level, and other criteria. Show results in a list or on a map.

Maximize School and Program Visibility to K-12 Applicants

Use new and improved objects and fields to present primary and secondary schools as well as academic programs on your Education Cloud Experience Cloud site. Help students and families find schools and programs in the Campus and Program Finder. Populate new grade fields to specify the grade levels of learning programs and courses. Classify schools and campuses by available grade levels and institution types such as public, private, or charter. Configure new location objects to present schools at multiple administrative levels, including city, state, and country.

Manage Critical Academic Operations

Extend the power of Education Cloud with new student information system (SIS) capabilities. Empower staff to design and implement auditable academic policies, manage holds and blocks for students, load course offering schedules by using API, and define course registration windows. Provide students with the ability to register for courses.

Optimize the Course Registration Experience

Enable Advanced Academic Operations to provide students with a unified course registration experience. Facilitate students' course searches, availability checks, enrollment eligibility verification, and registration confirmation in a single process. Make it easy for students to view, modify, or withdraw from registered courses. Automatically create a student enrollment record to maintain accurate and up-to-date enrollment data.

Define, Enforce, and Manage Student Holds Effectively

Use a hold definition guided setup to define and edit holds without manual entry. Easily enter regulatory code (hold) details, select reasons and restrictions for a hold, and assign resolution tasks. Gain a comprehensive, unified view of reasons, restrictions, and resolution tasks in a hold summary.

Use dedicated APIs to create holds accurately and fetch student violations to enforce the hold. Track and manage student holds in a unified Hold Instance View, and provide students a hold summary view in the Action Center.

Manage Your Course Offerings and Course Offering Schedules in Bulk

Save time by using APIs to import your existing course offerings and course offering schedules into Education Cloud. Create or update multiple course offerings and their related schedules at once.

Calculate the Grade Point Average of Students with Policy Rules

Use policy rules (expression sets) in Education Cloud to calculate the grade point average (GPA) of students enrolled in an academic term. Registrar staff can verify and publish the calculated results from the Academic Score Report tab of the student's academic term enrollment record page. Use the Academic Score Report Lightning web component on your Experience Cloud site so students can view their published score details.

Answer and Support Advisors Autonomously with Agentforce

Grow your advising team's capacity in minutes. Use Agentforce for Education: Student Advising and summarize student advising cases to quickly understand them. Get immediate answers to questions from students about campus resources, such as facilities, services, activities, clubs, programs, and action plans, and about campus policies. Follow up proactively by suggesting the next-best actions, such as creating to-dos or cases.

Manage Philanthropic Research Data Efficiently with Education Cloud

Use Education Cloud's Alumni app to manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one location. Use Einstein generative AI to summarize party philanthropic assessments, party philanthropic indicators, party philanthropic occurrences, and interaction summaries. Automate the case creation for research requests with the Create Research Request Case flow.

Optimize Your Philanthropic Engagement and Research Efforts with Agentforce

Use Philanthropic Research Topics in Agentforce to summarize the milestones and wealth capacities of prospects. Get answers to questions about a prospect's professional affiliations and philanthropic events. Leverage these insights to build personalized engagement strategies, foster deeper relationships with donors, and increase their loyalty.

Build Lifelong Philanthropic Relationships with Gift Planning

Establish multiyear philanthropic journeys for your prospects and donors that include complex planned gifts such as charitable gift annuities, trusts, life insurance, donor-advised funds, and bequests. Institutions can reduce the problems and risks of manual processes and scattered data by combining different aspects of gift planning into a single platform.

New and Changed Objects in Education Cloud

Do more with the new and updated Education Cloud objects.

New and Enhanced Common Features for Education Cloud

Education Cloud includes access to some features that are available across clouds and products in Industries. Use these features to extend and customize Education Cloud based on your business needs.

- Fundraising

Use Agentforce to summarize and get insights into philanthropic and wealth data. Create and manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one place. Simplify the management of complex gift planning processes by using new Gift Planning objects.

Use Different Rubrics to Assess Each Application Stage

Improve your application review process by assigning individualized rubrics to each stage. Administrators can assign customized rubrics based on the internal status of an individual application. For example, you can create and assign different rubrics for application reviews, phone interviews, and in-person interviews. The different rubrics help you use the right criteria to assess each stage.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

Who: Users with the Education Cloud Full Access or the Education Cloud Reviewer permission set can use this feature.

See Also

Salesforce Help: Connect Rubrics to Applications (can be outdated or unavailable during release preview)

Transform Student Recruitment with Agentforce for Education: Student Recruitment (Beta)

Handle escalations, create Academic Interest records, register prospects for campus tours and events, and start the application process by using the new topics and actions in the Student Recruitment Agent.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license and the applicable Agentforce add-on license are enabled.

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

Who: Users with the Education Cloud Full Access permission set can configure Student Recruitment Agent. Any user, including guest users, can use the Student Recruitment Agent.

See Also

Salesforce Help: Student Recruitment Agent for Education Cloud (Beta) (can be outdated or unavailable during release preview)

Gain Insights into Applicant Campus Preferences

Let applicants rank preferred campus locations during the application process. This data helps admissions teams to make more informed offer decisions. Increase applicant retention within your multicampus system by offering placements at alternative campuses and schools.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

Who: Users with the Education Cloud Full Access permission set can configure Application Campus Preferences, and view and edit applicants' preference data. Users with the Education Cloud Reviewer permission set can view applicants' preference data. Users with the Education Cloud Experience Cloud Access permission set can select their preferred campus locations on your applicant portal.

How: To set up Application Campus Preferences, complete these tasks.

- Clone and activate these Omnistudio components to use on your applicant portal.
  - EDUAdmissions_CampusPref_English_1: The Omniscript that displays the Flexcards and Lightning web components for the campus preferences feature.
  - EDUAdmissionsCampusPref: The Flexcard that shows the eduadmissionsCampusSelector Lightning web component.
  - EDUAdmissionsCampusPrefSequencer: The Flexcard that shows the campus preferences Lightning web component.
  - EDUAdmissionsGetCampusPref: The Omnistudio Data Mapper that gets the school or campus records to appear in the select campus view.
  - EDUAdmissionsSaveCampusPref: The Data Mapper that saves the selected schools or campus records.
- Create an Application Render Method that references your cloned copy of the EDUAdmissions_CampusPref_English_1 Omniscript.
- Expose Application Campus Preferences to applicants by creating an Application Stage record and other dynamic application records.
- Reviewers and internal users can access preference data through each application’s related Individual Application Task and Individual Application Task Item records.

See Also

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

Enhance Students’ Campus and Program Search with Detailed Profiles

Use new objects and fields to describe campuses and schools, and relate them to program and learning program offerings within the Education Cloud data model. Use this data to help prospective students research schools and programs in the Campus and Program Finder. Provide detailed profiles, including locations, formats, and fields of study. Help students identify and apply for the learning programs that specific campuses offer.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

Who: Users with the Education Cloud Full Access permission set can populate data. External users can access this data when the Salesforce admin enables relevant objects for them.

See Also

Salesforce Release Notes: New and Changed Objects in Education Cloud (can be outdated or unavailable during release preview)

Connect Students to Nearby Schools and Programs with Campus and Program Finder

Make it easy for students and families to browse and filter campuses and programs in their area. Create an Experience Cloud site for applicants to filter by location, learning program, campus or school, grade level, and other criteria. Show results in a list or on a map.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

Who:

- Users with the Education Cloud Full Access permission set can configure and use Campus and Program Finder.
- Users with the Education Cloud Reviewer permission set can use Campus and Program Finder.
- Users with Education Cloud Experience Cloud Access and unauthenticated guest users can use Campus and Program Finder when the Salesforce admin enables relevant objects for them.

How: Configure the included Flow and Data Processing Engine definition to populate new objects and fields to present your programs and campuses. Configure objects and fields for external access. Use Criteria-Based Search and Filter in your Experience Cloud site to help users search for programs and campuses and filter results. Optionally, create Flexcards to show program and campus information.

See Also

Salesforce Release Notes: New and Changed Objects in Education Cloud (can be outdated or unavailable during release preview)

Salesforce Help: Criteria-Based Search and Filter (can be outdated or unavailable during release preview)

Salesforce Help: Campus and Program Finder (can be outdated or unavailable during release preview)

Maximize School and Program Visibility to K-12 Applicants

Use new and improved objects and fields to present primary and secondary schools as well as academic programs on your Education Cloud Experience Cloud site. Help students and families find schools and programs in the Campus and Program Finder. Populate new grade fields to specify the grade levels of learning programs and courses. Classify schools and campuses by available grade levels and institution types such as public, private, or charter. Configure new location objects to present schools at multiple administrative levels, including city, state, and country.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license is enabled.

Who: Users with the Education Cloud Full Access permission set can populate data. External users can access this data when the Salesforce admin enables relevant objects for them.

See Also

Salesforce Release Notes: New and Changed Objects in Education Cloud (can be outdated or unavailable during release preview)

Manage Critical Academic Operations

Extend the power of Education Cloud with new student information system (SIS) capabilities. Empower staff to design and implement auditable academic policies, manage holds and blocks for students, load course offering schedules by using API, and define course registration windows. Provide students with the ability to register for courses.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where the Education Cloud license, Education Cloud Advanced Academic Operations for Experience Cloud add-on (available with purchase of Customer Community Plus for Education - Pro), and Education Cloud Advanced Academic Operations for Experience Cloud platform licenses are enabled. To purchase the add-on, contact your Salesforce account executive.

Who: Users with the Education Cloud Advanced Academic Operations Admin Access permission set can edit relevant objects. Users with the Education Cloud Advanced Academic Operations for Experience Cloud Access and Education Cloud for Experience Cloud permission sets can register by using the Advanced Academic Operations features in Experience Cloud.

How: Turn on Advanced Academic Operations in Set Up Education Cloud. After you purchase Customer Community Plus for Education - Pro, assign new permissions to student users.

Optimize the Course Registration Experience

Enable Advanced Academic Operations to provide students with a unified course registration experience. Facilitate students’ course searches, availability checks, enrollment eligibility verification, and registration confirmation in a single process. Make it easy for students to view, modify, or withdraw from registered courses. Automatically create a student enrollment record to maintain accurate and up-to-date enrollment data.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with these licenses and add-ons:

- The Education Cloud license
- The Education Cloud Advanced Academic Operations for Experience Cloud add-on (additional cost)

- The Education Cloud Advanced Academic Operations for Experience Cloud platform license

Who:

- To enable Advanced Academic Operations and assign permission sets to student users, users need the Education Cloud Full Access permission set.
- To edit relevant objects, users need the Education Cloud Advanced Academic Operations Admin Access permission set.
- To register in Experience Cloud, student users need the Education Cloud Advanced Academic Operations for Experience Cloud Access and the Education Cloud for Experience Cloud permission sets, and the Access Education Cloud Advanced Academic Operations for Experience Cloud Users user permission.
- To view their course search results in Experience Cloud, student users need the Education Cloud for Experience Cloud permission set.

How: In Setup, find and select **Set Up Education Cloud**, and then under Set Up Academic Operations, turn on Advanced Academic Operations.

See Also

Salesforce Help: Course Search and Registration (can be outdated or unavailable during release preview)

Define, Enforce, and Manage Student Holds Effectively

Use a hold definition guided setup to define and edit holds without manual entry. Easily enter regulatory code (hold) details, select reasons and restrictions for a hold, and assign resolution tasks. Gain a comprehensive, unified view of reasons, restrictions, and resolution tasks in a hold summary. Use dedicated APIs to create holds accurately and fetch student violations to enforce the hold. Track and manage student holds in a unified Hold Instance View, and provide students a hold summary view in the Action Center.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, Performance, and Developer editions where the Education Cloud license is enabled.

Who: Users with the Education Cloud Full Access permission set can use this feature.

Manage Your Course Offerings and Course Offering Schedules in Bulk

Save time by using APIs to import your existing course offerings and course offering schedules into Education Cloud. Create or update multiple course offerings and their related schedules at once.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Education Cloud license.

Who: Users with the Education Cloud Full Access permission set can create or update course offerings and course offering schedules.

Calculate the Grade Point Average of Students with Policy Rules

Use policy rules (expression sets) in Education Cloud to calculate the grade point average (GPA) of students enrolled in an academic term. Registrar staff can verify and publish the calculated results from the Academic Score Report tab of the student's academic term enrollment record page. Use the Academic Score Report Lightning web component on your Experience Cloud site so students can view their published score details.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with these licenses and add-ons:

- The Education Cloud license
- Education Cloud Advanced Academic Operations for Experience Cloud Add-On (available with purchase of Customer Community Plus for Education - Pro)
- The Education Cloud Advanced Academic Operations for Experience Cloud platform license

Who: Users with the Education Cloud Full Access permission set can set up and manage policy rules. Users with the Education Cloud Advanced Academic Operations for Experience Cloud Access permission set can view Academic Score Report on your Experience site.

How: In Setup, find and select **Set Up Education Cloud**, and then under Set Up Academic Operations, turn on Advanced Academic Operations.

Answer and Support Advisors Autonomously with Agentforce

Grow your advising team's capacity in minutes. Use Agentforce for Education: Student Advising and summarize student advising cases to quickly understand them. Get immediate answers to questions from students about campus resources, such as facilities, services, activities, clubs, programs, and action plans, and about campus policies. Follow up proactively by suggesting the next-best actions, such as creating to-dos or cases.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Education Cloud license and the applicable Agentforce add-on license.

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

Who: Users with the Education Cloud Full Access permission set can configure Student Advising Topics in Agentforce (Pilot). Users with the Education Cloud for Einstein permission set can use this feature.

How: In Setup, find and select **Set Up Education Cloud**, and then under Set Up Einstein for Education Cloud, turn on Student Advising Topics in Agentforce (Pilot).

See Also

Salesforce Help: AI Agents in Education Cloud (can be outdated or unavailable during release preview)

Manage Philanthropic Research Data Efficiently with Education Cloud

Use Education Cloud's Alumni app to manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one location. Use Einstein generative AI to summarize party philanthropic assessments, party philanthropic indicators, party philanthropic occurrences, and interaction summaries. Automate the case creation for research requests with the Create Research Request Case flow.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Education Cloud license and the Einstein for Sales or Einstein for Service add-on license. Einstein generative AI is available in Lightning Experience.

Who: Users with the Education Cloud Full Access permission set can set up and use this feature.

How: In Setup, find and select **Fundraising Settings**, and then turn on Fundraising.

See Also

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

Optimize Your Philanthropic Engagement and Research Efforts with Agentforce

Use Philanthropic Research Topics in Agentforce to summarize the milestones and wealth capacities of prospects. Get answers to questions about a prospect's professional affiliations and philanthropic events. Leverage these insights to build personalized engagement strategies, foster deeper relationships with donors, and increase their loyalty.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with the Education Cloud license and the applicable Agentforce add-on license.

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

Who: Users with the Education Cloud Full Access and Education Cloud for Einstein permission sets can configure and use Philanthropic Research Topics in Agentforce (Pilot).

How: In Setup, find and select **Fundraising Settings**, and then under Access Fundraising Research in Agentforce (Default), turn on Philanthropic Research Topics in Agentforce (Pilot).

See Also

Salesforce Help: Philanthropic Research Topics in Agentforce (can be outdated or unavailable during release preview)

Build Lifelong Philanthropic Relationships with Gift Planning

Establish multiyear philanthropic journeys for your prospects and donors that include complex planned gifts such as charitable gift annuities, trusts, life insurance, donor-advised funds, and bequests. Institutions can reduce the problems and risks of manual processes and scattered data by combining different aspects of gift planning into a single platform.

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

Who: To use Fundraising with Education Cloud, enable Fundraising in Education Cloud, and then create and assign a permission set to your users.

How: Turn on Gift Planning and Gift Agreements in Fundraising Settings in Setup. Then, add new fields to the page layouts for the Gift Transaction, Gift Commitment, and Gift Soft Credit objects.

New and Changed Objects in Education Cloud

Do more with the new and updated Education Cloud objects.

Represent more details about an academic term registration timeline
: Use the new **Category**, **Description**, **IsDefault**, **IsPublished**, and **EligibilityCriteria** fields on the existing AcademicTermRgstrTimeline object.

Relate an academic term registration timeline to an academic term enrollment
: Use the new **AcademicTermRgstrTimeline** field on the existing AcademicTermEnrollment object.

Represent the details of an academic term enrollment policy rule log
: Use the new AcadTermEnrlPolicyRuleLog object.

Represent an involvement group in an institution
: Use the new InvolvementGroup object.

Represent a member in an institution's involvement group
: Use the new InvolvementGroupMember object.

Represent a junction between competency and another object
: Use the new CompetencyRelatedObject object.

Represent the affinity of a person
: Use the new PersonAffinity object.

Represent the traits of a person

Use the new PersonTrait object.

Indicate whether the regulatory code can be automatically resolved

Use the new **CanResolveAutomatically** field on the existing RegulatoryCode object.

Specify a person's competency stage

Use the new **Stage** field on the existing PersonCompetency object.

Represent more details about an award

Use the new **IsCertification** and **IsVerified** fields on the existing Award object.

Represent more details about a person's employment

Use the new **EmploymentSite**, **EmploymentIndustry**, and **IsVerified** fields on the Award object.

Represent more details about a course offering participant

Use the new **RegistrationDateTime** and **DroppedDateTime** fields on the existing CourseOfferingParticipant object.

Represent information about an educational institution aggregated from other objects

Use the new EducInstSearchableProfile object.

Represent a junction between an institution's account and other objects

Use the new EducInstitutionOffering object.

Represent more details about a business profile

Use the new **Description**, **Format**, **GradesOffered**, **ImageUrl**, **InstitutionType**, **IsPubliclySearchable**, **Region**, **ShortDescription**, and **GradesOfferedSummary** fields on the existing BusinessProfile object.

Represent more details about a learning

Use the new **Grade**, **Category**, **Format**, and **ImageUrl** fields on the existing Learning object.

Represent more details about a learning program

Use the new **Grade**, **Category**, **Format**, **ImageUrl**, and **ShortDescription** fields on the existing LearningProgram object.

Specify the format in which a program is offered

Use the new **Format** field on the existing Program object.

Relate an institution's account to a constituent role

Use the new **Institution** field on the existing ConstituentRole object.

Represent more details about an application review

Use the new **Type** and **Institution** fields on the existing ApplicationReview object.

Represent the sequence number of an individual application task item

Use the new **SequenceNumber** field on the existing IndividualApplicationTaskItem object.

Represent details about an assessment question version choice

Use the new AssessmentQstnVerChoice2 object. The AssessmentQstnVerChoice object is deprecated.

Salesforce for Nonprofits

Use Agentforce to summarize and get insights into philanthropic and wealth data in Fundraising. Create and manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one place. Quickly and accurately enter single or batch gifts using the new Gift Entry Grid. Simplify the management of complex gift planning processes using new Gift Planning objects. In Program and Case Management, track the referrals originating from within your organization from one program to another to better understand the resources you're providing to your clients. Log benefits directly from the participant record to save time and make it easier to track the benefits that were delivered. Make sure that all services and goods are tracked and accounted for by easily creating ad hoc benefit disbursements in bulk, even if the benefit is tied to a schedule. Automate the creation and scheduling of funding award requirements and disbursements to reduce manual effort and errors in Grantmaking. Generate progress reports from predefined templates to save time and improve consistency. Reduce the time and effort required to manage volunteer programs and improve the volunteer experience by using the new Volunteer Management data model. Manage volunteer initiatives, track volunteer hours, and report on volunteer metrics using the data model. Create a volunteer management portal in Experience Cloud to share volunteer opportunities with constituents. Give volunteers the opportunity to browse, search, and register for volunteer opportunities using Volunteer Management in Experience Cloud.

- **Fundraising**
  Use Agentforce to summarize and get insights into philanthropic and wealth data. Create and manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one place. Increase speed and efficiency when entering single or batch gifts using the new Gift Entry Grid. Simplify the management of complex gift planning processes using new Gift Planning objects.
- **Program and Case Management**
  Track the referrals originating from within your organization from one program to another to better understand the resources you're providing to your clients. Log benefit disbursements directly from the participant record to save time and make it easier to track the benefits that were delivered. Easily track all services and goods by creating off-schedule and ad hoc benefits disbursements in bulk.
- **Grantmaking**
  Automate the creation and scheduling of funding award requirements and disbursements to reduce manual effort and errors. Generate progress reports from predefined templates to save time and

improve consistency.

Volunteer Management
Reduce the time and effort required to manage volunteer programs and improve the volunteer experience by using the Volunteer Management data model. Use the data model to manage volunteer initiatives, track volunteer hours, and report on volunteer metrics. Volunteer Management in Experience Cloud users can create a volunteer management portal to share volunteer opportunities with constituents and give volunteers the opportunity to browse, search, and register for volunteer opportunities.

Volunteer Management

Reduce the time and effort required to manage volunteer programs and improve the volunteer experience by using the Volunteer Management data model. Use the data model to manage volunteer initiatives, track volunteer hours, and report on volunteer metrics. Volunteer Management in Experience Cloud users can create a volunteer management portal to share volunteer opportunities with constituents and give volunteers the opportunity to browse, search, and register for volunteer opportunities.

Improve Volunteer Programs with Volunteer Management
Effectively manage volunteer programs, easily recruit and fill roles with qualified volunteers, enhance volunteer engagement and retention, and accurately report on volunteer impact when you turn on Volunteer Management in Salesforce.

Empower Programs and Organizations With Efficient Volunteer Management
Schedule volunteers, track volunteer hours, and report volunteer metrics by using the Volunteer Management data model. To help volunteers find and sign up for opportunities, submit applications, and track hours, Experience Cloud users can build a volunteer portal on the data model. Use this data model to address the problems of limited staffing, increased workload, recruitment and retention challenges, and supervision and scheduling difficulties.

Share Volunteer Opportunities and Gather Participant Details With Volunteer Management in Experience Cloud
Communicate volunteer opportunities directly on your Volunteer Management portal in Experience Cloud. In the portal, users can browse, search, and register for volunteer roles. Collect participant information, manage applications, and track volunteer hours so all involved have a successful experience.

New Objects in Volunteer Management
Do more with the new Volunteer Management objects.

Improve Volunteer Programs with Volunteer Management

Effectively manage volunteer programs, easily recruit and fill roles with qualified volunteers, enhance volunteer engagement and retention, and accurately report on volunteer impact when you turn on Volunteer Management in Salesforce.

Where: This change applies to Lightning Experience in Unlimited and Developer editions where Volunteer Management is enabled.

Who: To access Volunteer Management in Nonprofit Cloud, users need the Manage Volunteer Data permission set. To access Volunteer Management in Experience Cloud, users need the Manage Volunteer Work in Experience Cloud permission set.

How: To turn on Volunteer Management, in Setup, find and select **Volunteer Management Settings**.

Empower Programs and Organizations With Efficient Volunteer Management

Schedule volunteers, track volunteer hours, and report volunteer metrics by using the Volunteer Management data model. To help volunteers find and sign up for opportunities, submit applications, and track hours, Experience Cloud users can build a volunteer portal on the data model. Use this data model to address the problems of limited staffing, increased workload, recruitment and retention challenges, and supervision and scheduling difficulties.

Where: This change applies to Lightning Experience in Unlimited and Developer editions where Volunteer Management is enabled.

Who: To access Volunteer Management in Nonprofit Cloud, users need the Manage Volunteer Data permission set. To access Volunteer Management in Experience Cloud, users need the Manage Volunteer Work in Experience Cloud permission set.

Share Volunteer Opportunities and Gather Participant Details With Volunteer Management in Experience Cloud

Communicate volunteer opportunities directly on your Volunteer Management portal in Experience Cloud. In the portal, users can browse, search, and register for volunteer roles. Collect participant information, manage applications, and track volunteer hours so all involved have a successful experience.

Where: This change applies to Lightning Experience in Unlimited and Developer editions where Volunteer Management is enabled.

Who: To access Volunteer Management in Experience Cloud, users need the Manage Volunteer and Manage Volunteer Work in Experience Cloud permission sets.

New Objects in Volunteer Management

Do more with the new Volunteer Management objects.

Identify the instance of an action plan

Use the new ActionPlan object.

Identify an action plan item
Use the new ActionPlanItem object.

Describe the instance of an action plan template
Use the new ActionPlanTemplate object.

Identify the instance of an item on an action plan template version
Use the new ActionPlanTemplateItem object.

Identify the version of an action plan template
Use the new ActionPlanTemplateVersion object.

Describe a junction between an action plan template and a related record
Use the new ActionPlanTemplateAssignment object.

Log the high level information of a submitted application
Use the new ApplicationForm object.

Describe the verification information of a volunteer application
Use the new ApplicationFormEvaluation object.

Relate an application to the context in which it's held
Use the new ApplicationFormRelation object.

Describe how a part of a volunteer application can be rendered
Use the ApplicationRenderMethod object.

Describe a stage of a volunteer application
Use the new ApplicationStageDefinition object.

Log the benefits associated with a program
Use the new Benefit object.

Describe the competencies that qualify a volunteer
Use the new Competency object.

Store volunteer personnel data
Use the new ContactProfile object.

Describe the role associated with a person
Use the new ConstituentRole object.

Track volunteer metrics
use the DonorGiftSummary object.

Describe the authorized examinations that qualify a volunteer
Use the new Examination object.

Describe a section of a volunteer intake form
Use the new IntakeFormSection object.

Record information on job positions and relate the position to a volunteer initiative
Use the new JobPosition object.

Assign a person to a specific job position shift and track the hours served for the shift
Use the new JobPostionAssignment object.

Log a person's qualification for a job position
Use the new JobPositionQualification object.

Describe a specific work shift
Use the new JobPositionShift object.

Identify the location of the volunteer opportunity
Use the new Location object.

Describe the hours when a volunteer initiative is available
Use the new OperatingHours object.

Describe how a person and a skill competency are related
Use the new PersonCompetancy object.

Log the examinations taken by a person
Use the new PersonExamination object.

Log a person's availability to work at a specific location
Use the new PersonLocationAvailability object.

Describe the characteristics of a position
Use the new Position object.

Describe how a position and benefit are related
Use the new PositionBenefit object.

Record a position-based qualification

Use the new PositionQualification object.

Set the recurrence schedule for job position shifts

Use the new RecurrenceSchedule object.

Describe the period of time on a specified day of the week when the volunteer is available

Use the new TimeSlot object.

Record all volunteer activities for a volunteer initiative

Use the new VolunteerInitiative object.

Vlocity Contract Lifecycle Management

Upgrading to the Summer ’25 managed package automatically enables Document Generation 2.0 and doesn't require in-app consent. Increase file size limit for custom fonts in the Docgen Custom Fonts Library with a support request.

Transition Automatically to Document Generation 2.0

Document Generation 1.0 is scheduled to retire by July 2025. To start using Document Generation 2.0 in managed packages, upgrade to Summer ’25 managed package. Document Generation 2.0 is automatically enabled with Summer ’25 upgrade for Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages. The in-app consent, which was previously required to use Document Generation 2.0, is no longer applicable. With this seamless 2.0 transition, start validating your existing configurations in a sandbox environment and complete the necessary post-install or post-upgrade steps. If you're already using Document Generation 2.0, no further action is required.

Configure File Size Limits to Accommodate Larger Custom Font Files

Increase the file size limit for custom font files in the Docgen Custom Fonts Library through a support request. Use larger font files to generate documents in your desired fonts and maintain brand consistency. Configure custom file size limits within the combined maximum. In addition, the combined maximum allocation is increased from 50 MB to 100 MB, enabling you to use larger files while staying within the total allowed limit.

Transition Automatically to Document Generation 2.0

Document Generation 1.0 is scheduled to retire by July 2025. To start using Document Generation 2.0 in managed packages, upgrade to Summer ’25 managed package. Document Generation 2.0 is automatically enabled with Summer ’25 upgrade for Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages. The in-app consent, which was previously required to use Document Generation 2.0, is no longer applicable. With this seamless 2.0 transition, start validating your existing configurations in a sandbox environment and complete the necessary post-install or post-upgrade steps. If you're already using Document

Generation 2.0, no further action is required.

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

See Also

Document Generation 1.0 Retirement
Enhance Document Generation with Document Generation 2.0
Provide In-App Consent for Document Generation 2.0
Document Generation 2.0 for Managed Packages

Configure File Size Limits to Accommodate Larger Custom Font Files

Increase the file size limit for custom font files in the Docgen Custom Fonts Library through a support request. Use larger font files to generate documents in your desired fonts and maintain brand consistency. Configure custom file size limits within the combined maximum. In addition, the combined maximum allocation is increased from 50 MB to 100 MB, enabling you to use larger files while staying within the total allowed limit.

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

Who: To migrate and sync fonts in Document Generation 2.0, users need the DocGen Designer permission set.

How: To increase custom font file size limits in Document Generation 2.0, contact your Salesforce representative.

Industries Common Features

Some Salesforce Industries products share features. Business Rules Engine components are now available in Partial, Developer, or Developer Pro sandbox copies. Data Processing Engine leverages Data Cloud for complex data processing. Fundraising introduces the Gift Entry Grid to simplify gift management. Grantmaking automates creation and scheduling of funding award requirements. Industry Integration Solutions keeps your data secure with prebuilt MuleSoft integrations. Process Compliance Navigator helps you meet regulatory requirements, internal policies, and industry standards. Program and Case Management streamlines client services and improves tracking. We've also made enhancements to the Action Launcher, Actionable Relationship Center, Batch Management, Compliant Data Sharing, Interest Tags, Omnistudio Document Generation, Omnistudio for Industries, and Rollup Definitions features.

Action Launcher
Configure Unified Catalog in Action Launcher to make it easier for contact center agents to find and select service processes.

Action Plans

Make it convenient for users to work with action plans for their business processes. Save time and reduce manual effort by deploying predefined, industry-specific action plan templates. Improve task visibility and streamline fulfillment workflows with the new action plan task list for target records.

Actionable Relationship Center

View many-to-one relationship type records on an Actionable Relationship Center (ARC) graph.

Batch Management

Do more with the new and updated object and metadata types in Batch Management.

Business Rules Engine

Business Rules Engine components are now included in Partial, Developer, or Developer Pro sandbox copies. Handle null value conditions by using the IsNull and IsNotNull operators and functions in expression set steps. Quickly modify decision tables by downloading them as CSV files for bulk edits and re-uploading them.

Collections and Recovery

Configure an Experience Cloud site portal by using the Collections and Recovery portal template. Manage collection campaigns, and track the performance of your collection campaigns with Collections data kit. Provide a comprehensive view of collection plans and related records by using the Hierarchical View component. Efficiently log customer meeting outcomes with a quick action. Minimize regulatory violations with configurable call compliance checks. Enhance customer accountability by setting a maximum limit for the number of promises to pay.

Compliant Data Sharing

Compliant Data Sharing custom object record owners can now delete custom object participant records by using a new setting.

Context Service

Integrate external data seamlessly into your application context by using the new addRecordsToContext method in the Apex IndustriesContext class. Find the right data model objects faster by using the data space filter. Add longer descriptions for the attributes of your context definition by using the expanded Description field.

Cross Object Field History (Generally Available)

Track and visualize field changes across related objects in a single view. Cross-Object Field History is now generally available with some improvements.

Data Consumption Framework

Effortlessly integrate your Salesforce org with Equifax to access consumer credit history by using an integration definition template.

Data Processing Engine

Use Data Cloud to perform complex data processing and derive actionable insights with slice nodes, the Explode and Sequence functions, and the option to update only changed records. These foundational improvements set the stage for ensuring data integrity and flexibility with composite writeback nodes, Upsert actions on non-editable fields, and advanced metadata enhancements.

Discovery Framework

Users can save drafts of Discovery Framework-based assessments they aren't ready to submit. Provide a consolidated view of all assessments to your users, making it easier to track their progress.

Einstein Summary

Empower users to take quick, meaningful action with AI-driven insights directly from their AI summary. Continue with your AI agent to explore further, ask follow-up questions, and stay productive on the go.

Fundraising

Use Agentforce to summarize and get insights into philanthropic and wealth data. Create and manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one place. Increase speed and efficiency when you enter single or batch gifts by using the new Gift Entry Grid. Simplify the management of complex gift planning processes by using new Gift Planning objects.

Grantmaking

Automate the creation and scheduling of funding award requirements and disbursements to reduce manual effort and errors. Generate progress reports from predefined templates to save time and improve consistency.

Industries Configure, Price, Quote (CPQ)

Improve support efficiency and deployment with the key enhancements to Industries CPQ in Summer ’25. Support teams can resolve queries faster with a comprehensive view of the order details on the new Order Overview page. With Omnistudio for Managed Packages, deployment for Industries CPQ in LWC by using the Omnistudio Build Tool is simpler and more reliable. Classic Cart APIs offer more accurate pricing and better functionality for MACD orders when you use Attribute-Based Pricing. Additionally, Standard Cart APIs support offer specification for flexible in-life changes and product versioning for accelerated innovation without business disruption. Find qualified products faster by using Get Cart Products API, and prevent data loss during replace operations through the enhanced Replace Offers API .

Industry Integration Solutions

Customize the configurations of the prebuilt MuleSoft Direct assets to address your company’s integration requirements.

Interest Tags

Use sharing rules to extend sharing access to users for Tag Categories.

Omnistudio Document Generation

Upgrading to the Summer ’25 managed package automatically enables Document Generation 2.0 and doesn't require in-app consent. Increase file size limit for custom fonts in the Docgen Custom Fonts Library with a support request.

Omnistudio for Industries

Many Industries products include access to Omnistudio features.Use these features to extend and customize your product based on your business needs.

Process Compliance Navigator

Make sure that your organization meets regulatory requirements, internal policies, and industry standards by using the compliance management solution, Process Compliance Navigator. Create validation procedures with compliance controls to avoid non-compliance and to achieve ongoing regulatory compliance. Prevent compliance violations through compliance checks and compliance execution features. Draft clauses for regulations by using generative AI for quickly scanning a regulation document and providing a list of regulation clauses. Demonstrate compliance by using the audit trail of compliance control executions tied to regulations and policies.

Program and Case Management
Track the referrals originating from within your organization from one program to another to better understand the resources you're providing to your clients. Enter benefit disbursements directly from the participant record to quickly and easily track the benefits that were delivered. Easily track all services and goods by creating off-schedule and ad hoc benefits disbursements in bulk.

Rollup Definitions
Configure multiple record rollup definitions within one LWC component for improved data visualization. Set up on-demand record rollup definitions quickly and efficiently using the guided setup. Help business executives make more informed decisions by using the enhancements to record rollup definitions.

Stage Management
Create stage definitions quickly and easily by using templates. Make workflows more context-aware by assigning tasks to users or queues associated with reference object. Create flexible stage journeys tailored to different business contexts by using stage definition assignments. Help users understand and resolve issues during record stage transition by adding error messages that appear when criteria aren't met.

Action Launcher

Configure Unified Catalog in Action Launcher to make it easier for contact center agents to find and select service processes.

Simplify Service Access in Action Launcher with Unified Catalog
Action Launcher now supports Unified Catalog, which consolidates services from Service Catalog, Service Process Studio, and Product Catalog Management. Unified Catalog improves user experience and streamlines service access, making it easier for your contact center agents to use Action Launcher to find and launch the service processes they need.

See Also
Salesforce Help: Action Launcher

Simplify Service Access in Action Launcher with Unified Catalog

Action Launcher now supports Unified Catalog, which consolidates services from Service Catalog, Service Process Studio, and Product Catalog Management. Unified Catalog improves user experience and streamlines service access, making it easier for your contact center agents to use Action Launcher to find and launch the service processes they need.

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

Who: To use this feature, users need the Industry Service Excellence and Unified Catalog add-on licenses.

How: In Lightning App Builder, click the Action Launcher component. In the component's settings, select **Unified Catalog** in the Action Launcher Configuration field. Then, select a catalog and an expression set.

Save your changes.

Action Plans

Make it convenient for users to work with action plans for their business processes. Save time and reduce manual effort by deploying predefined, industry-specific action plan templates. Improve task visibility and streamline fulfillment workflows with the new action plan task list for target records.

Accelerate Business Processes with Predefined Action Plan Templates

Save time and reduce manual effort by deploying predefined, industry-specific action plan templates. Each template includes a complete task workflow for common business processes such as onboarding, incident resolution, change management, and case handling. After deployment, customize the template to fit your business needs.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Action Plan is enabled.

How: From Setup, go to Action Plan Template Settings and deploy the required industry specific template. Then, modify the action plan template and activate it.

Improve Task Visibility and Streamline Workflows with Action Plan Task Lists

Show all the tasks associated with an action plan in a single, consolidated view on the Tasks tab of a record details page. Manage dependencies and complete work on time by viewing key task information such as status, priority, and due date without switching between sections or pages.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Action Plan is enabled.

New and Changed Objects in Action Plans

Do more with the new and updated objects.

Action Plans

Do more with the new and updated fields for the ActionPlanTemplate object.

Specify the category that the action plan template belongs to
: Use the new **Category** field on the existing ActionPlanTemplate object.

Indicate the subcategory that the action plan template belongs to
: Use the new **Subcategory** field on the existing ActionPlanTemplate object.

Specify the estimated number of days to complete the action plan
: Use the new **EstimatedCompletionDays** field on the existing ActionPlanTemplate object.

Specify the source type that the action plan template belongs to
: Use the new **SourceType** field on the existing ActionPlanTemplate object.

Indicate the path to the file-based template that was used to create the action plan template
: Use the new **FileBasedTemplatePath** field on the existing ActionPlanTemplate object.

Actionable Relationship Center

View many-to-one relationship type records on an Actionable Relationship Center (ARC) graph.

Visualize More Relationships on an ARC Graph
Show records related to each other via a many-to-one relationship type in Actionable Relationship Center (ARC). The many-to-one relationship type uses a lookup relationship to link many records from an object to a single record from another object. In ARC, it shows a lookup field from the child node to the parent node. You can add one-to-many or many-to-many nodes to the child node. Previously, you could create an ARC graph by using only one-to-many or many-to-many relationship types.

Visualize More Relationships on an ARC Graph

Show records related to each other via a many-to-one relationship type in Actionable Relationship Center (ARC). The many-to-one relationship type uses a lookup relationship to link many records from an object to a single record from another object. In ARC, it shows a lookup field from the child node to the parent node. You can add one-to-many or many-to-many nodes to the child node. Previously, you could create an ARC graph by using only one-to-many or many-to-many relationship types.

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

Why: See connections and related records in a household on an ARC graph by using the Party Relationship Group object and many-to-one relationship type in ARC.

How: In Setup, create an ARC relationship graph. On the Properties tab, select relationship type as **Many-to-One**.

Batch Management

Do more with the new and updated object and metadata types in Batch Management.

Changed Object in Batch Management

Do more with the changed object in Batch Management.

Specify the name of the failed record in the batch job part
Use the new **RecordName** field on the existing BatchJobPartFailedRecord object.

New and Changed Metadata Types in Batch Management

Learn more about the changed metadata types in Batch Management.

New Metadata Type

Specify information about fields that are used to group data before they're added to a batch job
Use the **fieldPath**, **domainObjectName**, and **fieldName** fields on the new BatchDataSourceOrderField subtype of the BatchProcessJobDefinition metadata type.

Changed Metadata Types

Specify the type of data source that's used to create a batch job definition, whether it's multiple Salesforce objects or a single Salesforce object
Use the new **dataSourceType** field on the existing BatchDataSource subtype of the BatchProcessJobDefinition metadata type.

Save the field path and object name details of the related object
Use the new **fieldPath** and **domainObjectName** fields on the existing BatchDataSrcFilterCriteria subtype of the BatchProcessJobDefinition metadata type.

Business Rules Engine

Business Rules Engine components are now included in Partial, Developer, or Developer Pro sandbox copies. Handle null value conditions by using the IsNull and IsNotNull operators and functions in expression set steps. Quickly modify decision tables by downloading them as CSV files for bulk edits and re-uploading them.

Simplify Testing of Business Rules Engine Components in Sandboxes
Create and refresh the Partial, Developer, or Developer Pro sandbox copies that include Business Rules Engine components by default. Quickly test expression sets and lookup tables without moving them manually from production to sandbox orgs.

Ensure Precision in Calculation Results
Define decimal scale in expression set versions to determine the number of decimal places in calculation steps where the output variables are context variables. To prevent rounding errors that can lead to inaccuracy, set an appropriate number of decimal places for your use case.

Handle Null Values Flexibly by Setting Default Behaviour
Set a default behavior for expression set versions to initialize the resources with null or default values. Easily handle missing resource values to suit your business requirements. Use the IsNull and IsNotNull operators and functions in the condition, list filter, and calculation steps.

Migrate Decision Matrix Versions Efficiently by Using Ranks
Assign unique ranks to decision matrix versions in the source org to make sure that the correct decision matrix version is invoked after migration. Avoid manually defining the rank and activating decision matrix versions in the target org, as decision matrix versions retain their rank after migration. Enable your business rule updates to go live quicker post-migration, through the automatic selection of the appropriate decision matrix version from multiple valid versions.

Accelerate Bulk Updates to Decision Tables with Improved CSV File Support
To make extensive modifications to decision tables faster, download your decision tables as a CSV file. Then make bulk edits to the file and upload it back. Choose to either append new rows of data to an existing table or make bulk changes by overwriting the existing values.

Enhance Decision Table Invocations with Apex
Simplify your code and improve decision table performance for bulk calls. Use the new Connect API to make bulk invocations of decision tables with Apex.

Decision Table Types Now Have New Names
Decision table names are updated to better represent their capabilities. Low volume decision tables are called standard decision tables. Medium volume decision tables are called advanced decision tables. These changes are now live across all Salesforce apps.

Improve Scalability and Efficiency in Decision Tables
Simultaneously run up to 60 advanced decision tables in your Salesforce org. Previously, you ran 40 advanced decision tables simultaneously. Minimize disruption and reduce processing time by performing incremental refreshes on decision tables that have up to 5 input objects.

Simplify Testing of Business Rules Engine Components in Sandboxes

Create and refresh the Partial, Developer, or Developer Pro sandbox copies that include Business Rules Engine components by default. Quickly test expression sets and lookup tables without moving them manually from production to sandbox orgs.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Business Rules Engine and Context Service.

Ensure Precision in Calculation Results

Define decimal scale in expression set versions to determine the number of decimal places in calculation steps where the output variables are context variables. To prevent rounding errors that can lead to inaccuracy, set an appropriate number of decimal places for your use case.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Business Rules Engine and Context Service.

Who: To use context definitions in expression sets, users need the Rule Engine Designer permission set.

How: From Setup, find and select **Business Rule Engine Settings** and turn on the **Decimal Scale Configuration for Context Tag Values** setting. Set a value from 2 through 38 in the Decimal Scale setting for the expression set version.

Handle Null Values Flexibly by Setting Default Behaviour

Set a default behavior for expression set versions to initialize the resources with null or default values. Easily handle missing resource values to suit your business requirements. Use the IsNull and IsNotNull operators and functions in the condition, list filter, and calculation steps.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Business Rules Engine and Context Service.

How: To initialize the expression set version resources with null values, turn off the Initialize resources to default values option when you create an expression set. To customize how null values are handled, use the IsNull and IsNotNull operators and functions in the condition, list filter, and calculation steps. For example, to treat a missing number as 0, leave the Initialize resources to default values option on. To treat it as null, turn it off.

Migrate Decision Matrix Versions Efficiently by Using Ranks

Assign unique ranks to decision matrix versions in the source org to make sure that the correct decision matrix version is invoked after migration. Avoid manually defining the rank and activating decision matrix versions in the target org, as decision matrix versions retain their rank after migration. Enable your business rule updates to go live quicker post-migration, through the automatic selection of the appropriate decision matrix version from multiple valid versions.

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To make extensive modifications to decision tables faster, download your decision tables as a CSV file. Then make bulk edits to the file and upload it back. Choose to either append new rows of data to an existing table or make bulk changes by overwriting the existing values.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Business Rules Engine is enabled.

How: To update an existing decision table, click **Add CSV Data**. Upload a CSV file to append new rows of data. To overwrite existing values, download the existing table, edit the downloaded file, and then upload the updated CSV file.

See Also

Salesforce Help: Add CSV Data to Decision Tables (can be outdated or unavailable during release preview)

Enhance Decision Table Invocations with Apex

Simplify your code and improve decision table performance for bulk calls. Use the new Connect API to make bulk invocations of decision tables with Apex.

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Decision table names are updated to better represent their capabilities. Low volume decision tables are called standard decision tables. Medium volume decision tables are called advanced decision tables. These changes are now live across all Salesforce apps.

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Improve Scalability and Efficiency in Decision Tables

Simultaneously run up to 60 advanced decision tables in your Salesforce org. Previously, you ran 40 advanced decision tables simultaneously. Minimize disruption and reduce processing time by performing incremental refreshes on decision tables that have up to 5 input objects.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Business Rules Engine is enabled.

Collections and Recovery

Configure an Experience Cloud site portal by using the Collections and Recovery portal template. Manage collection campaigns, and track the performance of your collection campaigns with Collections data kit. Provide a comprehensive view of collection plans and related records by using the Hierarchical View component. Efficiently log customer meeting outcomes with a quick action. Minimize regulatory violations with configurable call compliance checks. Enhance customer accountability by setting a maximum limit for the number of promises to pay.

Accelerate Collections and Recovery Processes with Experience Cloud Site
Use the Collections and Recovery portal template to create a dedicated portal for collections and recovery specialists of third-party agencies. They can monitor and manage operations more efficiently, improve cash flows with promise-to-pay agreements, build better customer relationships through automated payment updates, and keep track of customer visits–all without leaving the portal. Reduce the manual effort and errors associated with spreadsheet sharing, and streamline the coordination between lenders and recovery agencies.

Efficiently Record Meeting Outcomes with a Quick Action
Collections specialists can capture collections-related interactions and next steps with a quick action, achieving faster recovery of overdue amounts and improving customer experience. Enhance transparency and accountability by making it easy for collections specialists to create a collections interaction event and a case if required. Streamline the legal escalation process by configuring business rules to quickly determine which cases require legal proceedings, create legal cases, and assign them to relevant legal teams.

Minimize Credit Risks with Promise-to-Pay Limits
Reduce the administrative burden and time spent on follow-ups, leading to faster resolution of overdue accounts. Streamline your collections process, and reduce the risk of bad debt by setting a maximum limit for the number of promises to pay. Encourage customers to be more accountable for their commitments, resulting in improved cash flow.

Get a Hierarchical View of Collection Plans and Related Records
Make it easy for collections specialists to view collection plans and their related records up to three levels, reducing the time and effort required to go through these records. They can manage collection activities more efficiently by viewing related financial accounts, collection plans, and collection plan items all at once on the collection plan record details page.

Reduce the Risk of Noncompliant Calls with Compliance Checks
Collections specialists can make informed decisions about contacting borrowers by using call compliance checks. Ensure legal compliance by configuring call compliance rules based on your organization’s legal requirements, such as time zone regulations and call frequency limits. Improve contact success rates and productivity of your collections specialists with real-time call compliance information.

Manage Collection Campaigns More Effectively with Collections Data Kit
Collections managers can use Marketing Cloud Growth Edition to create Data Cloud segments and manage collection campaigns without logging in to a separate marketing app. Use automated

workflows to run targeted campaigns across multiple channels, such as email and SMS, to enhance the chances of successful collection outcomes and maintain positive relationships. Track the performance of your collection campaigns in real time and make data-driven adjustments to optimize collection campaign results.

New and Changed Objects
Do more with the new and updated Collections objects.

Accelerate Collections and Recovery Processes with Experience Cloud Site

Use the Collections and Recovery portal template to create a dedicated portal for collections and recovery specialists of third-party agencies. They can monitor and manage operations more efficiently, improve cash flows with promise-to-pay agreements, build better customer relationships through automated payment updates, and keep track of customer visits–all without leaving the portal. Reduce the manual effort and errors associated with spreadsheet sharing, and streamline the coordination between lenders and recovery agencies.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: From Setup, in the Quick Find box, enter *`Digital Experiences`*, and select **All Sites**. Click **New**, select the **Collections and Recovery Portal** template, and click **Get Started**.

Efficiently Record Meeting Outcomes with a Quick Action

Collections specialists can capture collections-related interactions and next steps with a quick action, achieving faster recovery of overdue amounts and improving customer experience. Enhance transparency and accountability by making it easy for collections specialists to create a collections interaction event and a case if required. Streamline the legal escalation process by configuring business rules to quickly determine which cases require legal proceedings, create legal cases, and assign them to relevant legal teams.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: From the App Launcher, find and select **Collections**. Click **Collection Plans**, and open a collection plan record. On the collection plan record details page, from the Action Launcher, click **Capture Collections-Related Interaction**.

Minimize Credit Risks with Promise-to-Pay Limits

Reduce the administrative burden and time spent on follow-ups, leading to faster resolution of overdue accounts. Streamline your collections process, and reduce the risk of bad debt by setting a maximum limit for the number of promises to pay. Encourage customers to be more accountable for their commitments, resulting in improved cash flow.

Where: This change applies to Lightning Experience of multiple Industries clouds.

Get a Hierarchical View of Collection Plans and Related Records

Make it easy for collections specialists to view collection plans and their related records up to three levels, reducing the time and effort required to go through these records. They can manage collection activities more efficiently by viewing related financial accounts, collection plans, and collection plan items all at once on the collection plan record details page.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: Edit the Lightning record page of the Collection Plan object, and drag the Hierarchical View component from the Components panel to the Lightning page canvas location where you want to position the component on the record page.

Reduce the Risk of Noncompliant Calls with Compliance Checks

Collections specialists can make informed decisions about contacting borrowers by using call compliance checks. Ensure legal compliance by configuring call compliance rules based on your organization's legal requirements, such as time zone regulations and call frequency limits. Improve contact success rates and productivity of your collections specialists with real-time call compliance information.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: On the collection plan record details page, in the list of borrowers section, click **Check Call Compliance** adjacent to a borrower.

Manage Collection Campaigns More Effectively with Collections Data Kit

Collections managers can use Marketing Cloud Growth Edition to create Data Cloud segments and manage collection campaigns without logging in to a separate marketing app. Use automated workflows to run targeted campaigns across multiple channels, such as email and SMS, to enhance the chances of successful collection outcomes and maintain positive relationships. Track the performance of your collection campaigns in real time and make data-driven adjustments to optimize collection campaign results.

Where: This change applies to Lightning Experience of multiple Industries clouds with Data Cloud and Marketing Cloud.

Why: After you install the Collections Data Kit, collections managers can readily use collections data to create Data Cloud segments by using segment criteria, such as days past due, total overdue amount, and collection plan segment.

New and Changed Objects

Do more with the new and updated Collections objects.

Store the contact details of the borrower's legal representative or attorney

Use the new **LegalRepresentative** field on the existing CollectionPlan object.

Store the maximum number of promises to pay defined for a collection plan

Use the new **MaximumPromisetoPayCount** field on the existing CollectionPlan object.

Store the result of the collections specialist's interaction with a customer, such as promised to pay, escalated to recovery, legal case created, no commitment, or bankruptcy

Use the new **InteractionOutcome** field on the existing CollectionPlan object.

Store the total legal proceeding expenses for the case associated with a collection plan

Use the new **TotalLegalExpenses** field on the existing CaseProceeding object.

Compliant Data Sharing

Compliant Data Sharing custom object record owners can now delete custom object participant records by using a new setting.

Delete Compliant Data Sharing Participant Records

For Compliant Data Sharing custom objects, record owners have more control to manage participant records. Users without delete access to the Compliant Data Sharing parent custom object can delete a participant record if they own the parent record.

Delete Compliant Data Sharing Participant Records

For Compliant Data Sharing custom objects, record owners have more control to manage participant records. Users without delete access to the Compliant Data Sharing parent custom object can delete a participant record if they own the parent record.

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

How: From Setup, select the Delete custom object participant record by parent record owner setting.

Context Service

Integrate external data seamlessly into your application context by using the new addRecordsToContext method in the Apex IndustriesContext class. Find the right data model objects faster by using the data space filter. Add longer descriptions for the attributes of your context definition by using the expanded Description field.

Add Context Record at User-Defined Level

Integrate external data into existing context data by using the new `addRecordToContext` method in the `IndustriesContext` class in Apex. Use the enriched context data in custom integrations or save it to the Salesforce database. With the new method, you can add a new record at a user-defined level in the hierarchy of the context.

Search Data Model Objects Faster with Data Space Filter
Easily find the Data Model Objects (DMOs) that you need for your context mappings by using the data space filter to narrow down the list of available DMOs.

Add Detailed Description for Context Attributes
Provide descriptions of up to 3100 characters for your context definition attributes by using the enhanced Description field.

Easily Sync Extended Definitions with Standard Definitions
Keep your extended definitions up-to-date with the latest standard definitions effortlessly. The updated Sync Now option now identifies changes in the parent standard definition so you can easily add relevant new attributes and mappings to your extended definition. With this enhancement, you can now easily synchronize all changes, saving time and reducing the risk of errors.

Add Context Record at User-Defined Level

Integrate external data into existing context data by using the new `addRecordToContext` method in the `IndustriesContext` class in Apex. Use the enriched context data in custom integrations or save it to the Salesforce database. With the new method, you can add a new record at a user-defined level in the hierarchy of the context.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: Use the new `addRecordToContext` method. This example code shows how to add a new record in a context using the supported parameters of *input*, *contextId*, *overWriteExistingRecords*, *inputData*, and *isTaggedData*.

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContex
t();

Map<String, Object> inputAddRecord = new Map<String, Object>();
inputAddRecord.put('contextId', context.get('contextId').ToString());
inputAddRecord.put('overWriteExistingRecords', true);
inputAddRecord.put('isTaggedData', false);
inputAddRecord.put('inputData', '{\"Account\":[{\"id\":\"synthetic\",\"busines
sObjectType\":\"Account\",\"Name\":\"test_account\"}]}');

Map<String, Object> outputAddRecord = industriesContexts.addRecordToContext(in
putAddRecord);
```

Search Data Model Objects Faster with Data Space Filter

Easily find the Data Model Objects (DMOs) that you need for your context mappings by using the data space filter to narrow down the list of available DMOs.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: From Setup, in the Quick Find box, find and select **Context Definitions**. On the Custom Definitions tab, select a definition to open it. On the Map Data tab, click **Add Mapping**, specify the mapping details, and click **Next**. On the Mapping Intent Details tile, select **Hydration** as the Mapping Intent operation, and then click **Map**. On the Connect Objects tile, click **Select Data Source**, and to select one or more data spaces, in the Data Model Objects tab, in **Filter by Data Space**, click .

Add Detailed Description for Context Attributes

Provide descriptions of up to 3100 characters for your context definition attributes by using the enhanced Description field.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

Easily Sync Extended Definitions with Standard Definitions

Keep your extended definitions up-to-date with the latest standard definitions effortlessly. The updated Sync Now option now identifies changes in the parent standard definition so you can easily add relevant new attributes and mappings to your extended definition. With this enhancement, you can now easily synchronize all changes, saving time and reducing the risk of errors.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Context Service is enabled.

How: From Setup, in the Quick Find box, find and select **Context Definitions**. On the Custom Definitions tab, select the extended definition that you want to upgrade and click **Sync Now**.

Cross Object Field History (Generally Available)

Track and visualize field changes across related objects in a single view. Cross-Object Field History is now generally available with some improvements.

Track Changes Across Related Object Fields with Cross-Object Field History (Generally Available)
Monitor changes to records across related objects easily in a single view to identify key updates made by different users. Improve the auditability of record changes and derive inferences effortlessly. Eliminate the hassle of checking each record individually, by using the Cross-Object Field History Lightning web component. Track updates across multiple objects with complex data models, such as those used for Know Your Customer and Business Relationship Plan.

Track Changes Across Related Object Fields with Cross-Object Field History (Generally Available)

Monitor changes to records across related objects easily in a single view to identify key updates made by different users. Improve the auditability of record changes and derive inferences effortlessly. Eliminate the hassle of checking each record individually, by using the Cross-Object Field History Lightning web component. Track updates across multiple objects with complex data models, such as those used for Know Your Customer and Business Relationship Plan.

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

How: In Setup, search for and select **Cross-Object Field History Settings**. Turn on Cross-Object Field History. Set up the objects to be tracked for field changes by using the Cross-Object Field History Graphs builder.

Data Consumption Framework

Effortlessly integrate your Salesforce org with Equifax to access consumer credit history by using an integration definition template.

Easily Create Integration Definitions by Using Templates
Implement your integrations faster and minimize the need for manual data entry and setup by using integration definition templates.

Access Up-to-Date Customer Data with Equifax Integration Template
Effortlessly integrate your Salesforce org with Equifax by using an integration definition template to access consumer credit history. Incorporate this template into your workflow to streamline the setup process, and save time spent on setting up integrations. Financial institutions can use the template to verify the credit history of loan applicants, assess their creditworthiness, and speed up the loan origination process.

Easily Create Integration Definitions by Using Templates

Implement your integrations faster and minimize the need for manual data entry and setup by using integration definition templates.

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

How: In Setup, find and select **Integration Definitions**, click **New** and select **Use a Template** to create an integration definition.

Access Up-to-Date Customer Data with Equifax Integration Template

Effortlessly integrate your Salesforce org with Equifax by using an integration definition template to access consumer credit history. Incorporate this template into your workflow to streamline the setup process, and save time spent on setting up integrations. Financial institutions can use the template to verify the credit history of loan applicants, assess their creditworthiness, and speed up the loan origination process.

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

Note The Equifax integration definition template is applicable for customers using the Equifax Credit Scoring services in the United States.

Data Processing Engine

Use Data Cloud to perform complex data processing and derive actionable insights with slice nodes, the Explode and Sequence functions, and the option to update only changed records. These foundational improvements set the stage for ensuring data integrity and flexibility with composite writeback nodes, Upsert actions on non-editable fields, and advanced metadata enhancements.

Transform Complex Data by Using Data Cloud
Use slice nodes to process large volumes of data and generate actionable insights in Data Cloud runtime. Get a wider range of data manipulation options by using the Explode and Sequence functions. Write back only the changed data by using the new Update only changed records option.

Maintain Data Integrity Across Related Objects with Composite Writeback
Write to multiple, related entities within the same transaction to ensure data consistency. Use the new composite writeback node in the CRM Analytics runtime to define the relationships between various writeback nodes. Group records across nodes and write back data together, in a single transaction.

Write Data More Flexibly with Enhanced Upsert Action Type
Streamline your data integration processes by using the Upsert action on non-editable fields. To add new data without overwriting existing data, configure writeback nodes to include non-editable fields in the field mapping. Eliminate the need to create separate nodes for the Upsert and Insert operations.

Changed Metadata Types in Data Processing Engine
Learn more about the changed metadata types in Data Processing Engine.

Transform Complex Data by Using Data Cloud

Use slice nodes to process large volumes of data and generate actionable insights in Data Cloud runtime. Get a wider range of data manipulation options by using the Explode and Sequence functions. Write back only the changed data by using the new Update only changed records option.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions of Data Cloud with Data Processing Engine.

Maintain Data Integrity Across Related Objects with Composite Writeback

Write to multiple, related entities within the same transaction to ensure data consistency. Use the new composite writeback node in the CRM Analytics runtime to define the relationships between various writeback nodes. Group records across nodes and write back data together, in a single transaction.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Data Processing Engine is enabled.

How: In the node canvas, click **New Node** and then select **Composite Writeback** as the node type.

Write Data More Flexibly with Enhanced Upsert Action Type

Streamline your data integration processes by using the Upsert action on non-editable fields. To add new data without overwriting existing data, configure writeback nodes to include non-editable fields in the field mapping. Eliminate the need to create separate nodes for the Upsert and Insert operations.

Where: This change applies to Lightning Experience in Professional, Enterprise, Unlimited, and Developer editions where Data Processing Engine is enabled.

How: Select **Allow non-editable fields** on the Configuration tab of the writeback node.

Changed Metadata Types in Data Processing Engine

Learn more about the changed metadata types in Data Processing Engine.

Specify whether non-editable fields are included in field mapping for the Upsert action type

Use the new **canWrtBckToNonEditableFields** field on the existing BatchCalcJobWritebackObject subtype of the BatchCalcJobDefinition metadata type.

Specify the field name that describes the relationship between the child and parent writeback objects in a composite writeback node

Use the new **relationshipName** field on the existing BatchCalcJobAtomicWritebackRelationship subtype of the BatchCalcJobDefinition metadata type.

Specify the target field type and value on the writeback object

Use the new **fieldType** and **isAutogenerated** fields on the existing BatchCalcJobWritebackMapping subtype of the BatchCalcJobDefinition metadata type.

Discovery Framework

Users can save drafts of Discovery Framework-based assessments they aren't ready to submit. Provide a consolidated view of all assessments to your users, making it easier to track their progress.

Save Discovery Framework Assessments as Drafts to Complete Later
Salesforce users can save drafts of Discovery Framework-based assessments they aren't ready to submit. They can easily find and complete these draft assessments later at their convenience. The flexibility to save drafts prevents the loss of work when users pause an assessment for any reason.

Simplify Assessment Tracking with the Assessments Lightning Web Component
Improve assessment workflow by adding the Assessments Lightning web component in your record

page. Provide a consolidated view of all assessments to your users, making it easier to track their progress. Use it in communities to streamline assessment management and response tracking.

Save Discovery Framework Assessments as Drafts to Complete Later

Salesforce users can save drafts of Discovery Framework-based assessments they aren't ready to submit. They can easily find and complete these draft assessments later at their convenience. The flexibility to save drafts prevents the loss of work when users pause an assessment for any reason.

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

How: From Setup, in the General Settings for Discovery Framework, turn on Save Assessment As Draft.

As a Salesforce user, to save an assessment as draft, click **Save for later**. To resume an assessment, click the action menu on an assessment in progress and select **Continue**.

Simplify Assessment Tracking with the Assessments Lightning Web Component

Improve assessment workflow by adding the Assessments Lightning web component in your record page. Provide a consolidated view of all assessments to your users, making it easier to track their progress. Use it in communities to streamline assessment management and response tracking.

Where: This change applies to Lightning Experience of multiple Industries clouds.

Einstein Summary

Empower users to take quick, meaningful action with AI-driven insights directly from their AI summary. Continue with your AI agent to explore further, ask follow-up questions, and stay productive on the go.

Enhance Productivity with AI-Generated Summaries on Mobile App
Enable Einstein Summary to empower your users with AI-driven insights, directly within their existing workflows. They can use its embedded design to quickly generate insights, all within the context of the record they're viewing within the mobile app. Review key insights quickly, provide feedback on AI output, and edit the generated content, all on the go. Boost productivity, enhance customer interactions, and quickly gain valuable insights by using the AI-generated summaries.

Integrate Einstein Summary Component with Agentforce
Empower users to ask follow-up questions and take meaningful actions by using the capabilities of Agentforce directly from the AI summary. With the streamlined workflow, gain insights quickly and take action more efficiently by using the Continue with Agentforce button next to the AI-generated summary.

Enhance Productivity with AI-Generated Summaries on Mobile App

Enable Einstein Summary to empower your users with AI-driven insights, directly within their existing workflows. They can use its embedded design to quickly generate insights, all within the context of the record they're viewing within the mobile app. Review key insights quickly, provide feedback on AI output, and edit the generated content, all on the go. Boost productivity, enhance customer interactions, and quickly gain valuable insights by using the AI-generated summaries.

Where: This change applies to Lightning Experience in Starter, Professional, Enterprise, Unlimited, and Developer editions in clouds with Einstein Summary.

Who: To use this feature, users need the Industry Service Excellence, Einstein GPT Platform, and Einstein for Service Innovations add-on licenses.

How: To configure Einstein Summary, add the Einstein Summary component to a Lightning record page through Lightning App Builder.

Integrate Einstein Summary Component with Agentforce

Empower users to ask follow-up questions and take meaningful actions by using the capabilities of Agentforce directly from the AI summary. With the streamlined workflow, gain insights quickly and take action more efficiently by using the Continue with Agentfore button next to the AI-generated summary.

Where: This change applies to Lightning Experience in Starter, Professional, Enterprise, Unlimited, and Developer editions in clouds with Einstein Summary.

Who: To use this feature, users need the Industry Service Excellence, Einstein GPT Platform, and Einstein for Service Innovations add-on licenses.

How: To configure Einstein Summary, add the Einstein Summary component to a Lightning record page through Lightning App Builder. To control when the Continue with Agentforce button is shown, restrict Agentforce integration for specific prompt templates.

Fundraising

Use Agentforce to summarize and get insights into philanthropic and wealth data. Create and manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one place. Increase speed and efficiency when you enter single or batch gifts by using the new Gift Entry Grid. Simplify the management of complex gift planning processes by using new Gift Planning objects.

planned gifts such as charitable gift annuities, trusts, life insurance, donor-advised funds, and bequests. Institutions can reduce the problems and risks of manual processes and scattered data by combining different aspects of gift planning into a single platform.

Manage Philanthropic Research Data Efficiently

Create and manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one place. Use Einstein generative AI to request research by summarizing party philanthropic assessments, party philanthropic indicators, party philanthropic occurrences, and interaction summaries. Automate the case creation for research requests with the Create Research Request Case flow.

Optimize Your Philanthropic Engagement and Research Efforts with Agentforce

Use Philanthropic Research Topics in Agentforce to summarize the milestones and wealth capacities of prospects. Get answers to questions about a prospect's professional affiliations and philanthropic events. Leverage these insights to build personalized engagement strategies, foster deeper relationships with donors, and increase their loyalty.

New and Changed Objects and Fields for Fundraising

Do more with the new and updated Fundraising objects.

Enter Gifts More Efficiently in the Gift Entry Grid

Use the Gift Entry Grid table format to enter gifts more quickly and easily. View and enter single or multiple gifts on a one-page, tabular layout.

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

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set. To use Fundraising with Education Cloud, turn on Fundraising in Education Cloud, and then create and assign a permission set to your users.

How: To turn on the Gift Entry Grid, from Setup, in the Quick Find box, enter `Fundraising Settings`, and then select **Gift Entry**.

Build Lifelong Philanthropic Relationships with Gift Planning

Establish multiyear philanthropic journeys for your prospects and donors that include complex planned gifts such as charitable gift annuities, trusts, life insurance, donor-advised funds, and bequests. Institutions can reduce the problems and risks of manual processes and scattered data by combining different aspects of gift planning into a single platform.

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

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set. To use Fundraising with Education Cloud, enable Fundraising in Education Cloud, and then create and assign a permission set to your users.

How: Turn on Gift Planning and Gift Agreements in Fundraising Settings in Setup. Then, add new fields to the page layouts for the Gift Transaction, Gift Commitment, and Gift Soft Credit objects.

See Also

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

Manage Philanthropic Research Data Efficiently

Create and manage philanthropic research data, including prospect profiles, wealth assessments, and milestone summaries, all in one place. Use Einstein generative AI to request research by summarizing party philanthropic assessments, party philanthropic indicators, party philanthropic occurrences, and interaction summaries. Automate the case creation for research requests with the Create Research Request Case flow.

Where: his change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising and the Einstein for Sales or Einstein for Service add-on license are enabled. Einstein generative AI is available in Lightning Experience. To purchase an add-on license, contact your Salesforce account executive.

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set. To use Fundraising with Education Cloud, enable Fundraising in Education Cloud, and then create and assign a permission set to your users.

See Also

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

Optimize Your Philanthropic Engagement and Research Efforts with Agentforce

Use Philanthropic Research Topics in Agentforce to summarize the milestones and wealth capacities of prospects. Get answers to questions about a prospect's professional affiliations and philanthropic events. Leverage these insights to build personalized engagement strategies, foster deeper relationships with donors, and increase their loyalty.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Fundraising and the applicable Agentforce add-on license are enabled. For additional information, contact your Salesforce account executive.

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

Who: To access Nonprofit Cloud for Fundraising, users need the FundraisingAccess permission set. To use Fundraising with Education Cloud, turn on Fundraising in Education Cloud, and then create and assign a permission set to your users.

How: From Setup, find and select Fundraising Settings, and then under Access Fundraising Research in Agentforce (Default), turn on Philanthropic Research Topics in Agentforce (Pilot).

New and Changed Objects and Fields for Fundraising

Do more with the new and updated Fundraising objects.

Represent the initial idea or proposal for a gift, including the donor's intent and preliminary purpose
: Use the new DonorGiftConcept object.

Represent the agreement to accept a gift
: Use the new GiftAgreement object.

Represent the past, current, and projected monetary value of a gift
: Use the new GiftValueForecast object.

Represent the criteria for categorizing contacts and accounts based on specific classification information for a specified time period
: Use the new PartyCategory object.

Represent a complex gift such as an annuity, bequest, or trust
: Use the new PlannedGift object.

Represent the rate used to calculate payments for a charitable gift annuity
: Use the new PlannedGiftAnnuityRate object.

Represent the performance of a planned gift over time, including returns, expenses, and net value
: Use the new PlannedGiftPerformance object.

Identify the research profile related to the gift commitment
: Use the new `Party Philanthropic Research Profile` field on the GiftCommitment object.

Associate a gift agreement with a gift commitment
: Use the new `Gift Agreement` field on the GiftCommitment object.

Associate a gift concept with a gift commitment
: Use the new `Gift Concept` field on the GiftCommitment object.

Associate a planned gift with a gift commitment
: Use the new `Planned Gift` field on the GiftCommitment object.

Associate a research profile with a gift soft credit
Use the new `Party Philanthropic Research Profile` field on the GiftSoftCredit object.

Associate a research profile with a gift transaction
Use the new `Party Philanthropic Research Profile` field on the GiftTransaction object.

Associate a gift agreement with a gift transaction
Use the new `Gift Agreement` field on the GiftTransaction object.

Associate a gift concept with a gift transaction
Use the new `Gift Concept` field on the GiftTransaction object.

Associate a research profile with a set of research
Use the new `Party Philanthropic Research Profile` field on the PartyPhilanthropicAssessment object.

Identify the case that delivers a set of research
Use the new `Case` field on the PartyPhilanthropicAssessment object.

Identify the total hours spent on a set of research for an assessment
Use the new `Research Hours Logged` field on the PartyPhilanthropicAssessment object.

Identify the start date of a set of research for an assessment
Use the new `Research Start Date` field on the PartyPhilanthropicAssessment object.

Identify the end date of a set of research for an assessment
Use the new `Research End Date` field on the PartyPhilanthropicAssessment object.

Identify the date the completed research is shared with the relationship officer
Use the new `Research Shared Date` field on the PartyPhilanthropicAssessment object.

Associate a research profile with a party philanthropic indicator
Use the new `Party Philanthropic Research Profile` field on the PartyPhilanthropicIndicator object.

Identify the case that delivers a set of research
Use the new `Case` field on the PartyPhilanthropicIndicator object.

Identify the total hours spent on a set of research for a party philanthropic indicator
Use the new `Research Hours Logged` field on the PartyPhilanthropicIndicator object.

Identify the start date of a set of research for a party philanthropic indicator

Use the new `Research Start Date` field on the PartyPhilanthropicIndicator object.

Identify the end date of a set of research for a party philanthropic indicator

Use the new `Research End Date` field on the PartyPhilanthropicIndicator object.

Identify the date the completed research is shared with the relationship officer

Use the new `Research Shared Date` field on the PartyPhilanthropicIndicator object.

Associate a research profile with a party philanthropic occurrence

Use the new `Party Philanthropic Research Profile` field on the PartyPhilanthropicOccurrence object.

Identify the case that delivers a set of research

Use the new `Case` field on the PartyPhilanthropicOccurrence object.

Identify the total hours spend on a set of research for a party philanthropic occurrence

Use the new `Research Hours Logged` field on the PartyPhilanthropicOccurrence object.

Identify the start date of a set of research for a party philanthropic occurrence

Use the new `Research Start Date` field on the PartyPhilanthropicOccurrence object.

Identify the end date of a set of research for a party philanthropic occurrence

Use the new `Research End Date` field on thePartyPhilanthropicOccurrence object.

Identify the date the completed research is shared with the relationship officer

Use the new `Research Shared Date` field on the PartyPhilanthropicOccurrence object.

Grantmaking

Automate the creation and scheduling of funding award requirements and disbursements to reduce manual effort and errors. Generate progress reports from predefined templates to save time and improve consistency.

Simplify Funding Disbursement Scheduling

Streamline and automate the process of creating and scheduling funding disbursements with a simple interface to reduce manual effort and the risk of errors.

Quickly Generate Progress Reports with Templates

Save time and improve report consistency by generating progress reports from predefined templates. To quickly design progress reports that comply with requirements, set the specific form sections to include in the templates.

Automate Funding Award Requirements

Automate the creation and scheduling of funding award requirements with the Requirements Wizard. Save time and reduce manual effort, while ensuring accuracy and compliance.

Simplify Funding Disbursement Scheduling

Streamline and automate the process of creating and scheduling funding disbursements with a simple interface to reduce manual effort and the risk of errors.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

Quickly Generate Progress Reports with Templates

Save time and improve report consistency by generating progress reports from predefined templates. To quickly design progress reports that comply with requirements, set the specific form sections to include in the templates.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

Automate Funding Award Requirements

Automate the creation and scheduling of funding award requirements with the Requirements Wizard. Save time and reduce manual effort, while ensuring accuracy and compliance.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Grantmaking is enabled.

Changed Object in Grantmaking

Do more with the updated Grantmaking object.

Identify the action plan template that's related to the funding award requirement

Use the new `ActionPlanTemplateId` field on the existing FundingAwardRequirement object.

Industries Configure, Price, Quote (CPQ)

Improve support efficiency and deployment with the key enhancements to Industries CPQ in Summer '25. Support teams can resolve queries faster with a comprehensive view of the order details on the new Order Overview page. With Omnistudio for Managed Packages, deployment for Industries CPQ in LWC by using the Omnistudio Build Tool is simpler and more reliable. Classic Cart APIs offer more accurate pricing and better functionality for MACD orders when you use Attribute-Based Pricing. Additionally, Standard Cart APIs support offer specification for flexible in-life changes and product versioning for accelerated innovation without business disruption. Find qualified products faster by using Get Cart Products API, and prevent data loss during replace operations through the enhanced Replace Offers API .

Resolve Order Queries Efficiently with the Order Overview Page
Enhance efficiency and reduce resolution time by providing your Support team with quick access to critical information. Quickly resolve customer queries by configuring an Order Overview page in your service console. Get a complete snapshot of order details, such as product information, pricing, and promotions from this comprehensive, read-only page. Boost customer satisfaction by saving time, minimizing errors, and reducing the need to navigate multiple systems.

Streamline Deployment of Industries CPQ in LWC with Omnistudio for Managed Packages
Avoid deployment errors when you install Industries CPQ in LWC with Omnistudio for Managed Packages by using the Omnistudio Build Tool. To ensure successful deployment, the Omnistudio component, CPQ-AssetToOrderRequestPayload is renamed as CPQAssetToOrderRequestPayload.

Other Improvements in Industries CPQ Classic Cart APIs
Experience accurate pricing and proper functioning of Attribute-Based Pricing (ABP) when you use the MaintainAssetPrices parameter for your Move, Add, Change, or Delete (MACD) orders in Industries CPQ Classic Cart APIs.

Support for Offer Specification
From Summer '25, Offer Specification is supported for Standard Cart APIs. Offer Specification allows service providers flexibility for existing subscribers to manage in-life changes with purchased configurations.

Support for Product Versioning
From Summer ’25 Product Versioning is supported for Standard Cart APIs and Standard Digital Commerce APIs to accelerate product innovation and market responsiveness. With Product Versioning, sales teams can support and track offer modifications to existing offers without business disruption. With Product Versioning, you can also modify offers and deploy changes without disruption.

Prioritize and Easily Find Qualified Products
Enable users to define a limit on the number of products that are processed at a time and find qualified products faster by using the max_records parameter in the Get Carts Products API.

Eliminate Data Loss and Inconsistencies from Replace Operations
Use the enhanced Replace Offers API to avoid unexpected data loss or modification during the replace operations by retaining optional child items. Maintain consistency and reduce manual entries and data mismatch by copying relevant Order Line Item (OLI) fields such as attribute information to the new OLI.

Resolve Order Queries Efficiently with the Order Overview Page

Enhance efficiency and reduce resolution time by providing your Support team with quick access to critical information. Quickly resolve customer queries by configuring an Order Overview page in your service console. Get a complete snapshot of order details, such as product information, pricing, and promotions from this comprehensive, read-only page. Boost customer satisfaction by saving time, minimizing errors, and reducing the need to navigate multiple systems.

Where: This change applies to Lightning Experience in all editions where the Communications, Media, and Energy & Utilities (CME) managed package is installed.

How: Configure an Order Overview page in the service console from the Order object record.

Streamline Deployment of Industries CPQ in LWC with Omnistudio for Managed Packages

Avoid deployment errors when you install Industries CPQ in LWC with Omnistudio for Managed Packages by using the Omnistudio Build Tool. To ensure successful deployment, the Omnistudio component, CPQ-AssetToOrderRequestPayload is renamed as CPQAssetToOrderRequestPayload.

Where: This change applies to both Salesforce Classic and Lightning Experience in all editions where the Communications, Media, and Energy & Utilities (CME) managed package is installed.

Who: This feature is available to:

- Users who have Omnistudio for Managed Packages with the CME package installed.
- Users who have Omnistudio for Managed Packages with the Omnistudio Metadata setting turned off.

See Also

Help Documentation: Deploy Industries CPQ in LWC with Managed Package OmniStudio
Help Documentation: Deploy Industries CPQ in LWC with Standard OmniStudio

Other Improvements in Industries CPQ Classic Cart APIs

Experience accurate pricing and proper functioning of Attribute-Based Pricing (ABP) when you use the MaintainAssetPrices parameter for your Move, Add, Change, or Delete (MACD) orders in Industries CPQ Classic Cart APIs.

Where: This change applies to both Salesforce Classic and Lightning Experience in all editions where the Communications, Media, and Energy & Utilities (CME) managed package is installed, and Classic Cart APIs are used.

Why: Industries CPQ Classic Cart APIs offer these enhancements to the MACD scenarios:

- Accurate Price Calculation with MaintainAssetPrices: Get accurate pricing when you use the MaintainAssetPrices parameter in your MACD orders. Prevent incorrect pricing caused by adjustments on line items from the parent order, and ensure consistent pricing calculations across asset-based orders.
- ABP Compatibility with MaintainAssetPrices: Prevent discrepancies through the seamless integration of ABP with the MaintainAssetPrices parameter, guaranteeing pricing alignment with the rules and calculations set within the ABP model.

See Also

Help Documentation: Maintain the Prices of Assets by Disabling Repricing

Support for Offer Specification

From Summer '25, Offer Specification is supported for Standard Cart APIs. Offer Specification allows service providers flexibility for existing subscribers to manage in-life changes with purchased configurations.

Where: This change applies to all editions where the Communications, Media, and Energy & Utilities (CME) managed package is installed and Standard Cart APIs are enabled.

Who: This feature is available to users with the necessary permissions to configure and manage offers in Standard Cart APIs.

Support for Product Versioning

From Summer ’25 Product Versioning is supported for Standard Cart APIs and Standard Digital Commerce APIs to accelerate product innovation and market responsiveness. With Product Versioning, sales teams can support and track offer modifications to existing offers without business disruption. With Product Versioning, you can also modify offers and deploy changes without disruption.

Where: This change applies to all editions where the Communications, Media, and Energy & Utilities (CME) managed package is installed and Standard Cart APIs and Standard DC APIs are enabled.

Who: This feature is available to users with the necessary permissions to configure and manage offers in Standard Cart APIs and Standard DC APIs.

Prioritize and Easily Find Qualified Products

Enable users to define a limit on the number of products that are processed at a time and find qualified products faster by using the max_records parameter in the Get Carts Products API.

Where: This change applies to all editions where the Communications, Media, and Energy & Utilities (CME) managed package is installed.

Who: This feature is available to users with the necessary permissions to configure and manage offers in Standard Cart APIs.

Eliminate Data Loss and Inconsistencies from Replace Operations

Use the enhanced Replace Offers API to avoid unexpected data loss or modification during the replace operations by retaining optional child items. Maintain consistency and reduce manual entries and data mismatch by copying relevant Order Line Item (OLI) fields such as attribute information to the new OLI.

Where: This change applies to all editions where the Communications, Media, and Energy (CME) managed package is installed.

Who: This feature is available to users with the necessary permissions to configure and manage offers in Standard Cart APIs.

Industry Integration Solutions

Customize the configurations of the prebuilt MuleSoft Direct assets to address your company's integration requirements.

Customize MuleSoft Direct Assets for Your Integration Needs
Download an integration asset and its dependent assets as separate JAR files. Modify the configurations of each JAR file to meet your business requirements. Redeploy the updated JAR files on Anypoint Platform to apply the changes in your Salesforce org.

Customize MuleSoft Direct Assets for Your Integration Needs

Download an integration asset and its dependent assets as separate JAR files. Modify the configurations of each JAR file to meet your business requirements. Redeploy the updated JAR files on Anypoint Platform to apply the changes in your Salesforce org.

Where: This change applies to Lightning Experience in all editions where MuleSoft Direct is enabled.

Who: Users with the Salesforce Administrator profile can download the MuleSoft Direct assets as JAR files. Users with the MuleSoft Administrator profile or members of a business group with access to Anypoint Platform can redeploy the updated JAR files.

Interest Tags

Use sharing rules to extend sharing access to users for Tag Categories.

Enforce Sharing Rules for Tag Category
Prevent users from seeing tag categories that belong to work groups outside of their work group by using sharing rules. When the default internal access for tag categories is set to private, create sharing rules to grant users or groups access to tag categories.

Enforce Sharing Rules for Tag Category

Prevent users from seeing tag categories that belong to work groups outside of their work group by using sharing rules. When the default internal access for tag categories is set to private, create sharing rules to grant users or groups access to tag categories.

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

How: In Setup, find and select **Sharing Settings**, and then create sharing rules for tag categories.

Omnistudio Document Generation

Upgrading to the Summer '25 managed package automatically enables Document Generation 2.0 and doesn't require in-app consent. Increase file size limit for custom fonts in the Docgen Custom Fonts Library with a support request.

Transition Automatically to Document Generation 2.0
Document Generation 1.0 is scheduled to retire by July 2025. To start using Document Generation 2.0 in managed packages, upgrade to Summer '25 managed package. Document Generation 2.0 is automatically enabled with Summer '25 upgrade for Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages. The in-app consent, which was previously required to use Document Generation 2.0, is no longer applicable. With this seamless 2.0 transition, start validating your existing configurations in a sandbox environment and complete the necessary post-install or post-upgrade steps. If you're already using Document Generation 2.0, no further action is required.

Configure File Size Limits to Accommodate Larger Custom Font Files
Increase the file size limit for custom font files in the Docgen Custom Fonts Library through a support request. Use larger font files to generate documents in your desired fonts and maintain brand consistency. You can configure custom file size limits within the combined maximum. In addition, the combined maximum allocation is increased from 50 MB to 100 MB, enabling you to use larger files while staying within the total allowed limit.

Transition Automatically to Document Generation 2.0

Document Generation 1.0 is scheduled to retire by July 2025. To start using Document Generation 2.0 in managed packages, upgrade to Summer '25 managed package. Document Generation 2.0 is automatically enabled with Summer '25 upgrade for Industries Communications, Media, Energy & Utilities (CME), Insurance (INS), Vlocity Government (PS), and Omnistudio managed packages. The in-app consent, which was previously required to use Document Generation 2.0, is no longer applicable. With this seamless 2.0 transition, start validating your existing configurations in a sandbox environment and complete the necessary post-install or post-upgrade steps. If you're already using Document Generation 2.0, no further action is required.

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

See Also

- Document Generation 1.0 Retirement
- Enhance Document Generation with Document Generation 2.0
- Provide In-App Consent for Document Generation 2.0
- Get Started With Document Generation 2.0

Configure File Size Limits to Accommodate Larger Custom Font Files

Increase the file size limit for custom font files in the Docgen Custom Fonts Library through a support request. Use larger font files to generate documents in your desired fonts and maintain brand consistency. You can configure custom file size limits within the combined maximum. In addition, the combined maximum allocation is increased from 50 MB to 100 MB, enabling you to use larger files while staying within the total allowed limit.

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

Who: To migrate and sync fonts in Document Generation 2.0, users need the DocGen Designer permission set.

How: To increase custom font file size limits in Document Generation 2.0, contact your Salesforce representative.

Omnistudio for Industries

Many Industries products include access to Omnistudio features.Use these features to extend and customize your product based on your business needs.

See Also

Summer ‘25 Release Notes for Omnistudio

Process Compliance Navigator

Make sure that your organization meets regulatory requirements, internal policies, and industry standards by using the compliance management solution, Process Compliance Navigator. Create validation procedures with compliance controls to avoid non-compliance and to achieve ongoing regulatory compliance. Prevent compliance violations through compliance checks and compliance execution features. Draft clauses for regulations by using generative AI for quickly scanning a regulation document and providing a list of regulation clauses. Demonstrate compliance by using the audit trail of compliance control executions tied to regulations and policies.

Capture Business Operations Processes for Compliance
Help your compliance officers effectively capture the details of business operations processes. Create detailed records and organize information in a single repository for any client engagement process within your Salesforce org or external systems. Reduce the risk of non-compliance and enable the smooth, compliant execution of business processes across your company.

Define Regulations and Track Amendments for Compliance
Give your compliance officers a platform to define, manage, and track regulations. In regulation management, regulations and their clauses automatically generate corresponding versions. Ensure accurate compliance by mapping regulation versions to clause versions, publishing updates, and notifying stakeholders promptly. Activate new versions on effective dates and retire old versions to maintain continuous regulatory adherence and operational efficiency.

Create Compliance Policies and Manage Policy Updates
Maintain up-to-date compliance standards by optimizing policy management, reducing risks, and

enhancing regulatory adherence. Compliance officers can define and update policies to align with laws and regulations, ensuring thorough coverage and accuracy. Notify business process owners of updates, link policies to business operations processes, and activate the policies and their clauses on the effective date for seamless compliance and efficiency.

Combine Validation Controls by Using Validation Procedures

Make sure that your business process adheres to policies and defined by a compliance officer. When a business process runs a validation procedure, it executes the validation controls specified in that procedure.

Protect Your Company from Compliance Risks

Prevent compliance violations by using Compliance Controls. Track the changes in relevant policies and regulations, or a control gap by creating and maintaining previous compliance control versions. Automate compliance controls by using context definitions and business rule logic or Apex classes.

Track Compliance by Using Non-Validation Compliance Controls

Keep your users and customers compliant on their Salesforce and external processes by using non-validation compliance controls. Track and log compliance with the Compliance Logging API. Log compliance for your external business processes and Salesforce features such as Action Plans, Integrated Onboarding, and Stage Management.

View Relationships for Compliance Objects

Use the prebuilt Compliance Actionable Relationship Center (ARC) graph templates to visualize the Regulation Version, Regulation Clause Version, Business Operations Process, Compliance Control Version, Compliance Policy Version, and Compliance Policy Clause Version objects and their relationships.

Demonstrate Compliance Effectiveness

Provide your compliance officers and control managers with an easy-to-use compliance reporting capability. Show the effectiveness of compliance controls, identify compliance gaps, and demonstrate that business processes are compliant with laws and regulations. Use custom objects, Apex class, and joined reports to create a compliance audit log report and showcase that your compliance controls are preventing compliance violations.

New Connect REST API Resources

Learn more about the new resources available with Process Compliance Navigator.

New Invocable Action in Process Compliance Navigator

Use the new invocable action in Process Compliance Navigator.

New Objects in Process Compliance Navigator

Do more with these new Process Compliance Navigator objects.

Capture Business Operations Processes for Compliance

Help your compliance officers effectively capture the details of business operations processes. Create detailed records and organize information in a single repository for any client engagement process within your Salesforce org or external systems. Reduce the risk of non-compliance and enable the smooth, compliant execution of business processes across your company.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Process Compliance Navigator.

Why: Prevent compliance violations such as non-compliant actions, unauthorized sharing of sensitive data, missed deadlines, and missed required tasks or documents across the business processes. Use the unique API identifier to ensure smooth integration with other systems, improving overall data management and traceability.

How: From the App Launcher, go to the Business Operations Processes list view page, and create a business operations process record.

Define Regulations and Track Amendments for Compliance

Give your compliance officers a platform to define, manage, and track regulations. In regulation management, regulations and their clauses automatically generate corresponding versions. Ensure accurate compliance by mapping regulation versions to clause versions, publishing updates, and notifying stakeholders promptly. Activate new versions on effective dates and retire old versions to maintain continuous regulatory adherence and operational efficiency.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Process Compliance Navigator.

Why: From a single repository, manage all the compliance requirements set by regulatory authorities and legal bodies at the national, state, and regional levels. Versioning of regulations and regulation clauses helps companies track the changes over time, providing context for compliance requirements. Use the regulation management workflow to reduce the risk of inconsistent practices and promote accountability during compliance audits and investigations.

Create Compliance Policies and Manage Policy Updates

Maintain up-to-date compliance standards by optimizing policy management, reducing risks, and enhancing regulatory adherence. Compliance officers can define and update policies to align with laws and regulations, ensuring thorough coverage and accuracy. Notify business process owners of updates, link policies to business operations processes, and activate the policies and their clauses on the effective date for seamless compliance and efficiency.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Process Compliance Navigator.

Why: An effective compliance policy workflow is crucial to prevent violations in systems, reducing risks such as using unsecured apps for sensitive data or failing to protect customer data because of insecure storage. Simplify the process of identifying impacted policies and making necessary and timely updates when regulations change, making sure that your company remains compliant and secure.

Combine Validation Controls by Using Validation Procedures

Make sure that your business process adheres to policies and defined by a compliance officer. When a business process runs a validation procedure, it executes the validation controls specified in that procedure.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Process Compliance Navigator.

Why: Use Validation Procedure versions to track the changes to policies and regulations, or a control gap found through the testing and audits of the controls. To implement changes to an active or retired version, create a procedure version or clone another version. Versions retain the traceability from a business process or invocation to the exact regulation, law, policy, procedure, and controls that were in effect at that time.

How: Configure a validation procedure by configuring controls, defining business context, mapping business context, and reviewing the configured procedure summary. The control manager reviews the configuration to confirm that the validation procedure meets the business requirements, and then activates it.

Protect Your Company from Compliance Risks

Prevent compliance violations by using Compliance Controls. Track the changes in relevant policies and regulations, or a control gap by creating and maintaining previous compliance control versions. Automate compliance controls by using context definitions and business rule logic or Apex classes.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Process Compliance Navigator.

Why: Use versions to implement controls uniformly across different departments by reusing active compliance controls across multiple validation procedures. For example, if you’re preventing compliance violations when you check personal identification information (PII), the results must be consistent whether the communication for a loan product or investment advice was sent via email, chat, or voice communication.

How: Create a compliance control that describes the compliance requirement. Next, create a context definition that is a set of information required to run a validation control, and then create an expression set by using a compliance check and compliance control log elements that calculate if the business requirements are met. Then, add the compliance control to a validation procedure to define compliance for a business process.

Track Compliance by Using Non-Validation Compliance Controls

Keep your users and customers compliant on their Salesforce and external processes by using non-validation compliance controls. Track and log compliance with the Compliance Logging API. Log compliance for your external business processes and Salesforce features such as Action Plans, Integrated Onboarding, and Stage Management.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Process Compliance Navigator.

Why: Create non-validation compliance controls for Salesforce business processes and save the time to verify if your users completed the tasks. For example, to verify a customer's identity, financial advisors must complete an anti-money laundering (AML) and know your customer (KYC) reviews. Use action plans to define business process tasks, such as collecting client identification documents, verifying address, and screening customers against sanction lists and politically exposed persons (PEP) databases. To track compliance on the action plan, connect the action plan to the Compliance Logging API.

How: Create a compliance control and select an implementor type that matches the process that you want to log compliance for. To connect the Salesforce or external process and log compliance, use the Compliance Logging API.

View Relationships for Compliance Objects

Use the prebuilt Compliance Actionable Relationship Center (ARC) graph templates to visualize the Regulation Version, Regulation Clause Version, Business Operations Process, Compliance Control Version, Compliance Policy Version, and Compliance Policy Clause Version objects and their relationships.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Process Compliance Navigator.

How: Create an ARC graph by using one of the Compliance templates. In Lightning App Builder, add the graph to an object record page that's the same as the root node on the graph.

Demonstrate Compliance Effectiveness

Provide your compliance officers and control managers with an easy-to-use compliance reporting capability. Show the effectiveness of compliance controls, identify compliance gaps, and demonstrate that business processes are compliant with laws and regulations. Use custom objects, Apex class, and joined reports to create a compliance audit log report and showcase that your compliance controls are preventing compliance violations.

Where: This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions with Process Compliance Navigator.

New Connect REST API Resources

Learn more about the new resources available with Process Compliance Navigator.

Evaluate compliance procedure with a business context

Make a POST request to the `/connect/compliance/procedure/${procedureName}/evaluate` resource.

New request body: Compliance Procedure Evaluation Request Input

New response body: Compliance Procedure Evaluation Response

Log compliance check events for control

Make a POST request to the `/connect/compliance/log/logevent` resource.

New request body: Compliance Logging Info Request Input

New response body: Compliance Logging Response

New Invocable Action in Process Compliance Navigator

Use the new invocable action in Process Compliance Navigator.

Evaluate a compliance validation procedure, and create a procedure evaluation API response.

Use the new `evalCmplValidationProcedure` action.

New Objects in Process Compliance Navigator

Do more with these new Process Compliance Navigator objects.

Represent the business rule that implements compliance requirements

Use the new ComplianceControl object.

Represent the compliance procedure version that the business process uses

Use the new ComplianceControlVersion object.

Represent a junction between a Compliance Procedure Version and a Compliance Control

Use the new ComplianceProcedureControl object.

Store a group of compliance controls that test the business process actions for compliance

Use the new CmpValidationProcedure object.

Represent a validation procedure version that the business process uses

Use the new CmplValidationProcdVer object.

Represent the input parameters passed in the business context when the Compliance API is invoked, and the output parameters expected by the validation procedure check

Use the new CmplValidationProcdParam object.

Represent a junction between a Validation Procedure Version and a Compliance Control
Use the new CmplValidationProcdControl object.

Represent the association between a Validation Procedure Control Param Map record and a Context Attribute for a specified validation procedure and control
Use the new CmplVldProcdCtrlParmMap object.

Represent the validation procedure version that the business process uses
Use the new CmplValidationProcdVer object.

Store the authority responsible for issuing licenses and permits, and defining the regulatory code
Use the new RegulatoryAuthority object.

Store the information on laws and regulations as specified by the regulatory agencies and authorities
Use the new Regulation object.

Store the version of the regulation that tracks amendments
Use the new RegulationVersion object.

Store the information related to a regulation or law outlining specific requirements or sections
Use the new RegulationClause object.

Store the version of the regulation clause that tracks amendments
Use the new RegulationClauseVersion object.

Add a junction between the Regulation Version and the Regulation Clause Version
Use the new RegulationVerRegClauseVer object.

Add a junction between the Regulation Clause Version and the Compliance Control Version
Use the new RegClCmplControlVer object.

Store the information on the internal policies of the organization.
Use the new CompliancePolicy object.

Store the version of the compliance policy that tracks amendments
Use the new CompliancePolicyVersion object.

Store the information related to a compliance policy outlining specific requirements or sections
Use the new CompliancePolicyClause object.

Store the version of the compliance policy clause that tracks amendments
Use the new CompliancePlcyClauseVersion object.

Add a junction between the Compliance Policy Version and the Compliance Policy Clause Version
Use the new CompliancePlcyCmplClVer object.

Add a junction between the Compliance Policy Clause Version and the Compliance Control Version
Use the new CmplPlcyClCmplCtlVer object.

Add a junction between the Regulation Clause Version and the Compliance Policy Clause Version
Use the new RegClCmplPlcyClVer object.

Store the details of the business process in the organization
Use the new BusinessOperationsProcess object.

Add a junction between the Business Operations Process and the Control Version
Use the new BusOperProcControlVer object.

Add a junction between the Business Operations Process and the Compliance Policy Clause Version
Use the new BusOperProcCmplPlcyClVer object.

Add a junction between the Business Operations Process and the Regulation Clause Version
Use the new BusOperProcRegClVer object.

Store the metrics related to compliance API invocations
Use the new ComplianceUsgMetrics object.

Store the metrics related to compliance API invocations across Salesforce orgs
Use the new CrossOrgComplianceUsgMetrics object.

Create a request to extract documents related to a regulation version
Use the new RegulationVerDocExtrctRqst object.

Program and Case Management

Track the referrals originating from within your organization from one program to another to better understand the resources you're providing to your clients. Enter benefit disbursements directly from the participant record to quickly and easily track the benefits that were delivered. Easily track all services and goods by creating off-schedule and ad hoc benefits disbursements in bulk.

Improve Referral Tracking and Reporting
Use the new Internal referral type to track referrals happening within your organization from one program to another. This gives a better understanding of the resources you're providing to your clients. Additionally, the new page layout for the referral record makes it easier to find the information you need. You can quickly fill out the required information for an inbound, outbound, or internal referral.

Save and Complete In-Progress Assessments

Save in-progress assessments as drafts so that you can return to them later. Quickly view in-progress assessments to follow up with clients or to pick up where you left off.

Log Benefit Disbursements from Participant Record
Save time and make it easier to track the benefits that were delivered to participants by entering benefit disbursements directly from the participant record.

Save Time and Improve Benefit Tracking with Enhanced Benefit Disbursal Workflows
Make sure that all services and goods are tracked and accounted for by easily creating ad hoc benefit disbursements in bulk, even if the benefit is tied to a schedule. To save time during data entry and to ensure data quality and completeness, configure which fields are visible in the ad hoc disbursement component on an individual benefit basis.

Changed Objects in Program and Case Management
Do more with the updated Program and Case Management object.

Improve Referral Tracking and Reporting

Use the new Internal referral type to track referrals happening within your organization from one program to another. This gives a better understanding of the resources you're providing to your clients. Additionally, the new page layout for the referral record makes it easier to find the information you need. You can quickly fill out the required information for an inbound, outbound, or internal referral.

Where: This change applies to Lightning Experience in Enterprise, Professional, Unlimited, and Developer editions where Program Management is enabled.

Who: Users with the Case Referral or Education Cloud Full Access permission set can use the new referral type.

Save and Complete In-Progress Assessments

Save in-progress assessments as drafts so that you can return to them later. Quickly view in-progress assessments to follow up with clients or to pick up where you left off.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions where Program Management and Discovery Framework are enabled.

Who: Users with read and edit permission on Discovery Framework objects and who have the OmniStudio User permission set and the Form Framework User permission set, or users with the Education Cloud Full Access permission set can save and view in-progress assessments. Users with the Advanced Program Management permission set can see in-progress assessments on program enrollment.

Log Benefit Disbursements from Participant Record

Save time and make it easier to track the benefits that were delivered to participants by entering benefit disbursements directly from the participant record.

Where: This change applies to Lightning Experience in Enterprise, Professional, Unlimited, and Developer editions where Program Management is enabled.

Who: To create benefit disbursements, users need the Advanced Program Management permission set or the Education Cloud Full Access permission set.

See Also

Salesforce Help: Track Benefit Disbursements (can be outdated or unavailable during release preview)

Save Time and Improve Benefit Tracking with Enhanced Benefit Disbursal Workflows

Make sure that all services and goods are tracked and accounted for by easily creating ad hoc benefit disbursements in bulk, even if the benefit is tied to a schedule. To save time during data entry and to ensure data quality and completeness, configure which fields are visible in the ad hoc disbursement component on an individual benefit basis.

Where: This change applies to Lightning Experience in Enterprise, Professional, Unlimited, and Developer editions where Program Management is enabled.

Who: To create ad hoc benefit disbursements, users need the Advanced Program Management permission set or the Education Cloud Full Access permission set.

See Also

Salesforce Help: Track Benefit Disbursements (can be outdated or unavailable during release preview)

Changed Objects in Program and Case Management

Do more with the updated Program and Case Management object.

Mark referrals as internally sourced

Use the new Internal picklist value of the `ReferralType` field on the existing Referral object.

Rollup Definitions

Configure multiple record rollup definitions within one LWC component for improved data visualization. Set up on-demand record rollup definitions quickly and efficiently using the guided setup. Help business executives make more informed decisions by using the enhancements to record rollup definitions.

Make More Informed Decisions with On-Demand Record Rollup

Save time and improve efficiency for your business executives by enabling them to refresh record rollup results instantly. Help them make better decisions by making sure that the data they're working with is always up-to-date and accurate. Business executives can get the latest rollup results without waiting for scheduled refresh cycles. Enable or disable On-Demand Record Rollup as needed based on your business requirements.

View Multiple Record Rollup Results in One Place

Save time and effort by configuring multiple record rollup definitions in the new LWC component. Business executives can give more personalized advice to clients by viewing multiple rollup results, such as the assets, financial accounts, and policies associated with a household on the household record page. If on-demand record rollup is enabled for a record rollup definition, your business executives can instantly update the rollup results, enabling them to make informed decisions based on the up-to-date rollup results.

Configure On-Demand Record Rollup Easily with the New Guided Setup
Complete the tasks required to set up and configure on-demand record rollup for record rollup definitions by using the On-Demand Record Rollup guided setup.

Make More Informed Decisions with On-Demand Record Rollup

Save time and improve efficiency for your business executives by enabling them to refresh record rollup results instantly. Help them make better decisions by making sure that the data they're working with is always up-to-date and accurate. Business executives can get the latest rollup results without waiting for scheduled refresh cycles. Enable or disable On-Demand Record Rollup as needed based on your business requirements.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: In Setup, find and select **Record Rollup Settings**. Turn on On-Demand Record Rollup. Then, go to Record Rollup Definitions in Setup, and click the definition that you want to enable on-demand record rollup for. On the rollup definition details page, from the page-level action menu, click **Manage On-Demand**.

See Also

Help Documentation: Set Up On-Demand Record Rollup (can be outdated or unavailable during release preview)

View Multiple Record Rollup Results in One Place

Save time and effort by configuring multiple record rollup definitions in the new LWC component. Business executives can give more personalized advice to clients by viewing multiple rollup results, such as the assets, financial accounts, and policies associated with a household on the household record page. If on-demand record rollup is enabled for a record rollup definition, your business executives can instantly update the rollup results, enabling them to make informed decisions based on the up-to-date rollup results.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: On the Lightning Record page of a rollup target object, drag the Show Multiple Record Rollup Results component from the Components panel to the Lightning page canvas. Select the rollup definitions that you want to show the results for and save the changes.

See Also

Help Documentation: Customize Lightning Pages to View Record Rollup Results (can be outdated or unavailable during release preview)

Configure On-Demand Record Rollup Easily with the New Guided Setup

Complete the tasks required to set up and configure on-demand record rollup for record rollup definitions by using the On-Demand Record Rollup guided setup.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: From Setup, in the Quick Find box, enter `On-Demand Record Rollup`, and then under Guided Setup, select **On-Demand Record Rollup**.

Stage Management

Create stage definitions quickly and easily by using templates. Make workflows more context-aware by assigning tasks to users or queues associated with reference object. Create flexible stage journeys tailored to different business contexts by using stage definition assignments. Help users understand and resolve issues during record stage transition by adding error messages that appear when criteria aren't met.

Create Stage Definitions Faster
Create stage definitions across different record types by using templates. Access templates based on the selected reference object. Preview and reuse the templates for your business processes.

Assign Tasks to Associated Users or Queues
Enhance your workflows by dynamically assigning tasks to users at runtime. Assign manual tasks to users or queues that are associated with the reference object.

Clarify Record Transition Issues Through Custom Validation Messages
Help your users understand and resolve issues during record stage transition by adding error messages that appear when criteria aren't met. Replace complex notifications with clear, context-aware guidance on how to proceed.

Unlock Flexible Stage Progressions
Create flexible stage journeys tailored to different business contexts, such as varying lifecycles for request types. Configure multiple stage definitions for the same object and record type, and assign them dynamically at runtime by using stage definition assignments. Define stage assignment rule criteria within each assignment to determine which stage definition is applied based on record-level conditions.

Create Stage Definitions Faster

Create stage definitions across different record types by using templates. Access templates based on the selected reference object. Preview and reuse the templates for your business processes.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: In Setup, find and select **Stage Definitions**. Click **New** and select **Use a Template** to create stage definitions using templates.

Assign Tasks to Associated Users or Queues

Enhance your workflows by dynamically assigning tasks to users at runtime. Assign manual tasks to users or queues that are associated with the reference object.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: In the Stage Management builder, add a step definition and assign a manual task to **Associated Users or Queues**.

Clarify Record Transition Issues Through Custom Validation Messages

Help your users understand and resolve issues during record stage transition by adding error messages that appear when criteria aren't met. Replace complex notifications with clear, context-aware guidance on how to proceed.

Where: This change applies to Lightning Experience of multiple Industries clouds.

How: In the Stage Management builder, after you add the criteria and condition for a stage definition, click **Add Error Message**.

Unlock Flexible Stage Progressions

Create flexible stage journeys tailored to different business contexts, such as varying lifecycles for request types. Configure multiple stage definitions for the same object and record type, and assign them dynamically at runtime by using stage definition assignments. Define stage assignment rule criteria within each assignment to determine which stage definition is applied based on record-level conditions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Stage Management is enabled

How: From Setup, go to Stage Definition Assignments, define a stage definition assignment for each record type, and add stage assignment rule criteria within each assignment.

Marketing

Personalize every moment of engagement across the customer lifecycle and drive growth for your business with the latest features and enhancements from Marketing Cloud.

Marketing Cloud Account Engagement
Simplify how you manage failed email sends and automatically delete excessive visitor records for bot-

like prospects. Plus, get new insights into customer activities in Data Cloud with custom URL engagement data. We also added WhatsApp integration for using Account Engagement with Marketing Cloud.

Marketing Cloud Engagement

The Summer '25 Marketing Cloud Engagement release occurs June 6, 2025 through June 27, 2025.

Marketing Cloud

Marketing Cloud offers a number of updates in Summer '25, including enhancements to campaigns, improved content tools, and new reporting metrics. Plus, enjoy more AI capabilities and streamlined setup for messaging channels.

Marketing Cloud Account Engagement

Simplify how you manage failed email sends and automatically delete excessive visitor records for bot-like prospects. Plus, get new insights into customer activities in Data Cloud with custom URL engagement data. We also added WhatsApp integration for using Account Engagement with Marketing Cloud.

Get More Out of Your Engagement Data

Go beyond your customers' demographic data with custom URL engagement data from Data Cloud. Include custom URL activities to generate more nuanced segments and further personalize campaigns in Account Engagement. In addition, you can use Data Cloud segment members in up to 100 dynamic lists per business unit. Previously, the limit was 25 lists.

Reach More Prospects with WhatsApp

Expand your prospect marketing channels by integrating WhatsApp with Account Engagement. Connect a WhatsApp business account to get started. Then, marketers can access WhatsApp marketing channels through Marketing Cloud for use in Account Engagement.

Delivered Idea: Dismiss Configuration Issues in Optimizer

Focus on business-critical issues by dismissing Optimizer configuration warnings that don't apply to your business or marketing strategy. If needed, you can restore hidden configuration issues in Optimizer.

Quickly Pinpoint Failed Email Sends

A new Failed Email Sends report is available for your business unit. The report includes failure reasons such as missing content, invalid email addresses or sender domains, along with a timestamp and related prospect. Look for failed email send alerts in the Optimizer.

Gain Control of Bot-Like Prospects by Deleting Excessive Visitor Records

Account Engagement can pause activity tracking for prospects with an excessive amount of activity if it impacts your business unit's performance. Now you can automatically delete excessive visitor records from bot-like prospects before they get paused, or restore currently paused prospects by automatically deleting excessive visitor records. We also added the ability to manually delete visitors from a bot-like prospect for even more control.

Get More Out of Your Engagement Data

Go beyond your customers' demographic data with custom URL engagement data from Data Cloud. Include custom URL activities to generate more nuanced segments and further personalize campaigns in Account Engagement. In addition, you can use Data Cloud segment members in up to 100 dynamic lists per business unit. Previously, the limit was 25 lists.

Where: This change applies to Salesforce Enterprise and Unlimited editions with Marketing Cloud Account Engagement Growth or Advanced edition.

See Also

Salesforce Help: Ingest Custom URL Engagement Data from Account Engagement to Data Cloud (can be outdated or unavailable during release preview)

Reach More Prospects with WhatsApp

Expand your prospect marketing channels by integrating WhatsApp with Account Engagement. Connect a WhatsApp business account to get started. Then, marketers can access WhatsApp marketing channels through Marketing Cloud for use in Account Engagement.

Where: This change applies to Salesforce Enterprise and Unlimited editions with Marketing Cloud Account Engagement Growth, Advanced edition.

See Also

Salesforce Help: Quick Start: Set Up WhatsApp for Account Engagement (can be outdated or unavailable during release preview)

Dismiss Configuration Issues in Optimizer

Focus on business-critical issues by dismissing Optimizer configuration warnings that don’t apply to your business or marketing strategy. If needed, you can restore hidden configuration issues in Optimizer.

Where: This change applies to all Marketing Cloud Account Engagement editions.

See Also

Salesforce Help: Monitor Business Unit Health with Account Engagement Optimizer (can be outdated or unavailable during release preview)

Quickly Pinpoint Failed Email Sends

A new Failed Email Sends report is available for your business unit. The report includes failure reasons such as missing content, invalid email addresses or sender domains, along with a timestamp and related prospect. Look for failed email send alerts in the Optimizer.

Where: This change applies to Marketing Cloud Account Engagement Growth, Plus, Advanced, and

Premium editions.

See Also

Salesforce Help: Failed Email Sends Report (can be outdated or unavailable during release preview)

Gain Control of Bot-Like Prospects by Deleting Excessive Visitor Records

Account Engagement can pause activity tracking for prospects with an excessive amount of activity if it impacts your business unit's performance. Now you can automatically delete excessive visitor records from bot-like prospects before they get paused, or restore currently paused prospects by automatically deleting excessive visitor records. We also added the ability to manually delete visitors from a bot-like prospect for even more control.

Where: This change applies to all Marketing Cloud Account Engagement editions.

Why: To impact Account Engagement's performance, a prospect would have to accumulate thousands of activities. This high level of activity is usually the result of a bot. However, it's possible for excessive activity to happen because Account Engagement's tracking code is placed on a page that gets a lot of traffic. To avoid excessive clicks, use the tracking code only on specific landing pages instead of home pages.

See Also

Salesforce Help: Prospects with Paused Activity Tracking (can be outdated or unavailable during release preview)

Marketing Cloud Engagement

The Summer '25 Marketing Cloud Engagement release occurs June 6, 2025 through June 27, 2025.

Get an exclusive, in-depth look at the new features by tuning into the Summer '25 Marketing Cloud Engagement Release Panel webinar. Stay tuned for updates on this page!

Archived Release Notes
Marketing Cloud Engagement release notes from Spring '24 and earlier are available for PDF download. Refer to help documentation for the most accurate and current information about Engagement.

Archived Release Notes

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Included Releases	PDF Link
• Spring ’24	Spring '24 Marketing Cloud Engagement Release Notes
• Spring ’23 • Summer ’23 • Winter ’24	2023 Marketing Cloud Engagement Release Notes
• Spring ’22 • Summer ’22 • Winter ’23	2022 Marketing Cloud Engagement Release Notes
• Spring ’22 • Summer ’22 • Fall ’22 • Winter ’23	2022 Marketing Cloud Intelligence Release Notes
• Fall ’22 • Winter ’23	2022 Marketing Cloud Intelligence Data Pipelines Release Notes
• January 2021 • April 2021 • June 2021 • August 2021 • October 2021	2021 Marketing Cloud Engagement Release Notes
• January 2020 • April 2020 • June 2020 • August 2020 • October 2020	2020 Marketing Cloud Engagement Release Notes
• January 2019 • April 2019 • June 2019 • August 2019	2019 Marketing Cloud Engagement Release Notes

Included Releases	PDF Link
• October 2019	
• January 2018 • April 2018 • June 2018 • August 2018 • October 2018	2018 Marketing Cloud Engagement Release Notes
• January 2017 • March 2017 • June 2017 • August 2017 • October 2017	2017 Marketing Cloud Engagement Release Notes

Marketing Cloud

Marketing Cloud offers a number of updates in Summer '25, including enhancements to campaigns, improved content tools, and new reporting metrics. Plus, enjoy more AI capabilities and streamlined setup for messaging channels.

Save Time with New AI Capabilities for Reporting and Marketing Automation
Let Einstein take more work off marketers' plates by creating reports and automating flows based on predicted engagement. Plus, use a data graph to enhance Einstein Send Time Optimization and easily retrieve record scores with Agentforce.

Create Meaningful Moments with Campaign Designer (Beta)
New Campaign Designer (beta) functionality helps you quickly generate multi-touch marketing briefs and campaigns that use your trusted data for meaningful moments. When reviewing your draft brief, select an existing campaign to add more context for drafting your campaign. Plus, use AI to quickly and easily refine the message and channels of the draft campaign.

Enjoy More Control Over Campaigns and Flows
Managing your campaigns, related flows, and content is easier than ever. Build a campaign from the ground up and add flow elements from the campaign record. Plus, quickly send an email campaign to a list of opted-in leads or contacts.

Create Customized Content More Efficiently
Improved content tools make it easier to create more personalized customer experiences. Directly customize the HTML for an email, add repeater components, and personalize email images and buttons with merge fields and dynamic URLs.

Increase Customer Engagement with Personalization Recommendations

To increase engagement with more targeted email content, marketers can now recommend products, services, and other items with Salesforce Personalization recommendations. Connect recommendation data to a repeater component to show a set of recommended products that are tailored to each email recipient.

Stay Compliant with New and Improved Consent Tools
Now you can collect consent data in more flow types and include a column for country code in consent import files.

Gain Valuable Insights with Enhanced Reporting Options
Now marketers can track and report on custom links to pages on external websites, and attribute that tracking data to a campaign. You also get improved deliverability metrics for Marketing Performance dashboards and improved page view metrics for your external websites.

Manage Admin Tasks More Easily with These Enhancements
Enjoy easier setup for messaging channels, use Identity Licenses to grant Marketing Cloud access to your team members, and get more insight into your requests for SMS codes, brands, and campaigns. Plus, new Marketing Cloud customers can select a custom data space for marketing during initial setup.

Other Changes in Marketing Cloud Growth
Learn about other changes we've made in Summer '25.

Save Time with New AI Capabilities for Reporting and Marketing Automation

Let Einstein take more work off marketers' plates by creating reports and automating flows based on predicted engagement. Plus, use a data graph to enhance Einstein Send Time Optimization and easily retrieve record scores with Agentforce.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Create Reports for Einstein Predictive Features

Analyze the effectiveness of Einstein Engagement Frequency and Einstein Engagement Scoring in your Marketing Cloud campaigns by using new reports. To create these reports with Data Model Objects in Data Cloud, select the Email Engagement Frequency or Email Engagement Score object.

SEE ALSO | *Salesforce Help*: Data Cloud Reports for Einstein Features in Marketing Cloud (can be outdated or unavailable during release preview)

Automate Flows Based on Einstein Predictive Features

Direct contacts down different paths based on engagement predicted by Einstein Engagement Scoring and Einstein Engagement Frequency. Users can run more effective customer reengagement campaigns by ensuring the right audience gets the right number of messages without overwhelming them. After you create a data graph, users can build a flow that includes the Einstein Decision element. In the configuration pane of the Einstein Decision element, select any of the data graph fields as the Resource in a condition.

SEE ALSO | *Salesforce Help*: Enable AI Features in Marketing Cloud (can be outdated or unavailable during release preview)

Bring Data Graph Capabilities to Einstein STO Scores

An update to the Einstein Send Time Optimization (STO) data model allows you to build a data graph for STO. After you disable and reenable STO in Einstein for Marketing Setup, users can build and use data graphs to capture, automate, and personalize email send time data.

SEE ALSO | *Salesforce Help*: Setting Up a Data Graph for Einstein STO Scoring (can be outdated or unavailable during release preview)

Find Record Scores Quickly in Marketing Cloud with Agentforce

Use the Marketing Cloud: Get Score for Record ID action with Agentforce to gain insights into customer engagement and fit. This action retrieves the engagement and fit scores for lead, contact, and prospect records. Account scores appear in a separate bulleted list, including an overall account score and intent score. To enable these actions, turn them on in the Agent Actions section of Agent Studio in Salesforce Setup.

SEE ALSO | *Salesforce Help*: Agent Action: Get Score for Record ID (can be outdated or unavailable during release preview)

Create Meaningful Moments with Campaign Designer (Beta)

New Campaign Designer (beta) functionality helps you quickly generate multi-touch marketing briefs and campaigns that use your trusted data for meaningful moments. When reviewing your draft brief, select an existing campaign to add more context for drafting your campaign. Plus, use AI to quickly and easily refine the message and channels of the draft campaign.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Advanced edition or Marketing Cloud Account Engagement Plus, Advanced, and Premium editions with the Data Cloud and Einstein Requests add-on.

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

How: After AI features are enabled in Marketing Cloud, you can click the Draft with AI button on the Marketing Cloud home page. The campaign designer walks you through generating a brief, campaign, and components.

See Also

Salesforce Help: Agentforce in Marketing Cloud (can be outdated or unavailable during release preview)

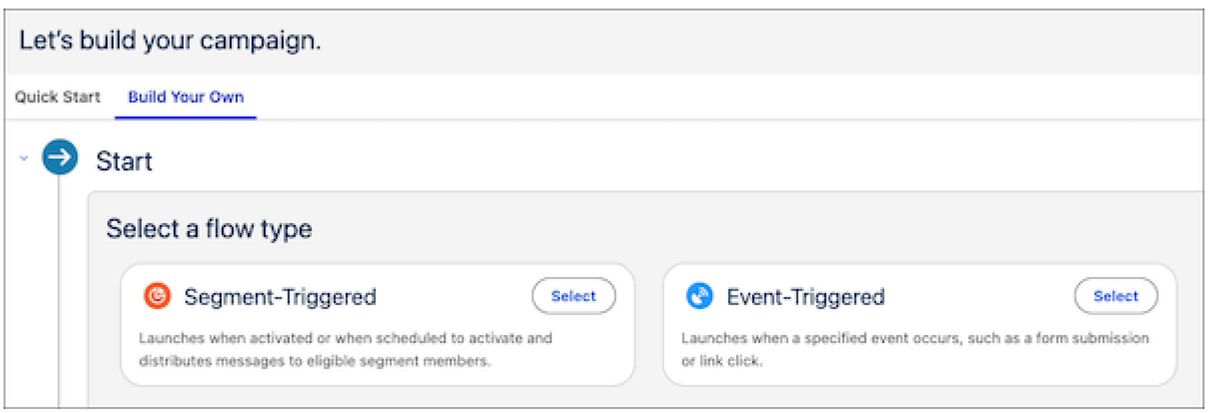
Enjoy More Control Over Campaigns and Flows

Managing your campaigns, related flows, and content is easier than ever. Build a campaign from the ground up and add flow elements from the campaign record. Plus, quickly send an email campaign to a list of opted-in leads or contacts.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Build a Custom Campaign

Now marketers can begin working on a campaign without using one of our quick start options. Create a campaign and select the Build Your Own tab. Marketers can select Build Your Own when they create a campaign, select a flow type, and build the campaign as they go. They can add message elements from the campaign record, or work in Flow Builder to create a more curated customer experience.



SEE ALSO | *Salesforce Help*: Enhance Your Marketing with Marketing Cloud Campaigns (can be outdated or unavailable during release preview)

Manage More of Your Flow from the Campaign

It's easier than ever to build out a marketing flow without leaving the campaign record. When a flow has 5 or fewer elements, add messages and wait elements from the campaign itself. Message details like Einstein Send Time Optimization and tracking options are also configurable from the campaign record.

SEE ALSO | *Salesforce Help*: Navigating Campaigns in Marketing Cloud (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: Send a Message with a Marketing Cloud Campaign (can be outdated or unavailable during release preview)

Send to a Lead or Contact List

Marketers can now send an email directly to leads or contacts who are opted in to receive marketing messages from your business. From any lead or contact list view in the Marketing app, click Send Email. Select the marketing email option, and then follow the prompts to create and send your content. We take care of creating the campaign, flow, and audience segment for you.

SEE ALSO | *Salesforce Help*: Send a Message with a Marketing Cloud Campaign (can be outdated or unavailable during release preview)

Create Customized Content More Efficiently

Improved content tools make it easier to create more personalized customer experiences. Directly customize the HTML for an email, add repeater components, and personalize email images and buttons with merge fields and dynamic URLs.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Create Emails with Custom HTML

Get more control over your email messages with the new HTML code view for emails. Convert an existing email to HTML, make detailed edits to the structure or stylesheet, and build highly customized, responsive emails of your own design.

SEE ALSO | *Salesforce Help*: Create and Manage an HTML Email (can be outdated or unavailable during release preview)

View and Manage Data Sources in Emails More Easily

The improved Data Sources tab gives marketers more visibility into the data sources that power merge fields and personalization in emails. Previously, marketers could only add an event data source in the content builder. Now, they can add and update data sources in the builder before publishing an email, and they can view all available data sources, including the default data graph or unified individual.

SEE ALSO | *Salesforce Help*: Manage Data Sources for Email Personalization (can be outdated or unavailable during release preview)

Show Related Content in a Consistent Layout with Repeater Components

Show customers recent purchases, popular products, or other relevant content in marketing emails. The repeater component dynamically shows items in a consistent card, list, or custom layout. Connect the repeater to an available data source, and use merge fields to show details about each item in the repeater, such as product names, descriptions, and images.

SEE ALSO | *Salesforce Help*: Work with Repeaters in Marketing Emails (can be outdated or unavailable during release preview)

Share Custom Links and Personalized Images with Email Recipients

Personalize emails with dynamic images and customize the button experience for each audience. Input a merge field or dynamic URL for an image component source or for a button action.

Use New Field Types for Data Source Objects in Forms

New field types for data source objects in forms provide more flexible and precise data collection based on the data types. Field types include date, date/time, time, and number for scheduling, time-sensitive, and numerical data. Plus, the Text Area (Long) field now displays a larger input area and provides a draggable corner to resize the field.

SEE ALSO | *Salesforce Help*: Data Sources for Forms in Marketing Cloud (can be outdated or unavailable during release preview)

Increase Customer Engagement with Personalization Recommendations

To increase engagement with more targeted email content, marketers can now recommend products, services, and other items with Salesforce Personalization recommendations. Connect recommendation data to a repeater component to show a set of recommended products that are tailored to each email recipient.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Advanced edition.

See Also

Salesforce Help: Work with Repeaters in Marketing Emails (can be outdated or unavailable during release preview)

Stay Compliant with New and Improved Consent Tools

Now you can collect consent data in more flow types and include a column for country code in consent import files.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Collect Consent Data Automatically with Flows

Consent collection is now available in event-triggered and Data Cloud-triggered flows. Use the Create Consent flow action to update the consent status for a unified individual. For example, change someone's consent status to Opted Out when they click a custom link. Previously, the Create Consent action was available only in event-triggered flows with a form submission event trigger.

SEE ALSO | *Salesforce Help*: Flow Element: Create Consent (can be outdated or unavailable during release preview)

Country Code Is Now Supported for Consent Import Files

When you import consent data for SMS or WhatsApp, you can now include a column for the corresponding country code. Previously, this data type wasn't supported for import files.

SEE ALSO | *Salesforce Help*: Formatting Marketing Consent Import Files (can be outdated or unavailable during release preview)

Gain Valuable Insights with Enhanced Reporting Options

Now marketers can track and report on custom links to pages on external websites, and attribute that tracking data to a campaign. You also get improved deliverability metrics for Marketing Performance dashboards and improved page view metrics for your external websites.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Track Links That Drive Traffic to Your Website

Now you can track links to your external website back to a specific source, such as an ad or email. If you set up external tracking before Summer '25, update the required Behavioral Events data stream to take advantage of the latest tracking capabilities.

SEE ALSO | *Salesforce Help*: Track Activity on External Sites (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: Create and Manage a Custom Tracked Link (can be outdated or unavailable during release preview)

Collect First-Touch Page View Data When a Visitor Consents to Tracking

When a site visitor opts in to cookie tracking on a connected external website, their initial page view data is now reported. If a visitor doesn't opt in to tracking, no tracking is reported.

Monitor Email Performance with Deliverability Dashboard

The new Deliverability dashboard tab in Marketing Performance helps marketers analyze your top and bottom-performing campaigns. Explore performance metrics to understand the reasons for failed email deliveries. Plus, the embedded Deliverability dashboard on individual campaign records reveals campaign-specific deliverability performance of sent emails.

SEE ALSO | *Salesforce Help*: Reporting in Marketing Cloud (can be outdated or unavailable during release preview)

Maximize Your Content Impact with Performance Dashboard

Track the performance of your email, SMS, WhatsApp, tracked links, and landing pages directly from the content records. Gain valuable insights on audience engagement, evaluate how dynamic content variations perform, and use these insights to drive interaction. View all the key metrics in a centralized location to make informed, data-driven enhancements to your content strategies.

SEE ALSO | *Salesforce Help*: Track Marketing Content Performance (can be outdated or unavailable during release preview)

SEE ALSO | *Salesforce Help*: Reporting in Marketing Cloud (can be outdated or unavailable during release preview)

Manage Admin Tasks More Easily with These Enhancements

Enjoy easier setup for messaging channels, use Identity Licenses to grant Marketing Cloud access to your team members, and get more insight into your requests for SMS codes, brands, and campaigns. Plus, new Marketing Cloud customers can select a custom data space for marketing during initial setup.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Streamline Messaging Channel Setup

We improved the data kit installation and update process, so that it's easier for you to set up the messaging channels.

SEE ALSO | *Salesforce Help*: Connect to Data Cloud for Unified Messaging (can be outdated or unavailable during release preview)

Submit Messaging Requests with Confidence

We added detailed instructions about requesting SMS codes, brands, and campaigns for specific countries in Unified Messaging Setup. This information helps you to avoid errors and get your requests approved quickly. We also provide a detailed list of any request rejections so that you can fix errors and retry the request.

SEE ALSO | *Salesforce Help*: Request a Location-Specific Sending Code (can be outdated or unavailable during release preview)

Select a Dedicated Data Space for Marketing Cloud

New Marketing Cloud customers can use a custom data space to separate and organize their marketing data in Data Cloud. This option helps improve the security, retrieval and processing times, and quality of your data. Previously, marketing data was assigned to the default data space. If you set up Marketing Cloud before Summer ’25, continue to use the default data space.

SEE ALSO | *Salesforce Help*: Getting Started with Marketing Cloud Setup (can be outdated or unavailable during release preview)

Manage User Access with Identity Licenses

Marketing Cloud now supports Identity Licenses, so that you can add users to your marketing team without giving each one a full Salesforce license. Identity-licensed users can log in with Salesforce single sign-on, and you can assign them the same permissions as Marketing Cloud Managers. This permission set includes full access to campaigns, segments, and flows. To provide multiple Identity-license users with different permissions, create additional identity profiles.

SEE ALSO | *Salesforce Help*: Set Up Identity Users in Marketing Cloud (can be outdated or unavailable during release preview)

Improve Identity Resolution Accuracy with Recommended Rules

To get the most out of identity resolution, add two recommended custom rules to the identity resolution ruleset that you use for marketing. These rules help ensure that records are properly linked during lead-to-contact conversion, and help identify visitors to your tracked external sites.

SEE ALSO | *Salesforce Help*: Configure Identity Resolution Rulesets for Marketing Cloud (can be outdated or unavailable during release preview)

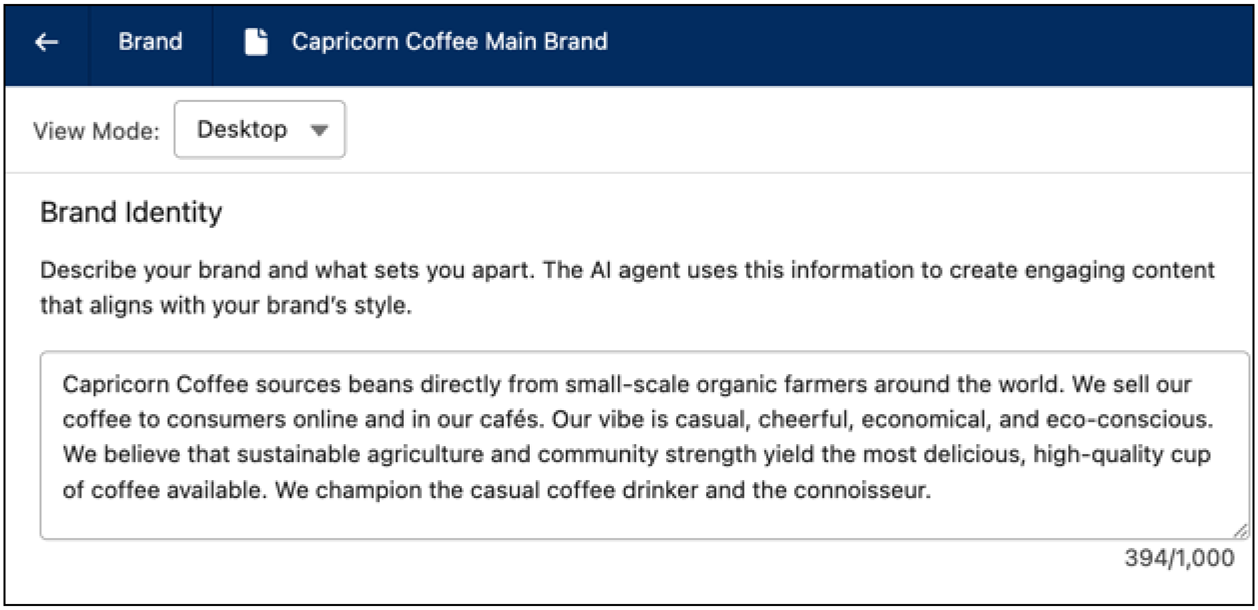
Other Changes in Marketing Cloud Growth

Learn about other changes we’ve made in Summer ’25.

Where: These changes apply to Salesforce Enterprise and Unlimited editions with Marketing Cloud Growth and Advanced editions.

Expand Your Brand Identity Description to Generate Better Content

Add more detail and nuance about your company to the expanded Brand Identity field in the branding section of the content builder. Now you have up to 1,000 characters to describe your brand and what sets you apart. Previously, Brand Identity was limited to 250 characters. When marketers use Agentforce to draft content for an email, landing page, or SMS message, the AI agent delivers text that aligns even more closely with your brand's style.



SEE ALSO | *Salesforce Help*: Brand Your Content in Marketing Cloud (can be outdated or unavailable during release preview)

Personalize Engagement by Converting Prospects to Contacts

Streamline the sales process, personalize communication, and boost conversion rates by converting qualified prospects into contacts and associate them with a new or existing account. You can either convert your prospects manually or by using automated flows.

SEE ALSO | *Salesforce Help*: Convert Prospects (can be outdated or unavailable during release preview)

Delete CMS Workspaces

Content admins can now delete outdated or unused marketing workspaces. To prepare, remove the workspace from all source and target workspace sharing relationships, and unpublish all the content in the workspace. You can't delete the default workspace that comes with Marketing Cloud.

MuleSoft

Use the MuleSoft Anypoint Platform suite of products to connect and integrate apps, systems, and data across your enterprise. Streamline operations by building and automating processes with clicks instead of code. You can design, develop, govern, and share APIs and integration apps and host them in the cloud or on-premises.

- The Mulesoft Release Notes are organized by product.
- The MuleSoft Release Note Summary by Month is organized by latest updates.

To learn more about MuleSoft products, see MuleSoft Documentation.

Mobile

Use a single component to configure Dynamic Related Lists on desktop and mobile (beta). Customize Seller-Focused Mobile Experience with a generally available mobile builder. External Client Apps for Mobile Publisher is now generally available for new apps. Files Priming for Salesforce Mobile App Plus is generally available.

Salesforce Mobile App
Use Dynamic Related Lists on mobile (Beta). Files Priming is generally available.

Mobile Publisher
External Client Apps for Mobile Publisher is now generally available for new apps. Landscape mode is now supported for all Mobile Publisher apps. Android users can preview PDF files after downloading them. Mobile Publisher release numbering is aligning with Salesforce release numbering.

General Mobile Updates
Configure mobile features with three new plugins. Mobile Builder for Seller-Focused Experience is generally available.

Salesforce Mobile App

Use Dynamic Related Lists on mobile (Beta). Files Priming is generally available.

Everything That’s New in the Salesforce Mobile App
Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

Everything That’s New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org’s Salesforce edition and licenses, as well as a user’s assigned profile and permission sets, determines the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of June 16, 2025.

Salesforce App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
Offline Access			
Access Record Attachments in the Offline App with Files Priming (Generally Available)	✓	✓	✓
Miscellaneous Enhancements			
Delivered Idea: Use Dynamic Related Lists on Mobile (Beta)	✓	✓	✓

Delivered Idea: Use Dynamic Related Lists on Mobile (Beta)
With this beta feature, you can now use Dynamic Related Lists on mobile. Previously, the Dynamic Related List - Single component rendered only on record pages on desktop, and you configured a Single Related List component to render on mobile devices. We delivered this feature thanks to your ideas on IdeaExchange.

Use Dynamic Related Lists on Mobile (Beta)

With this beta feature, you can now use Dynamic Related Lists on mobile. Previously, the Dynamic Related List - Single component rendered only on record pages on desktop, and you configured a Single Related List component to render on mobile devices. We delivered this feature thanks to your ideas on IdeaExchange.

Where: This feature is available in Lightning Experience in all editions.

Dynamic Related Lists for Mobile is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

See Also

Get the Desktop Dynamic Related List Experience on Mobile (Beta)

Access Record Attachments in the Offline App with Files Priming (Generally Available)

When you create or update a briefcase to select records to prime for the Offline App (Salesforce Mobile App Plus), you can now also include files attached to the selected records. The Files Priming feature, which was previously in beta, is now generally available. When you prime file attachments for offline use, your mobile workforce can access important attachments even in low-connectivity settings. For example, you can configure a briefcase to prime attached images for offline use, so that technicians can view the images during site visits or service appointments.

Where: This change applies to the Salesforce Mobile App Plus for iOS and Android on phones and tablets in all editions, except Database.com.

Who: Mobile Offline is available to users who have the Mobile Offline for Salesforce Mobile App Plus user permission in orgs with the Salesforce Mobile App Plus license.

How: From Setup, in the Quick Find box, enter `Briefcase Builder`, and then select **Briefcase Builder**. Update the briefcase that's associated with the Offline App, or create a briefcase. In the settings of an object rule, select **Enable file attachments**.

See Also

Salesforce Help: Create a Briefcase (can be outdated or unavailable during release preview)
Salesforce Help: Get Started With Mobile Offline (can be outdated or unavailable during release preview)

Mobile Publisher

External Client Apps for Mobile Publisher is now generally available for new apps. Landscape mode is now supported for all Mobile Publisher apps. Android users can preview PDF files after downloading them. Mobile Publisher release numbering is aligning with Salesforce release numbering.

Use External Client Apps to Manage Your App's Push Notifications (Generally Available)
External Client Apps for Mobile Publisher is now generally available for new Experience Cloud apps. The External Client Apps framework replaces the Connected App framework. By providing push notification configuration options and quicker deployments, External Client Apps shortens app publishing time significantly. Existing Mobile Publisher for Experience Cloud apps and both existing and new Mobile App Plus apps will continue using the connected apps framework.

View Mobile Publisher Content in Landscape Mode
Landscape mode is now supported in Mobile Publisher, making it easier to view and interact with your content. This feature is available on all form factors and devices, so you can use it on your phone, tablet, or desktop.

Align Mobile Publisher Release Numbering with Salesforce
Mobile Publisher is transitioning to align with Salesforce's major release numbering scheme. This change aligns Mobile Publisher apps with the well-supported core release cadence at Salesforce.

Preview PDFs on Android Devices
Android users can now preview PDF files after downloading them.

Get Notified of New Mobile Publisher Version Release Notes
Now, you're notified of new Mobile Publisher versions, app store rejections, and new terms and conditions. You can easily review the current and previous version release notes to determine whether the new version is the right choice for your app and business needs.

Use External Client Apps to Manage Your App's Push Notifications (Generally Available)

External Client Apps for Mobile Publisher is now generally available for new Experience Cloud apps. The

External Client Apps framework replaces the Connected App framework. By providing push notification configuration options and quicker deployments, External Client Apps shortens app publishing time significantly. Existing Mobile Publisher for Experience Cloud apps and both existing and new Mobile App Plus apps will continue using the connected apps framework.

Where: This change applies to new Mobile Publisher for Experience Cloud apps. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

See Also

Salesforce Help: Create a Mobile Publisher Project (can be outdated or unavailable during release preview)

View Mobile Publisher Content in Landscape Mode

Landscape mode is now supported in Mobile Publisher, making it easier to view and interact with your content. This feature is available on all form factors and devices, so you can use it on your phone, tablet, or desktop.

Where: This change applies to Mobile Publisher for Experience Cloud apps. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

See Also

Salesforce Help: Configure Your App's Orientation (can be outdated or unavailable during release preview)

Align Mobile Publisher Release Numbering with Salesforce

Mobile Publisher is transitioning to align with Salesforce's major release numbering scheme. This change aligns Mobile Publisher apps with the well-supported core release cadence at Salesforce.

Where: This change applies to Mobile Publisher for Experience Cloud apps. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

When: This change applies to all future Mobile Publisher releases. The last version with the old numbering is 14.0, and the current version is 256.

Preview PDFs on Android Devices

Android users can now preview PDF files after downloading them.

Where: This change applies to Mobile Publisher for Experience Cloud apps. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

Why: In Spring '25, Mobile Publisher added support for Enhanced Downloads. However, our Android users were quick to tell us about an issue–they were unable to preview PDF files [within the app] after downloading them. We've fixed this issue by adding PDF preview functionality for Android devices.

Get Notified of New Mobile Publisher Version Release Notes

Now, you're notified of new Mobile Publisher versions, app store rejections, and new terms and conditions. You can easily review the current and previous version release notes to determine whether the new version is the right choice for your app and business needs.

Where: This change applies to Mobile Publisher for Experience Cloud apps. Setup for Mobile Publisher is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

General Mobile Updates

Configure mobile features with three new plugins. Mobile Builder for Seller-Focused Experience is generally available.

Set Up Mobile Features and Notifications By Using the External Client App Framework (Beta)
With three new plugins, you can now use an external client app to configure mobile features. The mobile app plugin for external client apps turns on mobile-specific features, such as screen lock upon a custom timeout value. The push notification plugin enables a mobile app's push notifications for an Android or iOS device. With the new notifications plugin, you can configure your mobile app to receive custom notifications.

Customize Seller-Focused Mobile Experience (Generally Available)
Add native pages for custom objects and customize the layout of record home pages in Seller-Focused Mobile Experience. Mobile Builder for Seller-Focused Experience is now generally available.

Set Up Mobile Features and Notifications By Using the External Client App Framework (Beta)

With three new plugins, you can now use an external client app to configure mobile features. The mobile app plugin for external client apps turns on mobile-specific features, such as screen lock upon a custom timeout value. The push notification plugin enables a mobile app's push notifications for an Android or iOS device. With the new notifications plugin, you can configure your mobile app to receive custom notifications.

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

Note The mobile app, push notification, and notification plugins for External Client Apps are pilot or beta services that are subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of these pilot or beta services is at the Customer's sole discretion.

See Also

Enhance Your Mobile App With Three New Plugins for External Client Apps (Beta)

Customize Seller-Focused Mobile Experience (Generally Available)

Add native pages for custom objects and customize the layout of record home pages in Seller-Focused Mobile Experience. Mobile Builder for Seller-Focused Experience is now generally available.

Where: This feature is available in Lightning Experience in all editions. The Seller-Focused Mobile Experience for Android and iOS is available on phones and tablets in all editions, except Database.com, starting with mobile version 254.000.

See Also
Customize Seller-Focused Mobile Experience (Generally Available)

Omnistudio

Omnistudio offers faster standard designers and list views for all components. The standard designer for Omniscripts also supports the Newport Design System for easier custom designs. Expanding their multi-channel support, Omniscripts now can deploy to Lightning Web Runtime (LWR) sites for Experience Cloud. Omnistudio Data Mappers can load data from external sources by using a custom interface object as the input. Troubleshooting failed steps in Integration Procedures is easier with detailed logging. For easier migration from managed package runtime to standard runtime, Omnistudio automatically converts custom functions in Integration Procedures and Data Mappers. With new methods, you can now use Connect REST APIs to call Data Mappers or Integration Procedures on standard runtime.

Build Omnistudio Components Faster with the New Omnistudio Standard Designer
Use the intuitive and responsive Omnistudio standard designer to quickly create Flexcards, Omniscripts, Integration Procedures, and Data Mappers. Enjoy the streamlined workflows, easy drag-and-drop feature that doesn't need you to switch between tabs, and real-time design feedback and visualizations. Create components 10 times faster than with the managed package designer.

Quickly Browse and Manage Omnistudio Components with Standard List Views
Centrally manage Omnistudio components directly from standard list views. In this enhanced list view, searches run faster and refresh response time is significantly reduced. From the list view page, you can manage Omnistudio components, search and filter list views, view component versions, and control component activation and deletion. Based on a test with 2000 components, this list view is 9 times faster than before, in terms of search and refresh response times.

Customize Your Omniscript Design with Newport Design System
Enhance your Omniscript design experience with the Newport Design System. The system offers Newport and Newport Storybook themes in addition to the existing Lightning theme. Switch between the Lightning, Newport, and Newport Storybook themes to get instant visual feedback, similar to the package designer. Get the flexibility to override default styles and upload custom design files to align with your branding requirements.

Enhance Your Experience Cloud LWR Sites with Omniscripts
Embed Omniscripts in your Lightning Web Runtime (LWR) Experience Cloud sites. LWR sites offer better performance and scalability. Use the combined power of LWR's speed and Omniscripts'

customization options to create interactions that render faster for your users.

Use External Data Sources in an Omnistudio Data Mapper Load
Omnistudio now allows you to add external data as an input to a Data Mapper Load. Import the external data into a custom object using a data import tool and map the fields from the custom object to the target Salesforce records by using a Data Mapper Load. This allows you to seamlessly map external data to Salesforce records, ensuring data compatibility and accuracy.

Troubleshoot Integration Procedures by Analyzing Error Logs
Capture detailed information about failed Integration Procedure steps. Enable error logs to get the error details in the OmniComponentErrorLog records.

Convert Custom Functions Automatically to Work Seamlessly in Omnistudio Standard Runtime
If you're on Omnistudio managed package runtime with standard data model and enable standard runtime from Omnistudio settings as part of migration to standard runtime, Omnistudio automatically converts custom functions in Integration Procedures and Data Mappers from the user-defined syntax to the standard syntax. This syntax conversion is asynchronous. Get notified through email when the conversion is completed.

Use the New Connect APIs for Omnistudio Data Mappers and Integration Procedures in Standard Runtime
Omnistudio now offers Connect APIs that remove the dependency on the managed package and provide better performance for Data Mapper and Integration Procedure calls from Apex classes. Use these APIs to invoke Data Mappers or Integration Procedures through the DRGlobal or IntegrationProcedureService Apex classes.

Improve Text Formatting in Omniscripts and Flexcards
Use the TinyMCE Editor to add text, images, and other rich content to your Omniscripts and Flexcards. This editor provides advanced formatting options and real-time preview. It also supports custom labels, smart links, date and time formats, and special characters.

Experience Enhanced Security and Efficiency for Omnistudio
Build your Omnistudio solutions effectively by leveraging enhancements to email validations, scratch org setup, and the standard designer and runtime.

Omnistudio Minor Releases
Find out about bug fixes, minor updates, and known issues about Omnistudio made after Summer '25 and before Winter '26.

Build Omnistudio Components Faster with the New Omnistudio Standard Designer

Use the intuitive and responsive Omnistudio standard designer to quickly create Flexcards, Omniscripts, Integration Procedures, and Data Mappers. Enjoy the streamlined workflows, easy drag-and-drop feature that doesn't need you to switch between tabs, and real-time design feedback and visualizations. Create components 10 times faster than with the managed package designer.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime with the Omnistudio license enabled.

Why: The Omnistudio standard designer provides standard components for building user interfaces and integrating these components with other applications within Salesforce. The standard designer offers the Omnistudio Design Assistant that helps you get real-time feedback on component health, complexity, performance, and best practices during the design stage.

The new, refreshed layout of this designer offers an enhanced user experience as compared to the managed package designer.

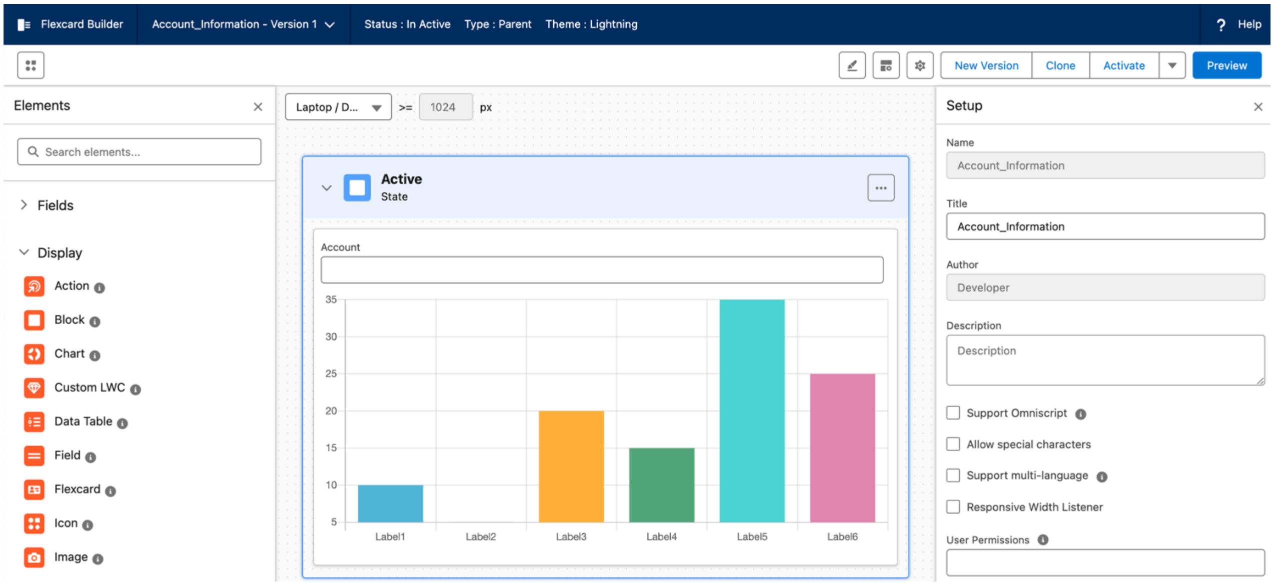
- Flexcard: Create Flexcards in fewer steps. Dragging elements to the canvas is now twice as fast. Flexcard activation is up to 7 times faster.
- Omniscript: Drag elements to the canvas twice as fast and edit their properties simultaneously, without switching between tabs. Omniscript activation is up to 6 times faster.
- Integration Procedure: Create Integration Procedures up to 2.5 times faster than before. Access Integration Procedure settings in a single click and configure Integration Procedures in fewer steps. Easily insert, edit, or rearrange elements between blocks by using connectors. Drag elements to the canvas up to 7 times faster than before.
- Data Mapper: Create Data Mappers up to 6 times faster than before. Effortlessly access Data Mapper settings and visualize connections between objects.

Important The performance figures in this document are provided for informational purposes only and are based on internal validation and testing under specific conditions. Actual results may vary depending on your component design, production environment, and other factors. These figures provide general guidance and aren't a guarantee of performance.

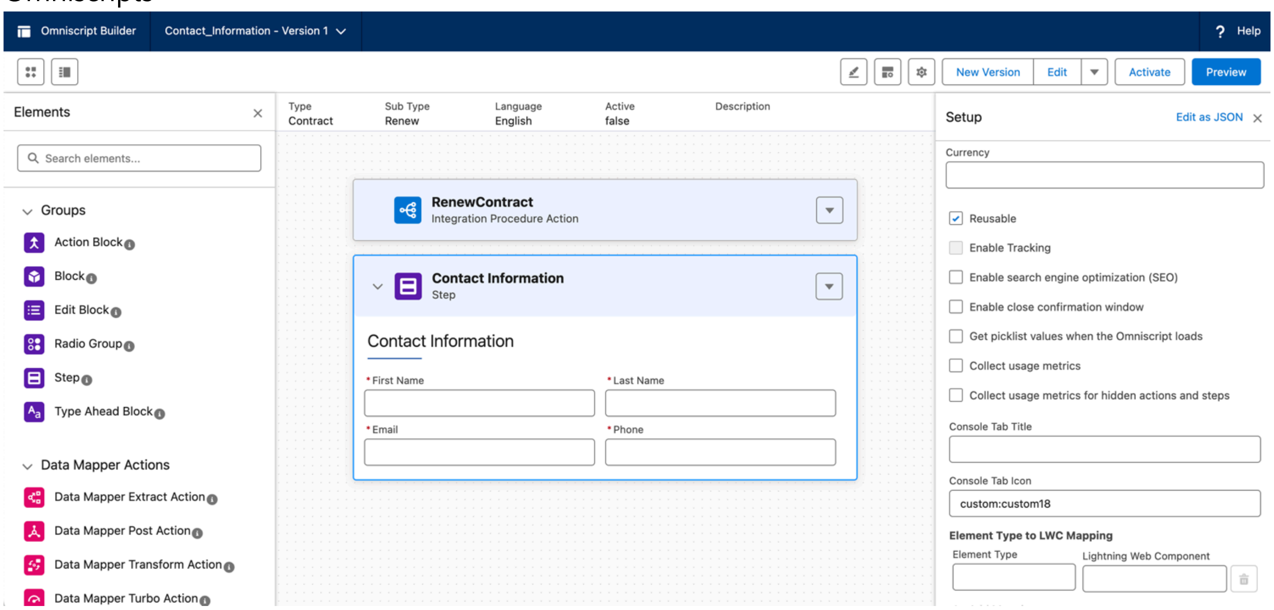
How: The standard designer is now available via the Managed Package Designer setting on the Omnistudio Settings page. For new users, the standard designer is enabled by default. For existing users using the standard runtime, the standard designer is enabled by default after upgrading to Summer '25.

To launch the standard designer, select a Flexcard, Omniscript, Integration Procedure, or Data Mapper from the list view page.

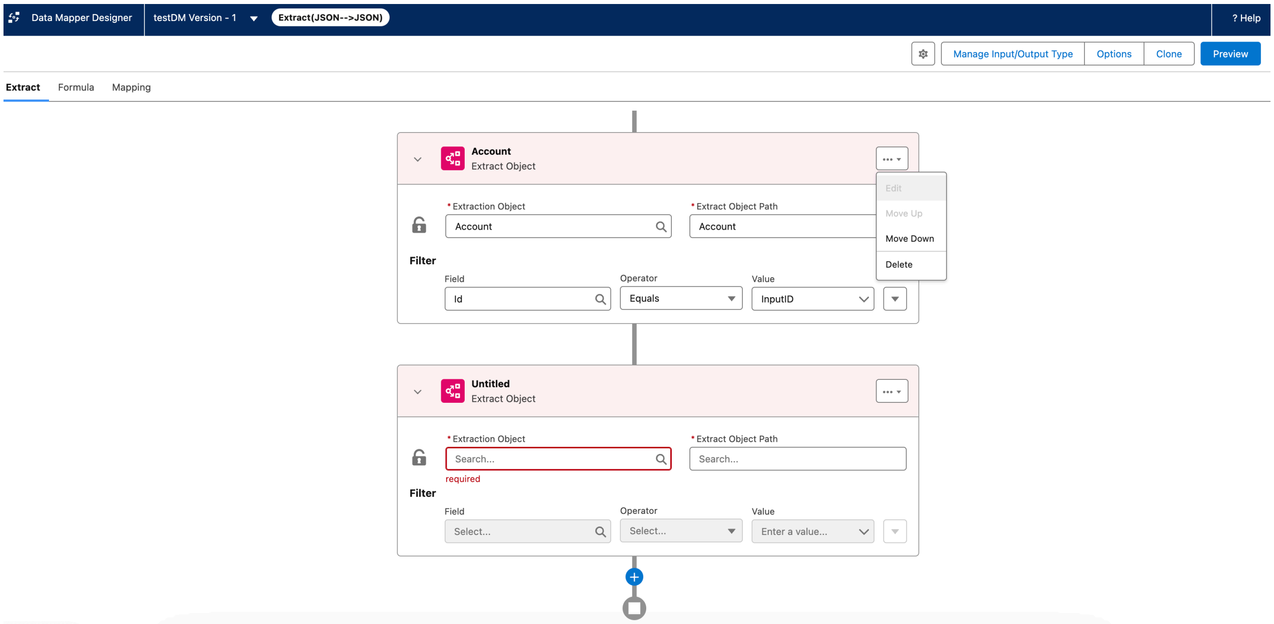
- Flexcard



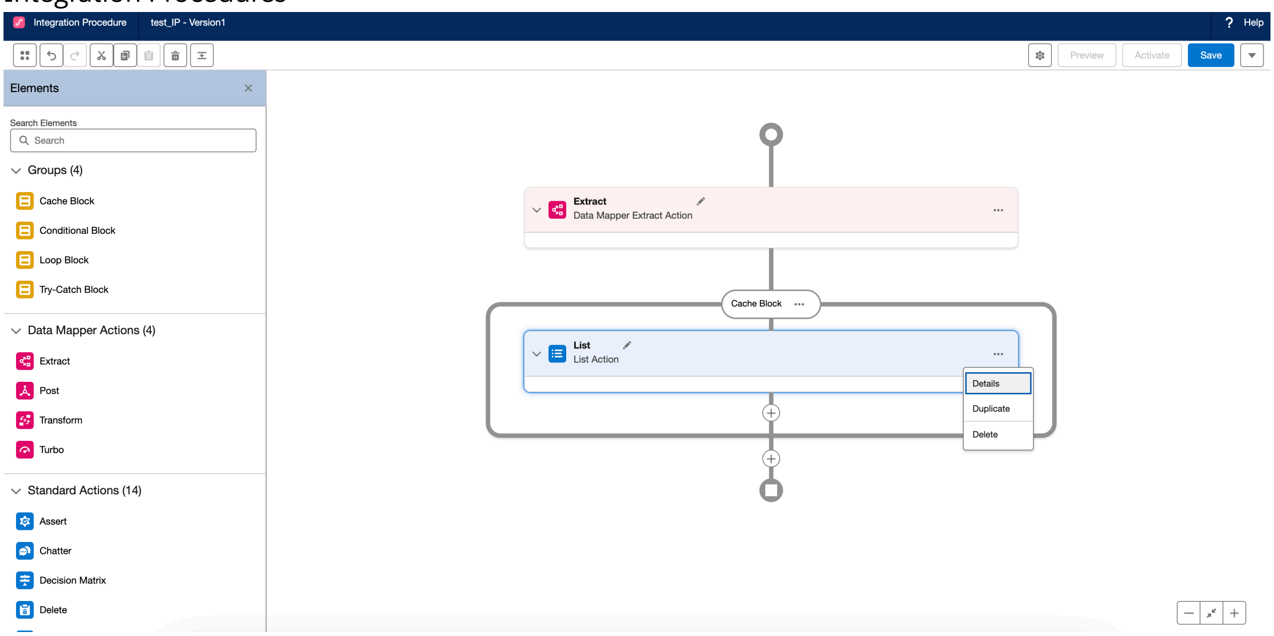
- Omniscripts



- Data Mappers



- Integration Procedures



See Also

Salesforce Help for Omnistudio: Omnistudio Standard Designer (can be outdated or unavailable during release preview)

Quickly Browse and Manage Omnistudio Components with Standard List Views

Centrally manage Omnistudio components directly from standard list views. In this enhanced list view, searches run faster and refresh response time is significantly reduced. From the list view page, you can manage Omnistudio components, search and filter list views, view component versions, and control component activation and deletion. Based on a test with 2000 components, this list view is 9 times faster than before, in terms of search and refresh response times.

Note The performance figures in this document are provided for informational purposes only and are based on internal validation and testing under specific conditions. Actual results may vary depending on your component design, production environment, and other factors. These figures provide general guidance and aren't a guarantee of performance.

Where: This change applies to all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime and standard designer.

How: To launch a list view page for an Omnistudio component, go to App Launcher, then find and select the component. From the new list view page, open any component in the standard designer. If needed, add frequently used components to your App Navigation Items by editing the navigation list.

Note You can't import or export Omnistudio components from the list page. Use Salesforce CLI instead.

Customize Your Omniscript Design with Newport Design System

Enhance your Omniscript design experience with the Newport Design System. The system offers Newport and Newport Storybook themes in addition to the existing Lightning theme. Switch between the Lightning, Newport, and Newport Storybook themes to get instant visual feedback, similar to the package designer. Get the flexibility to override default styles and upload custom design files to align with your branding requirements.

Where: This change applies to Lightning Experience, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime and standard designer.

How: To switch to the Newport theme, from the Omniscript list view page, open an Omniscript, and then from the dropdown on the designer canvas or the Preview page, select **Newport**. To switch to the Newport Storybook theme, from the Omniscript list view page, open an Omniscript in a designer canvas, click **Preview**, and then from the Theme dropdown, select **Newport Storybook**.

See Also

Salesforce Help for Omnistudio: Newport Design System (can be outdated or unavailable during release preview)

Enhance Your Experience Cloud LWR Sites with Omniscripts

Embed Omniscripts in your Lightning Web Runtime (LWR) Experience Cloud sites. LWR sites offer better performance and scalability. Use the combined power of LWR's speed and Omniscripts' customization options to create interactions that render faster for your users.

Where: This change applies to Experience Cloud sites in all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime and standard designer.

How: To enable Omniscripts on LWR sites, contact Salesforce Customer Support. To add an Omniscript to an LWR Experience Cloud site, activate the Omniscript and add it to the LWR site by using the site builder.

See Also

Salesforce Help for Omnistudio: Considerations for Using Omniscripts with Lightning Web Runtime Sites (can be outdated or unavailable during release preview)

Use External Data Sources in an Omnistudio Data Mapper Load

Omnistudio now allows you to add external data as an input to a Data Mapper Load. Import the external data into a custom object using a data import tool and map the fields from the custom object to the target Salesforce records by using a Data Mapper Load. This allows you to seamlessly map external data to Salesforce records, ensuring data compatibility and accuracy.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime and standard designers.

How: To use data from an external source in a Data Mapper Load, configure an interface object, which is a custom object for mapping the external data to the corresponding sObject. Add fields corresponding to the data in the external source to the interface object. Then, create a Data Mapper Load, select **sObject** as the input type, and then select the interface object. Then, map the fields to the required Salesforce records.

See Also

Salesforce Help for Omnistudio: Create Interface Objects for a Data Mapper Load(can be outdated or unavailable during release preview)

Troubleshoot Integration Procedures by Analyzing Error Logs

Capture detailed information about failed Integration Procedure steps. Enable error logs to get the error details in the OmniComponentErrorLog records.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime and standard designers.

How: From Setup, find and select **Omni Interaction Configuration**, create a new configuration named *`ErrorLoggingEnabled`* and enable it.

See Also

Salesforce Help for Omnistudio: Enable Error Logging for Integration Procedures(can be outdated or unavailable during release preview)

Convert Custom Functions Automatically to Work Seamlessly in Omnistudio Standard Runtime

If you're on Omnistudio managed package runtime with standard data model and enable standard runtime from Omnistudio settings as part of migration to standard runtime, Omnistudio automatically converts custom functions in Integration Procedures and Data Mappers from the user-defined syntax to the standard syntax. This syntax conversion is asynchronous. Get notified through email when the conversion is completed.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard data model and managed package runtime.

Why: In the Omnistudio managed package runtime, functions are defined using this syntax:

```
functionName(args)
```

Here *functionName* is the user-defined function.

In the managed package runtime, custom functions with the user-defined syntax are defined in custom metadata as `FunctionDefinition_mdt`. The Apex class name and method name are part of the custom metadata.

After migrating to Omnistudio standard runtime, custom functions are converted this syntax:

```
FUNCTION("ApexClassName", "MethodName", args)
```

How: To convert custom functions to the standard syntax, from Setup, find and select **Omnistudio Settings**, and then turn off the Managed Package Runtime setting.

See Also

Salesforce Help for Omnistudio: Disable the Managed Package Runtime and Deploy Custom Lightning Web Components(can be outdated or unavailable during release preview)

Use the New Connect APIs for Omnistudio Data Mappers and Integration Procedures in Standard Runtime

Omnistudio now offers Connect APIs that remove the dependency on the managed package and provide better performance for Data Mapper and Integration Procedure calls from Apex classes. Use these APIs to invoke Data Mappers or Integration Procedures through the DRGlobal or IntegrationProcedureService Apex classes.

Where: This change applies to Lightning Experience, in Experience Cloud sites, and in all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime.

How: If you're migrating to the standard runtime, replace the existing methods in the DRGlobal or IntegrationProcedureService Apex classes with the new Connect API methods.

Note For a complete list of features that depend on the managed package in Omnistudio standard runtime, see Considerations for Uninstalling the Managed Package.

See Also

Salesforce Help for Omnistudio: DRGlobal Class and Methods(can be outdated or unavailable during release preview)

Salesforce Help for Omnistudio: Integration Procedure Invocation from Apex(can be outdated or unavailable during release preview)

Salesforce Help for Omnistudio: Cache for Top-Level Integration Procedure Data(can be outdated or unavailable during release preview)

Salesforce Help for Omnistudio: Cache for Omnistudio Data Mappers and Integration Procedures(can be outdated or unavailable during release preview)

Improve Text Formatting in Omniscripts and Flexcards

Use the TinyMCE Editor to add text, images, and other rich content to your Omniscripts and Flexcards. This editor provides advanced formatting options and real-time preview. It also supports custom labels, smart links, date and time formats, and special characters.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: This feature is available to Omnistudio customers who use the standard runtime with the standard designer.

How: The TinyMCE editor is available by default in the these elements.

- Omniscript:
  - Step with the Instruction property
  - Disclosure with the Text property
  - Text Block with the Text property
- Flexcards
  - Display Text with the Text property

Experience Enhanced Security and Efficiency for Omnistudio

Build your Omnistudio solutions effectively by leveraging enhancements to email validations, scratch org setup, and the standard designer and runtime.

Where: This change applies to Lightning Experience, Experience Cloud sites, and all versions of Enterprise, Performance, and Unlimited editions where Omnistudio is enabled.

Who: The standard runtime and Omnistudio standard designer preview enhancements are available to Omnistudio customers who use them. All other enhancements are available to Omnistudio customers who use the managed package runtime or the standard runtime.

Why: Omnistudio offers these new enhancements.

- The standard runtime and Omnistudio standard designer previews are now more secure and performant.
- The Email input element in Omniscripts and Flexcards now has better email validations.
- To save time and improve consistency, metadata settings in scratch orgs are now copied from the parent org.

Omnistudio Minor Releases

Find out about bug fixes, minor updates, and known issues about Omnistudio made after Summer ’25 and before Winter ’26.

Omnistudio Minor Releases

Revenue Cloud

Improve product browsing by setting a default catalog. Create more complex product offerings with support for more product attributes. Simplify quotes by hiding less important products in complex bundles. Automate pricing simulations, apply sequential discounts, and track price change history. Speed up quote generation with cloning, enable auto-renewals, and manage flexible order amendments. Apply contractual volume or tier-based prices based on cumulative quantities purchased. Adapt to changes in ongoing orders by configuring how fulfillment plans respond. Save time and effort by configuring a fulfillment scenario for a product classification that covers a range of similar products. Use a dedicated billing app to streamline your daily tasks and get a 360-degree view of customer billing information. Improve operational efficiency with real-time visibility into invoices, credit memos, and billing schedules. Sell with commitment-based pricing and flexible token allocation. Associate usage-based grants with specific targets, such as accounts, contracts, or custom objects.

Product Catalog Management

Tailor product browsing with default catalogs and configurable list pages. Control the visibility of guided selection and product carts, and manage complex product bundles. Improve scalability of sales with support for more product attributes and the ability to create larger product ranges. Efficiently search extensive catalogs to expedite transactions.

Salesforce Pricing

Automate pricing simulations by passing line item details as input variables, reducing manual effort and improving accuracy. Determine optimal product pricing by using Price Adjustment Matrix to apply discounts sequentially or one after another. Improve pricing efficiency by processing elements concurrently, tracking price history to guide purchasing decisions, and applying cumulative discounts based on past orders to foster customer loyalty and drive growth.

Product Configurator

With the Advanced Configurator and the Constraint Builder, now generally available, use point-and-click tools or code to define highly scalable and performant constraints. Gain better control over asset data for configuration rules by setting an asset context. Improved setup labels make it easier to understand and enable relevant Product Configurator settings.

Transaction Management

Generate quotes quickly with Agentforce Quoting. Save time by cloning groups and line items on quotes and orders. Offer competitive pricing by applying contractual volume or tier-based prices based on cumulative quantities purchased. Improve revenues by using auto-renewals and improve forecasts by creating automatic renewal opportunities on quote and order items. Negotiate renewal price uplifts during initial sale that also apply to the subscription renewal. Amend order assets as many times as you want, including updating the start date and honoring multiple price amendments. Renew expired assets. Enjoy usability improvements to the Quotes and Orders pages, including visual indicators that increase accessibility and dependent picklists that increase accuracy.

Usage Selling

Offer reduced costs for usage resources based on the committed quantity by using commitment-based pricing. Use non-monetary units, such as tokens, to provide a flexible pricing model where customers can allocate their purchased tokens where needed and maximize value across various services. Define rates with tokens and currencies. Enhance usage product grant binding policies for account and contract binding targets, and implement an enhanced rating discovery procedure to improve rate accuracy.

Usage Management
Optimize resource utilization to efficiently manage usage-based grants. Associate usage-based grants with specific targets, such as accounts, contracts, or custom objects. Accurately retrieve and apply negotiated rates by using the enhanced rating procedures and real-time data access. Use the Wallet dashboard to closely monitor consumption details for binding objects. Track consumption data across all processing stages to provide complete transparency.

Salesforce Contracts
Increase file size limit for custom fonts in the Docgen Custom Fonts Library.

Dynamic Revenue Orchestrator
Fulfill any entity, such as service requests and custom objects, in addition to orders. Adapt to changes in ongoing orders by configuring how fulfillment plans respond. Use Decomposition Workspace for intuitive rule configuration. Save time and effort by configuring a fulfillment scenario for a product classification that covers a range of similar products. Enrich your target fields and attributes in decomposition rules by using expression sets. Update your order and fulfillment order line items by using real-time data from external systems. View the reasons for actions in the fulfillment line items in the Decomposition Viewer.

Billing
Use a dedicated Billing app to streamline your daily tasks and get a 360-degree view of customer billing information. Improve operational efficiency with real-time visibility into invoices, credit memos, and billing schedules. Achieve greater control over and flexibility from the UI by generating invoice previews, and managing billing schedule groups and credit memos. Write off uncollectible invoices and cater to your customer requirements by configuring billing profiles. Streamline financial operations with billing for external transactions, improved tax reporting, and payment and refund management. Optimize cash flow and financial reporting through collections and by capturing payment and refund amounts in corporate currency.

Product Catalog Management

Tailor product browsing with default catalogs and configurable list pages. Control the visibility of guided selection and product carts, and manage complex product bundles. Improve scalability of sales with support for more product attributes and the ability to create larger product ranges. Efficiently search extensive catalogs to expedite transactions.

Effortlessly Manage Catalogs on Your Product List Page
Enhance your product browsing experience by setting a default catalog on your product list page. Help customers make informed product selections through seamless catalog switching by configuring your product list page in Lightning App Builder or flows. To use this functionality in your overridden flow, incorporate the latest Discover Products flow changes.

Manage Cart Visibility on Product List Container Page
Add relevance to your sales process by controlling the visibility of the product cart on the Browse Catalogs page in Transaction Management. Preview the selected products from the catalog before adding them to a quote or order.

Control the Visibility of Guided Product Selection on Product List Page
Tailor your product discovery experience to specific business needs. Control the visibility of the Guided Product Selection feature on your product list page through Lightning App Builder or flows to ensure a more streamlined and relevant user experience.

Manage Complex Product Configurations with Expanded Attribute Support
Accurately represent and manage extensive product configurations, with support for 200 product attributes. For better performance, we recommend that you keep the product attribute count to a minimum. Previously, the support was limited to 15 attributes per product.

Scale Product Creation with Enhanced Product Classification
Manage the reuse of product characteristics and simplify your catalog maintenance by creating up to 10,000 similar products from a single product classification record. Previously, the support was limited to 200 products.

Search Products in Large Catalogs Faster
Help sales reps quickly find products in catalogs of up to 20 million products. Search by product name, description, product code, and stock keeping unit, and create transactions more quickly.

Simplify Quotes and Quote Documents to Enhance Focus on Essential Products
Product designers can choose the child products within a product bundle that appear in the Transaction Line Editor component on the quote page and quote documents. Make it easier for sales reps and customers to focus on core products by hiding the less important products in complex bundles that are used for large quotes.

Simplify Transaction Management with Auto-Renewals for Term Based Products
Streamline your subscription processes by automatically renewing frequently bought products and services when an order is assetized. You can configure your products to default to auto-renewal, and sales reps can then override this default on individual orders. This ensures uninterrupted customer service and a significant reduction in your administrative overload.

New and Changed Objects in Product Catalog Management
Do more with the new and changed objects in Product Catalog Management.

Effortlessly Manage Catalogs on Your Product List Page

Enhance your product browsing experience by setting a default catalog on your product list page. Help customers make informed product selections through seamless catalog switching by configuring your product list page in Lightning App Builder or flows. To use this functionality in your overridden flow, incorporate the latest Discover Products flow changes.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions where Product Catalog Management is enabled.

How: From Setup, in the Quick Find box, find and select **Product Discovery Settings**, and then set a default catalog.

Manage Cart Visibility on Product List Container Page

Add relevance to your sales process by controlling the visibility of the product cart on the Browse Catalogs page in Transaction Management. Preview the selected products from the catalog before adding them to a quote or order.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Catalog Management and Transaction Management are enabled.

Control the Visibility of Guided Product Selection on Product List Page

Tailor your product discovery experience to specific business needs. Control the visibility of the Guided Product Selection feature on your product list page through Lightning App Builder or flows to ensure a more streamlined and relevant user experience.

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Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Catalog Management is enabled.

Search Products in Large Catalogs Faster

Help sales reps quickly find products in catalogs of up to 20 million products. Search by product name, description, product code, and stock keeping unit, and create transactions more quickly.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Catalog Management is enabled

How: In Setup, find and select **Search Settings** and enable Product Field Search.

Simplify Quotes and Quote Documents to Enhance Focus on Essential Products

Product designers can choose the child products within a product bundle that appear in the Transaction Line Editor component on the quote page and quote documents. Make it easier for sales reps and customers to focus on core products by hiding the less important products in complex bundles that are used for large quotes.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Catalog Management is enabled.

How: On the Structure tab of a product bundle, click a child product tile, and then click **Edit Relationship**. On the Edit PRC page, use the Quote Visibility dropdown to control whether the child product appears in Transaction Line Editor, quote documents, both, or neither. By default, the child products appear in both quotes and quote documents.

Simplify Transaction Management with Auto-Renewals for Term Based Products

Streamline your subscription processes by automatically renewing frequently bought products and services when an order is assetized. You can configure your products to default to auto-renewal, and sales reps can then override this default on individual orders. This ensures uninterrupted customer service and a significant reduction in your administrative overload.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Catalog Management is enabled.

How: Open a term based product selling model, click **Edit**, and then select **Automatically Renew Asset by Default**.

New and Changed Objects in Product Catalog Management

Do more with the new and changed objects in Product Catalog Management.

Manage the visibility of a product related component as a quote line item within the Transaction Line Editor or the quote document.

Use the new **QuoteVisibility** field on the existing ProductRelatedComponent object.

Salesforce Pricing

Automate pricing simulations by passing line item details as input variables, reducing manual effort and improving accuracy. Determine optimal product pricing by using Price Adjustment Matrix to apply discounts sequentially or one after another. Improve pricing efficiency by processing elements concurrently, tracking price history to guide purchasing decisions, and applying cumulative discounts based on past orders to foster customer loyalty and drive growth.

Automate Cumulative Discount Calculations in Pricing Procedures

Foster stronger customer relationships and drive sales growth by applying cumulative discounts for volume and tier-based quantities, including those from past customer orders. Optimize volume and tier discount calculations by automatically including historical purchase quantities.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: To derive discounts on current and historical orders, select **Use cumulative pricing** in the Tier and Volume Discount elements.

Find the Best Price with Accurate Discount Calculations

Help organizations determine the optimal price for a product by defining pricing resolution strategies with additional formula options. Apply discounts sequentially or one after another by using the new Stack and Sequence formula options in the Price Adjustment Matrix element.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

Gain Insights into Pricing Decisions and Discounts

Provide insights into each step of the pricing process and show the applied discounts by using the Discount Distribution Service element in the Waterfall view. Use the Waterfall view to intelligently hide the empty data and maintain clarity when the Discount Distribution Service element contains null or empty string values.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

Improve Process Efficiency and Accuracy with Phases

Enhance the organization and control of business processes by introducing Phases within procedure plans. Associate each procedure plan section with a specific phase to map procedures to different stages of the business lifecycle. Use the new framework to make sure that tasks and evaluations are performed in a logical and sequential order.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

Improve Pricing Performance with Parallel Element Execution

Accelerate the execution of pricing procedures by processing elements concurrently. Boost the performance of pricing APIs and simulations, delivering smoother and faster pricing calculations for your users.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: From Setup, in the Quick Find box, enter *Salesforce Pricing* and select **Salesforce Pricing Setup**. Turn on Parallel Execution.

Make Smarter Purchasing Decisions by Using Price Tracking

Provide visibility into a product's price history and help your users make intelligent purchasing decisions. They can make well-informed buying decisions by tracking the minimum and maximum prices of a product over a period. Previously, users based their price calculations only on the lowest price of the product.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: To view maximum price of the product, from the setup, search for Salesforce Pricing Setup. Enable maximum price.

Enrich the Pricing Procedure Simulation Experience

Pass line item details automatically as input variables by selecting the Quote or Order object ID. Automate the pricing procedure simulation process to minimize the manual effort and improve the accuracy of the variable data that pricing designers enter.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing is enabled.

How: During simulation, in the Simplified Input mode, select **Auto-fill line items**, and provide a quote or order object ID.

Changed Objects in Salesforce Pricing

Access more data through these changed objects.

Procedure Plan Section

Map procedures to different stages of a business lifecycle
Use the new **Phase** field on the ProcedurePlanSection object.

Procedure Plan Option

Associate an Apex class to a procedure plan option record
Use the new **ApexClass** field on the ProcedurePlanOption object.

Associate an Apex class name to a procedure plan option record
Use the new **ApexClassName** field on the ProcedurePlanOption object.

Procedure Output Resolution

Associate different business verticals to a procedure output resolution record
Use the new **BusinessVertical** field on the ProcedureOutputResolution object.

Specify the pricing element on which the procedure output resolution is defined.
Use the new supported value `PriceAdjustmentMatrix` in the existing **PricingElement** field on the ProcedureOutputResolution object.

Procedure Plan Definition

Specify the process type to identify the business processes that need a procedure plan
Use the new supported values of `Billing`, `DRO`, `DeepClone`, and `RLM` in the existing **ProcessType** field on the ProcedurePlanDefinition object.

Product Price Range

Store the maximum recorded price of a product
Use the new **MaxRecordedPrice** field on the ProductPriceRange object.

Pricing Recipe

Associate different business verticals to a pricing recipe
Use the new **BusinessVertical** field on the PricingRecipe object.

Product Configurator

With the Advanced Configurator and the Constraint Builder, now generally available, use point-and-click tools or code to define highly scalable and performant constraints. Gain better control over asset data for configuration rules by setting an asset context. Improved setup labels make it easier to understand and enable relevant Product Configurator settings.

Support Complex Configurable Products with Ease with Advanced Configurator (Generally Available)
Simplify the design and setup of configurable products. Also, reduce the number of rules managed by business admins by defining constraints at an abstract level. Get better results with advanced algorithms that you can use to link and backtrack rules. Advanced Configurator, which is now generally available, is designed for customers in manufacturing, technology, and other industries dealing with

large transactions and complex rules.

Manage Product Configuration Logic with the Constraint Builder (Generally Available)
Make sure that your products are configured accurately by using constraint models and the Constraint Builder within Revenue Cloud's Advanced Configurator. In the Constraint Builder, now generally available, create constraint models to efficiently manage the complexities of product configuration. Constraint models provide a streamlined alternative to traditional if-then rules, so it's easier to validate complex product configurations.

Distinguish Product Configurator Settings Easily with More Accurate Labels
Product Configurator–related settings now have more accurate labels with clear descriptions of their functionality. Easily distinguish between the various settings and enable the required ones.

Manage Asset Data Flexibly in Configuration Rules
Get more control over your asset data by filtering it within your Constraint Modeling Language (CML) code, based on your requirements. Set an asset context definition to enable the Advanced Configurator engine to get asset data based on the selected context. Use this asset data when you configure asset-based rules and constraints in the CML Editor.

Support Complex Configurable Products with Ease with Advanced Configurator (Generally Available)

Simplify the design and setup of configurable products. Also, reduce the number of rules managed by business admins by defining constraints at an abstract level. Get better results with advanced algorithms that you can use to link and backtrack rules. Advanced Configurator, which is now generally available, is designed for customers in manufacturing, technology, and other industries dealing with large transactions and complex rules.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

Who: Users with the Advanced Configurator Designer permission set can turn on Advanced Configurator and create rules.

Note When you enable Advanced Configurator, AdvancedConfigurator is the default engine for transaction types in your org.

See Also

Salesforce Help: Set Up Advanced Configurator (can be outdated or unavailable during release preview)

Manage Product Configuration Logic with the Constraint Builder (Generally Available)

Make sure that your products are configured accurately by using constraint models and the Constraint Builder within Revenue Cloud's Advanced Configurator. In the Constraint Builder, now generally available, create constraint models to efficiently manage the complexities of product configuration. Constraint models provide a streamlined alternative to traditional if-then rules, so it's easier to validate complex product configurations.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled. Advanced Configurator services aren't available in Government Cloud and orgs within the EU Operating Zone (OZ). Contact your Salesforce account executive for more information.

Who: Users with the Advanced Configurator Designer permission set can use the Constraint Builder.

Why: Why: The Constraint Builder provides two interfaces, so you can easily create constraint models in the environment that you're most comfortable in. The CML Editor interface is a code-based UI for technical users who prefer to write code. The Visual Builder interface makes it simple for business users to create constraint models in a declarative clicks-not-code environment.

See Also

*Salesforce Help:*Set Up Advanced Configuration Rules with Constraint Builder(can be outdated or unavailable during release preview)

Distinguish Product Configurator Settings Easily with More Accurate Labels

Product Configurator–related settings now have more accurate labels with clear descriptions of their functionality. Easily distinguish between the various settings and enable the required ones.

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

Why: This table lists the old setting labels and their corresponding new labels.

Old Setting Label	New Setting Label
Product Configurator	Configure Products at Runtime
Set Up Configuration Rules	Set Up Basic Configuration Rules
Advanced Configurator	Set Up Advanced Configuration Rules and Constraints

Manage Asset Data Flexibly in Configuration Rules

Get more control over your asset data by filtering it within your Constraint Modeling Language (CML) code, based on your requirements. Set an asset context definition to enable the Advanced Configurator engine to get asset data based on the selected context. Use this asset data when you configure asset-based rules and constraints in the CML Editor.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Product Configurator is enabled.

Why: By setting an asset context definition, you can now fetch the asset data for the context and can apply additional filters directly in the CML Editor. Previously, when you fetched asset data, some assets were automatically filtered out if:

- The asset lifecycle start date or end date fell outside the quote effective date.
- The asset's Currency ISO Code differed from the quote's Currency ISO Code in multicurrency orgs.

How: On the Revenue Settings page, from the Set Up Asset Context for Product Configurator dropdown, select the asset context definition.

Transaction Management

Generate quotes quickly with Agentforce Quoting. Save time by cloning groups and line items on quotes and orders. Offer competitive pricing by applying contractual volume or tier-based prices based on cumulative quantities purchased. Improve revenues by using auto-renewals and improve forecasts by creating automatic renewal opportunities on quote and order items. Negotiate renewal price uplifts during initial sale that also apply to the subscription renewal. Amend order assets as many times as you want, including updating the start date and honoring multiple price amendments. Renew expired assets. Enjoy usability improvements to the Quotes and Orders pages, including visual indicators that increase accessibility and dependent picklists that increase accuracy.

With Advanced Approvals, harness AI to create dynamic approval notifications for reviewers. Enable Smart Approvals so that users can resubmit approval requests without restarting the workflow, routing requests to the required approvers only. Support your distributed organization by allowing partners to submit and review approval requests.

Accelerate Sales Cycles with a Conversational Quoting Agent
Close deals faster by using Agentforce Quote Management to conversationally create, update, and manage quotes. Agentforce Quoting responds to conversational prompts, such as “Create a quote for the Acme account” or “Add 10 widgets to the Acme quote,” making it easy for sale reps to manage their quotes using natural language. Shift your sales team's focus from administrative burdens to strategic customer engagement.

Expedite Contract Price Negotiations with the Contract Pricing Schedule Component
Empower your sales reps and contract managers to expedite contract negotiations and effectively manage contract pricing with the new Contract Pricing Schedule component.

Give Your Customers Better Pricing with Volume-Based Discounts Across Cumulative Quantities
Offer your customers competitive pricing by including a customer’s asset base when calculating contractual volume-based or tier-based pricing for quotes and orders. When cumulative pricing is enabled, Revenue Cloud adds the current active quantity of a customer's assets to the quantity of the same matching product sold across multiple line items in a quote or order. Cumulative pricing helps you give your customers the best price.

Customize Contract Pricing with Custom Fields and Validations
Support your business’s unique pricing strategies by customizing your contract pricing implementation in Revenue Cloud. Extend the data model for contract item price records by adding custom fields, so that you can capture the data that’s important to your company. When you extend the contract pricing

data model, you must also configure your own pricing validations and decision tables to confirm correct pricing.

Help Your Customers Scale with Increased Amendment Limits

It's easier to amend customer assets, so you can better support your customers when their business needs change. Customers often want to buy more assets to help their businesses grow. Previously, Revenue Cloud supported only up to 10 asset action source records per asset. Now there are no limits on how many times an asset can be amended.

Update Order Quantities and Add Products to Orders During Fulfillment

Support your customers when they need to modify their orders during the order fulfillment process. Order fulfillment managers can help customers by making necessary changes such as updating order quantities or adding additional products to activated orders being processed by Dynamic Revenue Orchestrator.

Adjust Start Dates for Subscription Assets

Honor your customers' need for flexibility by modifying the start date of subscriptions. You can change the start date to start earlier or later than originally planned on termed, evergreen, and one-time assets. An amendment quote or order is automatically generated when you modify an asset's start date.

Increase Customer Retention by Renewing Expired Subscriptions

Make it easier for customers to continue using your company's products by reactivating expired subscriptions. When you renew an asset, a renewal quote and renewal order are automatically generated, which you can share with your customer. Specify a start date for the renewal that is the current date or later, so that your customers can access the subscriptions when they need them.

Ensure Fair Pricing with As-Is Renewals

Renew a portion of assets at their original price, giving your customers greater transparency in your pricing strategy. Create renewal quotes or orders for specific quantities at that price point.

Increase Revenue by Implementing Negotiated Price Uplifts

Negotiate price increases on quotes, orders, and assets. When a sales rep enters a value in the Price Uplift field on quote line items or order line items, the field's value is added to the asset. The uplift is applied when assets that have negotiated prices are renewed. This makes it easier to see the negotiated price uplifts throughout the asset lifecycle.

Configure Transactions Faster by Accessing Dependent Picklists from Transaction Line Editor

Show dependent picklists on line item objects as columns in the Transaction Line Editor component on quote and order pages. Your sales reps can easily view and select dependent picklist values without going to individual line item pages. When you show a dependent picklist, we recommend that you show its controlling picklist as well.

Customize the Placement of Action Buttons in the Transaction Line Editor on Quotes and Orders

Provide an intuitive user experience for your sales reps when they work with quotes and orders by controlling the sequence and placement of action buttons in the Transaction Line Editor component layout. Specify which actions are available on the editor and configure the placement of the actions. Actions can appear as individual buttons, as two or more buttons separated with a divider or as menu items beneath a main button.

Provide Uninterrupted Product Access and Improve Customer Retention with Auto-Renewals

Automate product renewals for products with the Term-Defined product selling model by using a flow.

Product designers can turn on auto-renewal for products. If sales reps adjust auto-renewal at any stage, Transaction Management propagates the changes to subsequent stages. Assets with auto-renewal enabled are automatically renewed at the end of their subscription term.

Automate Renewal Opportunity Creation to Improve Forecasts and Sales

Set up a flow that automatically creates renewal opportunities for products with the Term-Defined product selling model when an order is assetized. With these opportunity records, your teams can better forecast renewal revenue and make informed decisions. Customize the flow to align with your business requirements. For example, update how the prices for renewal opportunities are calculated.

Boost Sales Productivity by Cloning Line Items and Groups in Revenue Cloud

Cloning quote line items duplicates their configurations, including ramped deals, and related records, so your sales reps can quickly replicate their work and create complete and accurate quotes for their customers. Cloning a group automatically performs a deep clone of the line items inside the group, including associated fields and records, so your sales reps can spend less time on quote administration and more time on selling.

Access All Groups from Transaction Line Editor

Sales reps can now access all groups in a transaction from the Transaction Line Editor component. By default, the component loads only 10 groups to ensure faster performance and an improved loading experience. Sales reps can load additional groups incrementally, in batches of 5. View the total number of groups in a transaction in the Transaction Line Editor header which can now show the group count up to 200.

View Only Essential Products in Quotes and Quote Documents

Empower your sales reps and customers to close deals faster by showing only the essential child products. Product designers can make it easier for everyone to focus on what matters by choosing the child products that appear in the Transaction Line Editor component and quote documents.

Expand Revenue Cloud Access to Additional Experience Cloud Sites

Partners and customers can now use Transaction Management components and manage data from Experience Cloud sites built using the B2B Commerce (LWR) and Customer Service templates.

Increase Sales Efficiency with Usability Improvements for Quotes and Orders

Sales reps can manage quotes and orders more efficiently with column wrapping and icons in the Transaction Line Editor. Wrapped column headers show the full name of the column, even in narrow columns. Pencil and lock icons indicate when fields are editable or read-only, so sales reps know when they can modify fields.

Provide a Better User Experience with Detailed Progress Indicators on Quotes and Orders

Sales reps can rest assured that their quotes and orders are being saved with an improved visual indicator and more detailed notifications at various milestones. The progress bar is replaced by a spinner, and additional notifications are shown for each step while the quote is being processed and saved.

Enhance Data Security for Quotes by Applying Restriction Rules

Prevent users from accessing quotes that contain sensitive data by defining restriction rules on quote records. Restriction rules filter the records so that users have access to only the records that match the criteria specified in the rule. Previously, restriction rules weren't supported on the Quote object.

Customize Your Pricing Procedures with Apex Hooks

Support your business's unique pricing scenarios by adding custom Apex logic to your pricing procedure plans. Use an Apex prehook to adjust pricing based on product attributes before it's priced, and an Apex posthook to handle pricing changes for groups and other Quote object elements after pricing. When a sales rep configures a product or changes a group of quote line items, the pricing procedure plan changes the pricing based on the instructions in Apex.

Troubleshoot Pricing Procedure Issues with Contextual Logging
It's easier to resolve pricing issues now that you can log the data from a pricing session. Debug logs capture contextual information that can help you pinpoint where the problem is occurring, so you can focus your investigation and fix the issue.

Speed Up Approval Processes with Dynamic Approval Notifications
Make it easier for approvers to say "yes" to approval requests by providing personalized and contextual information in the approval notification emails. Dynamic approval notifications contain all the information that approvers need to make good decisions, quickly. Approvers can understand the request and can approve or reject it right from their email, reducing approval times. The email notifications use Einstein AI and prompt templates to include relevant contextual information, such as a quote’s total amount and discount percentages, in the body of an approval email instead of relying on a generic notification.

Increase the Efficiency of Your Approval Resubmission Processes with Smart Approvals
With Smart Approvals your users can resubmit approval requests at the point where they left off in the approval workflow, so they don't have to restart the entire workflow from the beginning. Enable Smart Approvals to automatically approve requests on behalf of approvers based on the approvers' prior actions. Resubmitted approval requests are routed only to the approvers who need to review them again.

Include Partners in Your Approval Processes
Increase efficiency, transparency, and collaboration by inviting external stakeholders to participate in your approval processes. Support your distributed organization by including partners in approval steps. Partners also can function as request approvers.

New and Changed Objects in Transaction Management
Do more with these new and changed Transaction Management objects.

Accelerate Sales Cycles with a Conversational Quoting Agent

Close deals faster by using Agentforce Quote Management to conversationally create, update, and manage quotes. Agentforce Quoting responds to conversational prompts, such as “Create a quote for the Acme account” or “Add 10 widgets to the Acme quote,” making it easy for sale reps to manage their quotes using natural language. Shift your sales team's focus from administrative burdens to strategic customer engagement.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Salesforce where Revenue Cloud and Salesforce Foundations are enabled.

When: Agentforce Quoting is available later in Summer ’25.

Who: Users with the Agentforce Default Admin permission set can associate the Agentforce Employee Agent to a permission set of their choice and assign the Quote Management topic to the agent. Sales reps with the assigned permission set can generate and manage quotes with Agentforce Quoting.

How: To enable Agentforce Quoting, add the Quote Management topic to your agent. To manage quotes with Agentforce Quoting, go to Revenue Cloud and open an account, opportunity, or quote. Click the Agentforce icon and enter your request in the chat. If needed, Agentforce asks for clarification and then generates or updates a quote, which you can review and revise.

Expedite Contract Price Negotiations with the Contract Pricing Schedule Component

Empower your sales reps and contract managers to expedite contract negotiations and effectively manage contract pricing with the new Contract Pricing Schedule component.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Why: When sales reps and contract managers add products to a contract pricing schedule, the current list prices are automatically populated from the price book associated with the contract. These prices serve as a reference point for price and discount negotiations. Users can then easily add customer-specific prices and discounts, and enter the applicable effective dates for these contract prices.

How: On a contract record page, from Setup, select **Edit Page**. Create a tab and add the Contract Pricing Schedule component to it. If necessary, select the additional table columns and product price tier columns that you want to show.

Give Your Customers Better Pricing with Volume-Based Discounts Across Cumulative Quantities

Offer your customers competitive pricing by including a customer's asset base when calculating contractual volume-based or tier-based pricing for quotes and orders. When cumulative pricing is enabled, Revenue Cloud adds the current active quantity of a customer's assets to the quantity of the same matching product sold across multiple line items in a quote or order. Cumulative pricing helps you give your customers the best price.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps who can create, edit, and price quotes and orders can create volume or tier pricing based on cumulative quantities.

How: Configure your pricing procedure to use cumulative pricing and set your pricing contract's **Aggregation Strategy** to `Cumulative`.

Customize Contract Pricing with Custom Fields and Validations

Support your business's unique pricing strategies by customizing your contract pricing implementation in Revenue Cloud. Extend the data model for contract item price records by adding custom fields, so that you can capture the data that's important to your company. When you extend the contract pricing data model, you must also configure your own pricing validations and decision tables to confirm correct pricing.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Users with the Customize Application user permission can create custom fields and validation rules.

How: In Revenue Settings, turn on Customize Contract Pricing to bypass the default Revenue Cloud contract pricing validations. Create custom fields on the contract pricing item and create your pricing validations.

Help Your Customers Scale with Increased Amendment Limits

It's easier to amend customer assets, so you can better support your customers when their business needs change. Customers often want to buy more assets to help their businesses grow. Previously, Revenue Cloud supported only up to 10 asset action source records per asset. Now there are no limits on how many times an asset can be amended.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps with the Amend Assets permission and the Sales Rep permission group can use this feature.

Update Order Quantities and Add Products to Orders During Fulfillment

Support your customers when they need to modify their orders during the order fulfillment process. Order fulfillment managers can help customers by making necessary changes such as updating order quantities or adding additional products to activated orders being processed by Dynamic Revenue Orchestrator.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Users with the Place Supplemental Orders permission set can create, edit, and activate supplemental orders.

How: Add the Change button to the Order record page. When a user changes an order, Revenue Cloud creates a new order that captures the details of the change. When the new order is activated, resubmit the order to the orchestrator so that the order can be fulfilled.

Adjust Start Dates for Subscription Assets

Honor your customers' need for flexibility by modifying the start date of subscriptions. You can change the start date to start earlier or later than originally planned on termed, evergreen, and one-time assets. An amendment quote or order is automatically generated when you modify an asset's start date.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps with the Amend Assets permission and the Sales Rep permission group can use this feature.

How: Go to an account and open the Managed Asset Viewer. Select the assets that you want to modify, click Amend, specify the new start date, and select the Use the subscription start date for the amendment start date checkbox. You can only change the start date if the date is later than the current date. You can't adjust the start date if there are future transactions scheduled. You can't backdate assets. Also, you can't change the start date for ramped assets.

Increase Customer Retention by Renewing Expired Subscriptions

Make it easier for customers to continue using your company's products by reactivating expired subscriptions. When you renew an asset, a renewal quote and renewal order are automatically generated, which you can share with your customer. Specify a start date for the renewal that is the current date or later, so that your customers can access the subscriptions when they need them.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps with the Renew Assets and Sales Rep permission group can use this feature.

Ensure Fair Pricing with As-Is Renewals

Renew a portion of assets at their original price, giving your customers greater transparency in your pricing strategy. Create renewal quotes or orders for specific quantities at that price point.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps with the Renew Assets permission and the Sales Rep permission group can use this feature.

How: In the Revenue Settings page, turn on the As-Is Renewals setting. Go to an account and open the Managed Asset Viewer. Select the assets that you want to modify, set the pricing source on the asset to Last Transaction, and click Renew.

Increase Revenue by Implementing Negotiated Price Uplifts

Negotiate price increases on quotes, orders, and assets. When a sales rep enters a value in the Price Uplift field on quote line items or order line items, the field's value is added to the asset. The uplift is applied when assets that have negotiated prices are renewed. This makes it easier to see the negotiated price uplifts throughout the asset lifecycle.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps with the Amend Assets or Renew Assets permission and the Sales Rep permission group can use this feature.

Configure Transactions Faster by Accessing Dependent Picklists from Transaction Line Editor

Show dependent picklists on line item objects as columns in the Transaction Line Editor component on quote and order pages. Your sales reps can easily view and select dependent picklist values without going to individual line item pages. When you show a dependent picklist, we recommend that you show its controlling picklist as well.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Customize the Placement of Action Buttons in the Transaction Line Editor on Quotes and Orders

Provide an intuitive user experience for your sales reps when they work with quotes and orders by controlling the sequence and placement of action buttons in the Transaction Line Editor component layout. Specify which actions are available on the editor and configure the placement of the actions. Actions can appear as individual buttons, as two or more buttons separated with a divider or as menu items beneath a main button.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Users with the Customize Application user permission and the Manage Revenue Cloud system permission can configure actions for the Transaction Line Editor.

How: Edit the Quote record page in Lightning App Builder. In the Actions Buttons field, enter the API names of the actions that you want to show in the Transaction Line Editor. The format in which the action is specified affects how the action appears in the editor.

These actions are supported:

- AddAssets
- AddGroup
- Ungroup
- ExpandAllGroups
- CollapseAllGroups
- ImportQuoteLineItems
- MoveSelectedLines

Provide Uninterrupted Product Access and Improve Customer Retention with Auto-Renewals

Automate product renewals for products with the Term-Defined product selling model by using a flow. Product designers can turn on auto-renewal for products. If sales reps adjust auto-renewal at any stage, Transaction Management propagates the changes to subsequent stages. Assets with auto-renewal enabled are automatically renewed at the end of their subscription term.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

How: Create a flow by using the prebuilt Create Renewal Orders for Expiring Assets flow template. Customize the flow if needed and activate it.

Automate Renewal Opportunity Creation to Improve Forecasts and Sales

Set up a flow that automatically creates renewal opportunities for products with the Term-Defined product selling model when an order is assetized. With these opportunity records, your teams can better forecast renewal revenue and make informed decisions. Customize the flow to align with your business requirements. For example, update how the prices for renewal opportunities are calculated.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

How: Create a flow by using the prebuilt Create and Update Renewal Opportunities flow template. Customize the flow if needed and activate it.

Boost Sales Productivity by Cloning Line Items and Groups in Revenue Cloud

Cloning quote line items duplicates their configurations, including ramped deals, and related records, so your sales reps can quickly replicate their work and create complete and accurate quotes for their customers. Cloning a group automatically performs a deep clone of the line items inside the group, including associated fields and records, so your sales reps can spend less time on quote administration and more time on selling.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps who can create and edit quotes and orders in Revenue Cloud can clone quote line items and groups.

How: Turn on the Clone Line Items and Groups in Quotes and Orders setting and the Enable Groups in Quotes and Orders setting.

To clone a line item, open a quote or an order, open the actions menu for the line item, and select Clone. The line item is duplicated. If the line item has configurations, the configurations are cloned as well. If the line item is for a bundle, the cloned line item includes the entire bundle, including child line items. If the line item is for a ramp deal, then the entire ramp is cloned.

To clone a group, open a quote or an order, open the actions menu for the group, and select Clone Group. The group and all of the line items in the group are duplicated. Any configurations associated with the cloned line items are also cloned.

If you have a custom field on a quote line item, the custom field is also cloned if the field is mapped in the sales transaction context definition.

Access All Groups from Transaction Line Editor

Sales reps can now access all groups in a transaction from the Transaction Line Editor component. By default, the component loads only 10 groups to ensure faster performance and an improved loading experience. Sales reps can load additional groups incrementally, in batches of 5. View the total number of groups in a transaction in the Transaction Line Editor header which can now show the group count up to 200.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

View Only Essential Products in Quotes and Quote Documents

Empower your sales reps and customers to close deals faster by showing only the essential child products. Product designers can make it easier for everyone to focus on what matters by choosing the child products that appear in the Transaction Line Editor component and quote documents.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Expand Revenue Cloud Access to Additional Experience Cloud Sites

Partners and customers can now use Transaction Management components and manage data from Experience Cloud sites built using the B2B Commerce (LWR) and Customer Service templates.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Increase Sales Efficiency with Usability Improvements for Quotes and Orders

Sales reps can manage quotes and orders more efficiently with column wrapping and icons in the Transaction Line Editor. Wrapped column headers show the full name of the column, even in narrow columns. Pencil and lock icons indicate when fields are editable or read-only, so sales reps know when they can modify fields.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Sales reps who use the Transaction Line Editor on quote and order record pages in Revenue Cloud can enjoy these usability features.

Provide a Better User Experience with Detailed Progress Indicators on Quotes and Orders

Sales reps can rest assured that their quotes and orders are being saved with an improved visual indicator and more detailed notifications at various milestones. The progress bar is replaced by a spinner, and additional notifications are shown for each step while the quote is being processed and saved.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Users who create and update quotes in Revenue Cloud can see user experience improvements.

Enhance Data Security for Quotes by Applying Restriction Rules

Prevent users from accessing quotes that contain sensitive data by defining restriction rules on quote records. Restriction rules filter the records so that users have access to only the records that match the criteria specified in the rule. Previously, restriction rules weren't supported on the Quote object.

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

Who: Users with the Manage Sharing user permission can create and manage restriction rules.

How: Create restriction rules by going to the Quote object in Object Management, selecting Restriction Rules, and specifying the rule criteria.

Customize Your Pricing Procedures with Apex Hooks

Support your business's unique pricing scenarios by adding custom Apex logic to your pricing procedure plans. Use an Apex prehook to adjust pricing based on product attributes before it's priced, and an Apex posthook to handle pricing changes for groups and other Quote object elements after pricing. When a sales rep configures a product or changes a group of quote line items, the pricing procedure plan changes the pricing based on the instructions in Apex.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing and Transaction Management are enabled.

Who: Users with the Procedure Plan Access and the Salesforce Pricing Design Time User can create and update procedure plan definitions.

How: In Revenue Settings, turn on the Procedure Plan Orchestration for Pricing setting and the Skip Default and Sales Transaction Type Pricing Procedures setting.

In Setup, go to the Procedure Plan Definitions, select a plan, add an Apex section, and specify the Apex class that you want to use.

Troubleshoot Pricing Procedure Issues with Contextual Logging

It's easier to resolve pricing issues now that you can log the data from a pricing session. Debug logs capture contextual information that can help you pinpoint where the problem is occurring, so you can focus your investigation and fix the issue.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Salesforce Pricing and Transaction Management are enabled.

Who: Users with the View All Data permission can view, retain, and delete debug logs. Users with the Salesforce Pricing Design Time User permission can create, update, and delete pricing procedures.

How: In Debug Logs, create a session and select a user. When the problem is repeated, download and review the log. Enter the input variable values from the log into the pricing simulator in Revenue Cloud to see what's happening for each input.

If the price is right, then it suggests that the issue is occurring before the pricing procedure is run. If the price isn't right, then it indicates that the issue with an element in the pricing procedure.

Speed Up Approval Processes with Dynamic Approval Notifications

Make it easier for approvers to say "yes" to approval requests by providing personalized and contextual information in the approval notification emails. Dynamic approval notifications contain all the information that approvers need to make good decisions, quickly. Approvers can understand the request and can approve or reject it right from their email, reducing approval times. The email notifications use Einstein AI and prompt templates to include relevant contextual information, such as a quote's total amount and discount percentages, in the body of an approval email instead of relying on a generic notification.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management and Advanced Approvals are enabled. Requires an Einstein for Sales, Einstein for Platform, Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on. To purchase the Einstein for Sales, Einstein for Platform, or Einstein for Service, Einstein 1 Service, or Einstein GPT Service add-on, contact your Salesforce account executive.

Who: Users with the Approval Admin user permission can configure dynamic approval notifications.

How: In Approval Settings, turn on Dynamic Approval Notifications.

Increase the Efficiency of Your Approval Resubmission Processes with Smart Approvals

With Smart Approvals your users can resubmit approval requests at the point where they left off in the approval workflow, so they don't have to restart the entire workflow from the beginning. Enable Smart Approvals to automatically approve requests on behalf of approvers based on the approvers' prior actions. Resubmitted approval requests are routed only to the approvers who need to review them again.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management and Advanced Approvals are enabled.

Who: Users with the Approval Designer user permission can create resubmission approval processes.

How: In an Advanced Approval flow, when configuring an approval step, in the section Select the Record to Save, select the Use Smart Approval checkbox.

Include Partners in Your Approval Processes

Increase efficiency, transparency, and collaboration by inviting external stakeholders to participate in your approval processes. Support your distributed organization by including partners in approval steps. Partners also can function as request approvers.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Transaction Management is enabled.

Who: Users with the Approval Admin permission can set up approvals for partners. Partners using Experience Cloud can submit, review, approve, and reject approval requests.

How: To include partners in your approval processes, go to Approval Settings and assign an approval step to a partner community user or to group of queue that consists of partner community users.

New and Changed Objects in Transaction Management

Do more with these new and changed Transaction Management objects.

New Objects

Specify conditions for starting and concluding an approval step that's being evaluated as part of the smart approval process

Use the new **ApprovalWorkItemCondition** object.

Review the logic used to evaluate a smart approval request

Use the new **ApprovalWorkItemCriteria** object.

Changed Objects

Set up a percentage net price increase for quote line items, order items, assets, and contracts

Use the **UnitPriceUplift** field on QuoteLineItem, OrderItem, Asset, and Contract objects.

Set up auto renewals and visibility for quote line items

Use the new **HasAssetStartDateAdjustment**, **BatchIdentifier**, **DoesAutomaticallyRenew**, and **Visibility** fields on the QuoteLineItem object.

Skip orders during order processing in Salesforce Billing

Use the new **SalesforceBillingOrderProc** field on the Order object.

Track changes made to order items

Use the new **SupplementalChangeType** field on the OrderItem object.

Set up auto renewals for order items

Use the new **AggregatedQuantity**, **BatchIdentifier**, and **DoesAutomaticallyRenew** fields on the **OrderItem** object.

Transfer quotes and orders

Use the new **Subtype** field and **Transfer** enum value for the Type field on the OrderAction and QuoteAction objects. Review the **Subtype** field on the AssetAction object.

Specify whether to auto renew an asset by default

Use the new **DoesAutoRenewAssetByDefault** field on the ProductSellingModelOption object.

Set up auto renewals for assets

Use the new **DoesAutomaticallyRenew** field on the Asset object.

Review the list price of a contract item

Use the new **ListPrice** field on the ContractItemPrice object.

Usage Selling

Offer reduced costs for usage resources based on the committed quantity by using commitment-based pricing. Use non-monetary units, such as tokens, to provide a flexible pricing model where customers can allocate their purchased tokens where needed and maximize value across various services. Define rates with tokens and currencies. Enhance usage product grant binding policies for account and contract binding targets, and implement an enhanced rating discovery procedure to improve rate accuracy.

Offer Commitment-Based Pricing with Negotiable Rates

Increase flexibility in product sales by defining resource types and specifying commitment types for associated products. Negotiate the commitment amount, term, and resource rates, and then associate standard products to commitment products to take advantage of the commitment rates. Usage from associated services counts towards the commitment and canceling the commitment results in prorated charges and billing of overages.

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

Use Token-based Pricing for Products and Services

Use tokens to provide a flexible pricing model where customers can redeem tokens for services. Simplify pricing by giving a common unit for different usage types. For example, rate both data (GB) and SMS (count) in tokens before calculating the final cost in currency

Use Non-Monetary Units as Consumption Charges
Offer customers more flexible, competitive pricing by using non-monetary units (such as tokens or credits) to collect usage charges and drive higher consumption through tiered pricing structures.

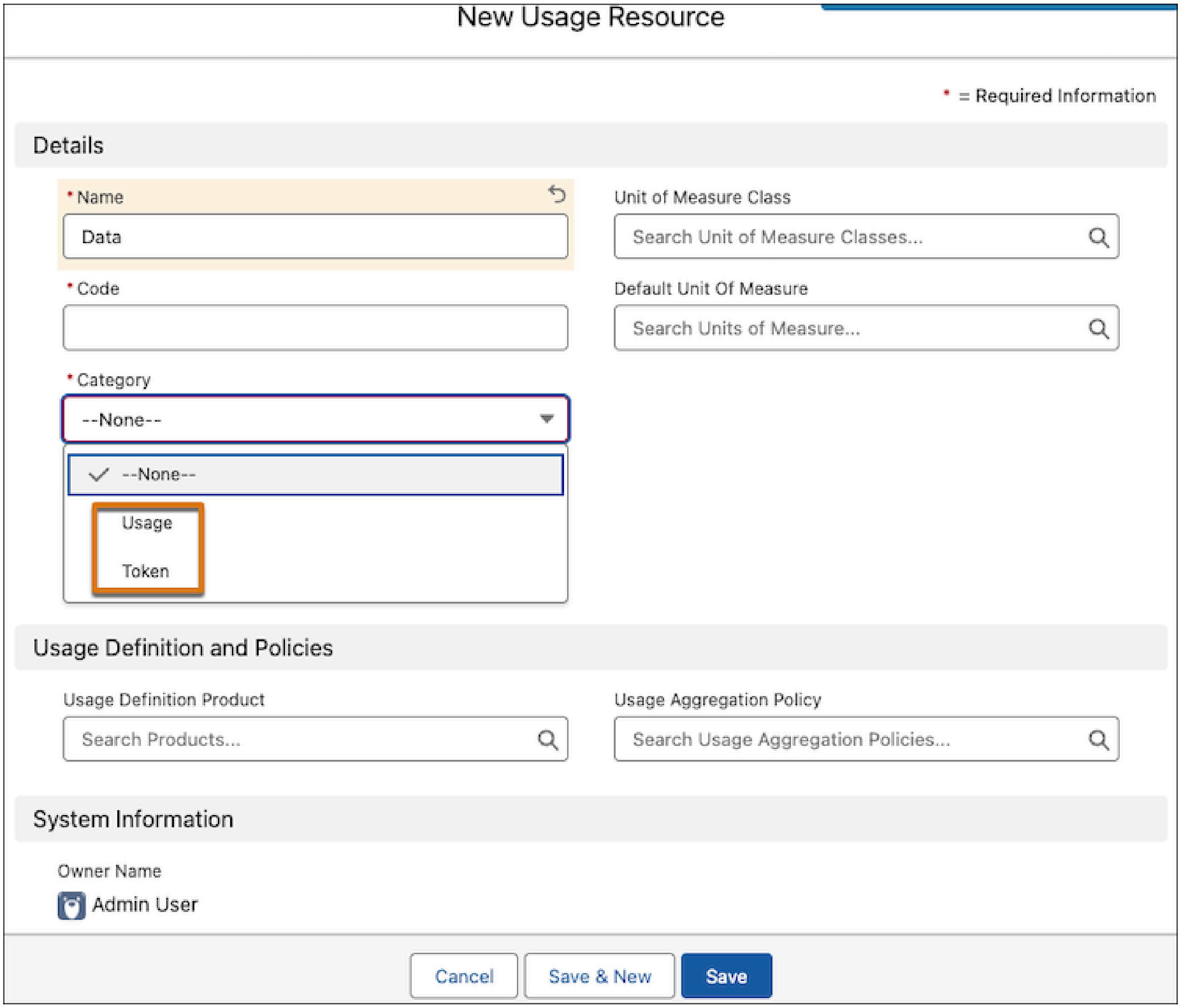
Define Rates with Tokens and Currencies
Create rate card entries to determine rates for resources by using both token and currency resources. Define base and adjustment rate card entries for usage resources by using tokens.

Use Non-Monetary Units as Consumption Charges

Offer customers more flexible, competitive pricing by using non-monetary units (such as tokens or credits) to collect usage charges and drive higher consumption through tiered pricing structures.

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

How: From the App Launcher, find and select **Usage Resource**. On the Usage Resources list view page, click **New**. When you create a new usage resource record, select the category as Usage or Token.



Define Rates with Tokens and Currencies

Create rate card entries to determine rates for resources by using both token and currency resources. Define base and adjustment rate card entries for usage resources by using tokens.

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

How: From the App Launcher, find and select **Rate Card Entries**. On the Rate Card Entries list view page, click **New**. When you create a new rate card entry record, select the rate unit of measure class that has a corresponding unit of measure class of type Token or Currency.

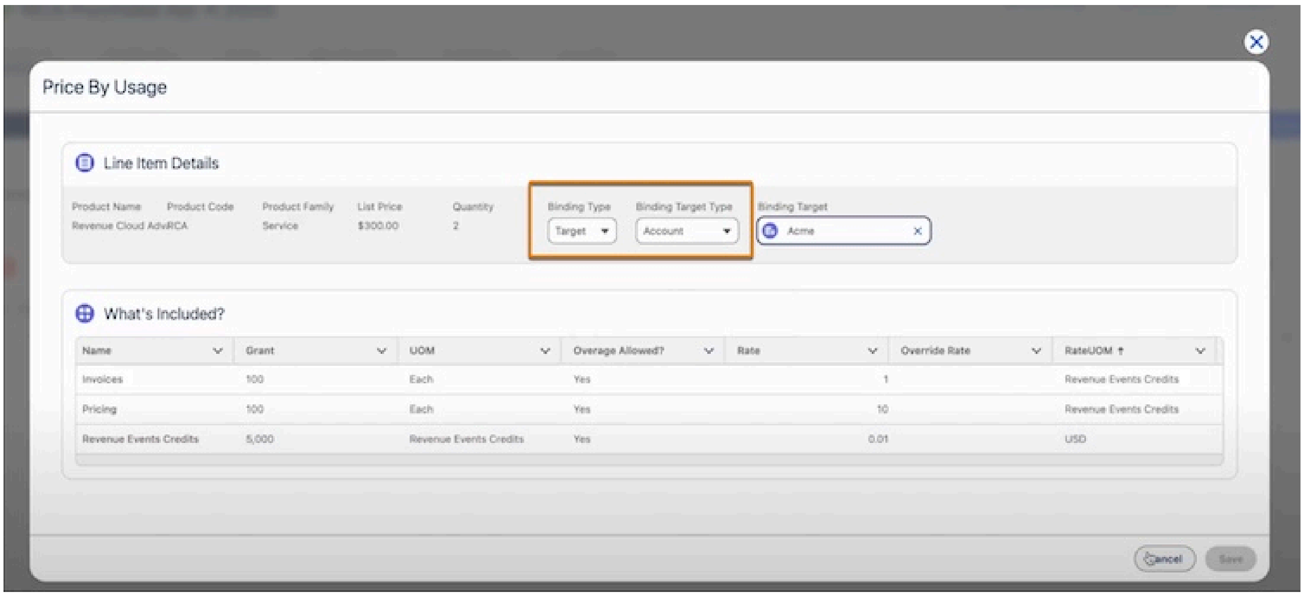
Optimize Resource Allocation with Extended Grant Binding for Usage Selling

Utilize resources more efficiently by applying grants directly to accounts, contracts, or custom objects. Empower customers to optimize allocation based on their needs by making grants applied to a selected target available to all consumptions that are linked to it.

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

Why: If you have a large business account, say Acme. You purchase 1000 usage units, also called a grant. When you bind this grant to Acme's account by using the Target binding type, all the individual services or products that your end-users consume are drawn from this central pool of 1000 units.

How: On a quote record page, for a quote line item, click **Price by Usage**. In Line Item Details, select the binding type as target, and then choose the Binding Target Type of your preference.

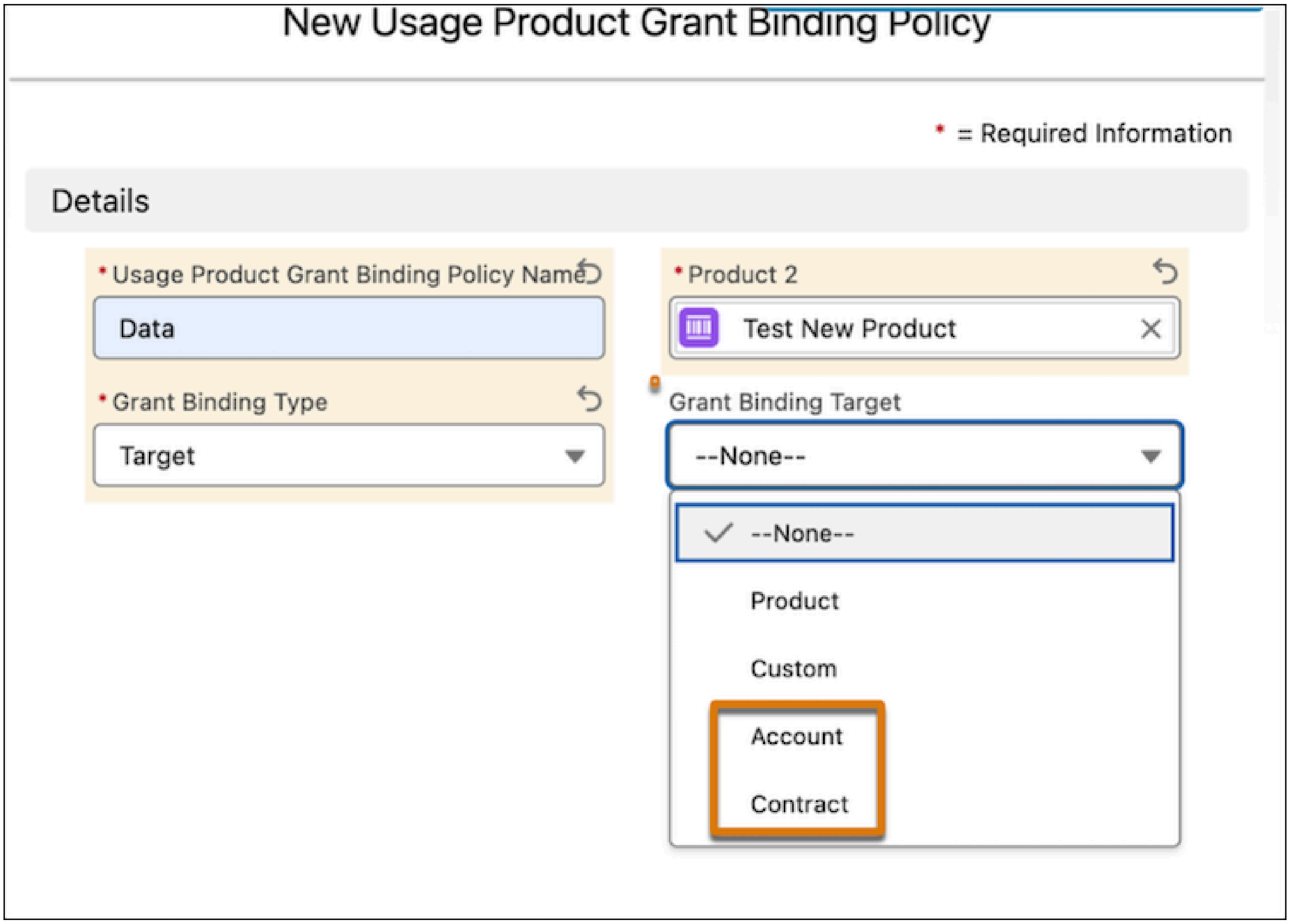


Extend Usage Product Grant Binding Policy for Account and Contract

Manage the allocation and timing of usage product grants by defining the usage product grant binding policy.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud Advanced where Usage Management is enabled.

How: From the App Launcher, find and select **Usage Product Grant Binding Policies**. On the Usage Product Grant Binding Policies list view page, click **New**. When you create a new usage product grant binding policy, select the grant binding target as Account or Contract.



Enhance Rating Accuracy

Retrieve rates with the Rating Discovery Procedure using the Get Binding Object Rate Card Entries and Get Binding Object Rate Adjustments elements. The update to the rating discovery procedure ensures rates are accurately reflected based on the bonded asset, account, or contracts.

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

How: From the App Launcher, find and select **Expression Sets**. From the list of expression sets, select **Default Rating Discovery Procedure**. Clone and customize your procedure, and then activate it.

Usage Management

Optimize resource utilization to efficiently manage usage-based grants. Associate usage-based grants with specific targets, such as accounts, contracts, or custom objects. Accurately retrieve and apply negotiated rates by using the enhanced rating procedures and real-time data access. Use the Wallet dashboard to closely monitor consumption details for binding objects. Track consumption data across all processing stages to provide complete transparency.

Manage Usage-Based Grants Efficiently

Optimize usage resource utilization for usage-based services by binding them to the desired target. Link grants directly to accounts, contracts, or custom objects to simplify resource allocation, improve rating accuracy, and enhance visibility into consumption and wallet balances for each target.

Track Consumption Data Across the Consumption Process Stages

Gain complete visibility into your consumption data processing with comprehensive tracking across all stages. Easily trace processed data from raw input to final summaries by linking usage details, rateable summaries, wallet statements, and liable summaries to the usage summary. Improve customer trust, resolve disputes faster, make audits transparent, and reduce compliance risks by offering end-to-end traceability.

Use Real-Time Data for Rating Procedures

Access the latest data for rating elements with the new real-time lookup option. Switch between manual static table sync and real-time data access for all rating elements.

New and Changed Objects in Usage and Rate Management

Do more with these new and changed Usage and Rate Management objects.

Manage Usage-Based Grants Efficiently

Optimize usage resource utilization for usage-based services by binding them to the desired target. Link grants directly to accounts, contracts, or custom objects to simplify resource allocation, improve rating accuracy, and enhance visibility into consumption and wallet balances for each target.

Calculate Consumption Charges Based on Target-Specific Rates

Calculate consumption charges for usage resources by using negotiated rates stored at self, account, contract, or custom targets. .

View Wallets for Grant Binding Targets

Use Wallet dashboard to view consumption details for binding objects, which can be accounts, contracts, products, and custom objects. Give admins and business analysts granular visibility into grant allocation and consumption through a usage entitlement account and a parent bucket for each grant binding object.

Calculate Consumption Charges Based on Target-Specific Rates

Calculate consumption charges for usage resources by using negotiated rates stored at self, account, contract, or custom targets. .

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud Billing where Usage Management is enabled.

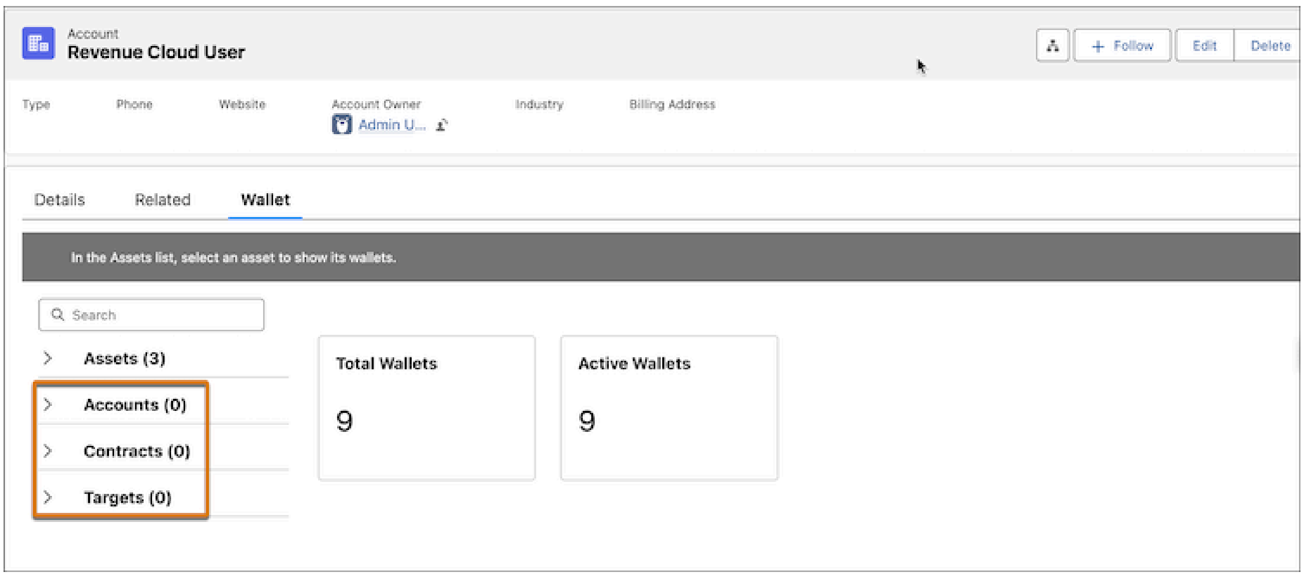
How: From the App Launcher, find and select **Expression Sets**. From the list of expression sets, select **Negotiable Rating Procedure**. Clone and customize your procedure, and then activate it.

View Wallets for Grant Binding Targets

Use Wallet dashboard to view consumption details for binding objects, which can be accounts, contracts, products, and custom objects. Give admins and business analysts granular visibility into grant allocation and consumption through a usage entitlement account and a parent bucket for each grant binding object.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud Billing where Usage Management is enabled.

How: From the App Launcher, find and select **Accounts**. To view the list of wallets and their consumption details, go to the Wallet tab on the Binding Target page.



Track Consumption Data Across the Consumption Process Stages

Gain complete visibility into your consumption data processing with comprehensive tracking across all stages. Easily trace processed data from raw input to final summaries by linking usage details, rateable summaries, wallet statements, and liable summaries to the usage summary. Improve customer trust, resolve disputes faster, make audits transparent, and reduce compliance risks by offering end-to-end traceability.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud Billing where Usage Management is enabled.

How: To see the associated summaries and wallet statements of a usage record, go to the Related tab of the record.

Use Real-Time Data for Rating Procedures

Access the latest data for rating elements with the new real-time lookup option. Switch between manual static table sync and real-time data access for all rating elements.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Usage Management or Rate Management is enabled.

How: Open a rating procedure, and enable **Use Real-Time Data** on an element.

New and Changed Objects in Usage and Rate Management

Do more with these new and changed Usage and Rate Management objects.

Define the custom target object of the entitlements granted for the sellable product
Use the new BindingObjectCustomExt object.

Relate a binding object with a rate card entry
Use the new BindingObjectRateCardEntry object.

Define the rates of the usage resource associated with the binding object
Use the new BindingObjectRateAdjustment object.

Define the applicable rate from the set of rates tied to a usage resource and its binding object
Use the new **IsChosenRate** field on the OrderItemRateCardEntry and QuoteLineRateCardEntry objects.

Define the type of model that defines the consumption of usage resources
Use the new **Type** field on the ProductUsageGrant object.

Define account or contract as binding target type for usage product grant binding policy
Use the new supported `Account` or `Contract` values in the existing **GrantBindingTarget** field on the UsageProductGrantBindingPolicy object.

Relate a product with a usage resource
Use the new ProductUsageResource object.

Indicate if waterfall generation is excluded for the rating request
Use the new **DoesExcludeWaterfall** field on the RatingRequest object.

Relate the usage summary with transaction journal
Use the new **UsageSummary** field on the TransactionJournal object.

Bind Account, Contract, or custom object to transaction usage entitlement for usage resource grants
Use the new supported `Account`, `Contract`, or `BindingObjectCustomExt` values in the existing **GrantBindingTarget** field on the TransactionUsageEntitlement object.

Relate the rating frequency policy with transaction usage entitlement

Use the new **RatingFrequencyPolicy** field on the TransactionUsageEntitlement object.

Define the type of unit of measure class

Use the new **Type** field on the UnitOfMeasureClass object.

Bind Account, Contract, or custom object to usage billing period item (liable summary) for usage resource grants

Use the new supported `Account`, `Contract`, or `BindingObjectCustomExt` values in the existing **GrantBindingTarget** field on the UsageBillingPeriodItem object.

Associate asset of the commitment-based usage resource with related object

Use the new UsageCmtAssetRelatedObj object.

Bind Account, Contract, or custom object to usage entitlement account for usage resource grants

Use the new supported `Account`, `Contract`, or `BindingObjectCustomExt` values in the existing **GrantBindingTarget** field on the UsageEntitlementAccount object.

Relate the usage summary with usage entitlement entry

Use the new **UsageSummary** field on the UsageEntitlementEntry object.

Relate the grant binding target (binding object) with usage ratable summary

Use the new **GrantBindingTarget** field on the UsageRatableSummary object.

Define whether the usage resource is of the token category

Use the new `Token` value in the existing **Category** field on the UsageResource object.

Relate the grant binding target (binding object) with usage summary

Use the new **GrantBindingTarget** field on the UsageSummary object.

Define the applicable rate from the set of rates tied to a usage resource and its binding object

Use the new **IsChosenRate** field on the QuoteLineRateCard Entry object.

Salesforce Contracts

Increase file size limit for custom fonts in the Docgen Custom Fonts Library.

Configure File Size Limits to Accommodate Larger Custom Font Files

Increase the file size limit for custom font files in the Docgen Custom Fonts Library through a support request. Use larger font files to generate documents in your desired fonts and maintain brand consistency. Configure custom file size limits within the combined maximum. In addition, the combined maximum allocation is increased from 50 MB to 100 MB, enabling you to use larger files while staying within the total allowed limit.

Configure File Size Limits to Accommodate Larger Custom Font Files

Increase the file size limit for custom font files in the Docgen Custom Fonts Library through a support request. Use larger font files to generate documents in your desired fonts and maintain brand consistency. Configure custom file size limits within the combined maximum. In addition, the combined maximum allocation is increased from 50 MB to 100 MB, enabling you to use larger files while staying within the total allowed limit.

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

Who: To migrate and sync fonts, users need the DocGen Designer permission set.

How: To increase custom font file size limits, contact your Salesforce representative.

Dynamic Revenue Orchestrator

Fulfill any entity, such as service requests and custom objects, in addition to orders. Adapt to changes in ongoing orders by configuring how fulfillment plans respond. Use Decomposition Workspace for intuitive rule configuration. Save time and effort by configuring a fulfillment scenario for a product classification that covers a range of similar products. Enrich your target fields and attributes in decomposition rules by using expression sets. Update your order and fulfillment order line items by using real-time data from external systems. View the reasons for actions in the fulfillment line items in the Decomposition Viewer.

Expand the Range of Entities for Fulfillment Orchestration
Dynamically generate and orchestrate business processes related to any entity, such as quotes, incidents, cases, service requests, and custom objects in addition to orders.

Orchestrate Changes to In-Flight Orders
Configure how an ongoing fulfillment plan adapts to changes to an in-flight order. On a step definition, click Add, and then specify the point of no return, and define the compensation and rollback steps for the steps impacted by the changes to the order.

Configure Decomposition Rules with Decomposition Workspace
Seamlessly create and manage decomposition rules by using the graphical interface in Decomposition Workspace. The Decomposition Workspace lets you to visually establish relationships between commercial and technical products, making the process intuitive and user-friendly.

Accelerate Scenario Creation Through Product Classifications
Your fulfillment designers can streamline their work by configuring the fulfillment scenario for a product classification that covers a range of similar products, instead of creating identical scenarios for each product.

Power Attribute Mapping by Using Expression Sets
Enrich fulfillment line attributes and fields during order decomposition by using expression sets to perform complex transformation on data from the order line attributes and fields.

Update Fulfillment Order Line Items and Order Line Items On the Go
Propagate data from external systems back into orders. Use the new flows to facilitate data

propagation to line items during fulfillment plan execution. Use this automated process to save time, to minimize human errors, and to make sure that users always have access to the most accurate and up-to-date information. Customize the flows according to your business requirements.

Understand Decomposition Easily with Explainability in the Decomposition Viewer
View the reasons for actions in the fulfillment line items in the Decomposition Viewer. Troubleshoot and optimize your fulfillment processes by gaining a clear understanding of the impact of order lines on related fulfillment lines actions.

Changed Objects in Dynamic Revenue Orchestrator
Do more with these changed Dynamic Revenue Orchestrator objects.

Expand the Range of Entities for Fulfillment Orchestration

Dynamically generate and orchestrate business processes related to any entity, such as quotes, incidents, cases, service requests, and custom objects in addition to orders.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud.

See Also

Salesforce Help: Auto Task Fulfillment Step(can be outdated or unavailable during release preview)

Orchestrate Changes to In-Flight Orders

Configure how an ongoing fulfillment plan adapts to changes to an in-flight order. On a step definition, click Add, and then specify the point of no return, and define the compensation and rollback steps for the steps impacted by the changes to the order.

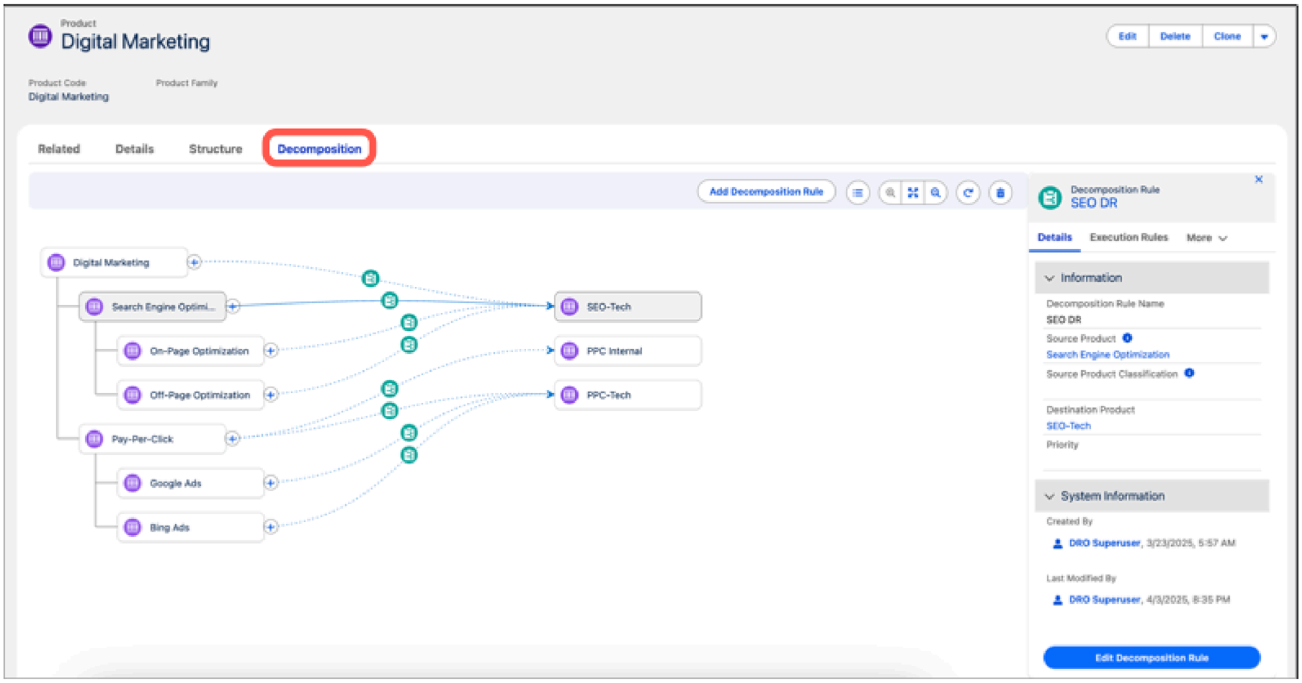
Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud.

Configure Decomposition Rules with Decomposition Workspace

Seamlessly create and manage decomposition rules by using the graphical interface in Decomposition Workspace. The Decomposition Workspace lets you to visually establish relationships between commercial and technical products, making the process intuitive and user-friendly.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud.

How: Click the **Decomposition** tab on the product record page.



Accelerate Scenario Creation Through Product Classifications

Your fulfillment designers can streamline their work by configuring the fulfillment scenario for a product classification that covers a range of similar products, instead of creating identical scenarios for each product.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud.

See Also

Salesforce Help: Configure Scenarios for a Fulfillment Step Definition Group(can be outdated or unavailable during release preview)

Power Attribute Mapping by Using Expression Sets

Enrich fulfillment line attributes and fields during order decomposition by using expression sets to perform complex transformation on data from the order line attributes and fields.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud.

Update Fulfillment Order Line Items and Order Line Items On the Go

Propagate data from external systems back into orders. Use the new flows to facilitate data propagation to line items during fulfillment plan execution. Use this automated process to save time, to minimize human errors, and to make sure that users always have access to the most accurate and up-to-date information. Customize the flows according to your business requirements.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud.

Understand Decomposition Easily with Explainability in the Decomposition Viewer

View the reasons for actions in the fulfillment line items in the Decomposition Viewer. Troubleshoot and optimize your fulfillment processes by gaining a clear understanding of the impact of order lines on related fulfillment lines actions.

Where: This feature is available in Lightning Experience in Enterprise, Unlimited, Developer editions of Revenue Cloud.

Changed Objects in Dynamic Revenue Orchestrator

Do more with these changed Dynamic Revenue Orchestrator objects.

Identify the decomposition source that's related to the fulfillment order line
Use the new **SourceItemIdentifier** field on the FulfilmentLineSourceRel object.

Identify the sales transaction record for fulfillment
Use the new **ReferenceObjectIdentifier** field on the SalesTransactionFulfillReq object.

Identify the version group that's assigned to the fulfillment step source item
Use the new **VersionGroupIdentifier** field on the FulfillmentStepSource object.

Billing

Use a dedicated Billing app to streamline your daily tasks and get a 360-degree view of customer billing information. Improve operational efficiency with real-time visibility into invoices, credit memos, and billing schedules. Achieve greater control over and flexibility from the UI by generating invoice previews, and managing billing schedule groups and credit memos. Write off uncollectible invoices and cater to your customer requirements by configuring billing profiles. Streamline financial operations with billing for external transactions, improved tax reporting, and payment and refund management. Optimize cash flow and financial reporting through collections and by capturing payment and refund amounts in corporate currency.

Manage All Billing Operations with a Dedicated App
Experience the convenience of the Billing app for your day-to-day billing tasks. Perform tasks such as scheduling invoices, creating credit memos, and processing payments with fewer clicks and seamless navigation.

Elevate Customer Service with Instant Access to Complete Account Billing Information
Access all billing-related information for a customer account in one consolidated view. Manage your customer's billing profiles, credit memos, invoices, and saved payment methods. Enhance customer service with a detailed timeline that tracks and provides status of the billing transactions.

Monitor Bill Runs Centrally with Billing Operations Console
Gain real-time visibility into your billing data with a centralized view of invoices, draft invoices, and credit memos. Monitor invoice batch runs and upcoming billing schedules. Easily retry document generation, create or deactivate invoice schedules, and recover invoice batch runs. Identify failed invoices and revenue transaction error logs instantly, and promptly resolve them.

Align Your Billing with Customer Preferences by Using Billing Profiles
Cater to your customers' billing preferences by creating billing profiles. Set a default profile for an account for easy retrieval of the customer's preferred billing day of the month, billing address, and other billing details. Sales representatives can save time and effort by easily selecting an existing billing profile when creating quotes, orders, and contracts.

Configure Billing Milestones Seamlessly with an Intuitive User Interface
Create or update multiple milestone plan items and treatment items in one place with the enhanced, intuitive user interface. Simplify the process of adding, removing, and editing milestones. Gain better control over the activation of billing treatment and milestone plan.

Manage, Track, Troubleshoot, and Visualize Data on Billing Schedule Group Records
Stay on top of your billing schedules and invoices by using the Billing Schedule Group record page. Determine if billing schedules are for original, amended, renewed, or canceled transactions without opening multiple schedules. View related billing period items to track the billing schedules that were processed and the expected amount to be billed for an invoice. Troubleshoot invoice batch run errors faster by accessing the revenue transaction error logs for a billing schedule group in a single place.

Generate Invoice Previews from the User Interface
Generate invoice previews for the next two billing periods of accounts, orders, or billing schedule groups directly from the user interface. Generate a PDF for the invoice preview, and download and share the PDF with your customers to enhance billing transparency and minimize customer disputes.

Generate Billing Schedules for External Transactions or Any Salesforce Objects
Create billing schedules based on transactions in an external system, or from any Salesforce objects. If you're using an external system to manage your transactions, create billing schedules for those transactions without importing any data into Salesforce. You can create billing schedules for original, amended, canceled, renewed, or usage-based transactions.

Improve Tax Reporting with the Flexibility to Add External Tax Lines
Import, use APIs, or manually add tax lines to invoices. Use your preferred tax calculation method and maintain accurate, compliant reporting.

Calculate Taxes Based on Shipment Origin
Eliminate tax calculation errors and maintain compliance by calculating tax based on the origin of shipment. The Billing process now includes the "ship from" address in the tax contract and seamlessly integrates it in Billing Schedule Group, Invoice Line, and Credit Memo Line records.

Configure Credit Memos from the User Interface
Create credit memos to correct invoicing errors, handle returns, and provide customer credits. In addition to creating credit memos by using API, use the intuitive interface to easily create standalone

credit memos or reference them against invoices.

Write Off Uncollectible Invoices

Settle uncollectible invoices, reduce collections efforts, and maintain accurate financial records by writing off invoices with Write-Off API or the Write Off Invoices invocable action. When you write off invoices, credit memos with amounts equivalent to the invoice's balance are created to settle the invoices. Automate the write-off process by using the Write Off Invoices invocable action in custom-built flows, and focus on collectible payments while ensuring accounting compliance.

Process Payments and Issue Refunds

Integrate Billing with native payment gateways such as Stripe and Adyen to configure merchant accounts, streamline future payments by saving customer payment methods, and automate the configuration of payment schedules for posted invoices. Apply payments at a granular level to invoice lines or to rolled-up invoices, schedule automatic payment collection, and design custom payment flows by using APIs. Easily issue and apply refunds if customers change or cancel their orders.

Capture Payments and Refunds in Corporate Currency

Enhance your financial accounting processes for payments and refunds by automatically capturing the corporate currency equivalents of transactional currency amounts. The corporate currency equivalent amounts help your accounting teams calculate the foreign exchange gains and losses for profit and loss reporting, thereby enhancing financial analysis.

Improve Your Revenue Recovery with Collections

Take control of your receivables and optimize your cash flow to maintain your business financial health with the Collections feature. Manage and track outstanding collections and payments for unpaid or partially paid invoices. Automate and send dunning emails with Marketing Cloud to reduce overdue payments. Empower collections rep with accurate collection plan data to enhance customer interactions, send dunning emails to reduce overdue amount and mitigate risk. With the billing payment promise workflow, collections rep can create and manage payment schedules.

New and Changed Objects for Billing

Store and access more data with these new Billing objects and changes to existing Billing objects.

Changed Metadata Type

Learn more about the changed metadata type in Billing.

New Connect REST API Resources

Learn more about the new resources available with Billing to manage payment-related processes.

New Connect in Apex Classes

Billing has new classes and methods to manage payment-related processes.

New Invocable Action

Use the new invocable action in Billing.

Manage All Billing Operations with a Dedicated App

Experience the convenience of the Billing app for your day-to-day billing tasks. Perform tasks such as scheduling invoices, creating credit memos, and processing payments with fewer clicks and seamless navigation.

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

Revenue Cloud where Billing is enabled.

How: From the App Launcher, find and select **Billing**.

Elevate Customer Service with Instant Access to Complete Account Billing Information

Access all billing-related information for a customer account in one consolidated view. Manage your customer's billing profiles, credit memos, invoices, and saved payment methods. Enhance customer service with a detailed timeline that tracks and provides status of the billing transactions.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

How: From the App Launcher, find and select **Billing**. Click **Accounts** from the navigation bar and open the required account.

Monitor Bill Runs Centrally with Billing Operations Console

Gain real-time visibility into your billing data with a centralized view of invoices, draft invoices, and credit memos. Monitor invoice batch runs and upcoming billing schedules. Easily retry document generation, create or deactivate invoice schedules, and recover invoice batch runs. Identify failed invoices and revenue transaction error logs instantly, and promptly resolve them.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

How: To access the Billing Operations Console home page, from the App Launcher, find and select **Billing**.

Align Your Billing with Customer Preferences by Using Billing Profiles

Cater to your customers' billing preferences by creating billing profiles. Set a default profile for an account for easy retrieval of the customer's preferred billing day of the month, billing address, and other billing details. Sales representatives can save time and effort by easily selecting an existing billing profile when creating quotes, orders, and contracts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To configure billing profiles, you need the Billing Admin or Billing Operations User permission set.

How: To create a billing profile, from the App Launcher, find and select **Billing**. Click **Accounts** from the navigation bar and open the required account. Go to the Billing Profile tab and click **New**.

Configure Billing Milestones Seamlessly with an Intuitive User Interface

Create or update multiple milestone plan items and treatment items in one place with the enhanced, intuitive user interface. Simplify the process of adding, removing, and editing milestones. Gain better control over the activation of billing treatment and milestone plan.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To configure milestone billing, you need the Revenue Cloud Billing license and the Billing Admin permission set.

How: To configure milestones, open a milestone-enabled billing treatment, and click **Configure Milestones**.

Manage, Track, Troubleshoot, and Visualize Data on Billing Schedule Group Records

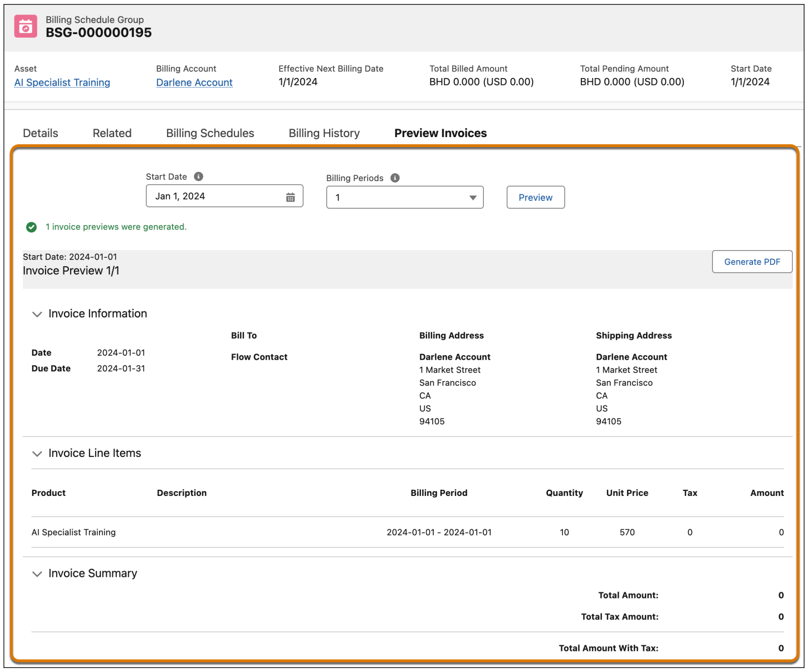
Stay on top of your billing schedules and invoices by using the Billing Schedule Group record page. Determine if billing schedules are for original, amended, renewed, or canceled transactions without opening multiple schedules. View related billing period items to track the billing schedules that were processed and the expected amount to be billed for an invoice. Troubleshoot invoice batch run errors faster by accessing the revenue transaction error logs for a billing schedule group in a single place.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

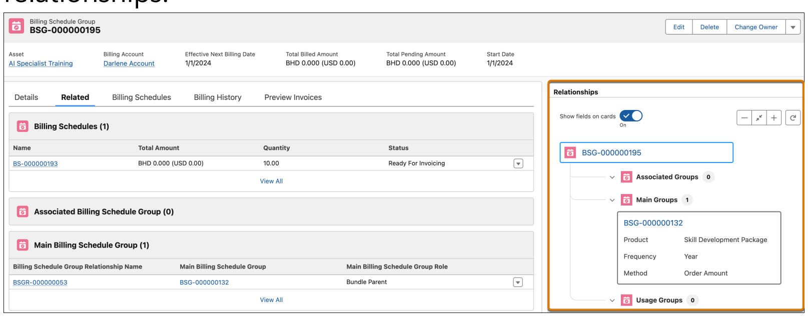
Who: To view billing schedule groups, you need the Billing Operations User permission set.

Why: View key billing information on the Billing Schedule Group record itself.

- The Billing Schedules tab shows the key billing schedule group details and the related billing schedules.
- The Billing History tab shows the related billing period items, billing milestone plan items, invoice lines, and revenue transaction error logs.
- The Preview Invoices tab shows the invoice previews generated based on the billing schedule group's effective next billing date.



- The Relationships Actionable Relationship Center (ARC) graph shows a clear picture of the associated, main, and usage billing schedule groups through the visualization of billing schedule group relationships.



How: Open any Billing Schedule Group record, and view the details on the various tabs.

See Also

Salesforce Help: View Billing Schedule Groups (can be outdated or unavailable during release preview)

Generate Invoice Previews from the User Interface

Generate invoice previews for the next two billing periods of accounts, orders, or billing schedule groups directly from the user interface. Generate a PDF for the invoice preview, and download and share the PDF with your customers to enhance billing transparency and minimize customer disputes.

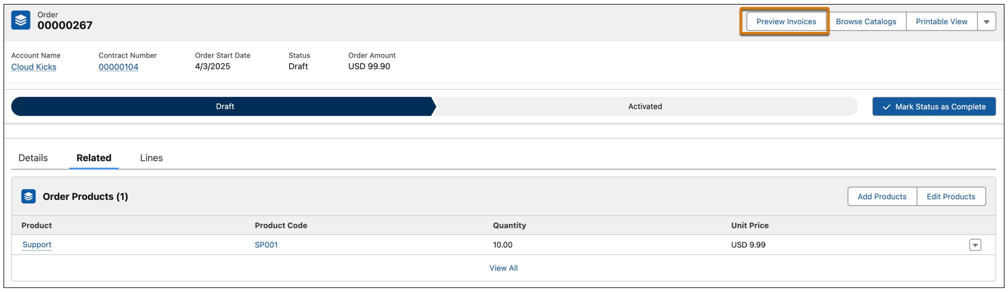
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To preview invoices, you need the Billing Operations User permission set.

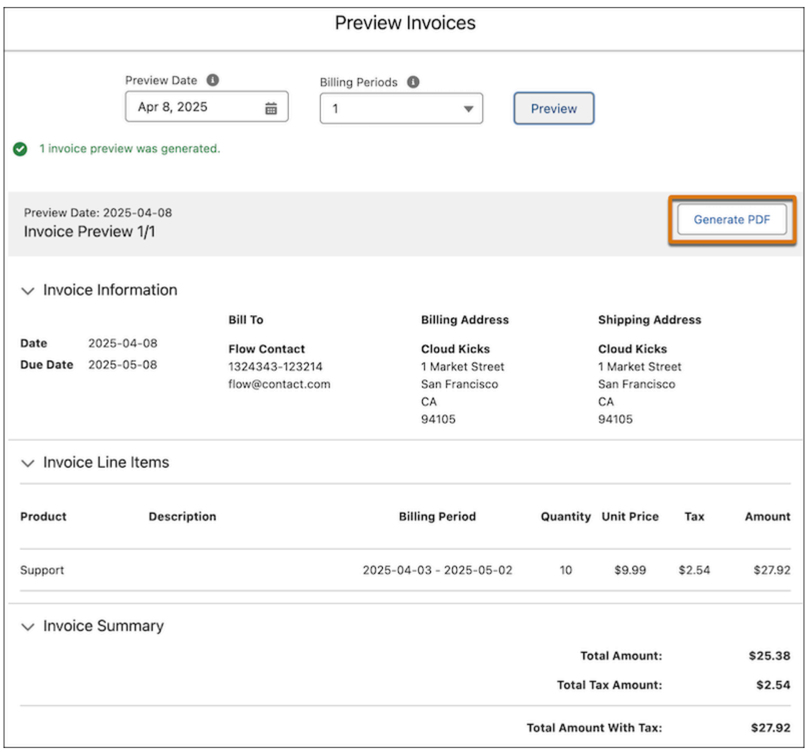
To generate PDFs of the invoice previews, you need the Revenue Cloud Billing license and the Billing

Operations User permission set.

How: To generate invoices previews, open an Account, Order, or Billing Schedule Group record, click **Preview Invoices**, and select the start date and the number of billing periods.



To generate PDF for the invoice previews, click **Generate PDF** on the generated invoice previews. Open and download the PDF from the Files related list.



Generate Billing Schedules for External Transactions or Any Salesforce Objects

Create billing schedules based on transactions in an external system, or from any Salesforce objects. If you're using an external system to manage your transactions, create billing schedules for those transactions without importing any data into Salesforce. You can create billing schedules for original, amended, canceled, renewed, or usage-based transactions.

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

Revenue Cloud where Billing is enabled.

Who: To create standalone billing schedules, you need the Billing Admin permission set.

How: To create billing schedules for an internal or external transaction, use Standalone Billing Schedules API. To automatically create billing schedules for Salesforce records, use the Create Standalone Billing Schedules invocable action.

Improve Tax Reporting with the Flexibility to Add External Tax Lines

Import, use APIs, or manually add tax lines to invoices. Use your preferred tax calculation method and maintain accurate, compliant reporting.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To add invoice tax lines, you need the Billing Admin or Billing Operations User permission set.

How: Generate draft invoices without tax lines, extract invoice lines to an external system, calculate taxes, add the results, and then post the invoices.

Calculate Taxes Based on Shipment Origin

Eliminate tax calculation errors and maintain compliance by calculating tax based on the origin of shipment. The Billing process now includes the "ship from" address in the tax contract and seamlessly integrates it in Billing Schedule Group, Invoice Line, and Credit Memo Line records.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Configure Credit Memos from the User Interface

Create credit memos to correct invoicing errors, handle returns, and provide customer credits. In addition to creating credit memos by using API, use the intuitive interface to easily create standalone credit memos or reference them against invoices.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To create credit memos, you need the Billing Admin or Credit Memo Operations User permission set.

How: To create standalone credit memos, from the App Launcher, find and select **Credit Memos**. Then click **Create Credit Memo**. To create and apply credit memos to invoice lines, from the invoice line page, select the required invoice lines. Then click **Create and Apply Credit Memo**.

Write Off Uncollectible Invoices

Settle uncollectible invoices, reduce collections efforts, and maintain accurate financial records by writing off invoices with Write-Off API or the Write Off Invoices invocable action. When you write off invoices, credit memos with amounts equivalent to the invoice's balance are created to settle the invoices. Automate the write-off process by using the Write Off Invoices invocable action in custom-built flows, and focus on collectible payments while ensuring accounting compliance.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To write off invoices, you need the Revenue Cloud Billing license, the Billing Operations User permission set, and the Credit Memo Operations permission set.

Process Payments and Issue Refunds

Integrate Billing with native payment gateways such as Stripe and Adyen to configure merchant accounts, streamline future payments by saving customer payment methods, and automate the configuration of payment schedules for posted invoices. Apply payments at a granular level to invoice lines or to rolled-up invoices, schedule automatic payment collection, and design custom payment flows by using APIs. Easily issue and apply refunds if customers change or cancel their orders.

Integrate Billing with Native Payment Gateways by Using Salesforce Payments
Seamlessly integrate Billing with Stripe or Adyen payment gateways. Then, use these gateways to connect Billing with existing Stripe or Adyen merchant accounts or set up new merchant accounts.

Securely Save Payment Methods for Seamless Collection
Reduce the time to process payments for future invoices by entering your customer's Automated Clearing House (ACH) or credit card details, and securely saving them using your preferred payment gateway. When you save payment methods, select merchant accounts for Stripe or Adyen payment gateways.

Automate Configuration of Payment Schedules for Invoices
Automatically create payment schedules and payment schedule items for your invoices after they're posted. After you configure payment schedulers, payment batch runs process these payment schedules and automatically collect the corresponding payments.

Schedule Automatic Collection of Payments for Posted Invoices
Reduce manual work and save time by scheduling payment batch runs to process payment schedules for posted invoices. Tailor the frequency of payment batch runs to meet your business requirements.

Apply Payments to Settle Balances of Invoices or Invoice Lines
Settle the balances of invoice lines separately or invoice line amounts rolled-up to invoices by applying payments. If you settle invoice lines, you can granularly track the products and services that are paid and are part of the same invoice. After payments are applied to invoices or invoice lines, the applied amounts and balance amounts are automatically updated.

Design Custom Flows for Processing Payments and Settling Invoices
Use a suite of Payments APIs to process payments and settle invoices with greater flexibility. Process ad

hoc payments, settle invoices by allocating payments, unallocate payments, authorize and capture payments through native payment gateways, and save card details for recurring payment processing.

Issue and Apply Refunds

Use APIs to refund your customers if they change or cancel products or services that they paid for. Refund the payment by using one of the native payment gateways that you configured.

Integrate Billing with Native Payment Gateways by Using Salesforce Payments

Seamlessly integrate Billing with Stripe or Adyen payment gateways. Then, use these gateways to connect Billing with existing Stripe or Adyen merchant accounts or set up new merchant accounts.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To configure merchant accounts, you need the Revenue Cloud Billing license and the Payment Admin permission set.

How: In the Billing Guided Setup, go to the Payment Configurations setup assistant, and click **Configure Merchant Payment Accounts**.

Securely Save Payment Methods for Seamless Collection

Reduce the time to process payments for future invoices by entering your customer's Automated Clearing House (ACH) or credit card details, and securely saving them using your preferred payment gateway. When you save payment methods, select merchant accounts for Stripe or Adyen payment gateways.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To create saved payment methods, you need the Revenue Cloud Billing license and the Payment Admin permission set.

How: Open the Account record of your customer, go to the Saved Payment Methods tab, and enter the payment method details.

Automate Configuration of Payment Schedules for Invoices

Automatically create payment schedules and payment schedule items for your invoices after they're posted. After you configure payment schedulers, payment batch runs process these payment schedules and automatically collect the corresponding payments.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To automatically create payment schedules and payment schedule items, you need the Revenue

Cloud Billing license and the Billing Admin permission set.

How: Go to the Billing Settings page in Setup and turn on Create Payment Schedules and Payment Schedule Items.

Schedule Automatic Collection of Payments for Posted Invoices

Reduce manual work and save time by scheduling payment batch runs to process payment schedules for posted invoices. Tailor the frequency of payment batch runs to meet your business requirements.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To schedule payment batch runs, you need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set.

How: From the App Launcher, find and select **Billing Batch Scheduler**. To schedule payment batch runs, click **New Payment Scheduler** and provide the required details.

Apply Payments to Settle Balances of Invoices or Invoice Lines

Settle the balances of invoice lines separately or invoice line amounts rolled-up to invoices by applying payments. If you settle invoice lines, you can granularly track the products and services that are paid and are part of the same invoice. After payments are applied to invoices or invoice lines, the applied amounts and balance amounts are automatically updated.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To apply payments to invoices or invoice lines, you need the Revenue Cloud Billing license and the Billing Admin permission set.

How: Go to the Billing Settings page in Setup, and select the credit and payment application level.

Design Custom Flows for Processing Payments and Settling Invoices

Use a suite of Payments APIs to process payments and settle invoices with greater flexibility. Process ad hoc payments, settle invoices by allocating payments, unallocate payments, authorize and capture payments through native payment gateways, and save card details for recurring payment processing.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To use the Payments APIs, you need the Revenue Cloud Billing license and the Payment Admin permission set.

Issue and Apply Refunds

Use APIs to refund your customers if they change or cancel products or services that they paid for. Refund the payment by using one of the native payment gateways that you configured.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To issue and apply refunds, you need the Revenue Cloud Billing license and the Payment Admin permission set.

How: To create refunds for processed payments, use Create Payment Refunds Billing API. To apply refunds to the processed payments, use Apply Refunds to Payments API.

Capture Payments and Refunds in Corporate Currency

Enhance your financial accounting processes for payments and refunds by automatically capturing the corporate currency equivalents of transactional currency amounts. The corporate currency equivalent amounts help your accounting teams calculate the foreign exchange gains and losses for profit and loss reporting, thereby enhancing financial analysis.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To enable this feature, you need the Billing Admin permission set.

How: From the Billing Settings page in Setup, turn on Store Transaction Amounts in Corporate Currency.

Improve Your Revenue Recovery with Collections

Take control of your receivables and optimize your cash flow to maintain your business financial health with the Collections feature. Manage and track outstanding collections and payments for unpaid or partially paid invoices. Automate and send dunning emails with Marketing Cloud to reduce overdue payments. Empower collections rep with accurate collection plan data to enhance customer interactions, send dunning emails to reduce overdue amount and mitigate risk. With the billing payment promise workflow, collections rep can create and manage payment schedules.

Track Payments of Invoices with Corresponding Collection Plan Items
Manage the payment collection process efficiently by creating a collection plan item for every uncollectible invoice. Equip your collections rep with precise data by creating collection plans. All the invoices related to the collection plan's customer account are available on the Invoices tab. Create collection plan items for selected invoices in one go with the Create Collection Plan Items for Invoice flow.

Secure Timely Payments by Creating Payment Promises
Close pending invoices and reduce the risk of overdue payments. Your collections rep can use the

Billing Payment Promise flow to gather payment schedule information from customers for overdue invoices, and create payment schedules and payment schedule items with a saved payment method.

Automate and Send Personalized Dunning Emails to Proactively Manage Overdues
Send automated dunning emails with relevant invoice's balance information to encourage prompt payments. Use segments to define your audience and create flow schedules to automate emails with Marketing Cloud, ensuring timely communication of invoice's payment overdues.

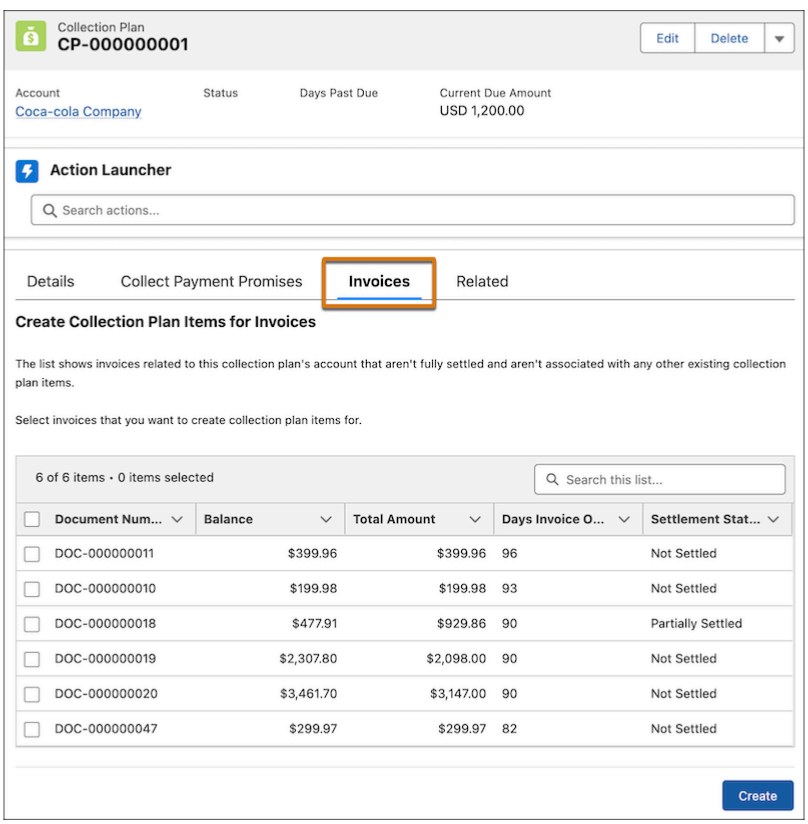
Track Payments of Invoices with Corresponding Collection Plan Items

Manage the payment collection process efficiently by creating a collection plan item for every uncollectible invoice. Equip your collections rep with precise data by creating collection plans. All the invoices related to the collection plan's customer account are available on the Invoices tab. Create collection plan items for selected invoices in one go with the Create Collection Plan Items for Invoice flow.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To create collection plan items, you need the Revenue Cloud Billing license and the Billing Collections and Recovery Specialist permission set.

How: To create collection plan items for invoices, open a Collection Plan record, go to the Invoices tab, select the required invoices and click **Create**.



Secure Timely Payments by Creating Payment Promises

Close pending invoices and reduce the risk of overdue payments. Your collections rep can use the Billing Payment Promise flow to gather payment schedule information from customers for overdue invoices, and create payment schedules and payment schedule items with a saved payment method.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To create payment promises, you need the:

- Revenue Cloud Billing license
- Billing Collections and Recovery Specialist permission set
- Omnistudio User permission set
- Payment Operations or the Payment Admin permission set

How: To create payment promises, open a Collection Plan record, go to the Collect Payment Promise tab, and click **New**. Select a collection plan item, provide payment promise details, and click **Finish**.

Automate and Send Personalized Dunning Emails to Proactively Manage Overdues

Send automated dunning emails with relevant invoice's balance information to encourage prompt payments. Use segments to define your audience and create flow schedules to automate emails with Marketing Cloud, ensuring timely communication of invoice's payment overdues.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions of Revenue Cloud where Billing is enabled.

Who: To schedule or send dunning emails, you need the:

- Revenue Cloud Billing license
- Marketing Cloud Growth edition
- Billing Collections and Recovery Specialist permission set
- Data Cloud Admin permission set
- Marketing Cloud Admin permission set

New and Changed Objects for Billing

Store and access more data with these new Billing objects and changes to existing Billing objects.

New Objects

Get information about the batch processing job that processes payments

Use the new PaymentBatchRun object.

Get information about the payment line that's applied to or unapplied from an invoice line

Use the new PaymentLineInvoiceLine object.

Get information about a set of payments that a customer wants to collect at different times for a certain record

Use the new PaymentSchedule object.

Get information about the configuration for the payment schedule

Use the new PaymentSchedulePolicy object.

Get information about the processing of payment schedules including the payment method and the payment amount

Use the new PaymentScheduleTreatment object.

Get information about the processing of payment schedules after the corresponding invoices are posted

Use the new PaymentScheduleTreatmentDtl object.

Get information about the partial payments that the total payment is divided into

Use the new PymtSchdDistributionMethod object.

Get information about a payment to be processed

Use the new PaymentScheduleItem object.

Changed Objects

Specify billing date as a number between 1 and 31

Use the new **BillDayOfMonth** field on the existing BillingAccount object.

Specify the contact associated with the billing account

Use the new **BillToContact** field on the existing BillingAccount object.

Specify the payment term associated with the billing account

Use the new **PaymentTerm** field on the existing BillingAccount object.

Specify the shipping address of the billing account

Use the new **ShippingAddress** field on the existing BillingAccount object.

Specify the billing schedule group that's related to the billing milestone plan item

Use the new **BillingScheduleGroupId** field on the existing BillingMilestonePlanItem object.

Specify the billing schedule group that's related to the billing period item

Use the new **BillingScheduleGroupId** field on the existing BillingPeriodItem object.

Stores the net unit price of the order item for which the billing schedule was created

Use the new **NetUnitPrice** field on the existing BillingSchedule object.

Stores the identifier of the external record for which the billing schedule group was created

Use the new **ExternalRefRecordIdentifier** field on the existing BillingScheduleGroup object.

Stores the ID of the SavedPaymentMethod record that's used to collect payment for the billing schedule group

Use the new **SavedPaymentMethodId** field on the existing BillingScheduleGroup object.

Stores the ID of the Salesforce record for which the billing schedule group was created

Use the new **ReferenceRecordId** field on the existing BillingScheduleGroup object.

Specify the address from which the product in the billing schedule group is shipped

Use the new **ShipFromAddress** field on the existing BillingScheduleGroup object.

Stores the sum of invoice balances of the collection plan items related to the collection plan

Use the new **TotalInvoiceBalance** field on the CollectionPlan object.

Stores the balance amount of the invoice related to the collection plan item

Use the new **InvoiceBalance** field on the CollectionPlanItem object.

Specify the category for the credit memo when it is created

Use the new supported values **InvoiceWriteOff, Referenced**, and **Standalone** in the new Category field on the existing CreditMemo object.

Specify the reason code for the credit memo of category Invoice Write-Off

Use the new **ReasonCode** field on the existing CreditMemo object.

Configure the credit memo's source action based on Invoice Write-Off

Use the new supported value **WriteOffPostedInvoice** in the existing **SourceAction** field on the existing CreditMemo object.

Specify the address from which the product in the credit memo line is shipped

Use the new **ShipFromAddress** field on the existing CreditMemoLine object.

Indicates the ship from address associated with the parent credit memo line

Use the new **ShipFromAddress** field on the existing CreditMemoLineTax object.

Stores the invoice's total charge amount that's written off

Use the new **WriteOffChargeAmount** field on the existing Invoice object.

View the status of Invoice's write-off process

Use the new supported values **InProgress, Completed**, or **Failed** in the new WriteOffStatus field on the existing Invoice object.

Stores the invoice's total tax amount that's written off

Use the new **WriteOffTotalTaxAmount** field on the existing Invoice object.

Specify the shipping origin of the invoiced product

Use the new **ShipFromAddress** field on the existing InvoiceLine object.

Indicates the ship from address associated with the parent invoice line

Use the new **ShipFromAddress** field on the existing InvoiceLineTax object.

Persist context for the new Standalone Billing Schedules API

Use the new supported value `StandaloneBillingSchedulesCreation` in the existing **JobType** field on the AsyncOperationTracker object.

Stores a payment's amount in corporate currency

Use the new **CorporateCurrencyCnvAmount** field on the Payment object.

Stores the date on which a payment's amount is converted into corporate currency

Use the new **CorporateCurrencyCvsnDate** field on the Payment object.

Specify the exchange rate that's used to convert a payment's amount into corporate currency

Use the new **CorporateCurrencyCvsnRate** field on the Payment object.

Specify the legal entity accounting period that's related to the payment

Use the new **LegalEntityAccountingPeriodId** field on the Payment object.

Specify the legal entity that's related to the payment

Use the new **LegalEntityId** field on the Payment object.

Specify the legal entity accounting period that's related to the payment line invoice

Use the new **LegalEntityAccountingPeriodId** field on the PaymentLineInvoice object.

Specify the legal entity that's related to the payment line invoice

Use the new **LegalEntityId** field on the PaymentLineInvoice object.

Stores the currency ISO code of the corporate currency

Use the new **CorporateCurrencyIsoCode** field on the Payment object.

Stores a refund's amount in corporate currency

Use the new **CorporateCurrencyCnvAmount** field on the Refund object.

Stores the date on which a refund's amount is converted into corporate currency

Use the new **CorporateCurrencyCvsnDate** field on the Refund object.

Specify the exchange rate that's used to convert a refund's amount into corporate currency

Use the new **CorporateCurrencyCvsnRate** field on the Refund object.

Stores the currency ISO code of the corporate currency

Use the new **CorporateCurrencyIsoCode** field on the Refund object.

Specify the legal entity accounting period that's related to the refund

Use the new **LegalEntityAccountingPeriodId** field on the Refund object.

Specify the legal entity that's related to the refund

Use the new **LegalEntityId** field on the Refund object.

Specify the legal entity accounting period that's related to the refund line payment

Use the new **LegalEntityAccountingPeriodId** field on the RefundLinePayment object.

Specify the legal entity that's related to the refund line payment

Use the new **LegalEntityId** field on the RefundLinePayment object.

REMOVED: The TotalChargeTaxAmount field on the CreditMemo object is removed from API version 64.0 and later

Instead, use the **TotalTaxAmount** field on the CreditMemo object.

REMOVED: The TotalChargeAmountWithTax field on the CreditMemo object is removed from API version 64.0 and later

Instead, use the **TotalAmountWithTax** field on the CreditMemo object.

REMOVED: The TotalAdjustmentTaxAmount field on the CreditMemo object is removed

This field is removed in API version 64.0 and later.

REMOVED: The TotalAdjustmentAmountWithTax field on the CreditMemo object is removed

This field is removed in API version 64.0 and later.

REMOVED: The ChargeTaxAmount field on the CreditMemoLine object is removed from API version

64.0 and later

Instead, use the **TaxAmount** field on the CreditMemoLine object.

REMOVED: The ChargeAmountWithTax field on the CreditMemoLine object is removed from API version 64.0 and later

Instead, use the **LineAmount** field on the CreditMemoLine object.

REMOVED: The AdjustmentTaxAmount field on the CreditMemoLine object is removed

This field is removed in API version 64.0 and later.

REMOVED: The AdjustmentAmountWithTax field on the CreditMemoLine object is removed

This field is removed in API version 64.0 and later.

Specify the transaction amount field on the transaction type that's used to record the credit or debit amount in the transaction journals

Use the new **TransactionAmountField** field on the existing GeneralLedgerAccountAssignmentRule object.

See Also

Revenue Cloud Developer Guide: Billing Standard Objects (can be outdated or unavailable during release preview)

Changed Metadata Type

Learn more about the changed metadata type in Billing.

Metadata Type

Create a default payment schedule policy and payment schedule treatment

Use the new **enablePaymentSchedulesAndItemsCreation** field on the existing BillingSettings metadata type.

See Also

Revenue Cloud Developer Guide: BillingSettings (can be outdated or unavailable during release preview)

New Connect REST API Resources

Learn more about the new resources available with Billing to manage payment-related processes.

Create payment schedulers to automate payment runs

Make a POST request to the `/commerce/payments/payment-schedulers/` resource.

New request body: Payments Batch Scheduler Input

New response body: Batch Payments Scheduler

Activate or deactivate a payment scheduler

Make a PATCH request to the `/commerce/payments/payment-schedulers/billingBatchSchedulerId` resource.

New request body: Payments Scheduler Update Input

New response body: Payments Scheduler Update

Allocate the balance of a payment to reduce the balance of an invoice

Make a POST request to the `/commerce/billing/payments/paymentId/actions/apply` resource.

New request body: Payment Line Apply Input

New response body: Payment Line Apply

Revert the application of a payment line from an invoice

Make a POST request to the `/commerce/billing/payments/paymentId/paymentlines/paymentLineId/actions/unapply` resource.

New request body: Payment Line Unapply Input

New response body: Payment Line Unapply

Make a refund transaction against a payment

Make a POST request to the `/commerce/billing/refunds/refundId/actions/apply` resource.

New request body: Refund Line Apply Input

New response body: Refund Line Applied Response

See Also

Revenue Cloud Developer Guide: Billing Business APIs (can be outdated or unavailable during release preview)

New Connect in Apex Classes

Billing has new classes and methods to manage payment-related processes.

These new methods are available in the `ConnectApi.PaymentsBilling` class.

Allocate the balance of a payment to reduce the balance of an invoice

- `applyPaymentLine(PaymentLineApplyInput, paymentId)`

  New input class: `ConnectApi.PaymentLineApplyRequest`

  New output class: `ConnectApi.PaymentLineApplyResponse`

Make a refund transaction against a payment

- `applyRefundLine(RefundLineApplyInput, refundId)`

  New input class: `ConnectApi.RefundLineApplyRequest`

  New output class: `ConnectApi.RefundLineApplyResponse`

Revert the application of a payment line from an invoice

- `unapplyPaymentLine(PaymentLineUnapplyInput, paymentId, paymentLineId)`

  New input class: `ConnectApi.PaymentLineUnapplyRequest`

  New output class: `ConnectApi.PaymentLineUnapplyResponse`

See Also

Revenue Cloud Developer Guide: Billing Apex Reference (can be outdated or unavailable during release preview)

New Invocable Action

Use the new invocable action in Billing.

Unapply a payment from an invoice or invoice line

Use the new unapplyPayment action.

See Also

Revenue Cloud Developer Guide: Billing Standard Invocable Actions (can be outdated or unavailable during release preview)

Sales

Boost your sales teams' results with new features across Sales Cloud.

Agentforce for Sales

Scale your sales team by using sales agents. Reach out to contacts and person accounts, engage with prospects in more languages, and test agent output with Agentforce SDR. Automate updates to opportunity fields and save time by using Agentforce Deal Agent.

Sales Fundamentals
Keep syncing leads from LinkedIn to Salesforce.

Einstein Conversation Insights
Einstein Conversation Insights (ECI) users can upload previously recorded meetings to ECI to identify coachable moments for meetings from external sources. The Get Conversation Transcript invocable action is available in flows, so you can automate team recaps and record updates related to your teams' customer conversations. And see information about your sales team's pricing and objection conversations in Sales Signals.

Sales Engagement
Multiple companion orgs can now access Prospecting Center by using a single Data Cloud home org.

Salesforce Forecasting
With a single click, let the Forecasting data kit complete the prerequisite steps in Data Cloud so you can easily configure consumption forecast types.

Sales Performance Management
Get the scoop on the latest optimization enhancements in Salesforce Maps. Set controls for who can export and publish quota plans. Navigate high volumes of data without losing your place in Quota Planning. And discover the latest enhancements for your incentive compensation management efforts within Salesforce Spiff.

Email, Calendar, Phone, and Integrations
Capture and report on email as an activity with the Sync Email as Salesforce Activity feature. Match a synced email to the most relevant records with the new Activities: Match Email to Records flow. Assign sales reps unique direct inward dialing (DID) phone numbers. Salesforce for Outlook retires in December 2027.

Other Changes in the Sales Cloud
Anticipate other changes that can affect your sales teams.

Agentforce for Sales

Scale your sales team by using sales agents. Reach out to contacts and person accounts, engage with prospects in more languages, and test agent output with Agentforce SDR. Automate updates to opportunity fields and save time by using Agentforce Deal Agent.

Agentforce SDR
Reach out to contacts and person accounts, engage with prospects in more languages, and test agent output with Agentforce SDR.

Increase Seller Productivity and Sales Process Adherence with Agentforce Deal Agent
Agentforce Deal Agent is an AI-powered agent that increases seller productivity by handling time-consuming tasks associated with deal management. The Deal Agent automatically reviews recent conversations and notes associated with opportunities in Salesforce to recommend actions for sellers to take. By default, the agent is configured to require seller approval for updates, but it can also be

configured to automatically update opportunities on a seller's behalf.

Agentforce SDR

Reach out to contacts and person accounts, engage with prospects in more languages, and test agent output with Agentforce SDR.

Reach Out to All Kinds of Customers with Agentforce SDR

Sales teams can now automate outreach to contacts and person accounts in addition to leads. If your business uses contacts or person accounts as the initial customer record, your SDR agent can nurture those relationships too. You can also use your SDR agent to initiate cross sales, upgrade, and other sales programs aimed toward your existing customers.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Agentforce SDR add-on. Setup for agents is available on the desktop site.

When: This change is available beginning March 31, 2025.

How: Turn on Agentforce SDR in Setup. In the Object Manager,Then add the Activate SDR Agent action to Contact and Person Account page layouts according to your business needs. In Agent Builder, set the Engagement Rules for your agent to reach out to leads, contacts, or person accounts as needed.

To use contacts and person accounts with SDR, records must have the Account Name field filled. If this field is empty for a record, the owner can manually share the record with the SDR Agent user. The Owner field on leads, person accounts, and contacts must be filled before assigning a record to the SDR agent. For contacts, fill the owner field on the related account.

All records assigned to the SDR agent must include an email address. The SDR agent doesn't yet handle email opt-out requests from person accounts.

Engage with Prospects in More Languages with Agentforce SDR

Now your SDR agent can generate intro emails, nudges and replies in French, Italian, German, Spanish, Japanese, and Portuguese.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Agentforce SDR add-on. Setup for agents is available on the desktop site.

When: This change is available beginning March 31, 2025.

How: In Agent Builder, choose the default language for your SDR agent in the Language Settings tab. The language setting determines which language the agent uses to generate outgoing emails. The agent will generate reply emails in the chosen language even when prospects reply in one of the other supported languages.

The separate Preview Language setting in Prompt Builder is for testing purposes only and doesn’t affect actual SDR agent email generation.

Test Agentforce SDR Email Generation in Agent Builder

In Agent Builder, you can test how your SDR agent generates intro emails, nudges, and replies to prospect emails. The Agent Builder Preview panel lets you enter the details of the scenario you want to test, and then view the email the SDR agent generates.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Agentforce SDR add-on. Setup for agents is available on the desktop site.

When: This change is available beginning March 31, 2025.

Why: When you set up Agentforce SDR or make any customizations to the agent actions or prompts it uses, the Agent Builder preview lets you validate agent-generated content and make configuration or data library changes before assigning prospects to the agent.

How: On the Topics tab for your SDR agent in Agent Builder, click the topic and action you want to test. Then click **Preview As**. Enter the details for your testing scenario. Use the Chat window to ask the agent to generate an email using a specific utterance for each scenario, and then view the results.

For each email scenario you want to test (intro, nudge, or reply), start a new Agent Builder testing session by clicking **Refresh** in the Preview panel.

See Testing Agentforce SDR in Salesforce Help before running your first tests in the Preview panel.

Increase Seller Productivity and Sales Process Adherence with Agentforce Deal Agent

Agentforce Deal Agent is an AI-powered agent that increases seller productivity by handling time-consuming tasks associated with deal management. The Deal Agent automatically reviews recent conversations and notes associated with opportunities in Salesforce to recommend actions for sellers to take. By default, the agent is configured to require seller approval for updates, but it can also be configured to automatically update opportunities on a seller's behalf.

Where: This feature is available in Lightning Experience in Enterprise, Performance, and Unlimited editions with the Agentforce Deal Agent add-on. To perform its work, Agentforce Deal Agent requires additional Sales Cloud features that are available with the Einstein for Sales add-on. Setup for agents is available on the desktop site.

When: This change is available starting in June 2025.

Why: The Deal Agent helps sellers maintain pipeline hygiene by suggesting updates to opportunity fields, such as Next Step and Stage. The agent can also update custom text fields on opportunities to automate data entry for organizations' sales methodologies, such as MEDDIC. Through its continuous analysis of recent changes to opportunities, the Deal Agent makes sure that opportunities are up to date and complete.

How: To turn on Agentforce Deal Agent, use the guided setup to enable the required features, automatically create the digital agent user record for the agent, and configure agent settings in Agentforce Builder. After the Deal Agent is configured, sellers can review suggestions or updates from the Deal Agent directly in the flow of work in Pipeline Inspection.

Sales Fundamentals

Keep syncing leads from LinkedIn to Salesforce.

Review and Update Settings to Capture Leads from LinkedIn (Release Update)
If you're syncing leads from LinkedIn Lead Forms to Salesforce, you must manually disconnect your LinkedIn account, reconfigure the feature by enabling a new setting, and then reconnect your account. Otherwise, LinkedIn leads will stop syncing when LinkedIn retires their legacy Ads Lead Sync APIs. This update was first available and scheduled to be enforced in Winter '25, but we postponed the enforcement date to Summer '25.

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

If you're syncing leads from LinkedIn Lead Forms to Salesforce, you must manually disconnect your LinkedIn account, reconfigure the feature by enabling a new setting, and then reconnect your account. Otherwise, LinkedIn leads will stop syncing when LinkedIn retires their legacy Ads Lead Sync APIs. This update was first available and scheduled to be enforced in Winter ’25, but we postponed the enforcement date to Summer ’25.

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

When: Salesforce enforces this update in May of Summer ’25. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

Why: LinkedIn updated the APIs used to capture lead data from LinkedIn Lead Gen forms and sync it to Salesforce with two-factor authentication. After you manually enable the Use LinkedIn Lead Sync APIs with Lead Forms setting and connect your LinkedIn account, your Salesforce org can continue to sync leads generated from LinkedIn Lead Gen forms.

How: To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Review and Update Settings to Capture Leads from LinkedIn, follow the testing and activation steps. We recommend that you check that your LinkedIn administrator has two-factor authentication set up and can provide you with the verification code when you do the release update.

Einstein Conversation Insights

Einstein Conversation Insights (ECI) users can upload previously recorded meetings to ECI to identify coachable moments for meetings from external sources. The Get Conversation Transcript invocable action is available in flows, so you can automate team recaps and record updates related to your teams’ customer conversations. And see information about your sales team’s pricing and objection conversations in Sales Signals.

Einstein Conversation Insights doesn’t record your calls. You connect it with your recording system such as Sales Dialer, Service Cloud Voice, or other supported partners. It’s a customer’s responsibility to manage consent and comply with local privacy requirements in the way that calls are recorded.

Identify Coachable Moments by Uploading Recorded Video Calls
Process important meetings that were recorded on a third-party platform by using Einstein Conversation Insights (ECI). Upload video call recordings under 2 GB in the MP4 format and get insights, see transcripts, and identify coachable moments surfaced from that meeting.

Improve Sales Processes by Using Conversation Transcripts in Flows
Help your sales reps get the most out of their conversations by creating flows that use the Get Conversation Transcript standard action in Flow Builder. For example, you can automate record updates and risk escalation, generate team recaps, or schedule post-call coaching sessions based on information from voice and video call conversations.

See Pricing and Objection Topics in Sales Signals
Want to see more details about your sales team’s pricing and objection coversations? Select either Pricing or Objection in Sales Signals to see dashboards and relevant metrics about either subject sorted by topic.

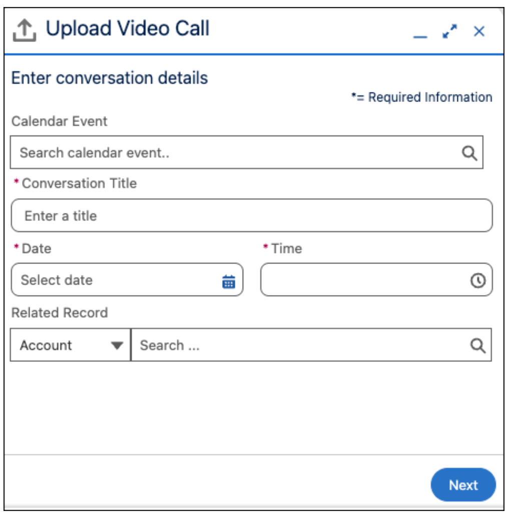
Identify Coachable Moments by Uploading Recorded Video Calls

Process important meetings that were recorded on a third-party platform by using Einstein Conversation Insights (ECI). Upload video call recordings under 2 GB in the MP4 format and get insights, see transcripts, and identify coachable moments surfaced from that meeting.

Where: This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance, and Unlimited editions and as an add-on in Enterprise Edition for more than 10 users.

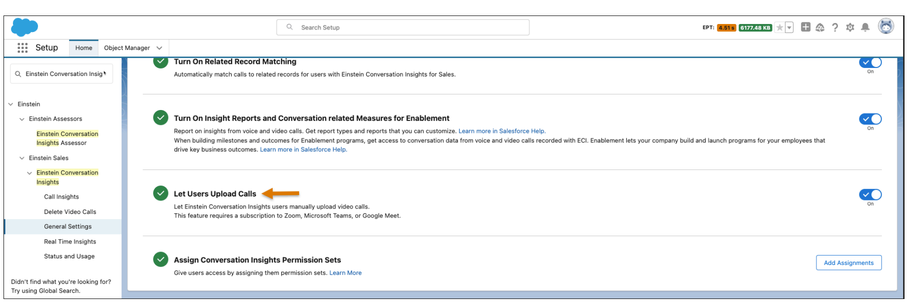
Who: This feature is available only for orgs on Hyperforce. Einstein Conversation Insights users must be authenticated with least one of these vendors–Zoom, Microsoft Teams, or Google Meet–to use this feature.

Why: From the Conversation Insights tab, ECI users can upload the video call file by clicking **+Upload Video Call**. The file must be in the MP4 format and under 2 GB. Each user can upload a maximum of 3 video call recordings in a day.



The Upload Video Call window enables users to fetch details from a calendar event or enter the meeting details. Add internal users, customer contacts, or leads that were part of the meeting, select the meeting platform, and upload the meeting file.

How: To turn on the feature, from Setup, enter `Einstein Conversation Insights` in the Quick Find box, and then select **General Settings**. Then turn on **Let Users Upload Calls**.



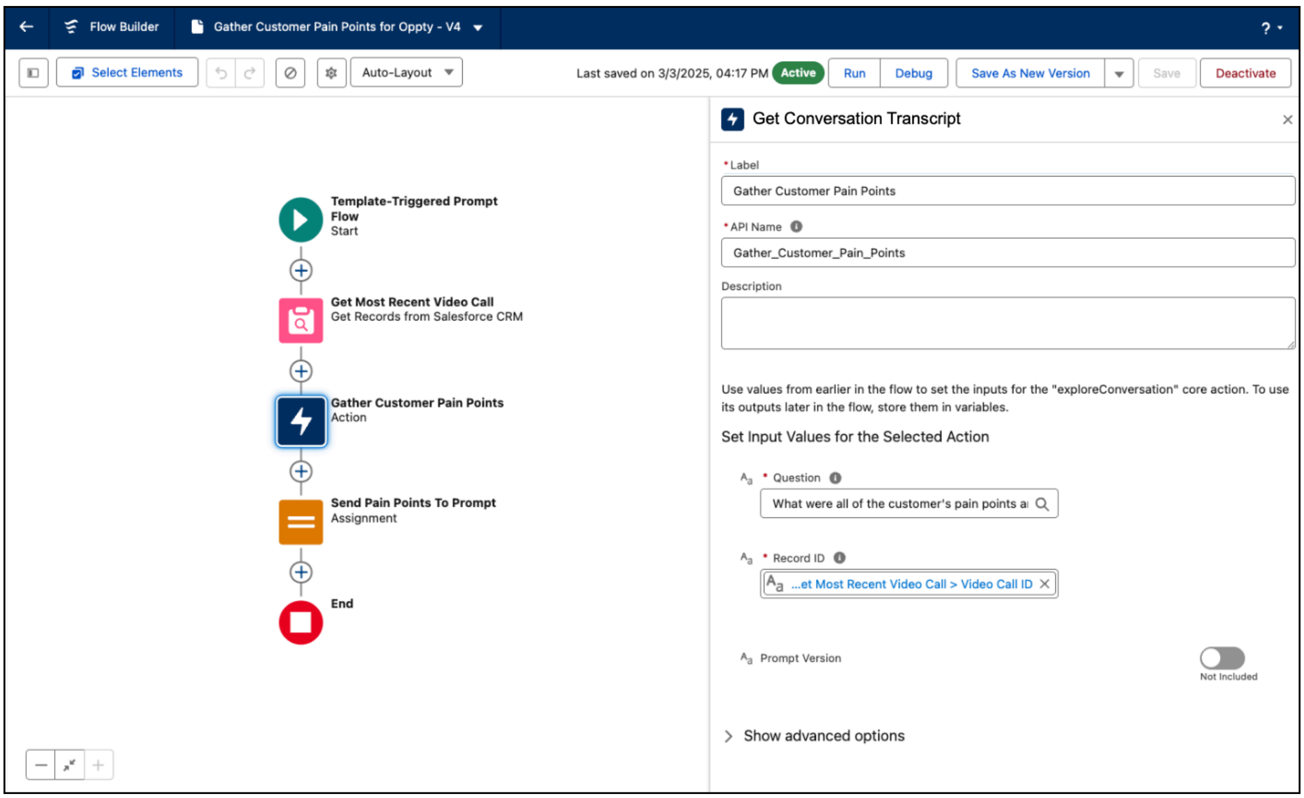
Improve Sales Processes by Using Conversation Transcripts in Flows

Help your sales reps get the most out of their conversations by creating flows that use the Get Conversation Transcript standard action in Flow Builder. For example, you can automate record updates and risk escalation, generate team recaps, or schedule post-call coaching sessions based on information from voice and video call conversations.

Where: This change applies to Einstein Conversation Insights in Lightning Experience. Einstein Conversation Insights is available in Enterprise, Performance, and Unlimited editions and as an add-on in Enterprise Edition for more than 10 users.

Who: This feature is available to users with access to Einstein Conversation Insights.

How: Add Get Conversation Transcript as a standard action in Flow Builder.



All flows are supported, including screen flows, scheduled flows, and record-triggered flows.

See Also

Salesforce Help: Automate Tasks with Flows (can be outdated or unavailable during release preview)

See Pricing and Objection Topics in Sales Signals

Want to see more details about your sales team's pricing and objection coversations? Select either Pricing or Objection in Sales Signals to see dashboards and relevant metrics about either subject sorted by topic.

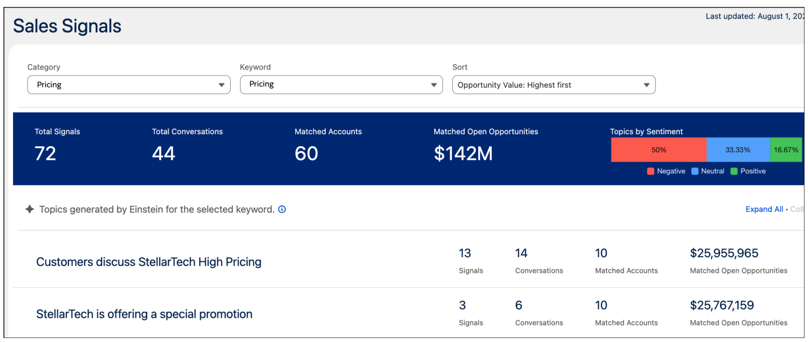
Where: This feature requires Einstein Conversation Insights, Data Cloud, and Einstein for Sales, and is available in Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein generative AI is available in Lightning Experience.

To purchase Einstein for Sales, contact your Salesforce account executive.

Who: This feature is available to users with the Sales Signals permission set. Access to Einstein Conversation Insights is not required to see topics in Sales Signals. Voice and video records access is required to see topic details.

How: To bring up topics related to pricing or objections, select the **Signals** tab in the Conversation Insights app.

Select **Pricing** or **Objection** for both the category and keyword to show a dashboard of relevant conversations about the keyword.



Like with other Sales Signals selections, conversations are sorted across different cards, and relevant metrics are shown for each topic. Topics are sorted based on the highest opportunity value by default. Users can also sort by sentiment, total signals, and other criteria.

Users can drill into different topics to get additional details and information. Information is limited to records that users have access to.

Sales Engagement

Multiple companion orgs can now access Prospecting Center by using a single Data Cloud home org.

For pricing details, contact your Salesforce account executive. Sales Dialer is also available for an extra cost as an add-on license.

Manage Prospecting Center Efficiently with Companion Orgs

Multiple companion orgs can now access Prospecting Center by using a single Data Cloud home org. Optimize the usage of Data Cloud licenses with this feature. Companion org users can now easily find their home org, look at shared data spaces, and check the health of their connection right within Setup. Companion org users are now allowed to locate their home org, view shared data spaces, and monitor their connection health. It also personalizes the user experience and ensures that users see only the data that they are authorized to access.

Manage Prospecting Center Efficiently with Companion Orgs

Multiple companion orgs can now access Prospecting Center by using a single Data Cloud home org. Optimize the usage of Data Cloud licenses with this feature. Companion org users can now easily find their home org, look at shared data spaces, and check the health of their connection right within Setup. Companion org users are now allowed to locate their home org, view shared data spaces, and monitor their connection health. It also personalizes the user experience and ensures that users see only the data that they are authorized to access.

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

Who: This feature is available to Sales Cloud users who have Prospecting Center enabled.

How: To use this feature, first create your data space in Data Cloud with the required settings and data. Then, on your Prospecting Center setup page, choose the data space that is shared with your Companion org. This will help you use Prospecting Center with data that is important to you.

Salesforce Forecasting

With a single click, let the Forecasting data kit complete the prerequisite steps in Data Cloud so you can easily configure consumption forecast types.

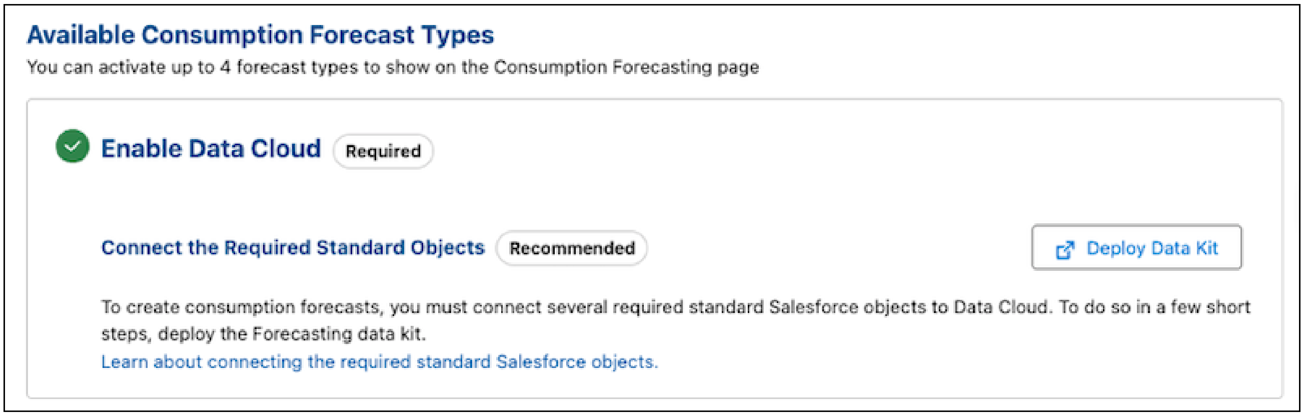
Automate Prerequisite Steps to Configure Consumption Forecasting with One Click
Simplify the consumption forecasting setup by deploying the Forecasting data kit. The data kit automatically creates the required data lake and data model objects for standard objects. As a result, the data import process is streamlined and you no longer need to create objects in Data Cloud manually.

Automate Prerequisite Steps to Configure Consumption Forecasting with One Click

Simplify the consumption forecasting setup by deploying the Forecasting data kit. The data kit automatically creates the required data lake and data model objects for standard objects. As a result, the data import process is streamlined and you no longer need to create objects in Data Cloud manually.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions and in Einstein 1 Sales Edition with Sales Cloud.

How: From Setup, on the Forecast Settings page, click **Deploy Data Kit**.



Sales Performance Management

Get the scoop on the latest optimization enhancements in Salesforce Maps. Set controls for who can export and publish quota plans. Navigate high volumes of data without losing your place in Quota Planning. And discover the latest enhancements for your incentive compensation management efforts within Salesforce Spiff.

Salesforce Maps and Salesforce Maps Advanced
Identify optimization enhancements and changes that impact your reps when they route customer visits.

Sales Planning
Apply the principle of least privelage and simplify navigation in Quota Planning. You now control access for exporting and publishing quota plans. And fixed columns and headings help sales operations better navigate high-volume plans.

Salesforce Spiff
Discover the latest enhancements that improve your incentive compensation management experiences.

Salesforce Maps and Salesforce Maps Advanced

Identify optimization enhancements and changes that impact your reps when they route customer visits.

Optimization Enhancements and Changes
Discover the benefits of improved route optimization results, faster processing times, and more frequent updates to road network data in Salesforce Maps.

Optimization Enhancements and Changes

Discover the benefits of improved route optimization results, faster processing times, and more frequent updates to road network data in Salesforce Maps.

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

Why: These optimization enhancements set the foundation for further innovations in terms of routing efficiencies and improvements.

Sales Planning

Apply the principle of least privelage and simplify navigation in Quota Planning. You now control access for exporting and publishing quota plans. And fixed columns and headings help sales operations better navigate high-volume plans.

Control Who Can Export and Publish Quota Plans
Comply with your company's security standards when you now limit who can export and publish from Quota Planning to territory-based forecast types in Pipeline Forecasting.

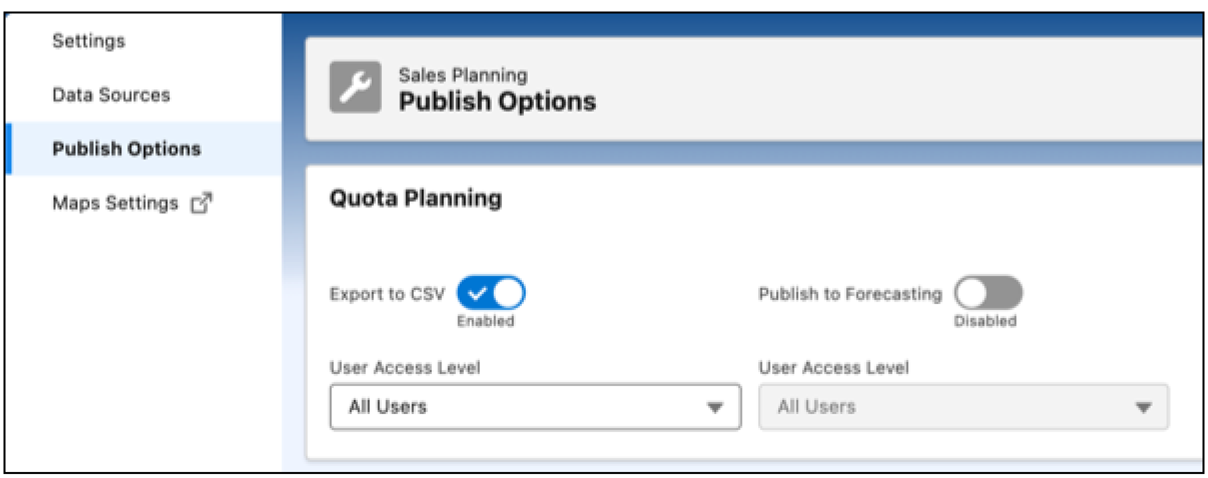
Navigate Quota Plans Easily
Work with large volumes of data without losing context when you freeze specific columns and headings with Quota Planning. Now when sales operations work on quota plans, Territory and Owner columns and table headings remain in a fixed position.

Control Who Can Export and Publish Quota Plans

Comply with your company's security standards when you now limit who can export and publish from Quota Planning to territory-based forecast types in Pipeline Forecasting.

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

How: From Publish Options within Sales Planning Settings, enable options to export and publish quota plans. Then set access levels for specific roles based on permission set assignments.



Navigate Quota Plans Easily

Work with large volumes of data without losing context when you freeze specific columns and headings with Quota Planning. Now when sales operations work on quota plans, Territory and Owner columns and table headings remain in a fixed position.

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

Salesforce Spiff

Discover the latest enhancements that improve your incentive compensation management experiences.

Go to Salesforce Spiff Release Notes.

Email, Calendar, Phone, and Integrations

Capture and report on email as an activity with the Sync Email as Salesforce Activity feature. Match a synced email to the most relevant records with the new Activities: Match Email to Records flow. Assign sales reps unique direct inward dialing (DID) phone numbers. Salesforce for Outlook retires in December 2027.

Email Configuration
Make sure that users created before 2017 can send email from Salesforce via a release update. Two new user fields help you track return email verification, and you can configure domain-level email verification for new users.

Einstein Activity Capture
Use the Sync Email as Salesforce Activity feature to capture and report emails as activities, access activity data through API, and use email data for automation. Match a synced email to the most relevant records with the new Activities: Match Email to Records flow. Prepare for the retirement of Activity 360 Reporting, Activity Metrics, and Activities Analytics Dashboard.

Email Integrations
Users must now log any emails that are set for tracking. Salesforce for Outlook is being retired in December 2027.

Assign Dedicated Phone Numbers to Sales Reps
Route calls directly to specific sales or service reps by assigning them unique direct inward dialing (DID) phone numbers. Now you can associate unique phone numbers to specific reps in Salesforce. Reps can dial out to customers while showing their direct number on Caller ID, and customers can reach their preferred rep directly.

Email Configuration

Make sure that users created before 2017 can send email from Salesforce via a release update. Two new user fields help you track return email verification, and you can configure domain-level email verification for new users.

Confirm Verified Email Addresses for Users Created in 2016 and Earlier (Release Update)
To comply with the latest email security standards, only users with a verified email address can send

email from Salesforce. This change affects user accounts created on or before November 1, 2016. User accounts created after that date already can't send emails unless their email address is verified. This update is available starting in Summer '25.

Identify Users with Unverified Return Email Addresses
Before Spring '25, users could save an unverified return email address in My Email Settings. Users with an unverified return email address can't send email from Salesforce. To identify those users and help them avoid issues with features that send email, add the new Return Address and Verified Return Address fields to the Users list in Setup.

Bypass User Email Verification for Domains That You Own
Simplify the onboarding process for new users with authorized email domains. New users with an email address on an authorized email domain can send email from that address through Salesforce without email verification. Changes to an existing user's email address still require email verification before the user can send email via Salesforce from the new address.

Confirm Verified Email Addresses for Users Created in 2016 and Earlier (Release Update)

To comply with the latest email security standards, only users with a verified email address can send email from Salesforce. This change affects user accounts created on or before November 1, 2016. User accounts created after that date already can't send emails unless their email address is verified. This update is available starting in Summer '25.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions except Database.com.

When: Salesforce enforces this update in Winter '26. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and then click the maintenance tab.

How: To identify the affected users, create a list view of users created before November 1, 2016 where the user's email address remains unverified. Then send email verification links to the affected users.

To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Confirm Verified Email Addresses for Users Created in 2016 and Earlier, follow the testing and activation steps.

See Also

Salesforce Help: Manage User Email Address Verification (can be outdated or unavailable during release preview)
Release Updates

Identify Users with Unverified Return Email Addresses

Before Spring '25, users could save an unverified return email address in My Email Settings. Users with an unverified return email address can't send email from Salesforce. To identify those users and help them avoid issues with features that send email, add the new Return Address and Verified Return Address fields to the Users list in Setup.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

Why: Multiple scenarios can affect email address verification. For example, if the Return Address field is blank, a return address was never set for the user and no verification is required.

If you use Domain Keys Identified Mail (DKIM) or an authorized email domain to verify user email addresses, the Verified Return Address can be false for user accounts with emails that are verified via those methods.

How: The Verified Return Address field isn't available when Enhanced User List View is enabled. To temporarily disable that feature, go to the User Management Settings Setup page and turn off **Enhanced User List View**.

From Setup, in the Quick Find box, enter `Users`, and then select **Users**. Add or edit a list view, and add the Verified Return Address and Return Address fields. Filter the list to exclude users with no Return Address. If you use DKIM or an authorized email domain for email verification, also filter the list to exclude the related domains from the Return Address field. Then instruct the users on the list to verify their return email address by clicking **Resend Verification Email** in My Email Settings.

See Also

Salesforce Help: Manage User Email Address Verification (can be outdated or unavailable during release preview)

Bypass User Email Verification for Domains That You Own

Simplify the onboarding process for new users with authorized email domains. New users with an email address on an authorized email domain can send email from that address through Salesforce without email verification. Changes to an existing user's email address still require email verification before the user can send email via Salesforce from the new address.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

Warning When an authorized email domain is used for email verification, any user who can create users can use any email address that's on the verified domain. This option can pose security risks for your org. Before you configure this feature, carefully evaluate the security implications.

How: In Setup, find and select **Authorized Email Domains**, and then add the authorized email domain. Add a DNS TXT record for the domain name that includes the verification code. Then verify ownership of your domain.

See Also

Salesforce Help: Authorize a Domain for User Email Verification (can be outdated or unavailable during release preview)

Einstein Activity Capture

Use the Sync Email as Salesforce Activity feature to capture and report emails as activities, access activity data through API, and use email data for automation. Match a synced email to the most relevant records with the new Activities: Match Email to Records flow. Prepare for the retirement of Activity 360 Reporting, Activity Metrics, and Activities Analytics Dashboard.

Leverage Email Data with Sync Email as Salesforce Activity

When you have Sync Email as Salesforce Activity in Einstein Activity Capture, email interactions are captured as activity data. With this feature, you can include email interactions in standard Salesforce reports; use email data in workflows, triggers, and automation; and enable activity data access through APIs. You can also leverage email information for analytics and AI insights. Previously, email captured by Einstein Activity Capture was unavailable in standard reports, automation, and public API.

Where: This feature is available in Lightning Experience in Starter, Professional, Enterprise, Unlimited, and Einstein 1 Sales Edition editions. Also available with the Einstein for Sales, Sales Engagement, or Revenue Intelligence add-ons. The Sync Email as Salesforce Activity feature must be enabled in Einstein Activity Capture.

Who: This feature is enabled automatically if you start email sync in Einstein Activity Capture for the first time.

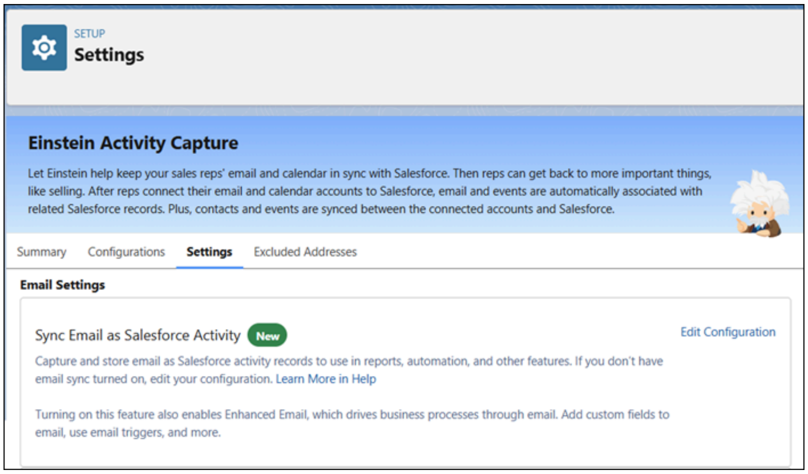
Why: When you have Sync Email as Salesforce Activity, Einstein Activity Capture syncs email data as EmailMessage and Task records. Then, it associates email with related users, contacts, and leads, along with an account and opportunity.

Because email is captured as activity data, you get a complete view of all your email activities on the Salesforce Platform, unlocking the full power of operational reports, analytics, and more. Activity data is also available to use with APIs.

- Enhanced Email is enabled automatically.
- Email sharing now follows your company's activity sharing rules.
- Email records and other activities are included in operational activity reports. Or, you can use an email or email insight report to drill into specifics. For example, whether the email was sent or received based on the **Incoming** field on the EmailMessage object.
- For security and privacy, internal and excluded emails aren't stored in Salesforce. End users have more control over their email privacy with an option to capture only the email header (sender, recipients, and sent date and time only).
- You can use email content as input to an AI Agent. For example, you can use an AI Agent to triage a customer's incoming email based on sentiment, or use an AI Agent to draft a response based on email content.
- Because synced email and tasks are now stored in Salesforce, they're subject to your org's data storage limits. To minimize data storage costs, we recommend regularly archiving email data to long-term storage such as Data Cloud.

How: From the Einstein Activity Capture page in Setup, go to the Settings tab. If Sync Email as Salesforce Activity is on, it appears as a row in the settings. You can sync up to 180 days of historical emails from the date sync was enabled.

If you don't see Sync Email as Salesforce Activity in settings, your environment doesn't meet the criteria to use this feature yet. Contact Salesforce Support to reset and restart Einstein Activity Capture with Sync Email as Salesforce Activity.



When Sync Email as Salesforce Activity is enabled, some existing features are unavailable.

See Also

- Customize Flows to Match Synced Email to Relevant Activity
- Improve Privacy and Security with Header-Only Email and Activity Sharing
- Prepare for Einstein Activity Capture Activity 360 Reporting, Activity Metrics, and Activities Analytics Dashboard Retirement
- *Salesforce Help*: Understanding Sync Email as Salesforce Activity (can be outdated or unavailable during release preview)

Customize Flows to Match Synced Email to Relevant Activity

When Sync Email as Salesforce Activity is enabled, you can match a synced email to the correct contact, account, or opportunity records with the new Activities: Match Email to Records flow. You can also match a synced email to a custom object instead of an account or opportunity by customizing the flow. Matching email activity to related records gives it meaningful CRM context and powers sales analytics.

Where: This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions or through Einstein 1 Sales Edition, Sales Engagement, or Revenue Intelligence. The Sync Email as Salesforce Activity feature must be enabled.

Why: Matching logic considers factors such as record ownership and whether your business sells with partners. Each email address is matched to a user, contact, or lead. To reflect your unique business needs, customize the flow. For example, if you use partners in your sales process, add criteria to differentiate partners and customers. You can also use custom Apex code for tiebreakers when an email matches multiple contacts. Or, match email to a custom entity record instead of an opportunity. You can make updates to flow-matched CRM records by modifying an email message.

How: From Setup, go to Flows and select **Activities: Match Email to Records**.

See Also

- *Salesforce Help:* Automate Tasks with Flows (can be outdated or unavailable during release preview)

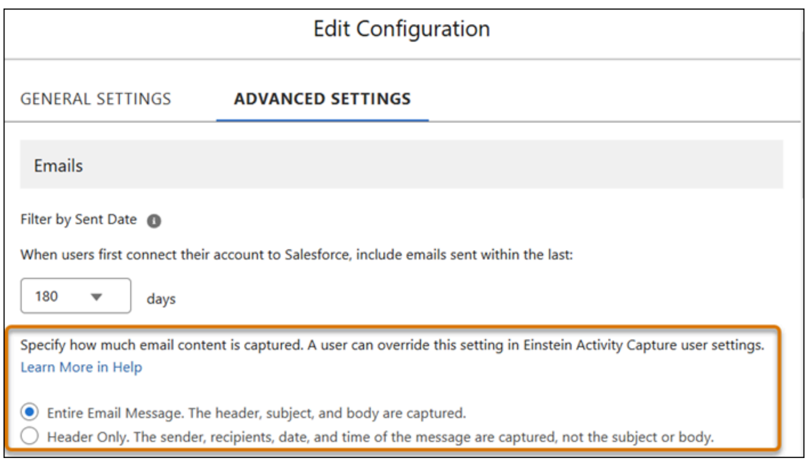
Improve Privacy and Security with Header-Only Email and Activity Sharing

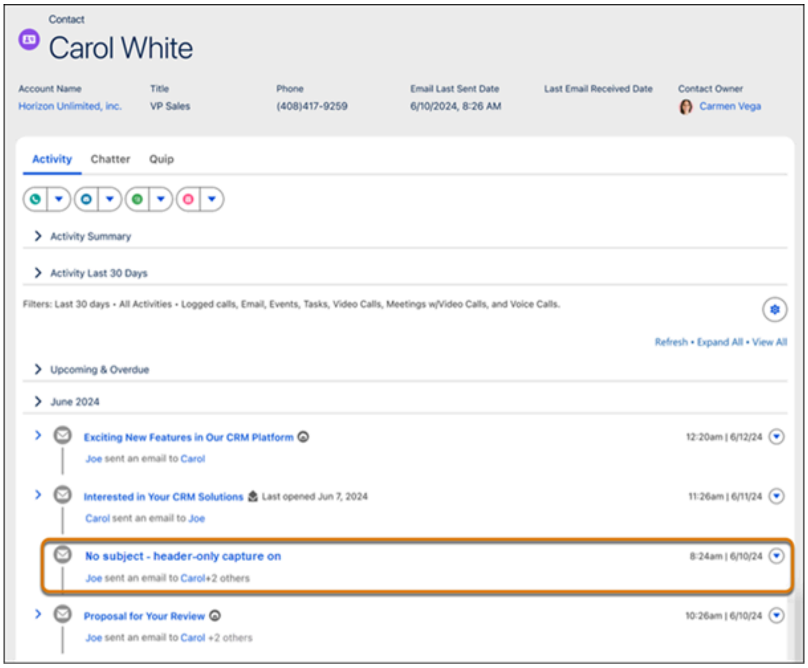
When Sync Email as Salesforce Activity is enabled, you can control the amount of email data captured. You can choose to capture the entire email message or only the header. The header-only capture option captures only the sender, recipients, date, and time the email was sent. The subject and body of the email are not captured. After the emails are synced, they follow your company's activity sharing rules.

Where: This feature is available in Lightning Experience in Professional, Enterprise, and Unlimited editions or through Einstein 1 Sales Edition, Sales Engagement, or Revenue Intelligence. The Sync Email as Salesforce Activity feature must be enabled.

Why: When you capture the entire email message, it maximizes the content that Email Insights uses for recommendations. When you capture the header only, the message subject and body text aren't captured or stored. For best security, blocked emails are never stored in Salesforce. Header-only capture isn't available for emails sent via the Salesforce Email Composer.

How: From the Einstein Activity Capture page in Setup, edit your configuration and go to Advanced Settings.





When Sync Email as Salesforce Activity is enabled, the Default Activity Sharing for New Users and the end user's Sharing Settings in Einstein Activity Capture are unavailable. Instead, use your organization-wide default sharing settings. To relate multiple contacts to events and tasks, use Activity Settings in Setup.

End users can override the email capture setting you set in Advanced Settings (or during Einstein Activity Capture setup) in their Email Capture Settings.

See Also

- Customize Flows to Match Synced Email to Relevant Activity
- *Salesforce Help*: Header-Only Email Capture with Sync Email as Salesforce Activity (can be outdated or unavailable during release preview)

Prepare for Einstein Activity Capture Activity 360 Reporting, Activity Metrics, and Activities Analytics Dashboard Retirement

Activity 360 Reporting, Activity Metrics, and Activities Analytics Dashboard are scheduled for retirement in Summer '26. To prepare, we recommend turning on Sync Email as Salesforce Activity for Einstein Activity Capture and configuring reports to explore data captured from email.

Where: Activity 360 Reporting, Activity Metrics, and Activities Analytics Dashboard are available in Lightning Experience in Starter, Professional, Enterprise, Unlimited, and Einstein 1 Sales Edition editions. They're also available with the Einstein for Sales, Sales Engagement, or Revenue Intelligence add-ons.

Why: Starting in Summer '25, Einstein Activity Capture can sync and store email data as Task and EmailMessage records. With this new data structure, you can explore and use email activity data with standard reports, SOQL, automation workflows, and APIs. Activity 360 Reporting, Activity Metrics, Activities Analytics Dashboard, and related data aren't available unless previously turned on. This change affects other features that use Einstein Activity Capture data, including Close Plan, Prospecting Center, Pipeline Inspection, and Einstein Conversation Insights.

In Summer ’26, Einstein Activity Capture is scheduled to move to the new data structure. Activity 360 Reporting, Activity Metrics, Activities Analytics Dashboard, and related data, which were built for the old data structure, won’t be available.

How: To turn on Sync Email as Salesforce Activity if you’re already using Einstein Activity Capture, contact Salesforce Support. Sync Email as Salesforce Activity is enabled by default if you turn on Einstein Activity Capture in Summer ’25 or later.

See Also

- Leverage Email Data with Sync Email as Salesforce Activity
- *Salesforce Help:* Considerations for Sync Email as Salesforce Activity (can be outdated or unavailable during release preview)
- *Salesforce Help:* Considerations for Activity 360 Reporting (can be outdated or unavailable during release preview)
- *Salesforce Help:* Considerations for Using Activity Metrics (can be outdated or unavailable during release preview)
- *Salesforce Help:* Guidelines for Using Analytics Activities Dashboard (can be outdated or unavailable during release preview)
- *Knowledge Article:* Einstein Activity Capture Activity 360 Reporting, Activity Metrics, Activities Dashboard Upcoming Retirement (Summer ’26)

Fine-Tune Email Associations When Using Sync Email as Salesforce Activity

With Sync Email as Activity enabled, Einstein Activity Capture works with Outlook and Gmail to capture email data. To improve meaningful CRM context and power sales analytics, users can override the suggested email record associations. Users can also associate messages and events that are not captured.

Where: This feature is available in Lightning Experience in Starter, Professional, Enterprise, Unlimited, and Einstein 1 Sales Edition editions. It’s also available with the Einstein for Sales, Sales Engagement, or Revenue Intelligence add-ons. The Sync Email as Salesforce Activity feature must be enabled in Einstein Activity Capture.

How: Open the email composer. In the side panel, change which records the email is associated with. Then send the email.

See Also

- Leverage Email Data with Sync Email as Salesforce Activity
- *Salesforce Help*: Understanding Sync Email as Salesforce Activity (can be outdated or unavailable during release preview)

Email Integrations

Users must now log any emails that are set for tracking. Salesforce for Outlook is being retired in

December 2027.

Decipher Attached Email Messages in Outlook More Efficiently
A new naming convention makes it easier to identify attached email messages in inbound Outlook emails. When an email received in Outlook has another email attached, the attachment name is the first 30 characters of the attached email's subject followed by a counter. Previously, Salesforce assigned these attachments a generic name and sequential number.

Control Email Logging and Tracking in Email Integrations
If your company uses Inbox or the Sync Email as the Salesforce Activity setting for Einstein Activity Capture, users must now log tracked emails. The updated user interface consolidates these functions into a Log and Track Email section in the email integration side panel. Previously, email tracking was handled in a separate component and logging wasn't required for tracking.

Salesforce for Outlook Is Being Retired in December 2027
For the latest integration with Microsoft Outlook, we recommend moving to our next-generation products, the Outlook integration and Einstein Activity Capture. These products replace Salesforce for Outlook features and give users new capabilities. We continue to introduce enhancements for these products every release.

Decipher Attached Email Messages in Outlook More Efficiently

A new naming convention makes it easier to identify attached email messages in inbound Outlook emails. When an email received in Outlook has another email attached, the attachment name is the first 30 characters of the attached email's subject followed by a counter. Previously, Salesforce assigned these attachments a generic name and sequential number.

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

Why: If an inbound email includes an attached email with the subject Q4 Strategy Meeting Notes April 20, 2025, the attachment is `Q4_Strategy_Meeting_Notes Apri_1.eml`. If the attached email has no subject, the attachment retains the old naming convention. For example, `Attachment_1.eml`.

Control Email Logging and Tracking in Email Integrations

If your company uses Inbox or the Sync Email as the Salesforce Activity setting for Einstein Activity Capture, users must now log tracked emails. The updated user interface consolidates these functions into a Log and Track Email section in the email integration side panel. Previously, email tracking was handled in a separate component and logging wasn't required for tracking.

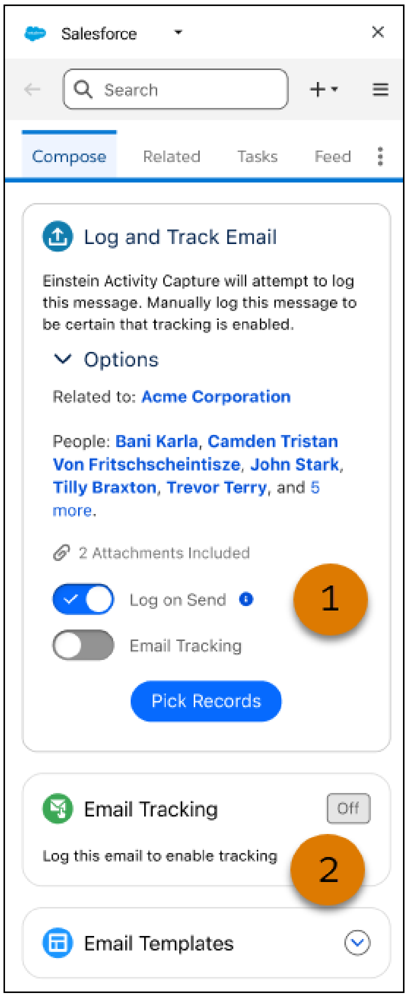
Where: Email integration is available in Lightning Experience in Starter, Professional, Enterprise, Unlimited, and Einstein 1 Sales Edition editions. Also available with the Einstein for Sales, Sales Engagement, or Revenue Intelligence add-ons.

Inbox is available in Lightning Experience. Certain features are available with Sales Cloud and included in Starter, Professional, Enterprise, Performance, and Unlimited editions. All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

Sync Email as Salesforce Activity is available in Lightning Experience in Starter, Professional, Enterprise, Unlimited, and Einstein 1 Sales Edition editions. Also available with the Einstein for Sales, Sales Engagement, or Revenue Intelligence add-ons. The Sync Email as Salesforce Activity feature must be enabled in Einstein Activity Capture.

Who: This feature is enabled automatically if you start email sync in Einstein Activity Capture for the first time and don't use Salesforce Inbox. See Salesforce Help for more prerequisites.

How: To track an email, it must be logged.



Turn on Log on Send (1) to automatically log the email. To also use open and link click tracking, turn on Email Tracking.

The read-only email tracking card (2) tells you the default tracking setting.

See Also

Leverage Email Data with Sync Email as Salesforce Activity

Salesforce Help: Considerations for Sync Email as Salesforce Activity (can be outdated or unavailable during release preview)

Salesforce Help: Outlook and Gmail Integration (can be outdated or unavailable during release preview)

Salesforce for Outlook Is Being Retired in December 2027

For the latest integration with Microsoft Outlook, we recommend moving to our next-generation products, the Outlook integration and Einstein Activity Capture. These products replace Salesforce for Outlook features and give users new capabilities. We continue to introduce enhancements for these products every release.

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

How: When Salesforce for Outlook is retired, it will no longer sync contacts, events, or tasks. Admins and users also lose access to Salesforce for Outlook features, such as the side panel.

See Also

Knowledge Article: Salesforce for Outlook Retirement
Salesforce Help: Move from Salesforce for Outlook to the Next-Generation Products (can be outdated or unavailable during release preview)
Trailblazer Community: Salesforce for Outlook Release Notes

Assign Dedicated Phone Numbers to Sales Reps

Route calls directly to specific sales or service reps by assigning them unique direct inward dialing (DID) phone numbers. Now you can associate unique phone numbers to specific reps in Salesforce. Reps can dial out to customers while showing their direct number on Caller ID, and customers can reach their preferred rep directly.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

How: In Service Cloud Voice Setup, choose your contact center. Then choose **Assign Phone Number** from the Actions menu for each of the contact center users you want to set up.

See Also

Salesforce Help: Route Calls Directly to and from Reps (can be outdated or unavailable during release preview)

Other Changes in the Sales Cloud

Anticipate other changes that can affect your sales teams.

Sales Cloud Go is Now Salesforce Go
With Salesforce Go, you can discover, set up and configure Sales Cloud features. You can also track feature usage, all from one location. Learn more about features and get help with configuration by accessing content resources and links. If you turned on the Your Account app, you can purchase add-on licenses for some features directly from Salesforce Go.

Customize Seller-Focused Mobile Experience (Generally Available)
Seller-Focused Mobile Experience shows you the records that you need in order to plan meetings, connect with decision makers, and close deals. And now, with Mobile Builder for Seller-Focused Experience (beta) you can add native pages for custom objects and customize the layout of record home pages in the app. Mobile Builder for Seller-Focused Experience was a beta feature in Spring '25.

Sales Cloud Go is Now Salesforce Go

With Salesforce Go, you can discover, set up and configure Sales Cloud features. You can also track feature usage, all from one location. Learn more about features and get help with configuration by accessing content resources and links. If you turned on the Your Account app, you can purchase add-on licenses for some features directly from Salesforce Go.

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

See Also

Simplify Feature Discovery and Setup with Salesforce Go

Customize Seller-Focused Mobile Experience (Generally Available)

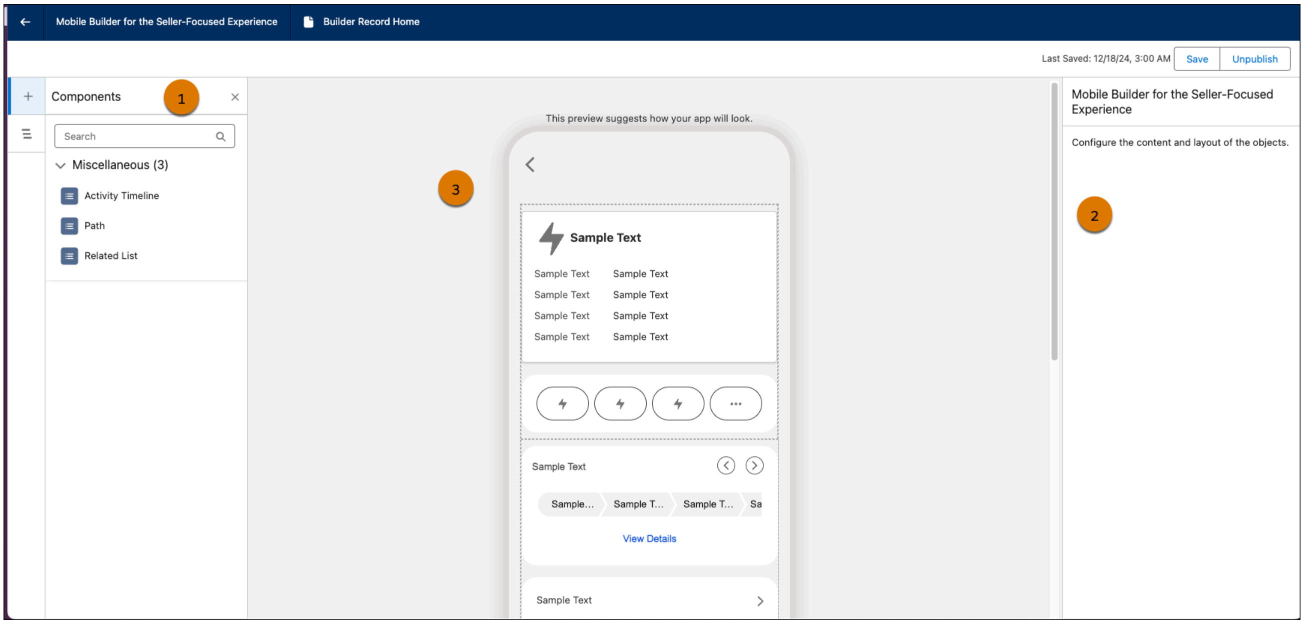
Seller-Focused Mobile Experience shows you the records that you need in order to plan meetings, connect with decision makers, and close deals. And now, with Mobile Builder for Seller-Focused Experience (beta) you can add native pages for custom objects and customize the layout of record home pages in the app. Mobile Builder for Seller-Focused Experience was a beta feature in Spring '25.

Where: This feature is available in Lightning Experience in all editions. The Seller-Focused Mobile Experience for Android and iOS is available on phones and tablets in all editions, except Database.com, starting with mobile version 254.000.

Who: To use Seller-Focused Mobile Experience, users must have the Salesforce Mobile App: Native Seller Experience permission.

How: Mobile Builder for Seller-Focused Experience is enabled by default in Salesforce Mobile App Setup.

Once you create an app configuration and an object configuration, the Mobile Builder opens. Drag components on to the canvas. (1) Define component properties in the properties pane. (2) See your changes in the interactive canvas. (3)



See Also

[*Salesforce Help*: Customize Seller-Focused Mobile Experience (can be outdated or unavailable during release preview)]

[*Salesforce Help:* Seller-Focused Mobile Experience (can be outdated or unavailable during release preview)]

Salesforce CMS

Delete enhanced CMS workspaces, create enhanced custom content types, and deliver all media content types at high scale.

Deliver All Media Content Types at High Scale

In addition to image content, orgs hosted on Hyperforce can now use Dedicated Content Delivery to deliver document, audio, and video content types with high performance and low latency. After you enable this feature, any media content that you publish is served through Hyperforce. Existing published content is served through Hyperforce the next time it's published. The Dedicated Content Delivery setting is on by default for all new public channels in an enhanced CMS workspace.

Create More Powerful Content with Enhanced Custom Content Types

To create enhanced custom content types for use in enhanced CMS workspaces and LWR sites, use the new ContentTypeBundle metadata type. Enhanced custom content types offer a JSON-based schema that gives you greater flexibility when defining the blueprint of your custom content.

Delete Enhanced CMS Workspaces

To keep your Salesforce CMS organized and secure, you can now permanently delete any outdated or unused enhanced CMS workspaces. When you delete a workspace, you delete all its content and cancel any scheduled publications, imports, and exports.

Deliver All Media Content Types at High Scale

In addition to image content, orgs hosted on Hyperforce can now use Dedicated Content Delivery to deliver document, audio, and video content types with high performance and low latency. After you enable this feature, any media content that you publish is served through Hyperforce. Existing published content is served through Hyperforce the next time it's published. The Dedicated Content Delivery setting is on by default for all new public channels in an enhanced CMS workspace.

Where: This change applies to enhanced CMS workspaces in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions hosted on Hyperforce.

How: To enable Dedicated Content Delivery for existing public channels on Hyperforce, edit the channel settings.

See Also

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

Create More Powerful Content with Enhanced Custom Content Types

To create enhanced custom content types for use in enhanced CMS workspaces and LWR sites, use the new ContentTypeBundle metadata type. Enhanced custom content types offer a JSON-based schema that gives you greater flexibility when defining the blueprint of your custom content.

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

See Also

Salesforce Help: Types of CMS Content (can be outdated or unavailable during release preview)

Delete Enhanced CMS Workspaces

To keep your Salesforce CMS organized and secure, you can now permanently delete any outdated or unused enhanced CMS workspaces. When you delete a workspace, you delete all its content and cancel any scheduled publications, imports, and exports.

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

How: Before you can delete an enhanced CMS workspace, remove all CMS channels from it, and unshare it from other workspaces. Then go to the workspace settings to delete it.

See Also

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

Salesforce Flow

Compose intelligent workflows with Flow Builder and Flow Orchestration. Integrate across any system with Mulesoft for Flow: Integration.

Flow Builder
Get related records in the Get Records element (beta). Search nested resources in Flow Builder (beta). Simplify screen flows with automatically-triggered screen actions. Route users through a flow based on engagements with the Einstein Decision element. Create flow approval processes with an action. Debug more flows, and do it more efficiently with improvements to the debug experience. Speed up flow testing with integrated tests.

Flow Approval Processes
Run an autolaunched flow approval process from a flow. Add a path to run actions if someone recalls an approval submission. Delegates now have access to run approval work items in the Work Guide that's been added to a record page.

Flow Orchestration
Add error handling to orchestrations by using fault paths.

MuleSoft for Flow: Integration
MuleSoft for Flow: Integration is a no-code solution that connects your flows to external systems using third-party connectors. Use these connectors as triggers or actions, creating seamless data and information exchange between systems.

Flow Builder

Get related records in the Get Records element (beta). Search nested resources in Flow Builder (beta). Simplify screen flows with automatically-triggered screen actions. Route users through a flow based on engagements with the Einstein Decision element. Create flow approval processes with an action. Debug more flows, and do it more efficiently with improvements to the debug experience. Speed up flow testing with integrated tests.

Flow Builder Updates
Get related records in the Get Records element (beta). Search for nested resources (beta). Create flows that perform time-based operations with the new time data type. Configure negative assertions in flow tests. Work more efficiently with UI improvements to the Einstein panel, picklists, the ability to pinch-to-zoom, and an easier way to select resources.

Screen Flow Updates
Streamline your screen flows with automatically-triggered screen actions. Upload files in Aura, Lightning Web Runtime, and Lightning Experience with the File Upload Enhanced component (beta). Customize the width of screen components and record fields. Preview your screens in real time. Add icons to choice resources. Make screens more visually engaging with the Visual Picker component.

Flow Marketing Cloud Updates
Use the new Einstein Decision element to route users through a flow based on email engagement. Create flows that use data spaces other than the default data space. Trigger flows with custom

engagement signals. Prevent individuals from reentering segment-triggered flows. Manage resources and variables in Flow Builder.

Flow Actions

Create flow approval processes with an action. Use dynamic actions to call flow approval processes. Send emails, create emails, and more with the improved Send Email action.

Flow Testing and Debugging

We made a number of big improvements to the debug experience with the aim of making debug more intuitive and powerful. Quickly skim through debug results with element-level summaries. Debug data-graph triggered flows. Configure the triggering data model object for event-triggered flows. Send test emails and SMS messages in debug. Streamline the debug process with enhancements like element cards, debug search, and JSON formatting.

Flow Runtime

Versioned updates are available for flows that are configured to run on API version 64.0.

Flow Management

Use integrated tests to speed up your flow testing process. Log flow executions directly to Data Cloud.

Flow Configuration Enhancements

View output resources in the Flow Builder configuration panel. Add a flexible way to specify input values with multiple input controls. Specify how inputs and outputs are presented using extended metadata annotations for invocable actions.

Flow Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

Flow Builder Updates

Get related records in the Get Records element (beta). Search for nested resources (beta). Create flows that perform time-based operations with the new time data type. Configure negative assertions in flow tests. Work more efficiently with UI improvements to the Einstein panel, picklists, the ability to pinch-to-zoom, and an easier way to select resources.

Get Related Records Faster (Beta)

Now you can get related records in a single query in Flow Builder, making it easier to manage related records. Previously, you managed related records by adding separate Get Records elements. With the Get Records element, you can select related object relationships, which can help you reflect complex business logic. Related records in the Get Records element are available in screen flows, autolaunched flows, and template-triggered prompt flows.

Find More Resources with Expanded Search (Beta)

When searching for and selecting resources in Flow Builder, you can choose to expand your search to include results from an expanded set of resources, like fields from records and related actions, components, and outputs. This feature was previously released in Winter ‘25, but was later removed. We're reintroducing this feature after addressing customer feedback.

Manage Time-Specific Data Easily

Use resources and fields of the Time data type to process data where only the time of day matters and not the associated date. You can specify the time of the day down to the exact millisecond. The Time data type is available across flow elements, formula builder, expression builder, subflows, and resources such as variables and constants. It's also available in input and output to and from invocable actions. The time data type isn't supported in the offline flows available on the Salesforce Mobile app.

View Picklist Selections as Pills
After selecting a picklist value, to make your selection clearer and easier to understand, the selection is rendered as a pill with an easy-to-read label. Previously, picklist selections were shown with API names, which could vary significantly from the provided labels. For example, a picklist option labeled "True" could appear as the value "1" after selecting it.

Select an Entire Resource More Efficiently When Browsing Through a Resource
The new Entire Resource menu item on the resource selection menu streamlines how to select the entire resource that you're currently browsing. Previously, to select the entire resource, you had to select the resource from the resource menu, and then click out of the menu without selecting a specific field.

Enjoy the Efficiency and Flexibility of the new Einstein Panel in Flow Builder
With the new Einstein panel, you get a larger, more user-friendly interface. You can drag the panel anywhere on the screen and work with it and an element configuration panel at the same time. This flexibility reduces the need to switch between interfaces, minimizing frustration and improving the overall user experience. Also, you can open and close the panel or pin and unpin as needed, and you can clear the conversation history.

Test Flows for Error Handling
With the new Has Error operator, you can configure negative assertions in a flow test. Intentionally test flow paths where things don't go according to plan, ensuring that your flows handle errors gracefully. Previously, you configured only positive assertions that tested for successful outcomes, which left gaps in your testing. The Has Error operator is available in flow tests for record-triggered and data cloud-triggered flows. Select the Has Error operator to configure negative assertions for Create Records, Update Records, Delete Records, and Action elements.

Zoom Through the Flow Builder Canvas with Touch Gestures and Keyboard Shortcuts
You can now zoom in and out of the Flow Builder canvas using pinch-to-zoom gestures.

Select Resources Efficiently for More Elements When Adding Fields and Values
With this update, Flow Builder makes it easier to select resources for Start element triggers for schedule-triggered flows and for Update Records, Get Records, and Delete Records elements for all flow types. We now group the fields and values of manually selected objects with clearer labels to help you identify and select resources more easily.

Build on Your Successes by Saving an Existing Flow as a Template
Whether you have a flow that performs well or took you a long time to finalize, it's now easier to save a flow as a template for future use. On the flow properties window, you now have the option to Save as Template, which will add the flow to the templates available when creating a new flow.

Manage Elements Faster in Auto-Layout Mode for All Flow Types
Improved element cards in the Flow Builder canvas make it easier to create and edit flows. The element cards offer a larger selection area, one-click access to the configuration panel, quick access to common element actions, and an improved canvas experience with less visual noise. These element cards are now available for all flow types in auto-layout mode.

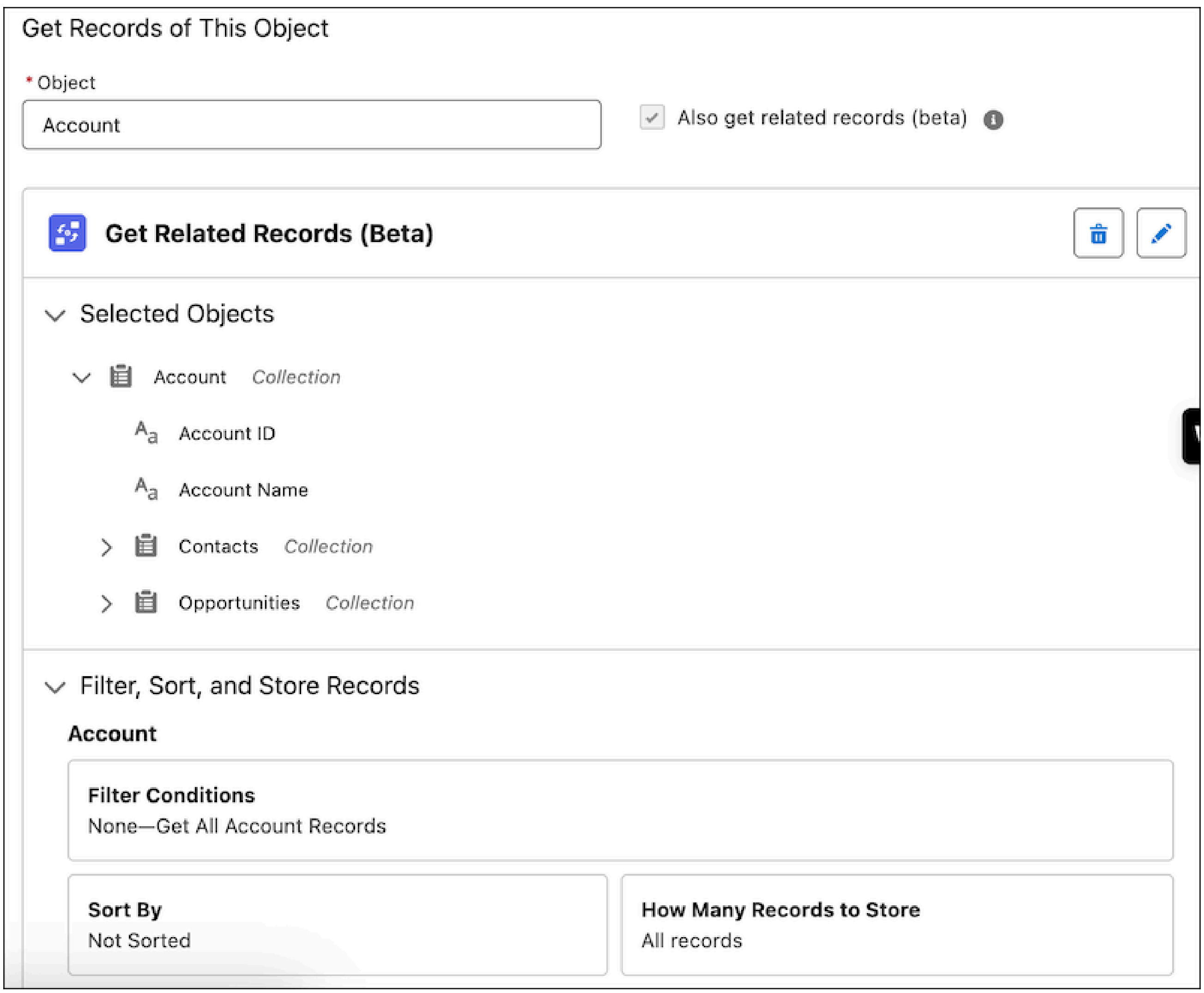
Get Related Records Faster (Beta)

Now you can get related records in a single query in Flow Builder, making it easier to manage related records. Previously, you managed related records by adding separate Get Records elements. With the Get Records element, you can select related object relationships, which can help you reflect complex business logic. Related records in the Get Records element are available in screen flows, autolaunched flows, and template-triggered prompt flows.

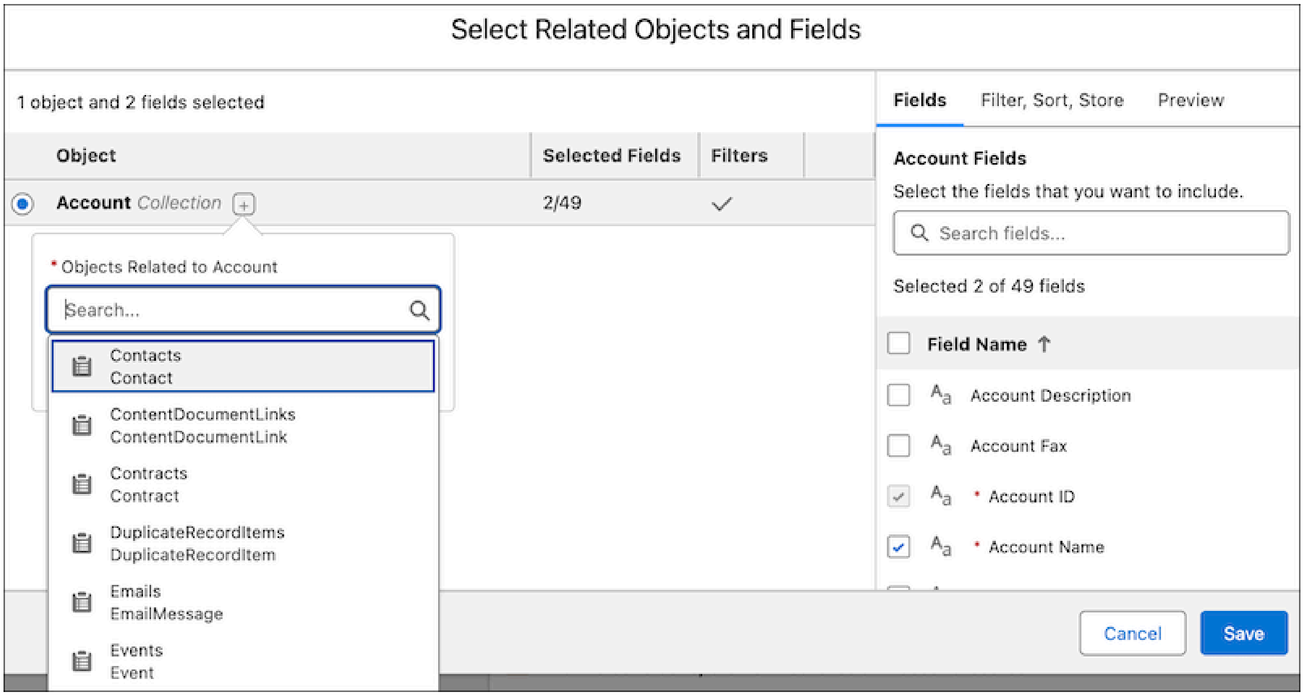
Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Pro Suite, Professional, Enterprise, Performance, Unlimited, Developer, and all Einstein 1 editions.

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

Why: For example, you use a single Get Records element to retrieve an account and all of its account team members. Then, use the Loop element to send each team member a message.



How: To get related records, select an object like Account in the Get Records element, and select **Also add related records (beta)**. Then, add child objects like contacts and opportunities, linking them to the Account object.



See Also

Salesforce Help: Get Related Salesforce Records from a Flow (Beta) (can be outdated or unavailable during release preview)

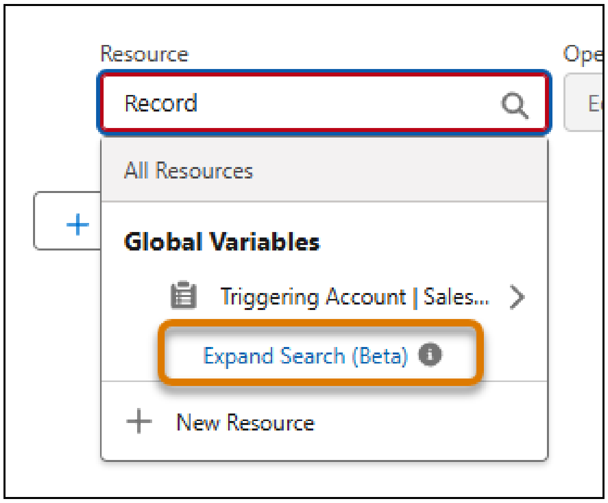
Find More Resources with Expanded Search (Beta)

When searching for and selecting resources in Flow Builder, you can choose to expand your search to include results from an expanded set of resources, like fields from records and related actions, components, and outputs. This feature was previously released in Winter '25, but was later removed. We're reintroducing this feature after addressing customer feedback.

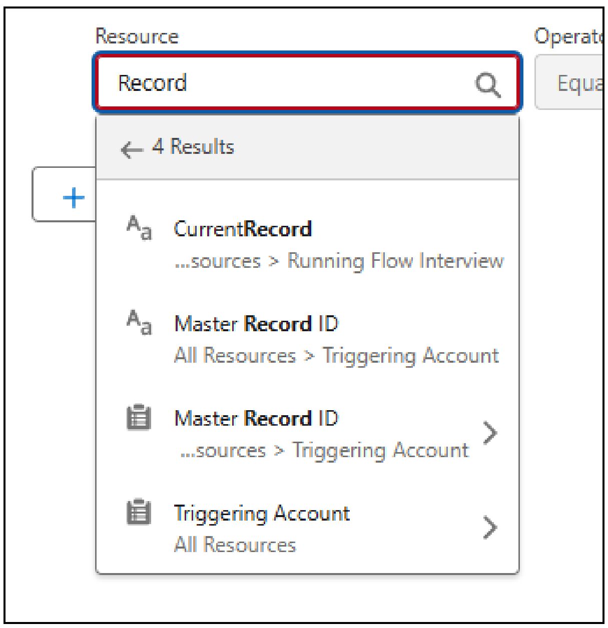
Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

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

How: To include more resources in your search, click **Expand Search (Beta)** when searching for resources.



After clicking Expand Search (Beta), your search results update to include fields from records and related actions, components, and outputs. Exact matches without children, and other exact matches are returned first, followed by partial matches without children, and then other partial matches. Recommend results are also prioritized, depending on the context of your search. For example, picklist values when searching within a picklist. To go back to the standard search experience, click ←.



Manage Time-Specific Data Easily

Use resources and fields of the Time data type to process data where only the time of day matters and not the associated date. You can specify the time of the day down to the exact millisecond. The Time data type is available across flow elements, formula builder, expression builder, subflows, and resources such as variables and constants. It's also available in input and output to and from invocable actions. The time data type isn't supported in the offline flows available on the Salesforce Mobile app.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in

Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. This change applies to flows that run in API version 64.0 and later.

How: The time data type is available across flow elements such as Action, Assignment, Collection Filter, Collection Sort, Create Records, Delete Records, Decision, Get Records, Subflow, Transform, Update Records, and Wait for Conditions. Use these time functions in the formula editor: `HOUR()`, `MINUTE()`, `SECOND()`, `MILLISECOND()`, `TIMENOW()`, and `TIMEVALUE()`. When you enter a time in a time field, use the hh:mm:ss.SSS AM/PM format. Including seconds or milliseconds is optional. For example, 9:00 AM, 5:30:05 PM, and 14:45:53.650 PM are valid time values.

For example, with the time data type, you can create a flow that sends an email reminder 30 minutes before a meeting. You can also use it in decision elements to check the time of day, and then take different actions based on whether it's before or after business hours.

See Also

Salesforce Help: Flow Operators in Assignment Elements (can be outdated or unavailable during release preview)
Salesforce Help: Flow Operators in Decision, Wait, and Collection Filter Elements (can be outdated or unavailable during release preview)
Salesforce Help: Flow Operators in Data Elements and Record Choice Sets (can be outdated or unavailable during release preview)
Salesforce Help: Time Custom Field (can be outdated or unavailable during release preview)

View Picklist Selections as Pills

After selecting a picklist value, to make your selection clearer and easier to understand, the selection is rendered as a pill with an easy-to-read label. Previously, picklist selections were shown with API names, which could vary significantly from the provided labels. For example, a picklist option labeled "True" could appear as the value "1" after selecting it.

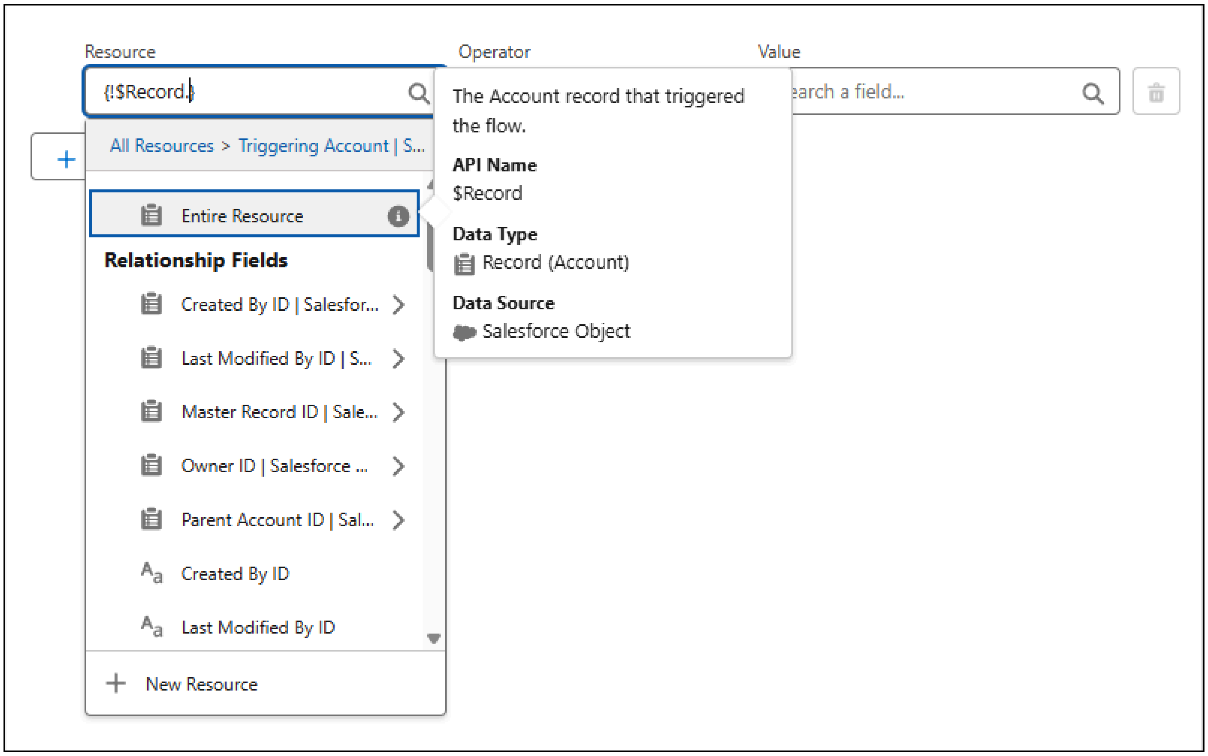
Where: This change applies to Lightning Experience and Salesforce Classic in all editions.

Select an Entire Resource More Efficiently When Browsing Through a Resource

The new Entire Resource menu item on the resource selection menu streamlines how to select the entire resource that you're currently browsing. Previously, to select the entire resource, you had to select the resource from the resource menu, and then click out of the menu without selecting a specific field.

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

How: To add the resource you're browsing, after selecting a resource in the resource picker, click **Entire Resource**.

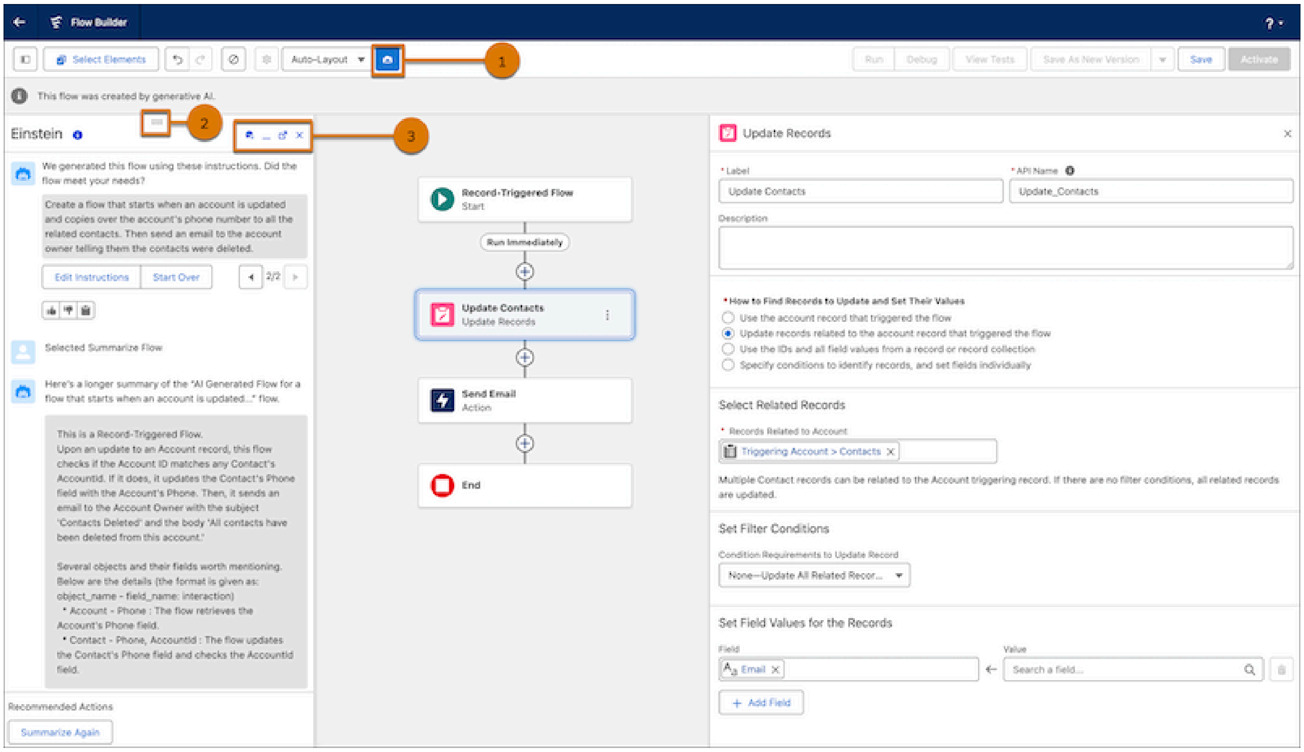


Enjoy the Efficiency and Flexibility of the new Einstein Panel in Flow Builder

With the new Einstein panel, you get a larger, more user-friendly interface. You can drag the panel anywhere on the screen and work with it and an element configuration panel at the same time. This flexibility reduces the need to switch between interfaces, minimizing frustration and improving the overall user experience. Also, you can open and close the panel or pin and unpin as needed, and you can clear the conversation history.

Where: This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions with the Einstein for Sales, Einstein for Service, or Einstein for Platform add-on. Einstein generative AI is available in Lightning Experience. To purchase Einstein for Sales, Einstein for Platform, or Einstein for Service add-ons, contact your Salesforce account executive.

How: Turn on Einstein generative AI in Setup. Then, open a flow in Flow Builder. To open and close the panel, click the Einstein button (1). Click the dots to drag and drop the panel wherever you like on the screen (2). Clear the history and pin the Einstein panel, as needed (3).



See Also

Salesforce Help: Drafting Flows with Einstein (can be outdated or unavailable during release preview)

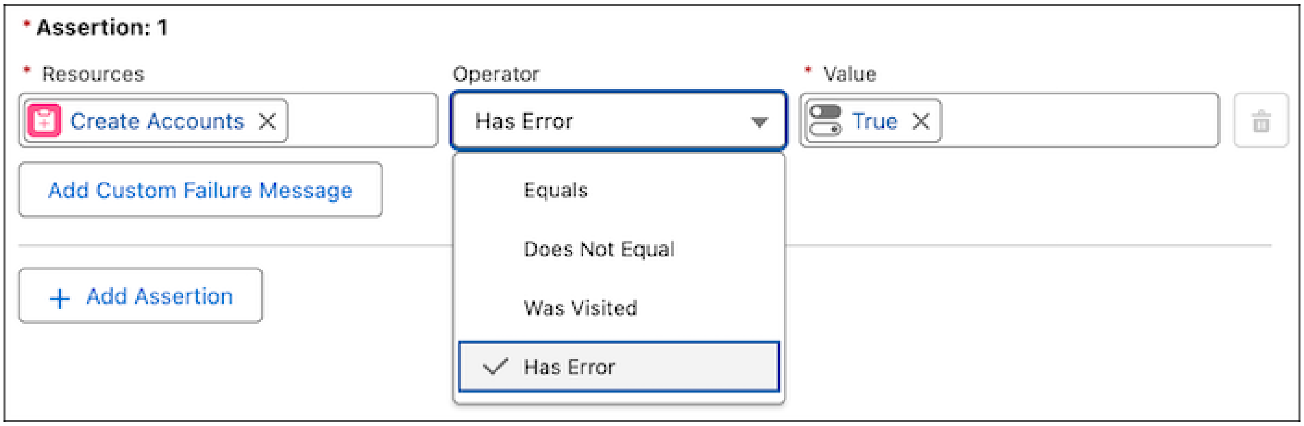
Test Flows for Error Handling

With the new Has Error operator, you can configure negative assertions in a flow test. Intentionally test flow paths where things don't go according to plan, ensuring that your flows handle errors gracefully. Previously, you configured only positive assertions that tested for successful outcomes, which left gaps in your testing. The Has Error operator is available in flow tests for record-triggered and data cloud-triggered flows. Select the Has Error operator to configure negative assertions for Create Records, Update Records, Delete Records, and Action elements.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Pro Suite, Professional, Enterprise, Performance, Unlimited, Developer, and all Einstein 1 editions.

Why: With negative assertions, your flows can now check for errors and edge cases effectively. For example, consider a flow that processes customer data. You can create a test to make sure the flow handles invalid input, such as a missing required field. This test verifies the flow's error handling, making your processes more robust.

How: In Flow Builder, create a data cloud-triggered flow or record-triggered flow. Add the Create Records, Update Records, Delete Records, or Action element. Save the flow. Create a flow test and click **Set Assertions**. For Operator, click **Has Error**.



See Also

Salesforce Help: Testing Your Flow (can be outdated or unavailable during release preview)

Flow Testing and Debugging

Zoom Through the Flow Builder Canvas with Touch Gestures and Keyboard Shortcuts

You can now zoom in and out of the Flow Builder canvas using pinch-to-zoom gestures.

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

How: When viewing the Flow Builder canvas, pinch to zoom in and out. Alternatively, use these keyboard shortcuts.

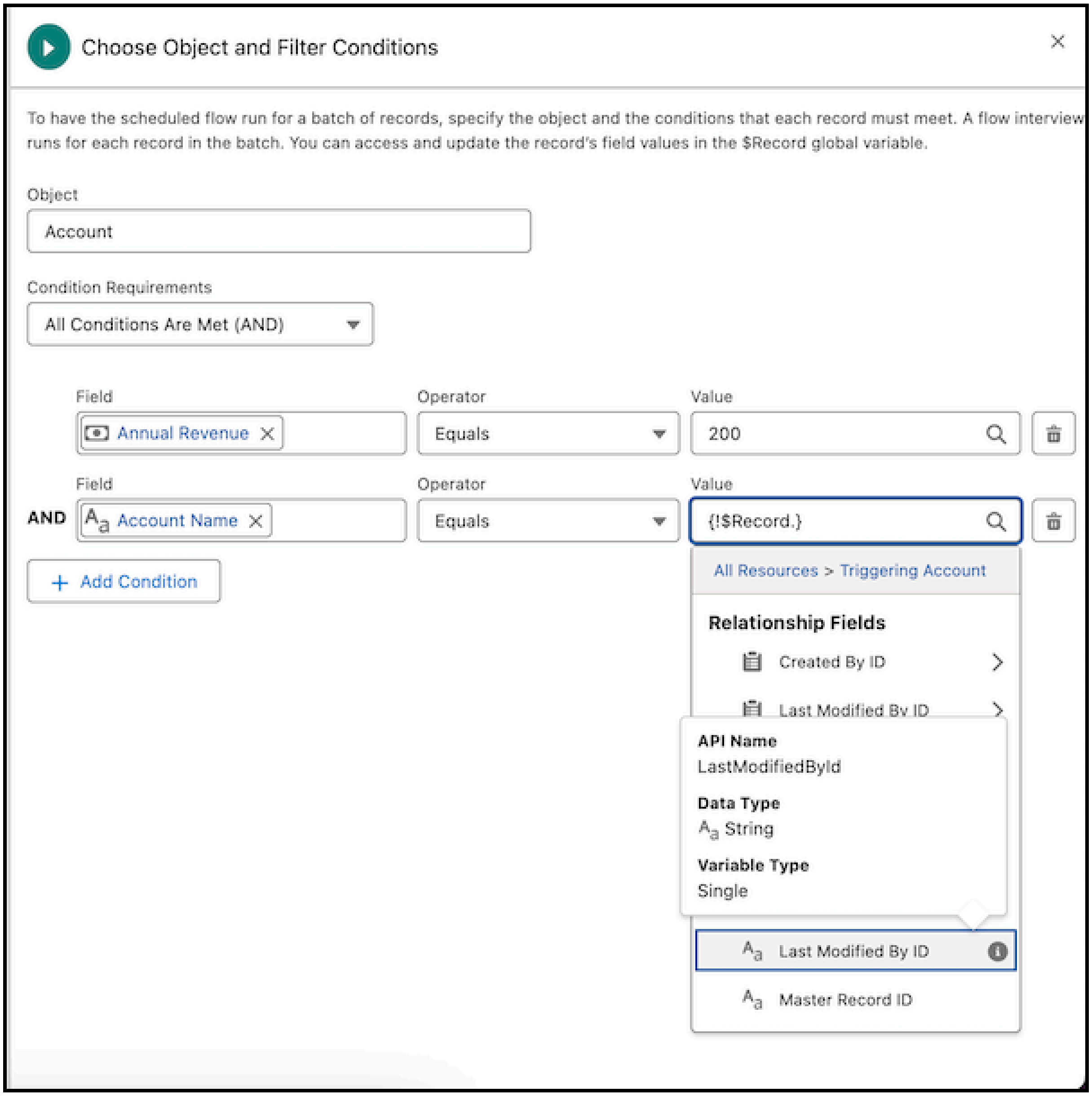
Command	Mac OS	Windows
Zoom In	Cmd+Option++ Or Cmd+Mouse Wheel Up	Ctrl+Alt+- Or Ctrl+Mouse Wheel Down
Zoom Out	Cmd+Option++ Or Cmd+Mouse Wheel Up	Ctrl+Alt+- Or Ctrl+Mouse Wheel Down
Zoom to Fit	Cmd+Option+1	Ctrl+Alt+1
Reset Zoom	Cmd+Option+0	Ctrl+Alt+0

Select Resources Efficiently for More Elements When Adding Fields and Values

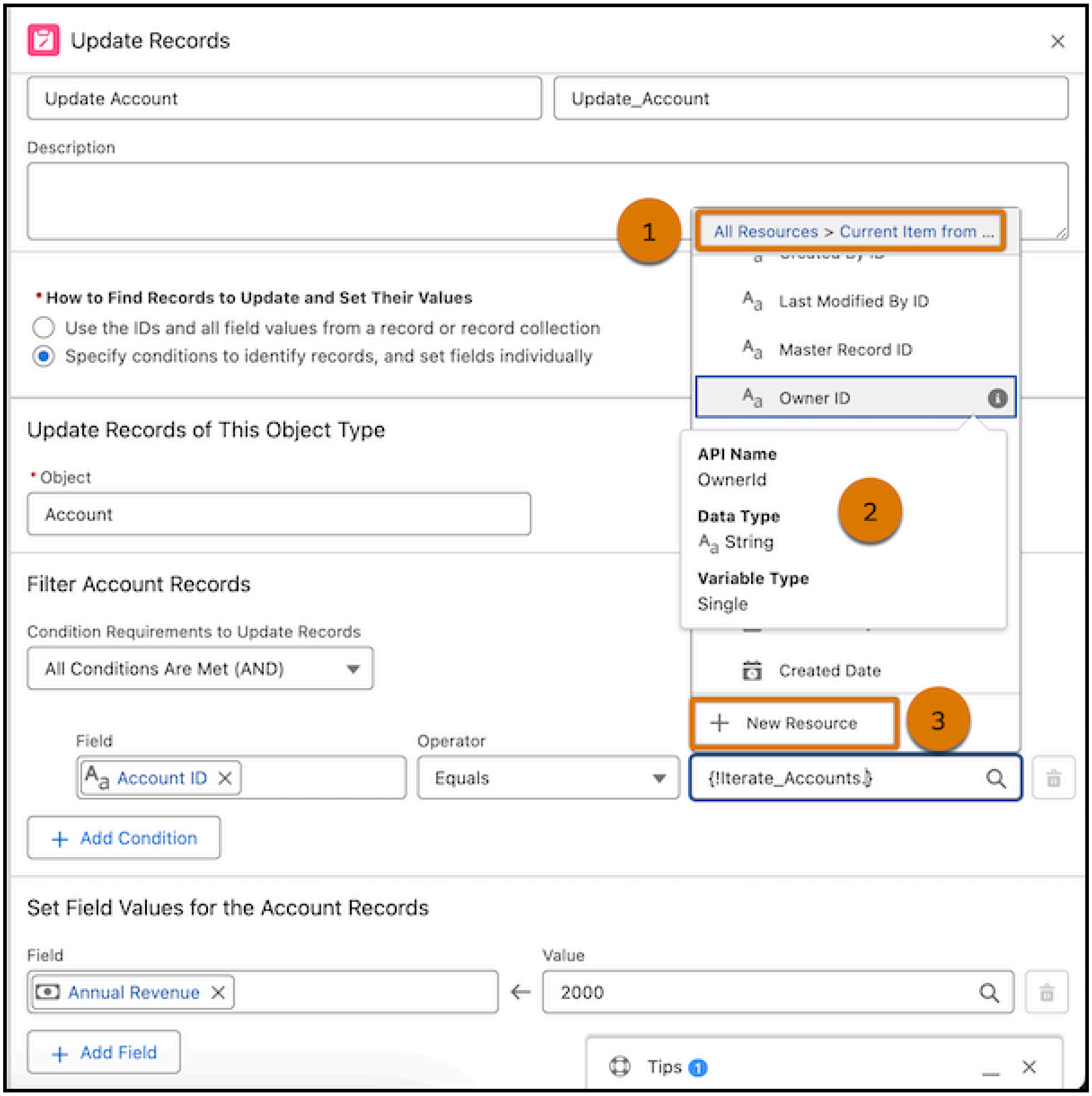
With this update, Flow Builder makes it easier to select resources for Start element triggers for schedule-triggered flows and for Update Records, Get Records, and Delete Records elements for all flow types. We now group the fields and values of manually selected objects with clearer labels to help you identify and select resources more easily.

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

How: Create or open a schedule-triggered flow. For the Start element, select the object that you want to work with. In a row that defines a condition, click in Field and Value to show clearly labeled groups of resources.



For Update Records, Get Records, and Delete Records elements, use the clickable breadcrumb path (1) to navigate through resource groups. Icons indicate different resource types. To get details (2) about a resource, hover over its info icon. To create a new resource, click **New Resource** (3).



Build on Your Successes by Saving an Existing Flow as a Template

Whether you have a flow that performs well or took you a long time to finalize, it's now easier to save a flow as a template for future use. On the flow properties window, you now have the option to Save as Template, which will add the flow to the templates available when creating a new flow.

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

Manage Elements Faster in Auto-Layout Mode for All Flow Types

Improved element cards in the Flow Builder canvas make it easier to create and edit flows. The element cards offer a larger selection area, one-click access to the configuration panel, quick access to common element actions, and an improved canvas experience with less visual noise. These element cards are now available for all flow types in auto-layout mode.

Where: This feature is available in Lightning Experience for Enterprise and Unlimited editions.

Screen Flow Updates

Streamline your screen flows with automatically-triggered screen actions. Upload files in Aura, Lightning Web Runtime, and Lightning Experience with the File Upload Enhanced component (beta). Customize the width of screen components and record fields. Preview your screens in real time. Add icons to choice resources. Make screens more visually engaging with the Visual Picker component.

Keep Users on One Flow Screen with Automatically Triggered Screen Actions (Generally Available)
Make your flow screens dynamic by running flows in the background automatically. With screen actions you can use additional flow logic without the user leaving the screen. When a user enters a value into a screen component, they see the results of that logic, and updates to the screen in real time. Screen actions help you build screen flows with fewer screens and provide an improved user experience. By default, automatically triggered screen actions run any time their input values are updated, and any time the screen loads, except when a user gets to a screen by clicking the Previous button on the next screen.

Get Better Usability with the File Upload Enhanced Flow Screen Component (Beta)
The new File Upload Enhanced (beta) flow screen component is similar to the existing File Upload screen component but has some enhancements. Now your users can upload files in screen flows in both Aura and Lightning Web Runtime (LWR) sites and in Lightning Experience. Also, you can require users to upload documents before moving on in the flow.

Get More Control Over Component and Field Layout in Screen Flows
Customize the width of screen components and record fields, whether they're in section columns or not. Additionally, tweak the vertical alignment of components and fields to optimize the way that they're positioned relative to each other.

See How Your Screen Looks in Real Time on Different Screen Sizes
Check how your screen appears on large, medium, or small devices with the Preview Size feature. Identify and fix any layout issues during design time so that your screens always look great, no matter the device.

Help Users Make Selections Faster by Adding Icons to Choice Resources
Reduce the cognitive load on your users by adding icons to each of their choices in choice resources. Icons convey information at a glance, reducing the amount of text users must read and process. Choice resources with icons can only be used in Choice Lookup and Visual Picker components. Additionally, these choice resources must be of the text data type.

Display Choices in Tiles with the Visual Picker Component in Screen Flows
You can make choices in screen flows more visually engaging with the Visual Picker Component. Combining icons and text, the Visual Picker component helps users quickly select what they need without scrolling through long lists or dropdown menus.

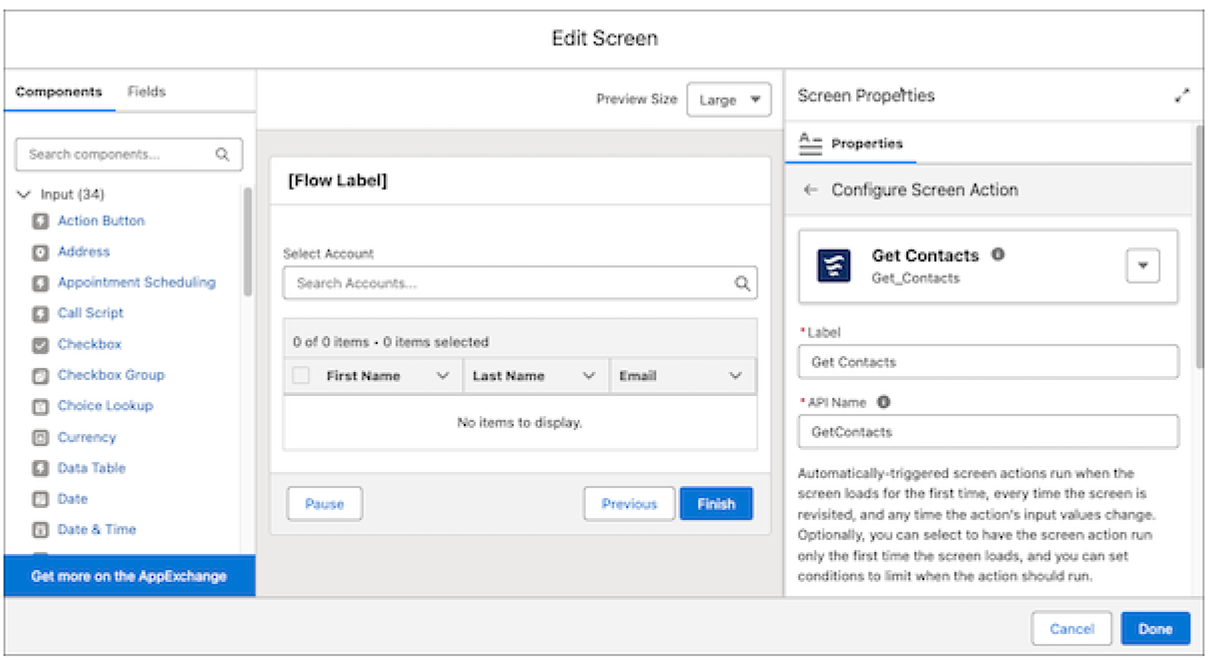
Keep Users on One Flow Screen with Automatically Triggered Screen Actions (Generally Available)

Make your flow screens dynamic by running flows in the background automatically. With screen actions you can use additional flow logic without the user leaving the screen. When a user enters a value into a screen component, they see the results of that logic, and updates to the screen in real time. Screen actions help you build screen flows with fewer screens and provide an improved user experience. By default, automatically triggered screen actions run any time their input values are updated, and any time the screen loads, except when a user gets to a screen by clicking the Previous button on the next screen.

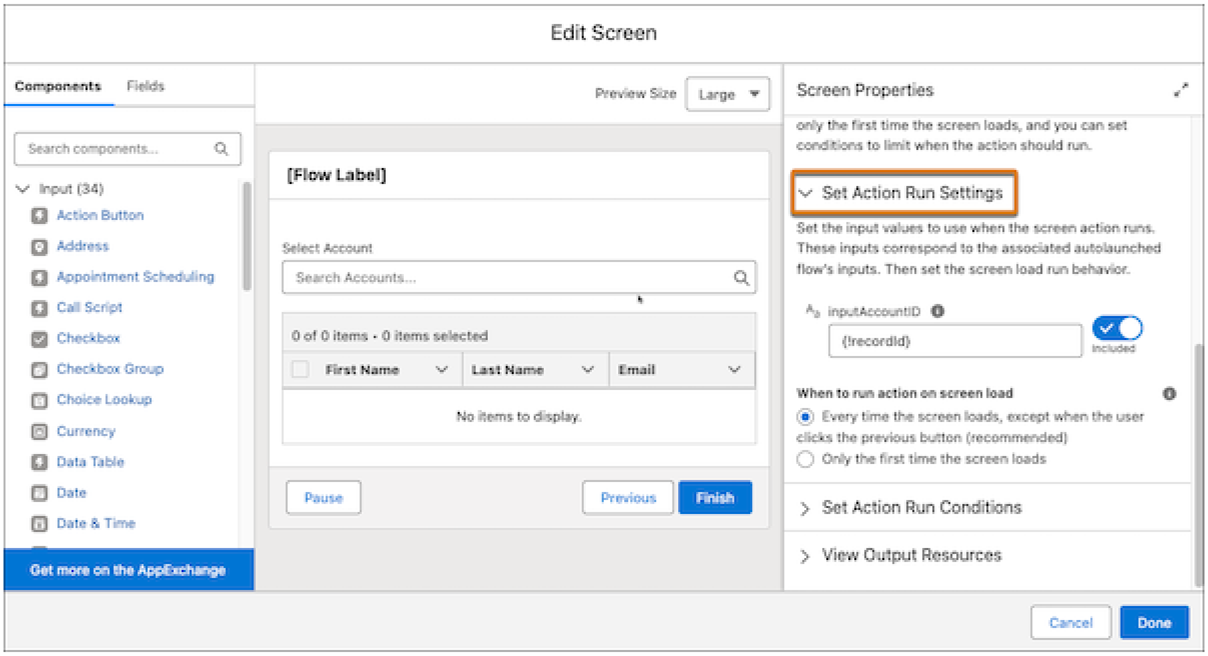
Where: This change applies to both Lightning Experience and Salesforce Classic (not available in all orgs) in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. It's supported only in Lightning runtime for flows.

Why: Now that automatically triggered screen actions are generally available, you can limit when an automatically triggered screen action runs by setting condition requirements that make the user experience more relevant. Setting condition requirements can also help reduce loading times by limiting how much data goes between the screen action and the associated autolaunched flow. Also, you can now have the screen flow run only the first time the screen is loaded.

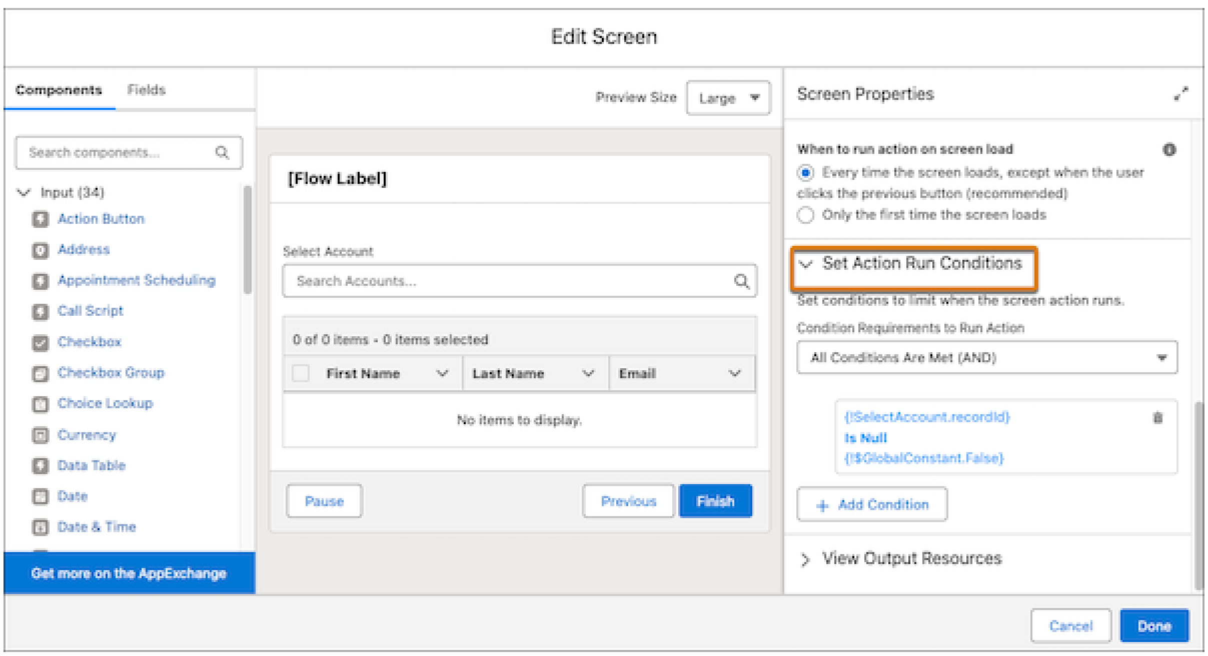
How: In a screen element's properties, open the Configure Screen Actions section. Select the autolauched flow that you want to run in the background. The Configure Screen Action panel opens.



In the Set Action Run Settings section, set the action's input values and optionally select to run the screen action only when the screen is loaded for the first time.



To limit when the screen action runs, open the Set Action Run Conditions section and set your conditions. For example, set a condition to run the screen action only when another screen component has been filled out.



See Also

Salesforce Help: Get or Process Data Within a Screen Element with Screen Actions (can be outdated or unavailable during release preview)

Get Better Usability with the File Upload Enhanced Flow Screen Component (Beta)

The new File Upload Enhanced (beta) flow screen component is similar to the existing File Upload screen component but has some enhancements. Now your users can upload files in screen flows in both Aura and Lightning Web Runtime (LWR) sites and in Lightning Experience. Also, you can require users to upload documents before moving on in the flow.

Where: This change applies to Aura and LWR sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

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

How: To enable the File Upload Enhanced (beta) screen component, from Setup, in the Quick Find box, enter `Salesforce Files`, and select **General Settings**. Then select **Use the File Upload Enhanced Lightning web component (Beta)**. To use the screen component, add it to a screen element in a flow. To require users to upload a file, set the Required field to true.

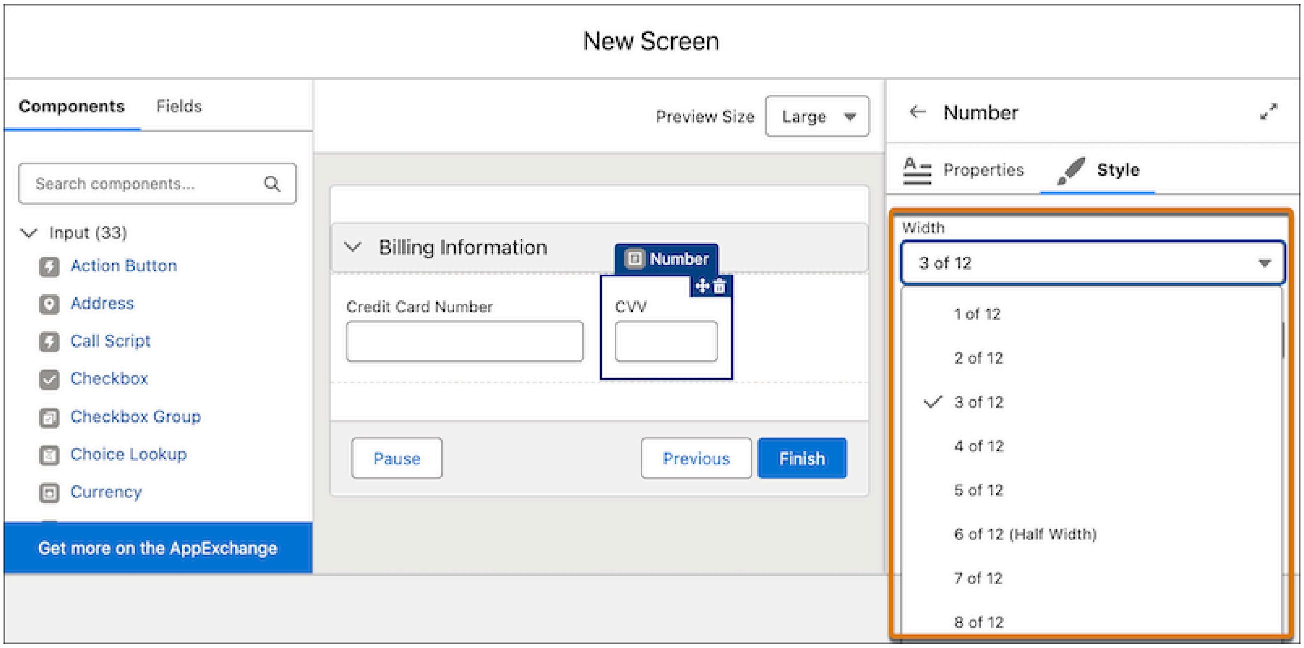
Get More Control Over Component and Field Layout in Screen Flows

Customize the width of screen components and record fields, whether they're in section columns or not. Additionally, tweak the vertical alignment of components and fields to optimize the way that they're positioned relative to each other.

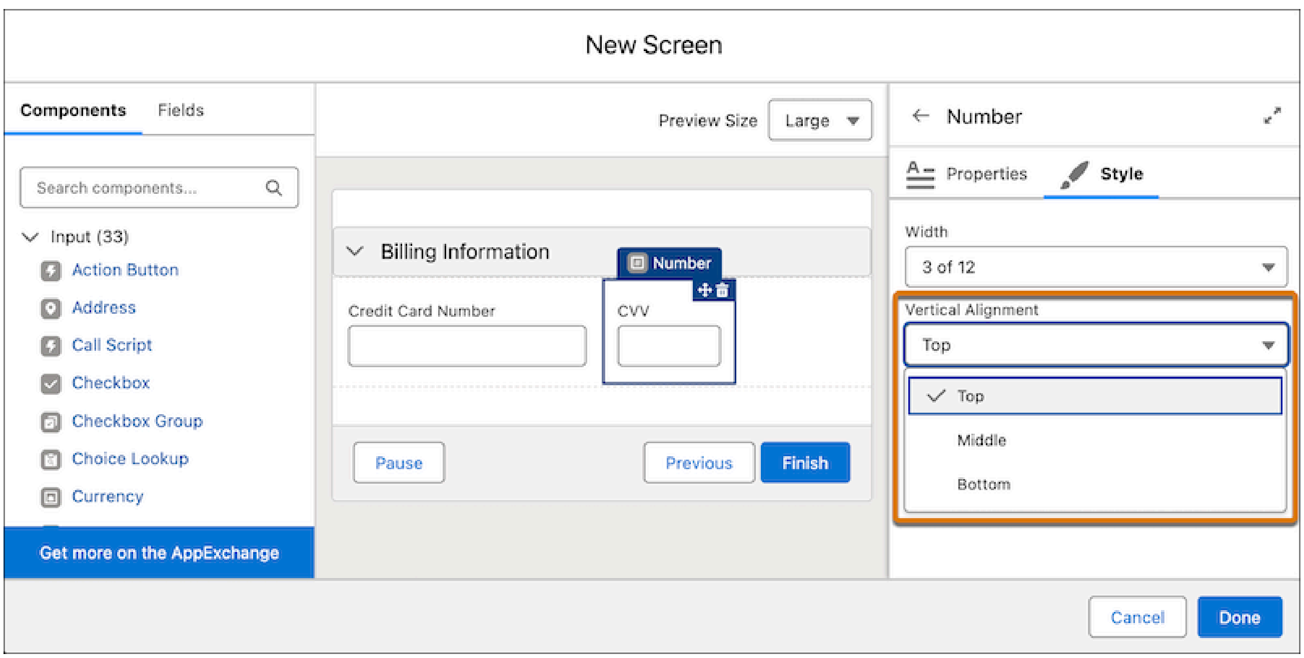
Where: This change applies to Lightning Experience, Salesforce Classic (not available in all orgs), in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

How: Different components require different amounts of space on a screen. For example, a text component needs more width than a checkbox component.

To control the horizontal space occupied by the screen component, adjust its width.



To control the vertical position of the component relative to other components on the screen, adjust the vertical alignment.



See Also

Salesforce Help: Customize Component and Field Layout in Screen Flows (can be outdated or unavailable during release preview)

Salesforce Help: Considerations When Changing the Width and Vertical Alignment of Screen Components (can be outdated or unavailable during release preview)

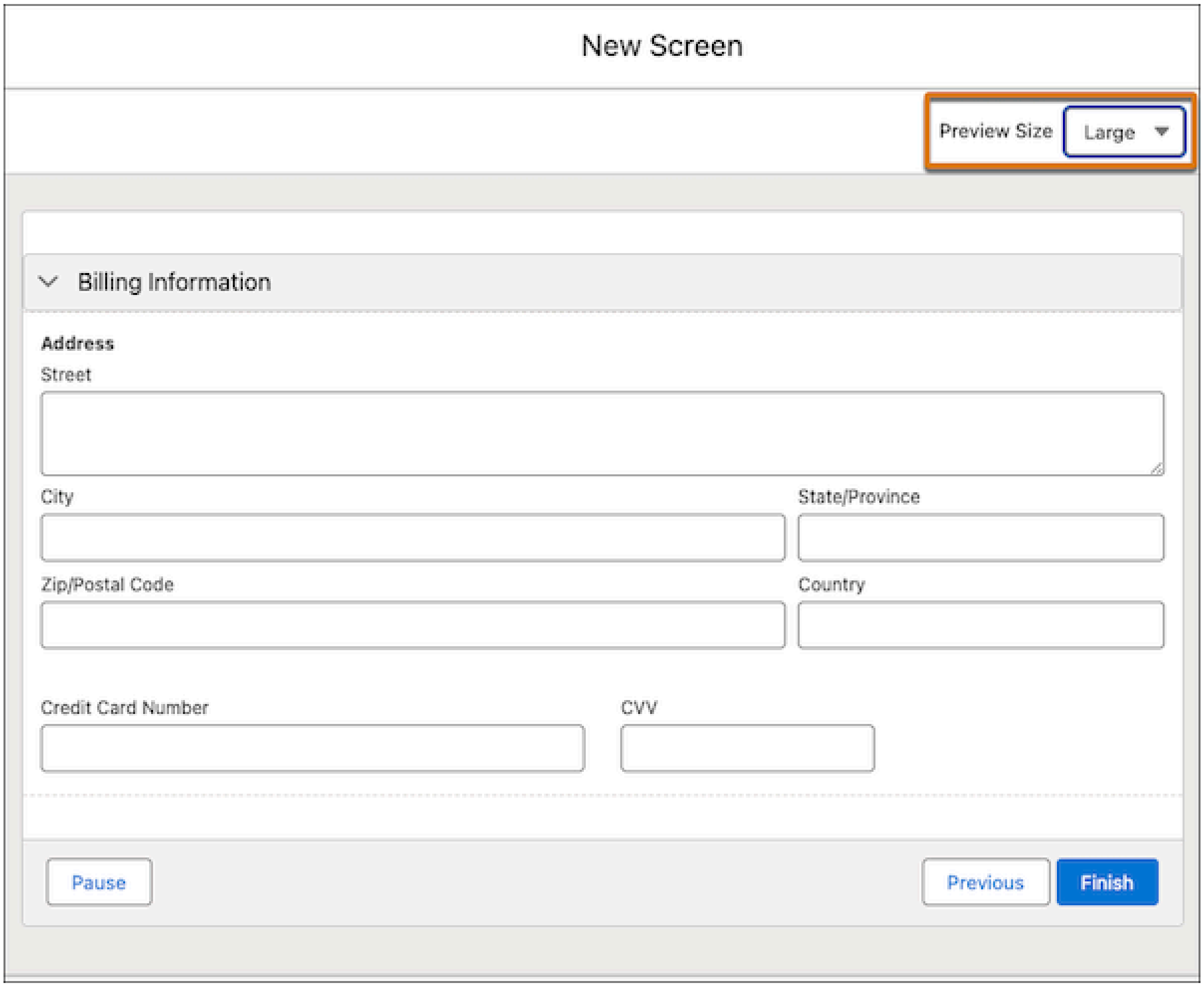
See How Your Screen Looks in Real Time on Different Screen Sizes

Check how your screen appears on large, medium, or small devices with the Preview Size feature.

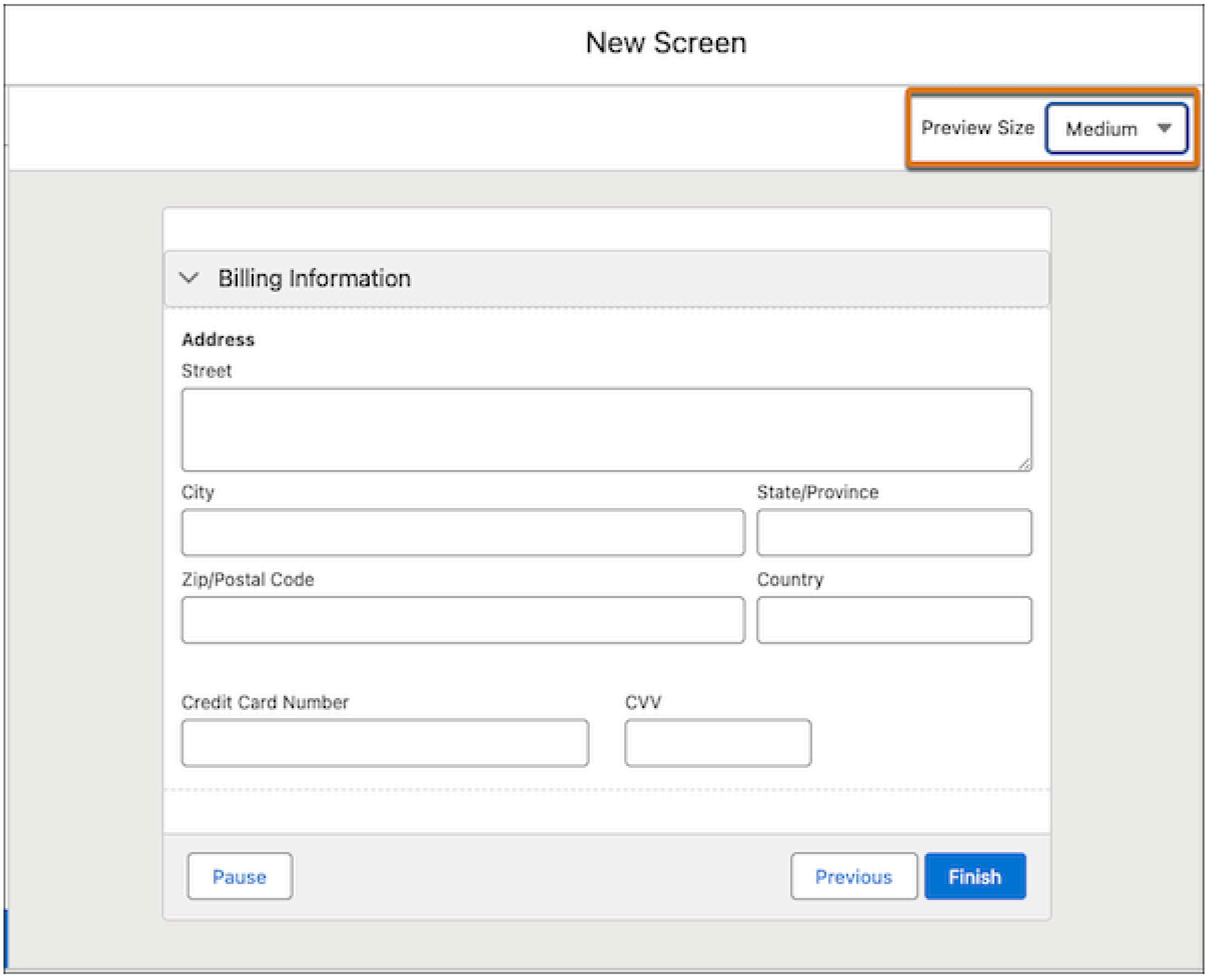
Identify and fix any layout issues during design time so that your screens always look great, no matter the device.

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

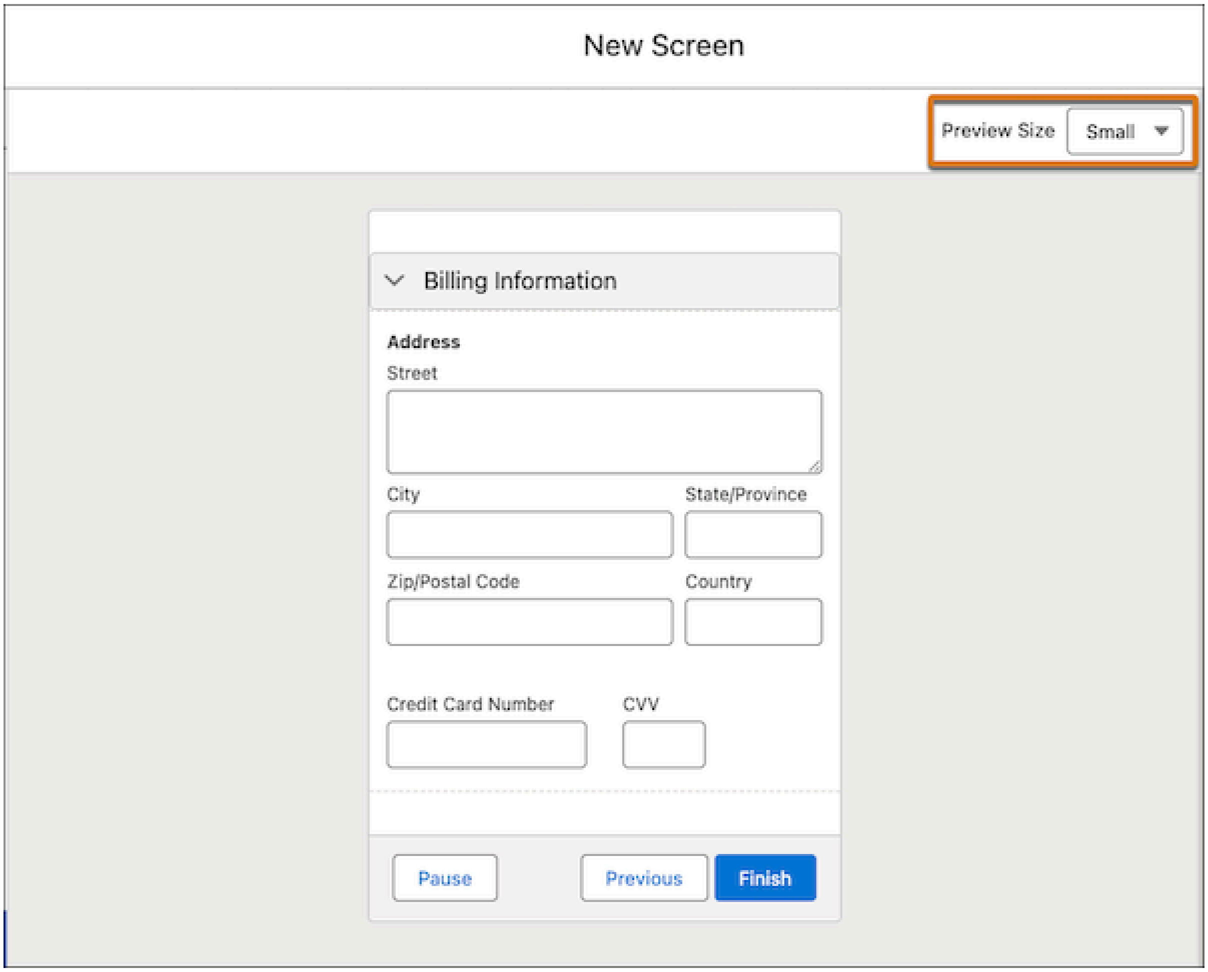
Why: Here's an example of a screen with an address component and how it appears on large-sized screens.



Here's how the same screen appears on medium-sized screens.



And finally, here’s how the same screen appears on small-sized screens.



See Also

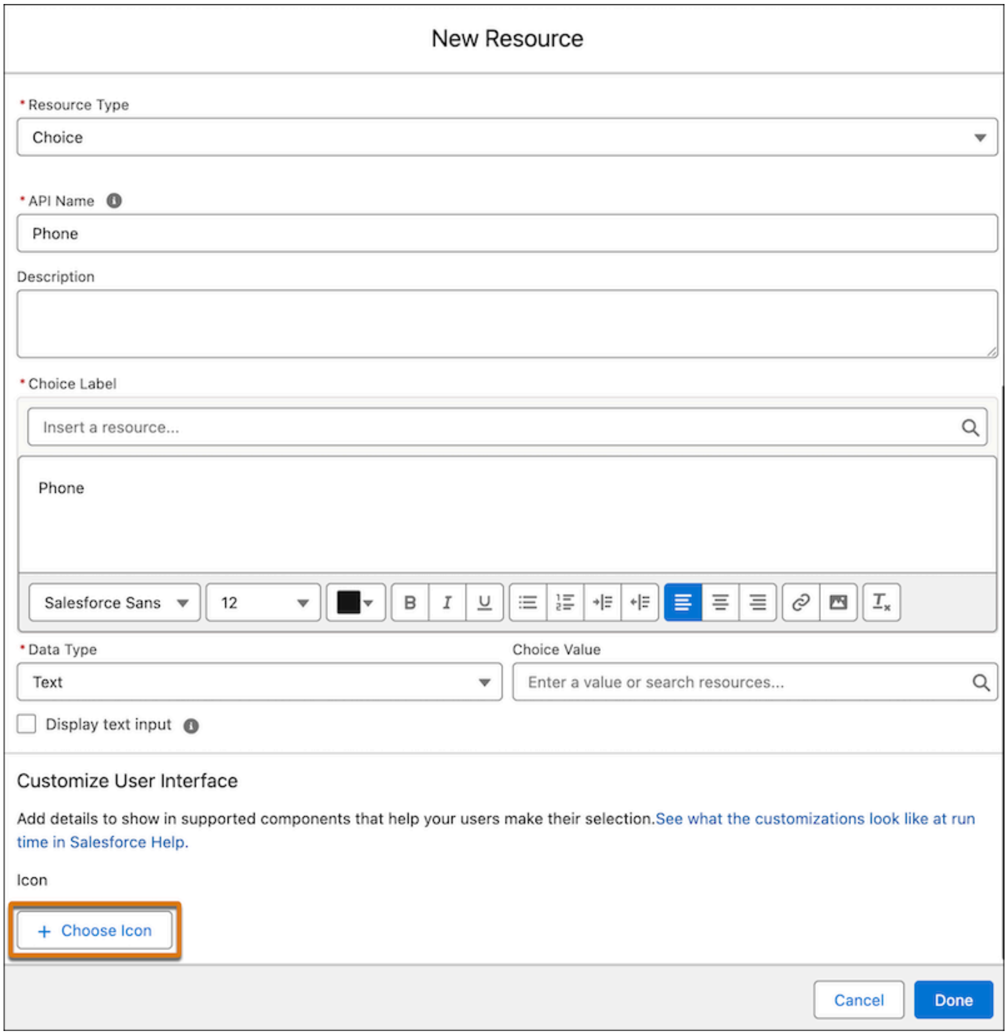
Salesforce Help: Customize Component and Field Layout in Screen Flows (can be outdated or unavailable during release preview)

Help Users Make Selections Faster by Adding Icons to Choice Resources

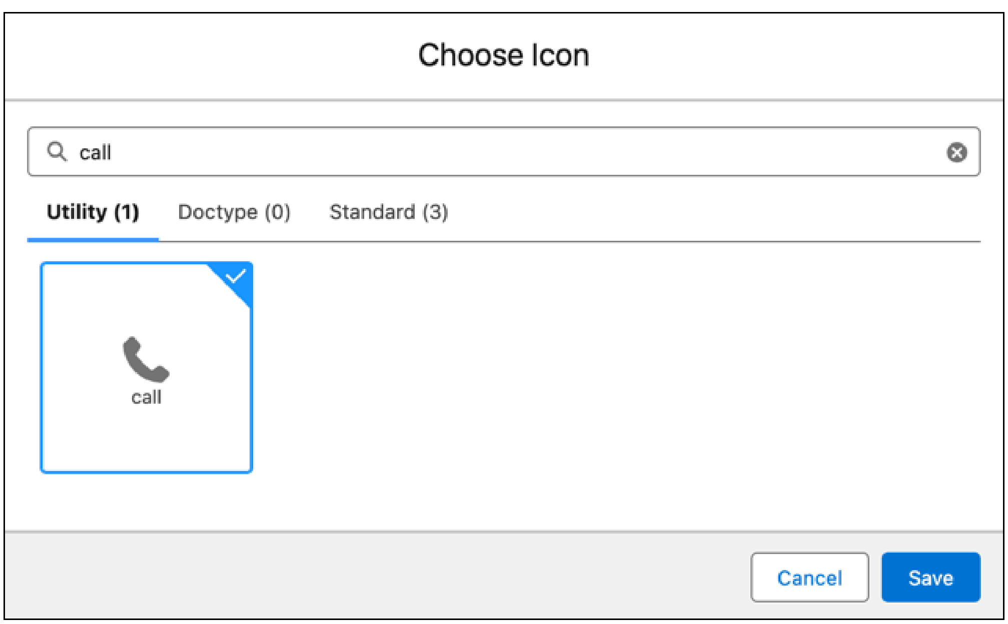
Reduce the cognitive load on your users by adding icons to each of their choices in choice resources. Icons convey information at a glance, reducing the amount of text users must read and process. Choice resources with icons can only be used in Choice Lookup and Visual Picker components. Additionally, these choice resources must be of the text data type.

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

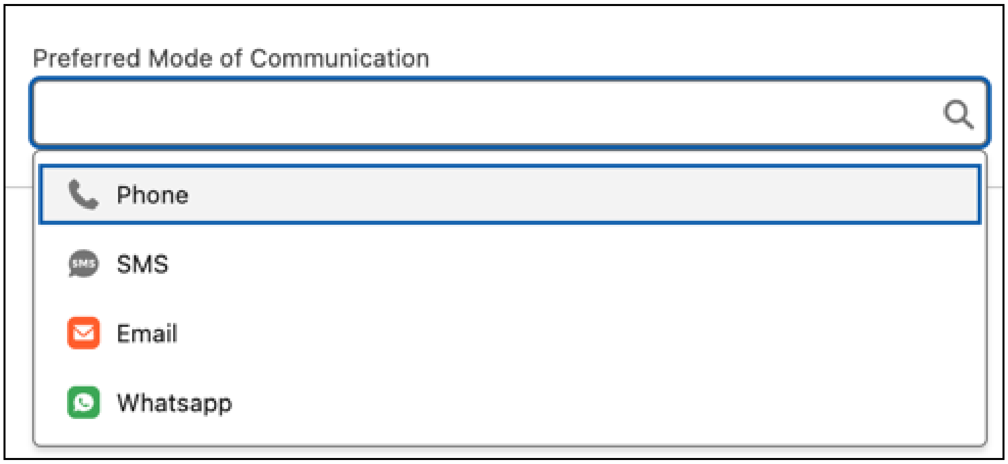
How: If you want to add an icon to a choice resource, click **Choose Icon** under Customize User Interface in the New Resource window.



Select an icon from the available Utility, Doctype, or Standard Salesforce Lightning Design System icons. You can also search for specific icons by using the search bar.



Use the choice resource in screen components, such as Choice Lookup or Visual Picker, and see the choice label with icons at run time.



See Also

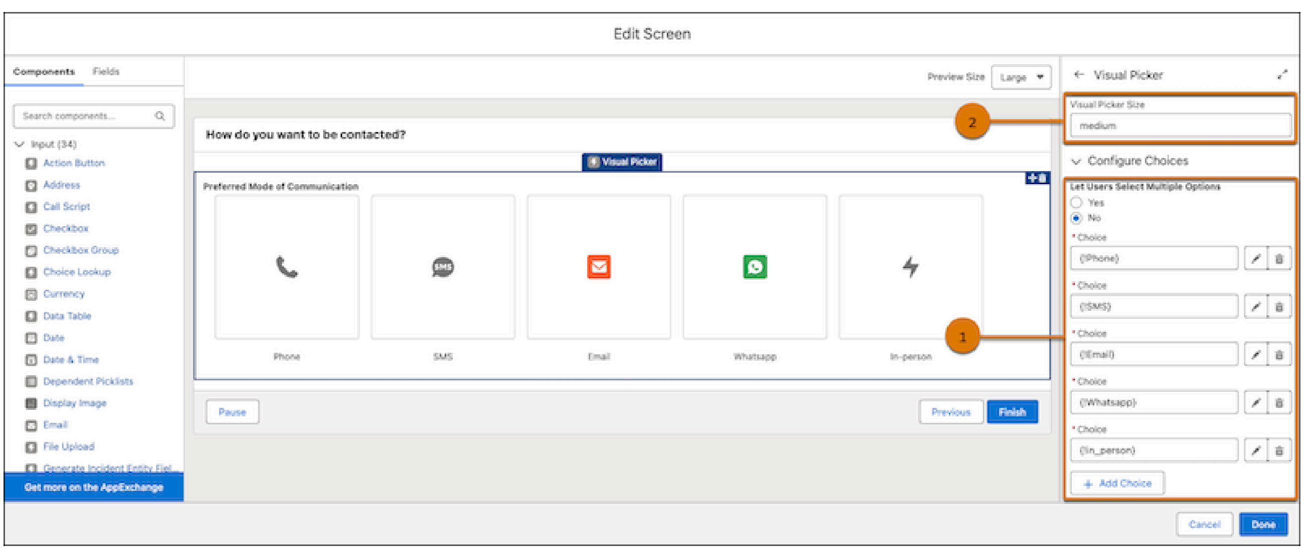
Salesforce Help: Help Users Select Faster by Using Visual Cues in Choices (can be outdated or unavailable during release preview)

Display Choices in Tiles with the Visual Picker Component in Screen Flows

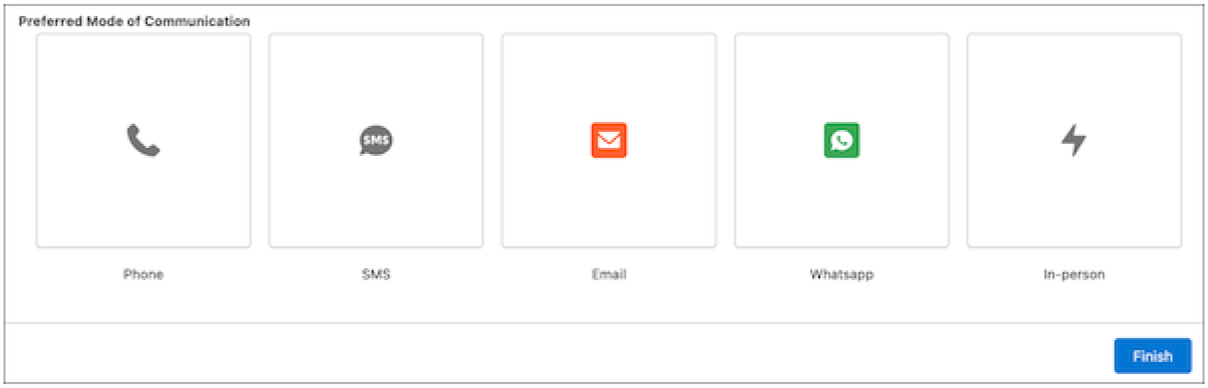
You can make choices in screen flows more visually engaging with the Visual Picker Component. Combining icons and text, the Visual Picker component helps users quickly select what they need without scrolling through long lists or dropdown menus.

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

How: Create your choice resources, and add icons to them if you want. Drag the Visual Picker to your screen element. Configure the Visual Picker properties, including the visual picker size (1) and the option for users to select more than one choice (2). Add the choices that you created earlier.



At runtime, users can quickly select tiles by glancing over the icons.



See Also

Help Users Make Selections Faster by Adding Icons to Choice Resources

Salesforce Help: Flow Screen Input Component: Visual Picker (can be outdated or unavailable during release preview)

Flow Marketing Cloud Updates

Use the new Einstein Decision element to route users through a flow based on email engagement. Create flows that use data spaces other than the default data space. Trigger flows with custom engagement signals. Prevent individuals from reentering segment-triggered flows. Manage resources and variables in Flow Builder.

Determine the Path of a Flow Based on Email Engagement

Harness the power of Einstein Engagement Scoring and Einstein Engagement Frequency by using the new Einstein Decision element. Add the element to a flow and create multiple possible paths based on how likely a user is to click an email or how saturated the user is with your marketing emails. For example, you can create a path for users who are oversaturated with emails and a different path for users who aren’t. When a user arrives at the element, the flow determines the best path for the user based on real-time data from Data Cloud.

Create Automations That Use Custom Data Spaces

Automations no longer require you to use the default data space. You can select any data space that was specified before the installation of a data kit. Debug also works for automations that use custom data spaces.

Trigger Flows Based on Custom Engagement Signals

Create custom engagement signals and then trigger flows when the engagement signal conditions are met.

Prevent Individuals from Reentering Any Version of a Flow

For segment-triggered flows that have a recurring schedule, in the Start element, select Never for the Can Rejoin Flow? option.

Create and Manage Resources and Variables in Flow Builder

Marketing Cloud automation users can access and create resources in Flow Builder from the Toolbox.

Updated Flow Types for Marketing Flows

To improve compatibility with other features, any new segment-triggered, form-triggered, automation event-triggered, and data graph-triggered flows use an updated flow type. The flow types for flows that use the old flow type are renamed to include “v0,” for example, Segment-Triggered Flow v0. The flow types for flows that use the new flow type don’t include “v0,” for example, Segment-Triggered Flow.

Use Segment Membership in Data Graph-Triggered Flows

In data graph-triggered flows, segment membership records are now available in the object selection picklist. With segment membership as the triggering object, you can trigger flows based off of any of its fields.

Reference Salesforce Records from Prior Elements

You can now directly reference records created from a Create Records element. For example, after creating contact records, you can directly reference those created contact records in subsequent elements. Previously, you had to use a Get Records element to fetch the created records with a record ID, and then reference the Get Records element in any following elements. This feature applies only to Salesforce object records.

Manage Elements Faster in Auto-Layout Mode for All Flow Types

Improved element cards in the Flow Builder canvas make it easier to create and edit flows. The element cards offer a larger selection area, one-click access to the configuration panel, quick access to common element actions, and an improved canvas experience with less visual noise. These element cards are now available for all flow types in auto-layout mode.

Pause an Automation Event-Triggered Flow Until a Customer Takes Action

Add the Wait Until Event element to pause your automation event-triggered flow until a customer takes a specified action. For example, let's say that you have a flow that sends a thank-you email each time a customer fills out a form. You can then wait to take another action until the customer opens that email. And if the customer doesn't open the email within a specified period, you can send a follow-up SMS message. The Wait Until Event element gives you more control over your flows, so you can deliver the right message at the right time.

View More Detailed Metrics in On-Canvas Insights

Two more metrics appear in the analytics panel in On-Canvas Insights. You can now see whether email messages weren’t sent by the flow, providing more detail about what’s happening as your flow runs. (This functionality isn't yet available for other message types, such as SMS or WhatsApp.) You can also see which elements are paused in the Run Status chart, which gives you a clearer picture of an element’s performance.

Create Email Marketing Flows Faster with Out-of-the-Box Templates

Start running marketing email flows quickly with templates that address common use cases, such as birthday promotions, event registrations, and nurture campaigns. Templates appear in the new flow creation window and the Automation App homepage. They include prebuilt flow elements and email drafts that you can tailor to your audiences.

See Also

Configure the Triggering DMO Record for Event-Triggered Flows
Debug Data Graph-Triggered Flows
Test Email and SMS Sends with Test Messages

Determine the Path of a Flow Based on Email Engagement

Harness the power of Einstein Engagement Scoring and Einstein Engagement Frequency by using the new Einstein Decision element. Add the element to a flow and create multiple possible paths based on how likely a user is to click an email or how saturated the user is with your marketing emails. For example, you can create a path for users who are oversaturated with emails and a different path for users who aren't. When a user arrives at the element, the flow determines the best path for the user based on real-time data from Data Cloud.

Where: This change applies to Lightning Experience for Marketing Cloud Advanced edition.

Who: To use the Einstein Decision element, a user needs the Marketing Manager permission or the Marketing admin permission.

How: From the Flows or Campaigns tab, create a segment-triggered or automation event-triggered flow. Configure the flow to include the Einstein Decision element. Save and run the flow.

Create Automations That Use Custom Data Spaces

Automations no longer require you to use the default data space. You can select any data space that was specified before the installation of a data kit. Debug also works for automations that use custom data spaces.

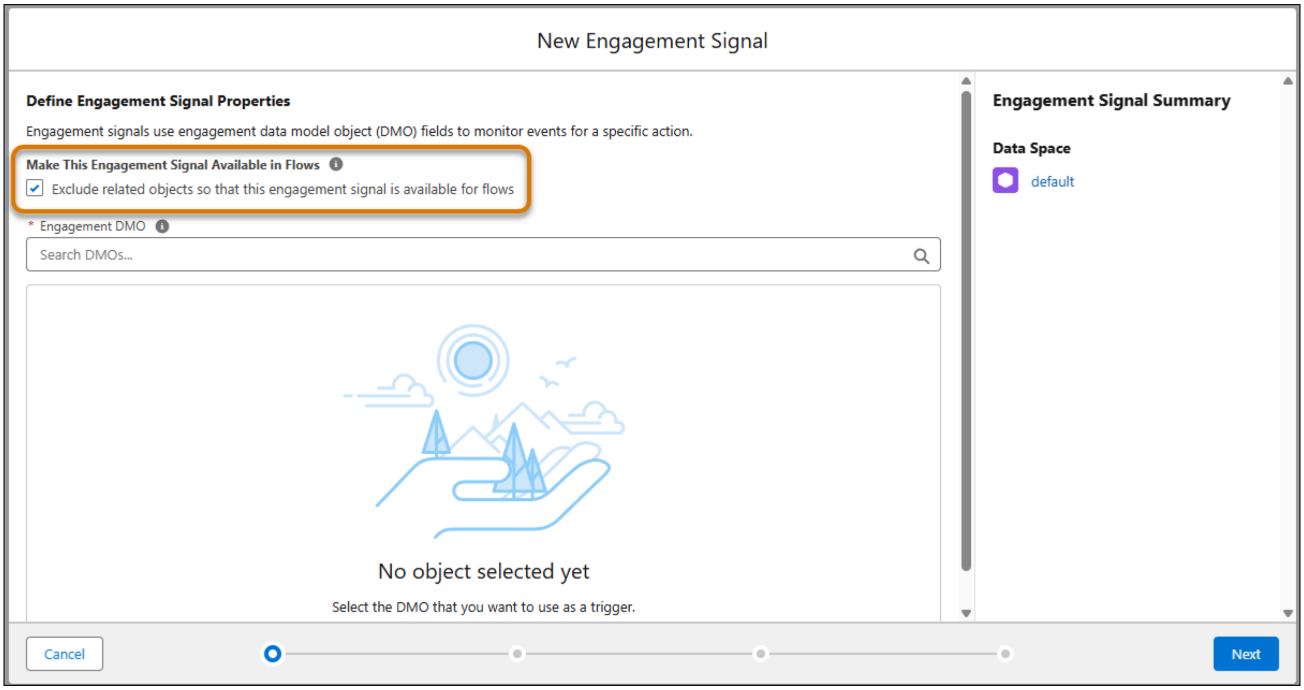
Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition or Advanced Edition.

Trigger Flows Based on Custom Engagement Signals

Create custom engagement signals and then trigger flows when the engagement signal conditions are met.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition or Advanced Edition.

How: When you create an engagement signal, select **Make This Engagement Signal Available in Flows** to ensure that the engagement signal is selectable as a flow trigger in automation event-triggered flows.



See Also

Salesforce Help: Engagement Signals and Metrics (can be outdated or unavailable during release preview)

Prevent Individuals from Reentering Any Version of a Flow

For segment-triggered flows that have a recurring schedule, in the Start element, select Never for the Can Rejoin Flow? option.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition or Advanced Edition.

Create and Manage Resources and Variables in Flow Builder

Marketing Cloud automation users can access and create resources in Flow Builder from the Toolbox.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition or Advanced Edition.

Updated Flow Types for Marketing Flows

To improve compatibility with other features, any new segment-triggered, form-triggered, automation event-triggered, and data graph-triggered flows use an updated flow type. The flow types for flows that use the old flow type are renamed to include “v0,” for example, Segment-Triggered Flow v0. The flow types for flows that use the new flow type don’t include “v0,” for example, Segment-Triggered Flow.

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In data graph-triggered flows, segment membership records are now available in the object selection picklist. With segment membership as the triggering object, you can trigger flows based off of any of its fields.

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Reference Salesforce Records from Prior Elements

You can now directly reference records created from a Create Records element. For example, after creating contact records, you can directly reference those created contact records in subsequent elements. Previously, you had to use a Get Records element to fetch the created records with a record ID, and then reference the Get Records element in any following elements. This feature applies only to Salesforce object records.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition or Advanced Edition.

Manage Elements Faster in Auto-Layout Mode for All Flow Types

Improved element cards in the Flow Builder canvas make it easier to create and edit flows. The element cards offer a larger selection area, one-click access to the configuration panel, quick access to common element actions, and an improved canvas experience with less visual noise. These element cards are now available for all flow types in auto-layout mode.

Where: This feature is available in Lightning Experience for Enterprise and Unlimited editions.

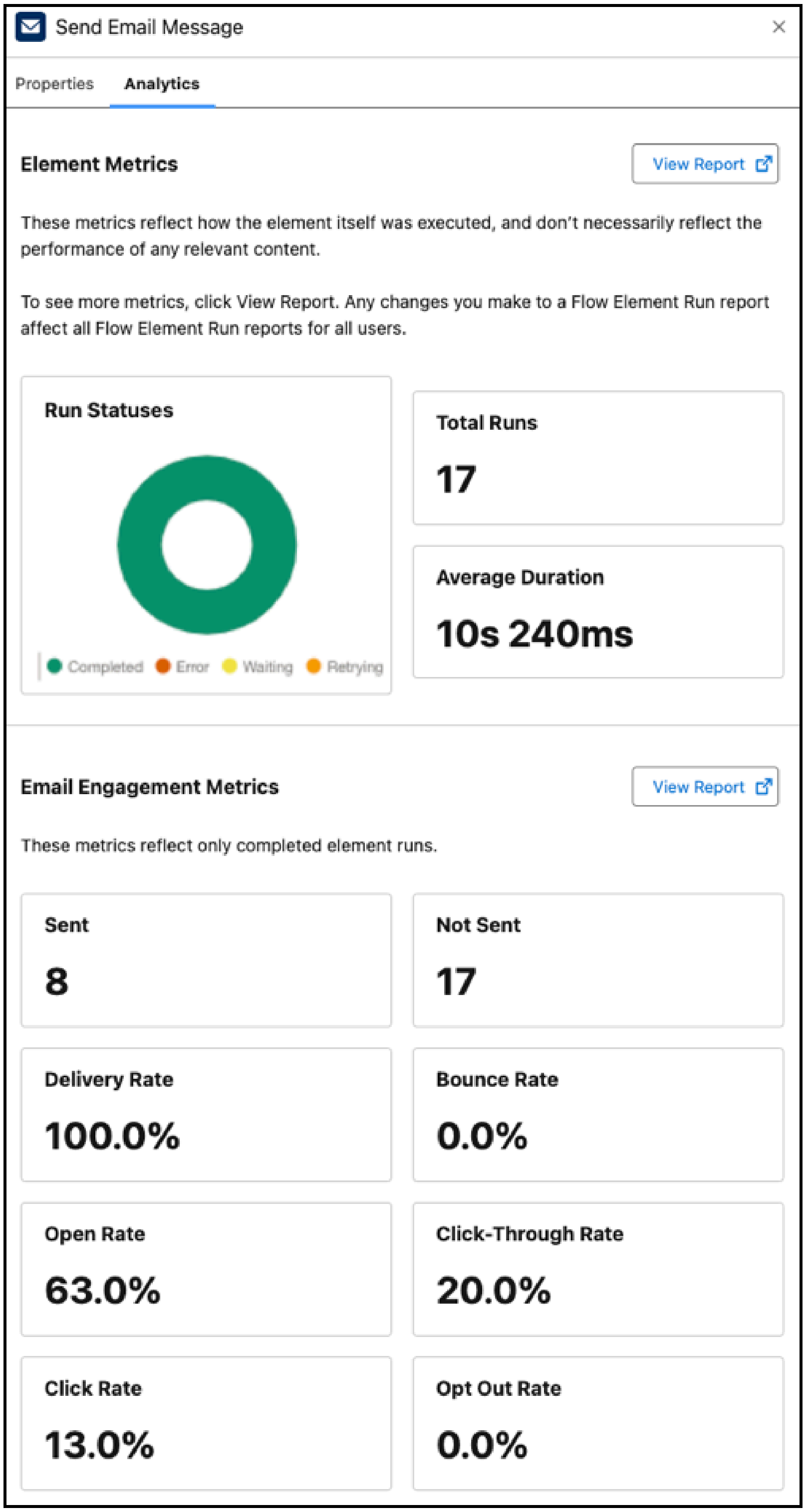
Pause an Automation Event-Triggered Flow Until a Customer Takes Action

Add the Wait Until Event element to pause your automation event-triggered flow until a customer takes a specified action. For example, let's say that you have a flow that sends a thank-you email each time a customer fills out a form. You can then wait to take another action until the customer opens that email. And if the customer doesn't open the email within a specified period, you can send a follow-up SMS message. The Wait Until Event element gives you more control over your flows, so you can deliver the right message at the right time.

Where: This feature is available in Lightning Experience for Enterprise and Unlimited editions with Marketing Cloud Growth or Advanced edition.

View More Detailed Metrics in On-Canvas Insights

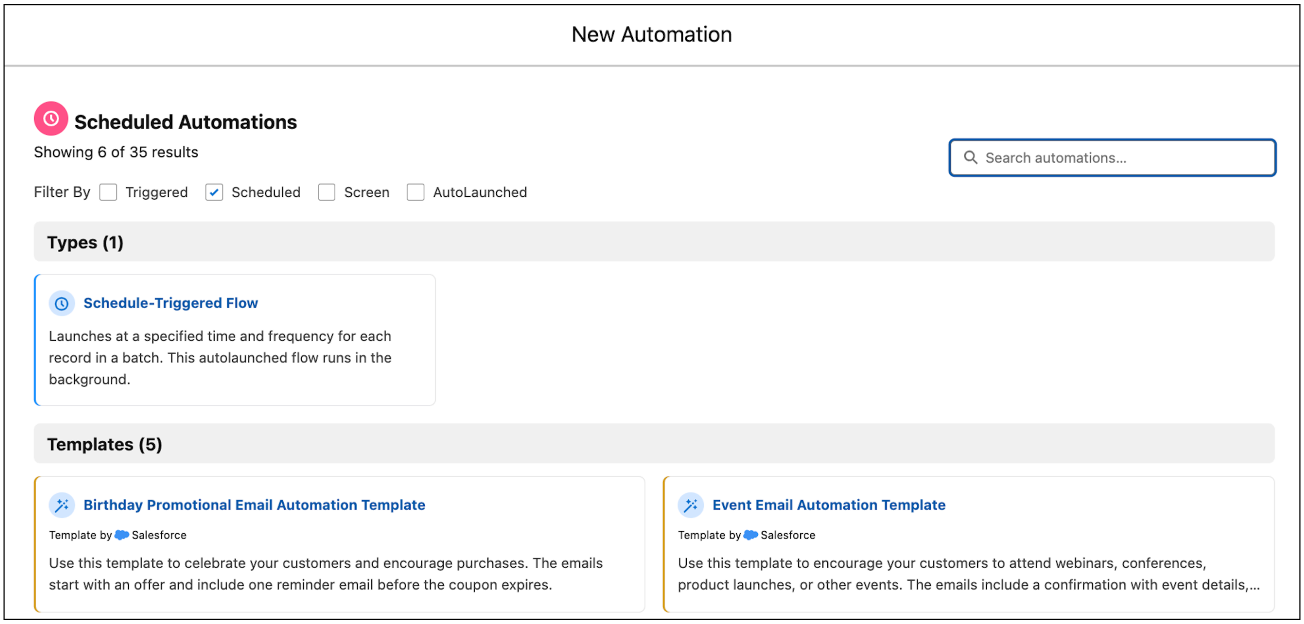
Two more metrics appear in the analytics panel in On-Canvas Insights. You can now see whether email messages weren’t sent by the flow, providing more detail about what’s happening as your flow runs. (This functionality isn't yet available for other message types, such as SMS or WhatsApp.) You can also see which elements are paused in the Run Status chart, which gives you a clearer picture of an element's performance.



Where: This feature is available in Lightning Experience for Enterprise and Unlimited editions with Marketing Cloud Growth or Advanced.

Create Email Marketing Flows Faster with Out-of-the-Box Templates

Start running marketing email flows quickly with templates that address common use cases, such as birthday promotions, event registrations, and nurture campaigns. Templates appear in the new flow creation window and the Automation App homepage. They include prebuilt flow elements and email drafts that you can tailor to your audiences.



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

Flow Actions

Create flow approval processes with an action. Use dynamic actions to call flow approval processes. Send emails, create emails, and more with the improved Send Email action.

Create a Flow Approval Process with an Action
Use the new Create Flow Approval Process action to draft an autolaunched flow approval process with up to 20 levels of approvals. The draft can also contain final actions and a recall path. After creation, configure the flow approval process elements in Flow Builder.

Use a Dynamic Action to Call a Flow Approval Process from a Flow
Use a flow to gather information about an approval submission before starting the associated flow approval process. Build an autolaunched flow to collect relevant data. Then add an Action element that calls the appropriate active, autolaunched flow approval process from your flow. To make the flow available to users after you test and activate the flow, add a custom button to the page layout for the affected object.

Send Email Action Updates
Configure your Send Email action with clearly organized input sections for recipients, senders, and email content. Switch between versions of the Send Email Action to control the visibility and organization of email content configuration parameters. Create your email content directly in the Send

Email action without creating a text template resource first. Select an existing template by name instead of bringing the email template ID into the flow. Enhance your Flow Builder email actions with the new CC and BCC Recipient Address Collection fields. Choose a sender type, enter a sender email address, select an email template, attach files, and choose a specific record more easily. Log your email only if you provide a recipient or a related record ID. Add threading tokens to Body and Subject only if you provide a related record ID. Attaching files to emails in Flow Builder is easier now that you can provide a text collection variable in the Attachment ID Collection field in the Send Email action.

Create a Flow Approval Process with an Action

Use the new Create Flow Approval Process action to draft an autolaunched flow approval process with up to 20 levels of approvals. The draft can also contain final actions and a recall path. After creation, configure the flow approval process elements in Flow Builder.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, all Einstein 1, and Developer editions.

Who: Only users with the Manage Flow permission can run the Create Flow Approval Process action.

How: After the flow approval process is created, the user must configure the elements in the draft before the it can be activated. To open the draft flow approval process in Flow Builder, use the Manage All Flow Approval Processes tile in the Approvals app or look in the Flows list view in Setup.

Use a Dynamic Action to Call a Flow Approval Process from a Flow

Use a flow to gather information about an approval submission before starting the associated flow approval process. Build an autolaunched flow to collect relevant data. Then add an Action element that calls the appropriate active, autolaunched flow approval process from your flow. To make the flow available to users after you test and activate the flow, add a custom button to the page layout for the affected object.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, all Einstein 1, and Developer editions.

How: In Flow Builder, build an autolaunched flow. In a new action element in the flow, search for and select the name of the active, autolaunched flow approval process to run. Using information gathered earlier in the flow, provide input values to the selected flow approval process.

Send Email Action Updates

Configure your Send Email action with clearly organized input sections for recipients, senders, and email content. Switch between versions of the Send Email Action to control the visibility and organization of email content configuration parameters. Create your email content directly in the Send Email action without creating a text template resource first. Select an existing template by name instead of bringing the email template ID into the flow. Enhance your Flow Builder email actions with the new CC and BCC

Recipient Address Collection fields. Choose a sender type, enter a sender email address, select an email template, attach files, and choose a specific record more easily. Log your email only if you provide a recipient or a related record ID. Add threading tokens to Body and Subject only if you provide a related record ID. Attaching files to emails in Flow Builder is easier now that you can provide a text collection variable in the Attachment ID Collection field in the Send Email action.

Find Send Email Action Inputs Easier with Organized Inputs
Now you can configure your Send Email action with clearly organized input sections for recipients, senders, and email content. Inputs grouped into distinct categories makes it easier to manage and customize your emails. It’s also easier to configure inputs with the include or exclude toggles now removed.

Manage Email Configuration by Switching Send Email Action Versions
To control the visibility and organization of email content configuration parameters, you can switch between Send Email Action versions. By selecting the latest action version, you can compose the email body directly or use a predefined email template, enhancing your email worflow’s flexibility and efficiency.

Compose Your Email Content or Select Templates Within the Send Email Action
Write and format your email content directly within the Send Email action, eliminating the need to create a separate text template resource. The body text can include merge fields and be formatted to match your company’s brand. Alternatively, you can now select existing email templates by name instead of bringing the ID of the email template into the flow.

Add Collection Support for CC and BCC Recipients in Email Action
Enhance your Flow Builder email actions with the new CC and BCC Recipient Address Collection fields. With these fields, you can add multiple CC and BCC recipients directly within the Send Email action. This update simplifies the process of dynamically managing recipients by eliminating the need to manually enter each address. The maximum total number of recipient email addresses remains 150.

Configure Sender and Content Inputs Easier in the Send Email Action
With the Send Email action, Flow Builder makes it easier to directly choose a sender type, enter a sender email address, select an email template, attach files, and choose a specific record. A more streamlined email configuration process reduces the need for searching, creating a text template resource, or using extra elements.

Make Sure That Emails Are Logged Only to Appropriate Records
Now you are asked if you want to log your email only if you specify a recipient or a related record ID. The Log Email on Send field is now hidden by default. Previously, the Log Email on Send field was always visible, but now it remains hidden until you enter the necessary recipient or related record ID. We hide the field by default to make sure that emails are logged only to the appropriate records.

Make Sure That Threading Tokens Are Added Only to Emails Linked to Appropriate Records
Now you are asked if you want to add threading tokens to Body and Subject only if you also provide a related record ID. Salesforce requires the related record ID to make sure that threading tokens are added only to emails that are linked to the appropriate records. Previously, the fields Add Threading Token to Body and Add Threading Token to Subject were always visible, but now they’re hidden until you enter the related record ID.

Attach Files to Emails in Flow Builder Without Extra Processing
Attaching files to emails in Flow Builder is easier now that you can provide a text collection variable in

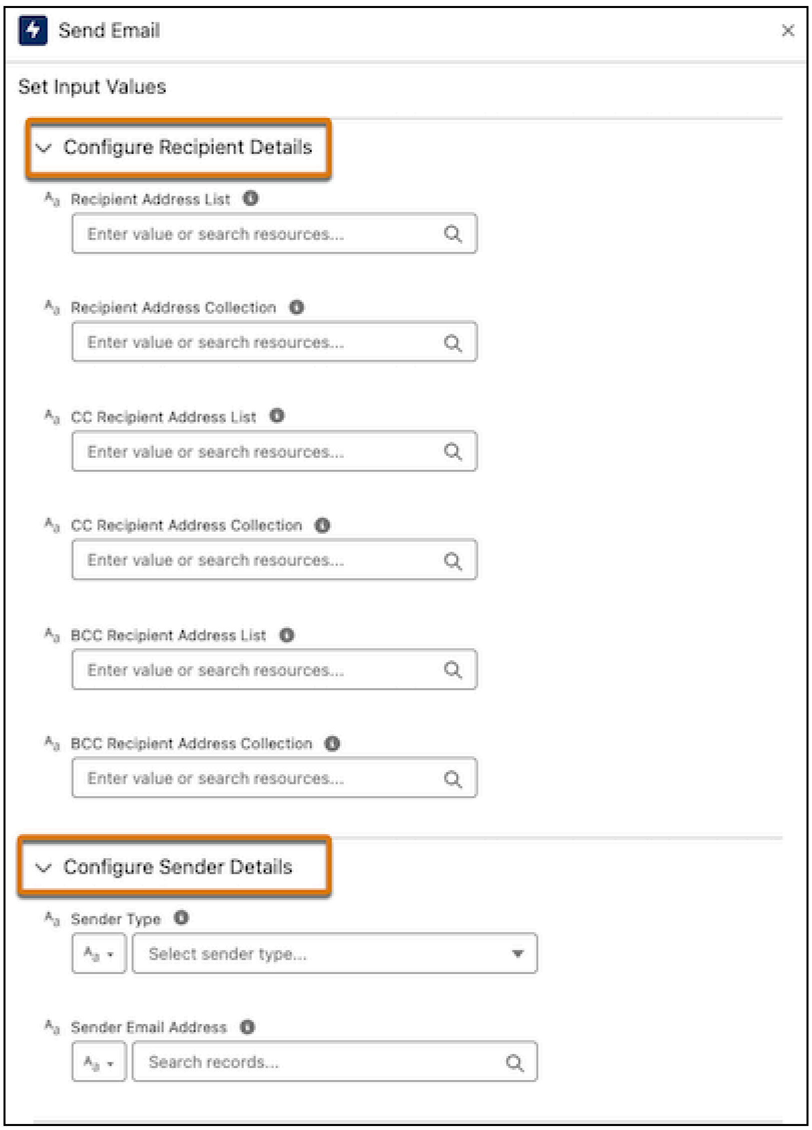
the Attachment ID Collection field in the Send Email action. Converting text collection variables to single-value text variables is no longer necessary.

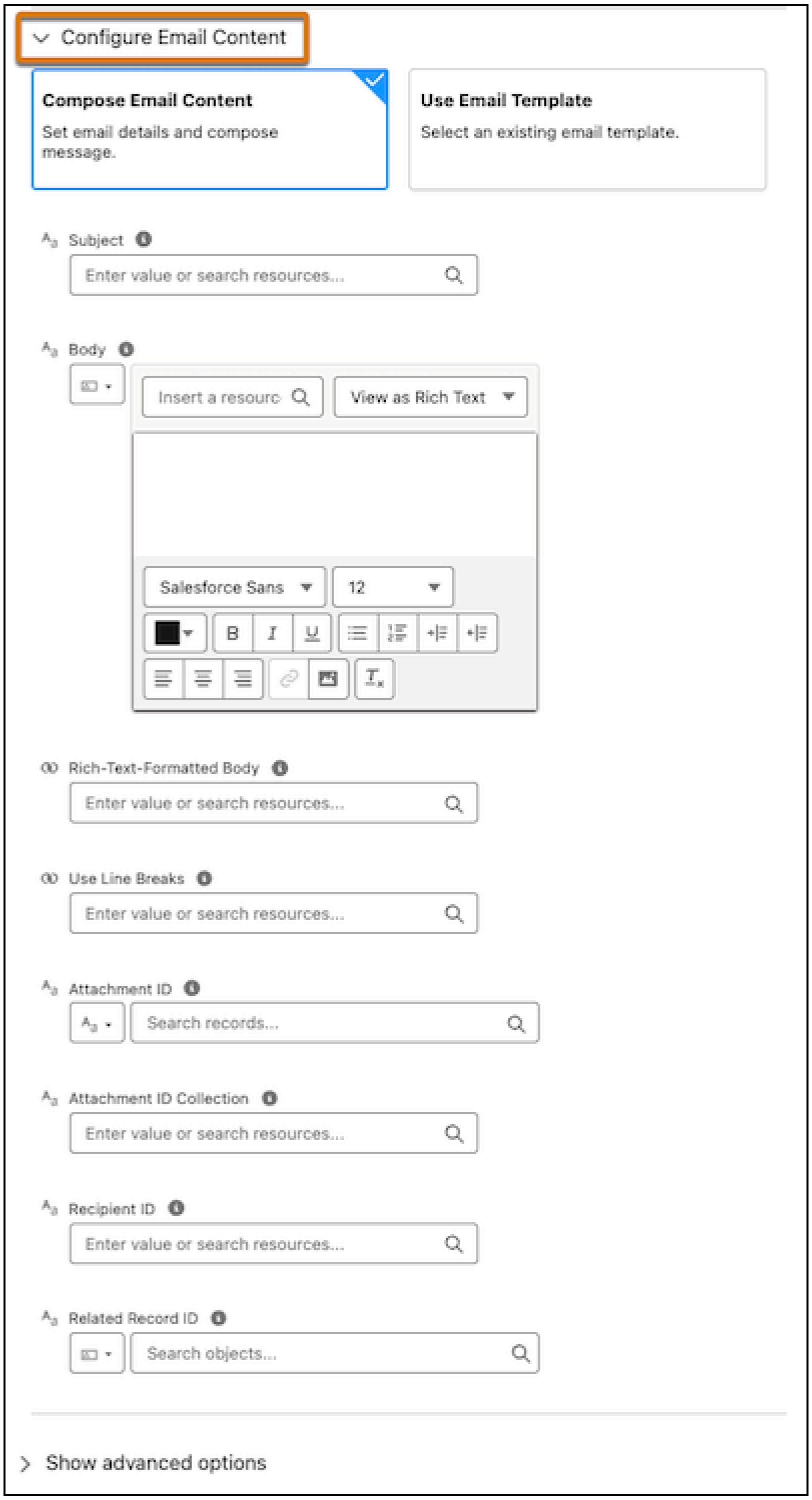
Find Send Email Action Inputs Easier with Organized Inputs

Now you can configure your Send Email action with clearly organized input sections for recipients, senders, and email content. Inputs grouped into distinct categories makes it easier to manage and customize your emails. It's also easier to configure inputs with the include or exclude toggles now removed.

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

How: In Flow Builder, in the element menu, search for and select **Send Email**. The input parameters are grouped into three categories: Configure Recipient Details, Configure Sender Details, and Configure Email Content. Enter the necessary information in the respective fields to set up your email.





See Also

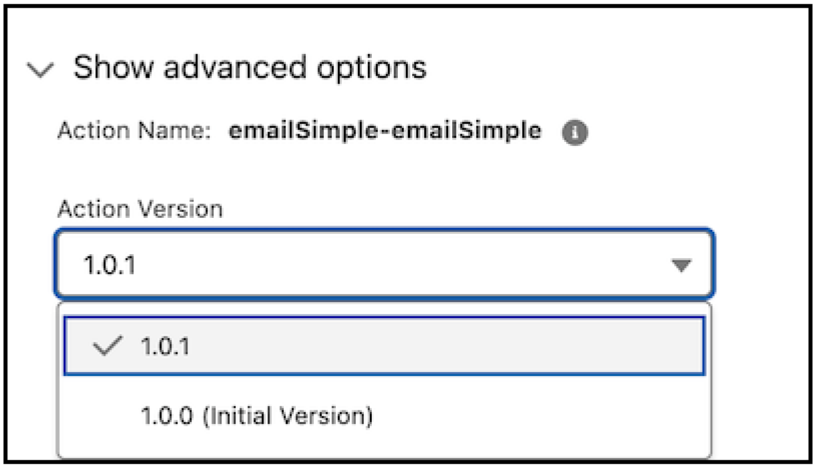
Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)

Manage Email Configuration by Switching Send Email Action Versions

To control the visibility and organization of email content configuration parameters, you can switch between Send Email Action versions. By selecting the latest action version, you can compose the email body directly or use a predefined email template, enhancing your email worflow's flexibility and efficiency.

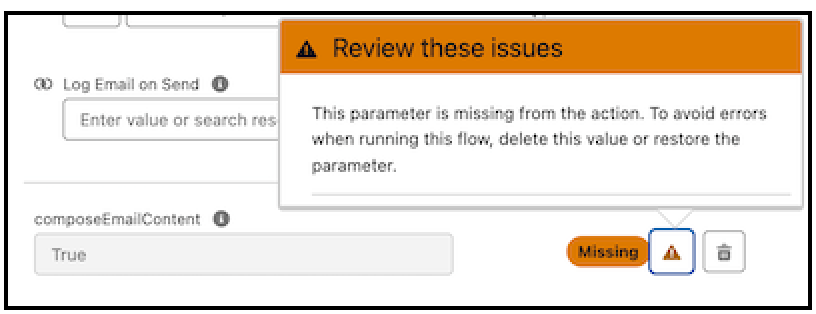
Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

How: Open or create a flow in Flow Builder. In the element menu, search for and select **Send Email**. To change the action version, select the required version from the Action Version dropdown.



For existing flows, the default version is 1.0.0. In this version, the Compose Email Content and Use Email Template options under Configure Email Content aren't available. Add values to the input parameters according to your requirements. To access the Compose Email Content and Use Email Template options, change the version to 1.0.1 from the Active Version dropdown.

For new flows, the default version is 1.0.1. Choose Compose Email Content or Use Email Template options under Configure Email Content. If required, you can revert to version 1.0.0 from the Active Version dropdown. To prevent errors related to the Compose Email Content or Use Email Template options, delete the value or restore the parameter.



See Also

Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)

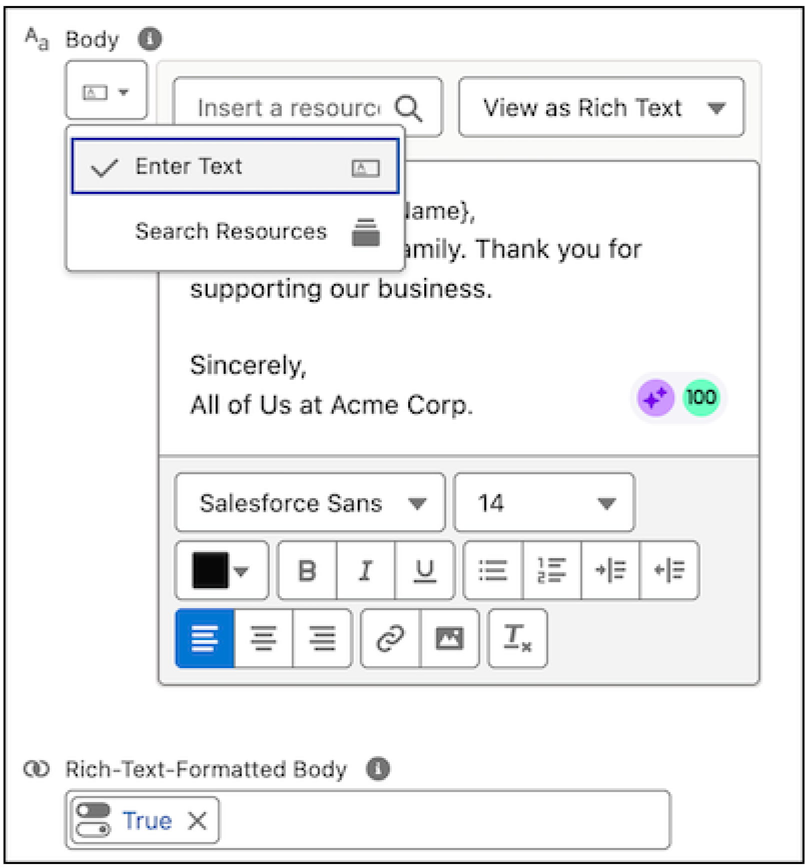
Compose Your Email Content or Select Templates Within the Send Email Action

Write and format your email content directly within the Send Email action, eliminating the need to create a separate text template resource. The body text can include merge fields and be formatted to match your company's brand. Alternatively, you can now select existing email templates by name instead of bringing the ID of the email template into the flow.

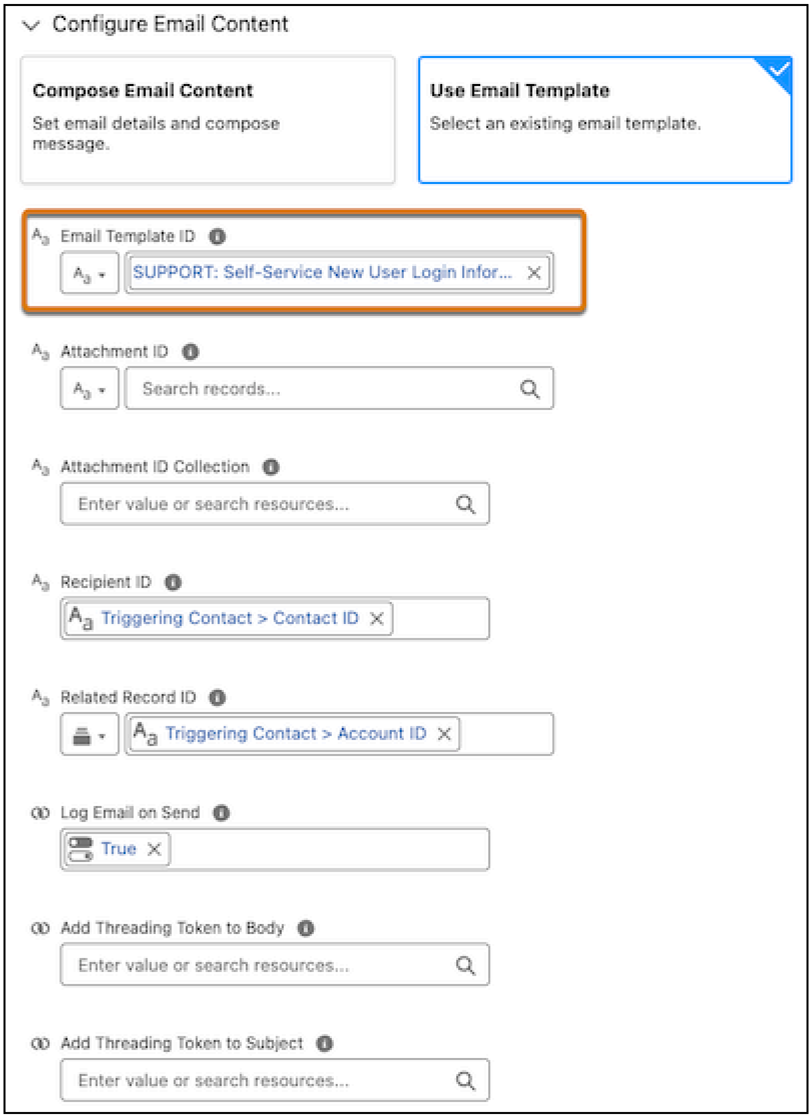
Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Essentials, Professional, Enterprise, Unlimited, and Developer editions.

How: Open or create a flow in Flow Builder. In the element menu, search for and select **Send Email**. To write your email content, go to Configure Email Content. By default, the Compose Email Content option is selected.

To enter the email content directly, from the Body dropdown, select **Enter Text**. Format your content by using the rich-text toolbar, which includes options like Bold and Italics. You can also insert upstream resources into the flow as merge fields. To view the text in rich or plain format in the Body, from the dropdown, select **View as Rich Text** or **View as Plain Text**. To display the email in rich text format, set Rich-Text-Formatted Body to **True**. If this option is not set to **True**, the email is displayed in plain text.



To use an existing email template, go to Configure Email Content and select **Use Email Template**. The input fields Subject, Body, Rich-Text-Formatted Body, and Use Line Breaks are hidden. Enter the template ID or search for your email template.



See Also

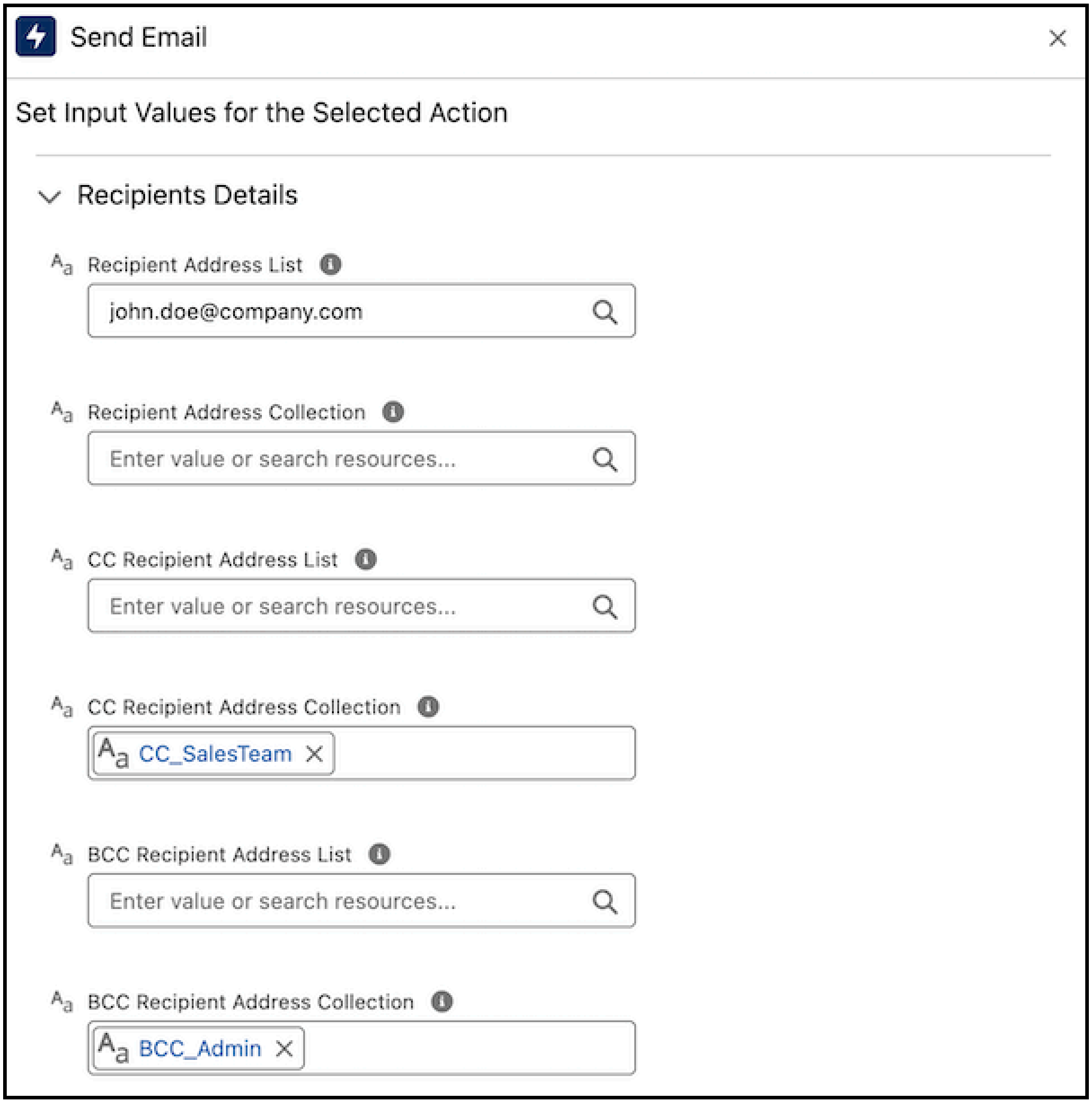
Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)

Add Collection Support for CC and BCC Recipients in Email Action

Enhance your Flow Builder email actions with the new CC and BCC Recipient Address Collection fields. With these fields, you can add multiple CC and BCC recipients directly within the Send Email action. This update simplifies the process of dynamically managing recipients by eliminating the need to manually enter each address. The maximum total number of recipient email addresses remains 150.

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

How: Open or create a flow in Flow Builder. In the element menu, search for and select **Send Email**. Create a collection variable of type Text for CC and BCC email addresses in your flow. Populate each collection variable with the email addresses. Then, reference them in the CC and BCC Recipient Address Collection fields within the Send Email action.



See Also

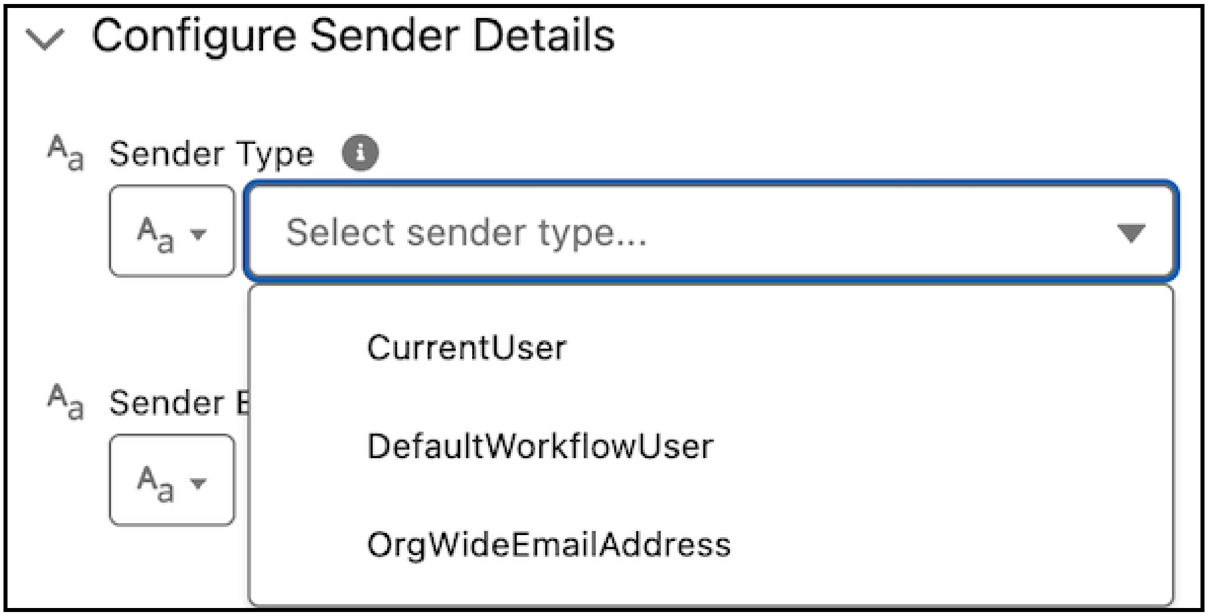
Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)

Configure Sender and Content Inputs Easier in the Send Email Action

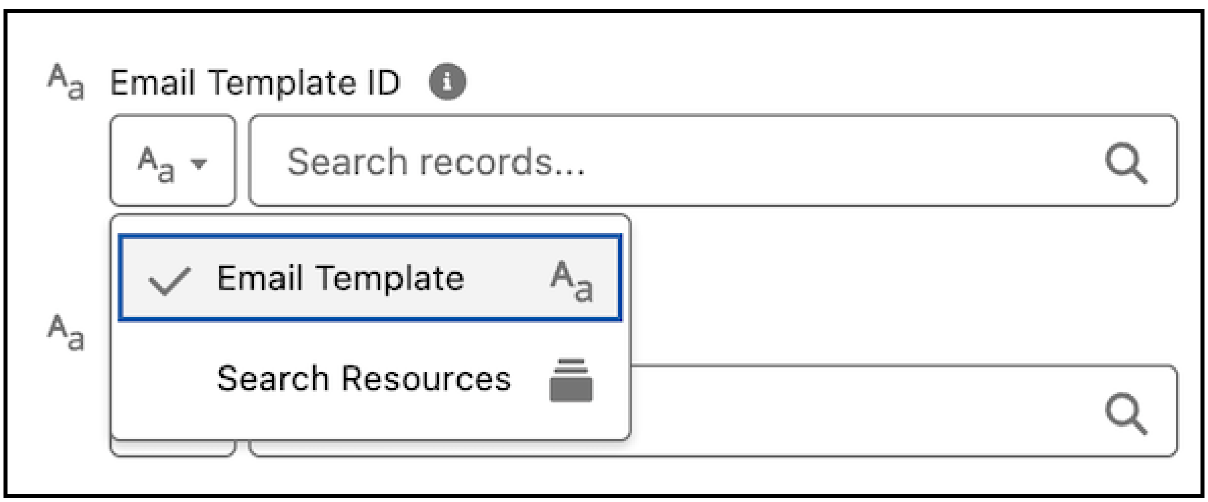
With the Send Email action, Flow Builder makes it easier to directly choose a sender type, enter a sender email address, select an email template, attach files, and choose a specific record. A more streamlined email configuration process reduces the need for searching, creating a text template resource, or using extra elements.

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

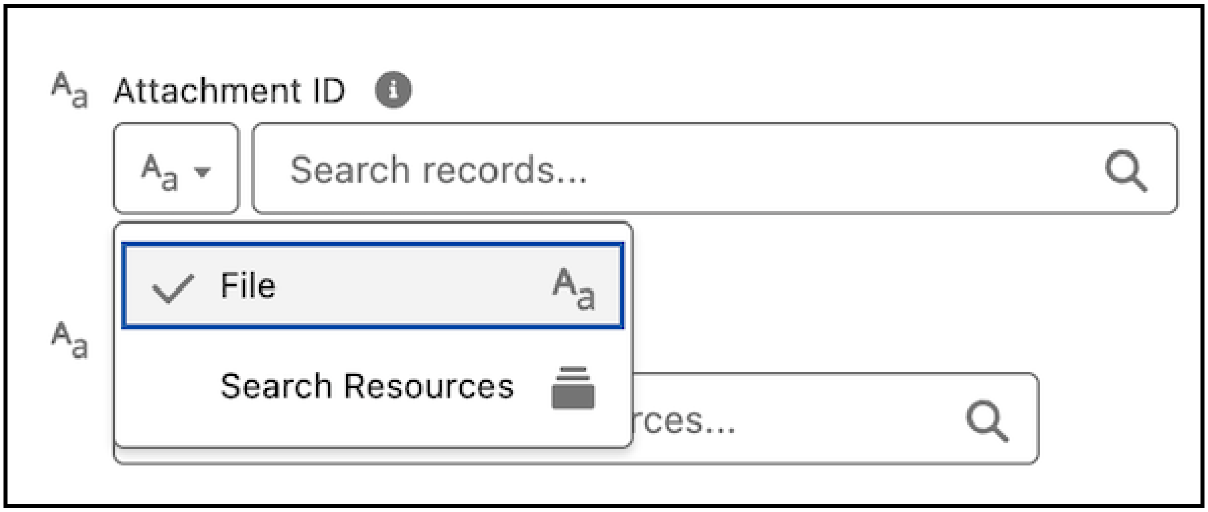
How: Open or create a flow in Flow Builder. In the element menu, search for and select **Send Email**. To configure the sender, select the desired Sender Type from the dropdown list, and then enter the sender's email address in the provided field.



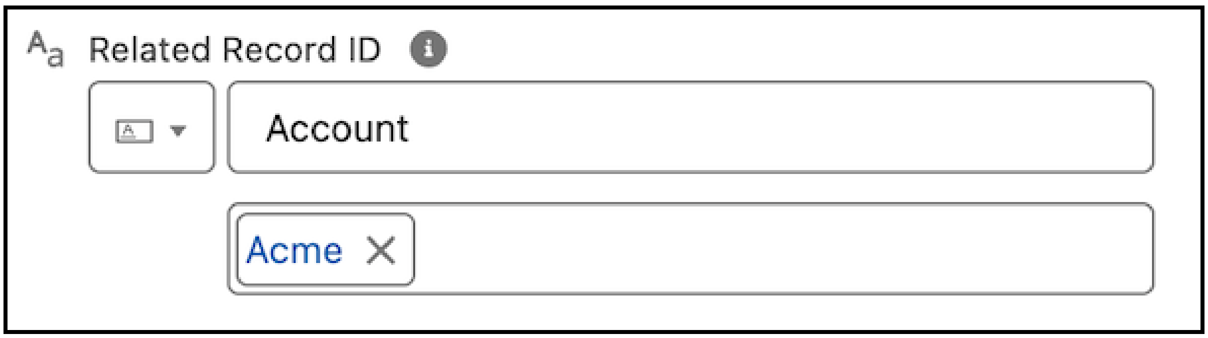
To use an email template, select the **Email Template** option under Email Template ID, and then select the template that you created from the list.



To attach files to your email, select the **File** option under Attachment ID. Search for and select the file that you uploaded. You can attach multiple files by selecting them one by one.



To select a non-recipient record, select the **Record** option under Related Record ID. Search for the desired object and choose a specific record.



See Also

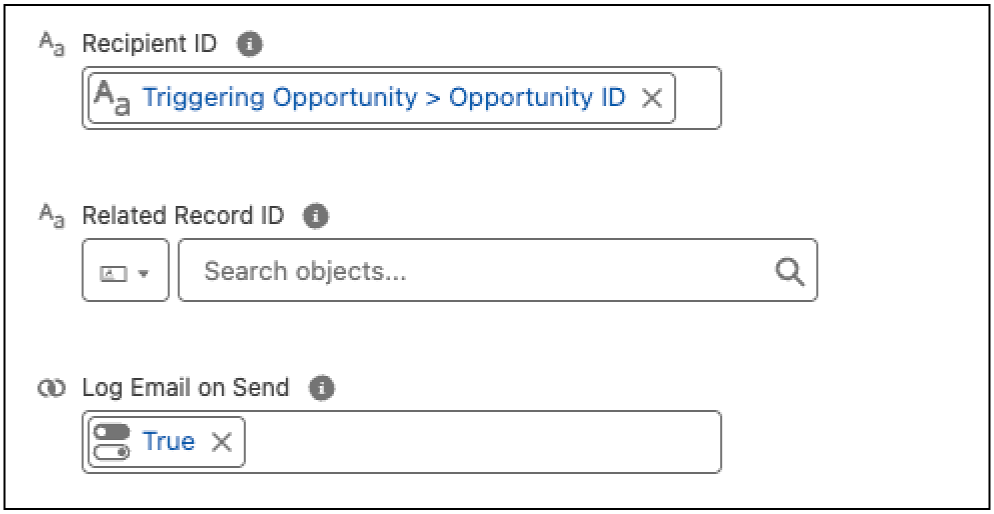
Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)

Make Sure That Emails Are Logged Only to Appropriate Records

Now you are asked if you want to log your email only if you specify a recipient or a related record ID. The Log Email on Send field is now hidden by default. Previously, the Log Email on Send field was always visible, but now it remains hidden until you enter the necessary recipient or related record ID. We hide the field by default to make sure that emails are logged only to the appropriate records.

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

How: Open or create a flow in Flow Builder. In the element menu, search for and select **Send Email**. To display Log Email on Send, enter a value in the Recipient ID or Related Record ID fields. To log your email, set Log Email on Send to **True**.



See Also

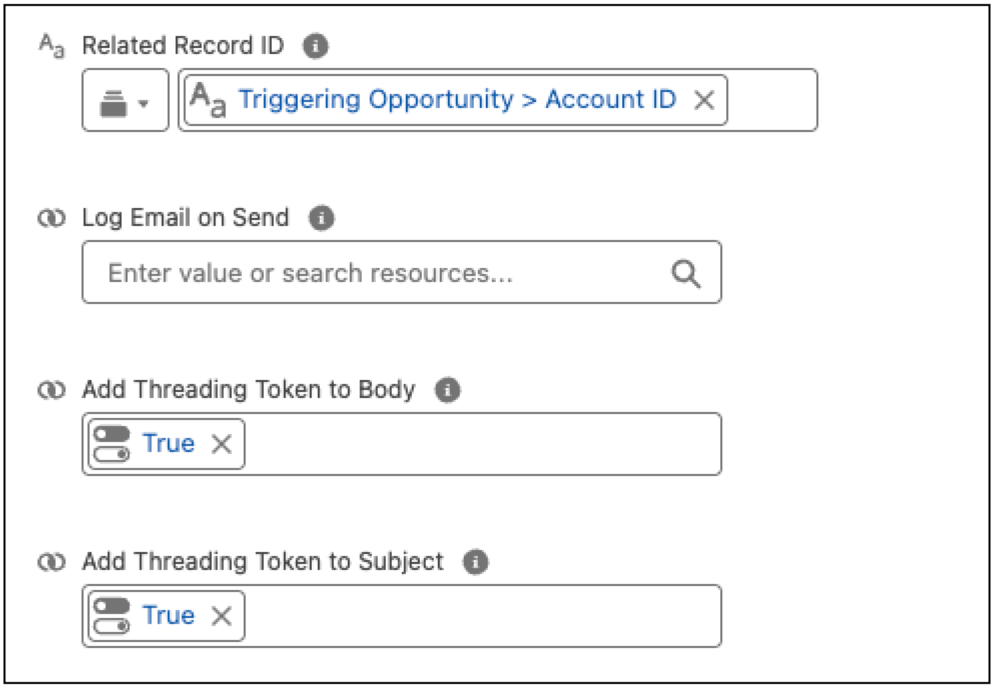
Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)

Make Sure That Threading Tokens Are Added Only to Emails Linked to Appropriate Records

Now you are asked if you want to add threading tokens to Body and Subject only if you also provide a related record ID. Salesforce requires the related record ID to make sure that threading tokens are added only to emails that are linked to the appropriate records. Previously, the fields Add Threading Token to Body and Add Threading Token to Subject were always visible, but now they're hidden until you enter the related record ID.

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

How: Open or create a flow in Flow Builder. In the element menu, search for and select **Send Email**. To display the Add Threading Tokens to Body and Add Threading Tokens to Subject fields, specify the **Related Record ID**. To add a unique token to the email body and subject, set these fields to **True**.



See Also

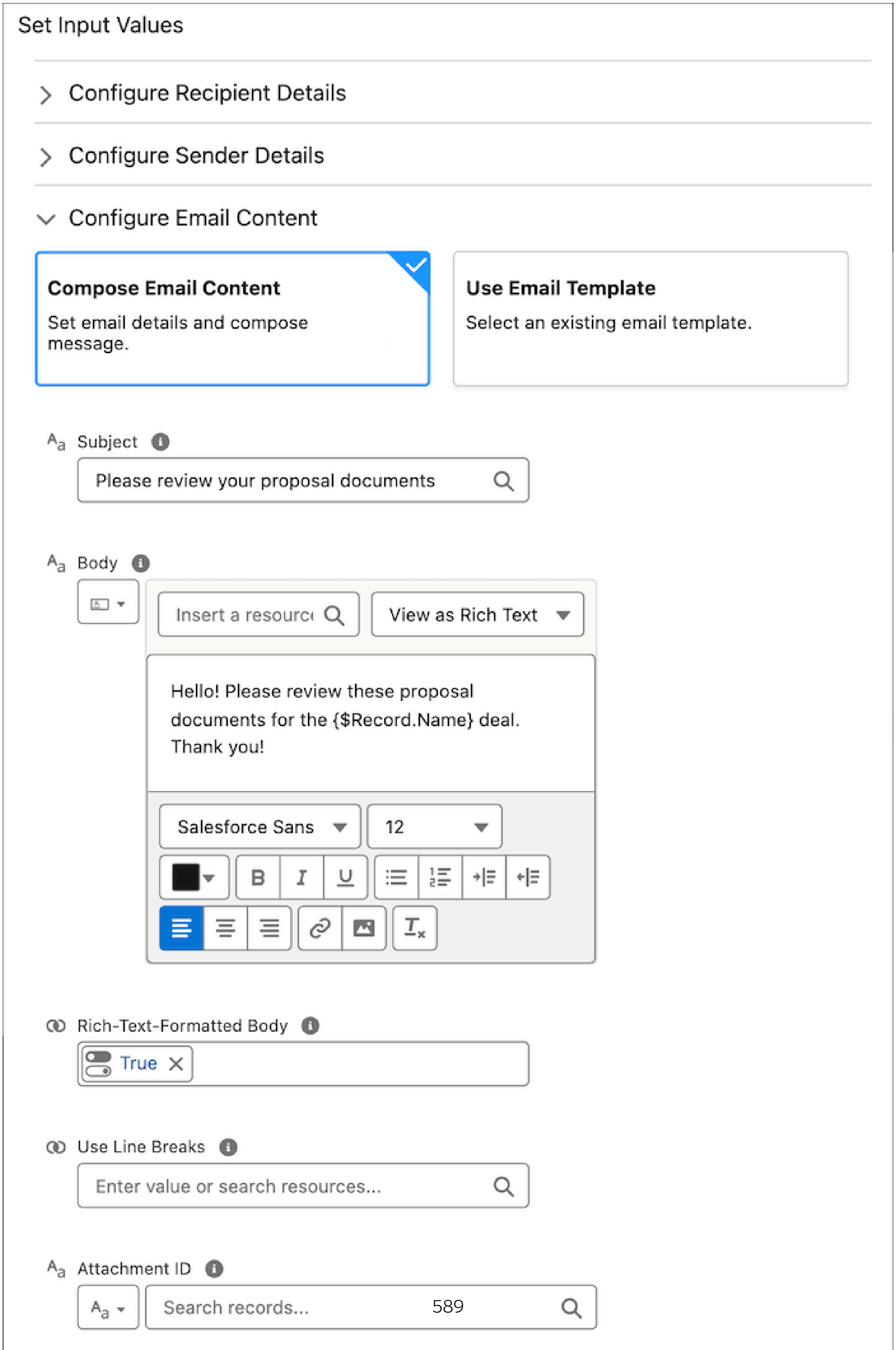
Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)

Attach Files to Emails in Flow Builder Without Extra Processing

Attaching files to emails in Flow Builder is easier now that you can provide a text collection variable in the Attachment ID Collection field in the Send Email action. Converting text collection variables to single-value text variables is no longer necessary.

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

How: To send an email with attachments, open the flow in Flow Builder. In the Add Element menu, find and select **Send Email**. Under Configure Email Content, in the Attachment ID Collection field, select a text collection variable that holds the list of attachment IDs.


Set Input Values
Configure Recipient Details
Configure Sender Details
Configure Email Content
Compose Email Content
Set email details and compose message.
Use Email Template
Select an existing email template.
Subject
Please review your proposal documents
Body
Insert a resource
View as Rich Text
Hello! Please review these proposal documents for the {$Record.Name} deal.
Thank you!
Salesforce Sans
12
Rich-Text-Formatted Body
True
Use Line Breaks
Enter value or search resources...
Attachment ID
Search records...

See Also

Salesforce Help: Flow Core Action: Send Email (can be outdated or unavailable during release preview)
Salesforce Help: Flow Example: Send an Email with Attachments from a Record-Triggered Flow (can be outdated or unavailable during release preview)

Flow Testing and Debugging

We made a number of big improvements to the debug experience with the aim of making debug more intuitive and powerful. Quickly skim through debug results with element-level summaries. Debug data-graph triggered flows. Configure the triggering data model object for event-triggered flows. Send test emails and SMS messages in debug. Streamline the debug process with enhancements like element cards, debug search, and JSON formatting.

Debug Flows at a Glance with the Element-Level Summaries
The debugging experience for flows now includes element-level summaries to help you understand more quickly what happened at each point in a flow. For example, for an Update Records element, the Debug Details pane shows at a glance how many elements were updated after the element was executed. Previously, element-level summaries were available only when debugging marketing flows.

Debug Data Graph-Triggered Flows
Debug support is now available for data graph-triggered flows.

Configure the Triggering DMO Record for Event-Triggered Flows
When debugging an event-triggered flow, you can select a specific triggering data model object (DMO) record to debug with, or manually enter values that you want to test.

Test Email and SMS Sends with Test Messages
If your flow includes a send email or send SMS action, you can send a test message as part of your debug run. When setting up your debug run, specify the email addresses or phone numbers that you want to use to test your message. When you start the debug run, we'll attempt to send the message to the specified recipients.

User Experience Improvements for Debug
We made some improvements to the debug experience to make your debug results easier to navigate and understand. In the debug panel, each element run appears in a separate card, with easily skimmable information. Element cards load dynamically as you scroll for improved performance. To optimize your view of the debug results, you can now resize the width of the debug panel to see more of the debug results, or more of the Flow Builder canvas. The debug panel also now includes search functionality, so that you can quickly find and highlight what you're looking for. For the Create Records, Get Records, Update Records, Delete Records, Collection Filter, and Collection Sort elements, complex data types are now rendered in a code block using JSON formatting with syntax highlighting, making the information easier to digest. You can also copy the entire debug log with a click.

See Also

Test Flows Faster with Integrated Tests

Debug Flows at a Glance with the Element-Level Summaries

The debugging experience for flows now includes element-level summaries to help you understand more quickly what happened at each point in a flow. For example, for an Update Records element, the Debug Details pane shows at a glance how many elements were updated after the element was executed. Previously, element-level summaries were available only when debugging marketing flows.

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

Debug Data Graph-Triggered Flows

Debug support is now available for data graph-triggered flows.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition or Advanced Edition.

How: Open an automation-triggered flow that's triggered by a data graph event and click **Debug**. In the Specify Debug Record section, select an existing data model object (DMO) record, or manually enter record field values. You can also specify which record fields to update as part of the flow.

See Also

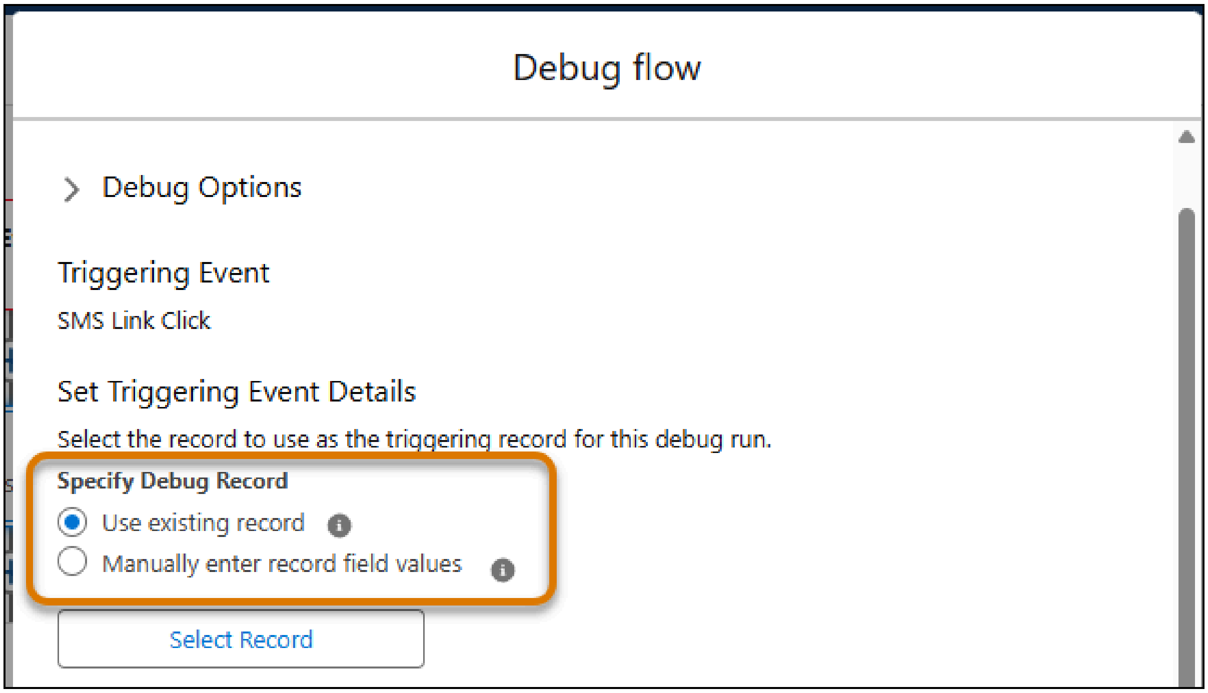
Flow Marketing Cloud Updates

Configure the Triggering DMO Record for Event-Triggered Flows

When debugging an event-triggered flow, you can select a specific triggering data model object (DMO) record to debug with, or manually enter values that you want to test.

Where: This feature is available in Lightning Experience for Marketing Cloud Growth Edition.

How: In the Debug Flow window, in the Specify Debug Record section, you can select to use an existing record or to manually enter record field values.



See Also

[Flow Marketing Cloud Updates]

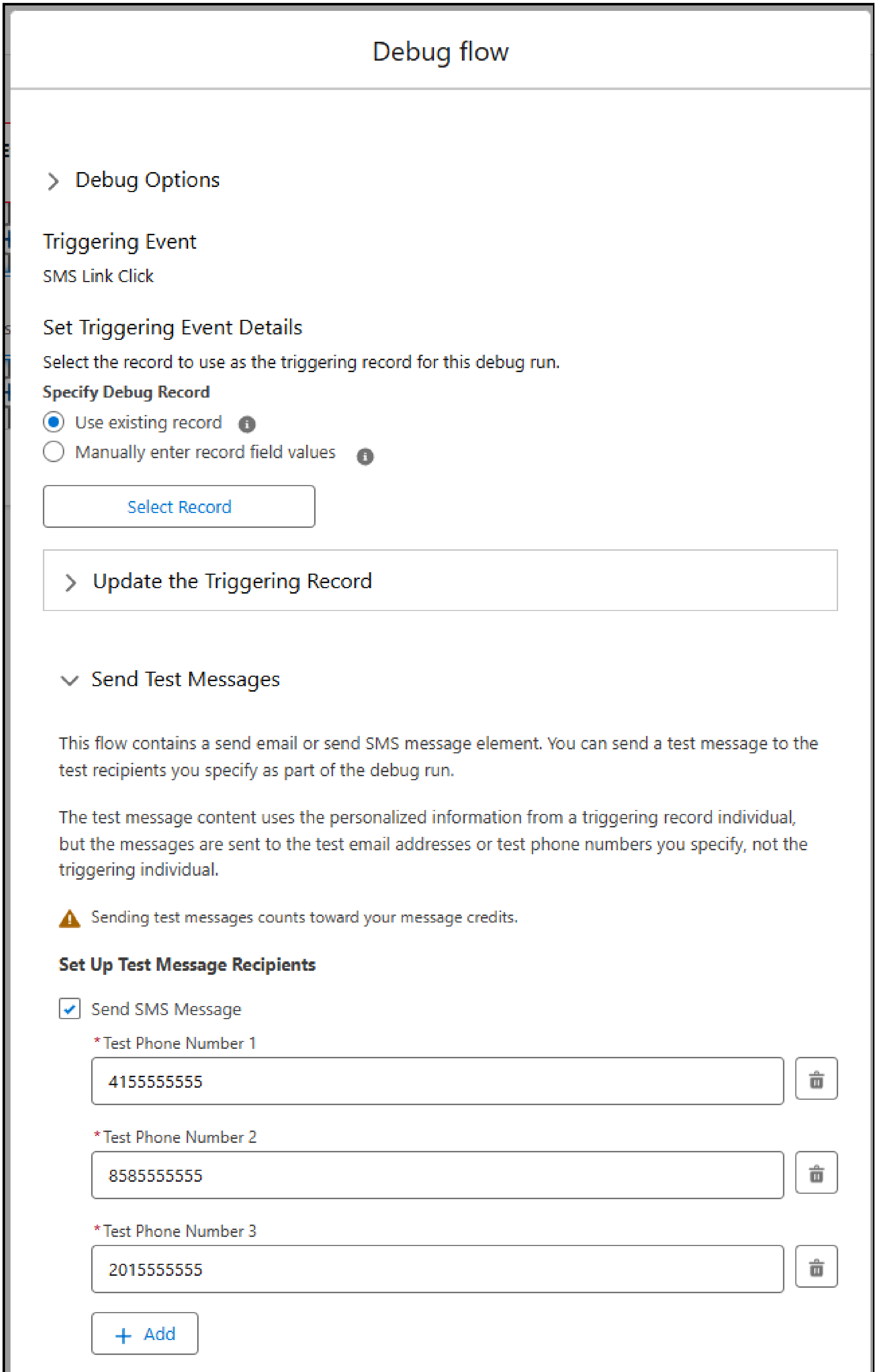
Test Email and SMS Sends with Test Messages

If your flow includes a send email or send SMS action, you can send a test message as part of your debug run. When setting up your debug run, specify the email addresses or phone numbers that you want to use to test your message. When you start the debug run, we'll attempt to send the message to the specified recipients.

Where: This feature is available in Lightning Experience for flows in Marketing Cloud Growth Edition.

How: In the Debug Flow window, in the Send Test Messages section, select the message types that you want to test. After selecting a message type, you can enter the test recipient's contact information. When you start a debug run, the message is sent to the test recipients, and details about the send appear in the debug summary panel.

Note Sending test messages counts toward your message credits.


Debug flow
Debug Options
Triggering Event
SMS Link Click
Set Triggering Event Details
Select the record to use as the triggering record for this debug run.
Specify Debug Record
Use existing record
Manually enter record field values
Select Record
Update the Triggering Record
Send Test Messages
This flow contains a send email or send SMS message element. You can send a test message to the test recipients you specify as part of the debug run.
The test message content uses the personalized information from a triggering record individual, but the messages are sent to the test email addresses or test phone numbers you specify, not the triggering individual.
Sending test messages counts toward your message credits.
Set Up Test Message Recipients
Send SMS Message
*Test Phone Number 1
4155555555
*Test Phone Number 2
8585555555
*Test Phone Number 3
2015555555
Add

See Also

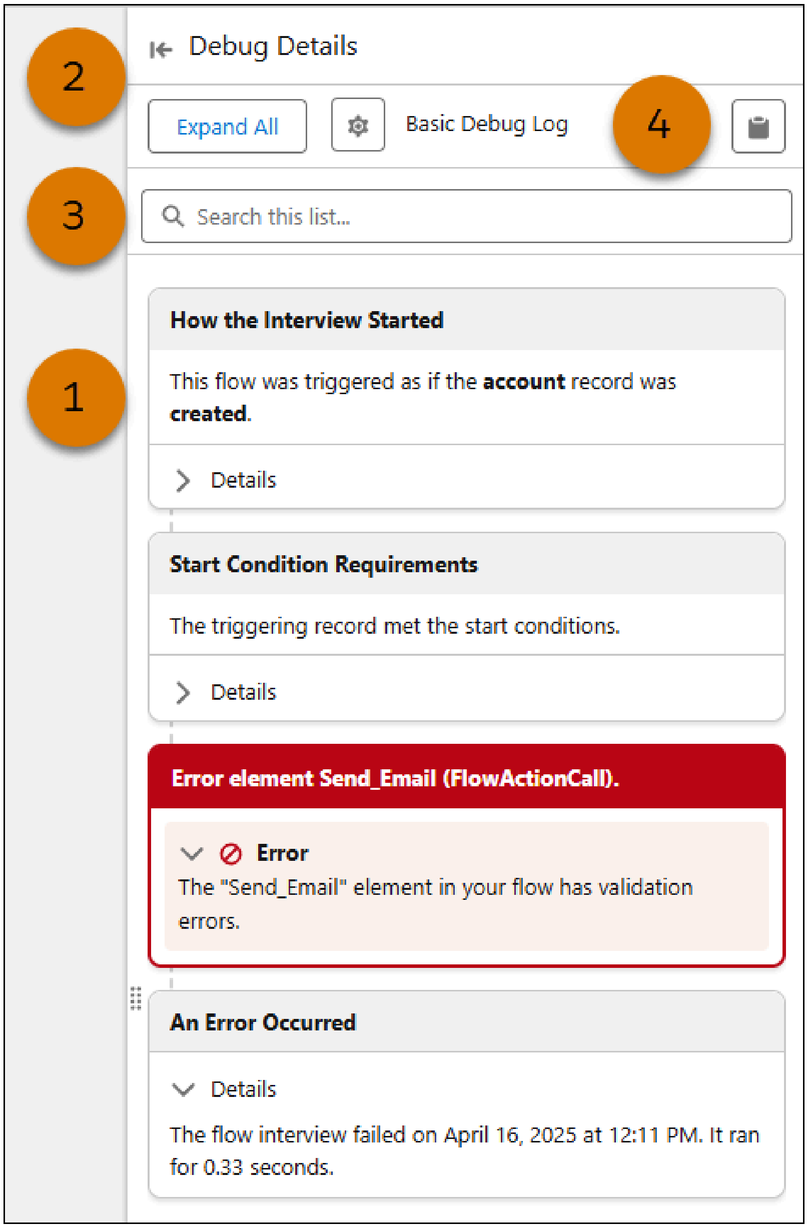
Flow Marketing Cloud Updates

User Experience Improvements for Debug

We made some improvements to the debug experience to make your debug results easier to navigate and understand. In the debug panel, each element run appears in a separate card, with easily skimmable information. Element cards load dynamically as you scroll for improved performance. To optimize your view of the debug results, you can now resize the width of the debug panel to see more of the debug results, or more of the Flow Builder canvas. The debug panel also now includes search functionality, so that you can quickly find and highlight what you're looking for. For the Create Records, Get Records, Update Records, Delete Records, Collection Filter, and Collection Sort elements, complex data types are now rendered in a code block using JSON formatting with syntax highlighting, making the information easier to digest. You can also copy the entire debug log with a click.

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

How: When you view your debug results, the run is organized into cards (1) that highlight all of the most important information about the run. To resize the debug panel, drag the edge of the panel to your desired width, or click and (2). To search the debug run results, enter a search term in the search box (3). To copy the debug log onto your clipboard, click (4).



Watch this video for an overview of the new debug experience.

Watch the video: https://play.vidyard.com/sJsUqRt1jsDJ3zB2FyYdew

View this video in a separate tab.

Flow Runtime

Versioned updates are available for flows that are configured to run on API version 64.0.

Flow and Process Run-Time Changes
Get new flow updates with these versioned changes.

Flow and Process Run-Time Changes

Get new flow updates with these versioned changes.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. These updates affect flows only if they're configured to run on API version 64.0 or later.

How: With versioned updates you can test and adopt run-time behavior changes for individual flows and processes at your convenience. To change the run-time API version of a flow, open it in Flow Builder and edit the flow version properties. To change the run-time API version of a process, open it in Process Builder and edit its properties.

Manage Time-Specific Data with the Time Data Type

You can now use the time data type in flows that process data where only the time of day matters and not the associated date. Flows created with API version 63.0 or earlier that use custom fields of time data type still work as they did before. However, if you edit these flows, save them as a new version with API version 64.0. Saving the flow as a new version makes sure that the updated flow can use the time data type for custom time fields. See Manage Time-Specific Data Easily with the Time Data Type

Use the Is Null Operator with Boolean Screen Components in Conditional Visibility Expressions

Now you can use the Is Null operator when referencing Checkbox and Toggle screen components in a conditional visibility expression. Previously, expressions with the Is Null operator didn't identify when Boolean screen components were null. See Conditionally Show Screen Components.

Flow Management

Use integrated tests to speed up your flow testing process. Log flow executions directly to Data Cloud.

Test Flows Faster with Integrated Tests

Integrate flow tests into your regression testing, unit testing, and continuous integration and continuous delivery (CI/CD) process. Use Salesforce CLI to run flow tests seamlessly in more channels, enhancing your testing capabilities. For example, before rolling out changes to your org, you can add flow tests in your CI/CD process to make sure that the changes don't break existing flows or Apex code. Previously, you ran a set of tests manually for each flow in Flow Builder, which was time-consuming and prone to oversight.

Log More Flow Data to Data Cloud

You can now log flow executions directly to Data Cloud, ensuring reliable and scalable data management. Previously, logging to Data Cloud was available for schedule-triggered flows in some Marketing Cloud editions. Now, you can install and set up logging to Data Cloud without Marketing Cloud for schedule-triggered flows and autolaunched flows that have no triggers.

Test Flows Faster with Integrated Tests

Integrate flow tests into your regression testing, unit testing, and continuous integration and continuous delivery (CI/CD) process. Use Salesforce CLI to run flow tests seamlessly in more channels, enhancing your testing capabilities. For example, before rolling out changes to your org, you can add flow tests in your CI/CD process to make sure that the changes don't break existing flows or Apex code. Previously, you ran a set of tests manually for each flow in Flow Builder, which was time-consuming and prone to oversight.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Pro Suite, Professional, Enterprise, Performance, Unlimited, Developer, and all Einstein 1 editions.

How: In Flow Builder, create a flow test in a record-triggered flow. In the Salesforce CLI flow plugin or Salesforce CLI version 2.86.x and later, such as 2.86.6, use this Salesforce CLI command to run all flow tests. You can incorporate this command in existing scripts in your CI/CD system.

```
sf flow run test
```

Review the test results.

```
=== Test Results
TEST NAME               OUTCOME  MESSAGE  RUNTIME (MS)
──────────────────────  ───────  ───────  ────────────
FlowName_1.testName2    Pass              55
FlowName_1.testName1    Pass              86
FlowName_1.testName3    Fail
=== Test Summary
NAME                   VALUE
─────────────────────  ─────────────────────────────
Outcome                Failed
Tests Ran              3
Pass Rate              67%
Fail Rate              33%
Skip Rate              0%
Test Run Id
Test Setup Time        0 ms
Test Execution Time    1036 ms
Test Total Time        1036 ms
Org Id                 000D0x0x000000000000000
Username               test-6qpkro7dsmdz@example.com
```

For more details, use this Salesforce CLI command.

```
sf flow run test --help
```

See Also

Salesforce CLI Setup Guide: Before You Begin

Salesforce Help: Testing Your Flow

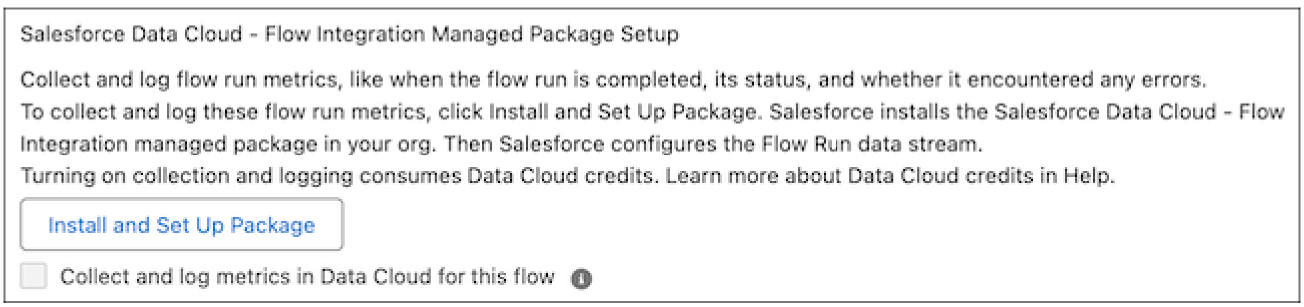
Flow Testing and Debugging

Log More Flow Data to Data Cloud

You can now log flow executions directly to Data Cloud, ensuring reliable and scalable data management. Previously, logging to Data Cloud was available for schedule-triggered flows in some Marketing Cloud editions. Now, you can install and set up logging to Data Cloud without Marketing Cloud for schedule-triggered flows and autolaunched flows that have no triggers.

Where: This change applies to Lightning Experience and Salesforce Classic in Essentials, Pro Suite, Professional, Enterprise, Performance, Unlimited, Developer, and all Einstein 1 editions.

How: Open your flow. Click , and then click **Show Advanced**. Click **Install and Set Up Package**. After installation and setup, select **Collect and log metrics in Data Cloud for this flow**.



To view the flow data, click , and then select **Data Explorer**. View the Flow Run Data Cloud data model object (DMO).

See Also

Salesforce Help: Log Flow Data to Data Cloud (can be outdated or unavailable during release preview)

Flow Configuration Enhancements

View output resources in the Flow Builder configuration panel. Add a flexible way to specify input values with multiple input controls. Specify how inputs and outputs are presented using extended metadata annotations for invocable actions.

Debug Flows More Easily by Viewing Output Resources in Flow Builder

The configuration panel in Flow Builder has a new View Output Resources section that displays output parameters and resources, such as output names and labels, data types, and descriptions. Use this section to help you debug flows and make sure that they're using the correct outputs, leading to more accurate and user-friendly flow designs. You can also sort output parameters and manually assign variables if needed.

Enhance Flow Builder with Alternative Input Modes
Flow Builder now supports multiple input controls, providing a flexible and user-friendly way to specify input values with ongoing enhancements to support more input types. You can switch between different input modes, this includes the resource pick you're familiar with and new modes that you can select from a picklist.

Add Extended Metadata Annotations for Invocable Actions (Developer Preview)
Use the *InvocableActionExt* (Developer Preview) metadata type to specify how to present inputs and outputs, such as setting the order of inputs or providing descriptions and labels. With this change, action developers can add extended attributes for Apex actions and types, enhancing the user experience in low-code tools like Flow Builder. This change also improves the overall development experience by making it easier to configure complex actions.

Debug Flows More Easily by Viewing Output Resources in Flow Builder

The configuration panel in Flow Builder has a new View Output Resources section that displays output parameters and resources, such as output names and labels, data types, and descriptions. Use this section to help you debug flows and make sure that they're using the correct outputs, leading to more accurate and user-friendly flow designs. You can also sort output parameters and manually assign variables if needed.

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

How: Go to Flow Builder and open the configuration panel.

Enhance Flow Builder with Alternative Input Modes

Flow Builder now supports multiple input controls, providing a flexible and user-friendly way to specify input values with ongoing enhancements to support more input types. You can switch between different input modes, this includes the resource pick you're familiar with and new modes that you can select from a picklist.

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

How: If an input has multiple modes available, a menu to the left of the input allows you to switch to your preferred mode. Easily switch between different input modes by using the mode selection UI and access type-optimized pickers for specific data types. If a specific configurator isn't available, the component input displays the default text box.

Add Extended Metadata Annotations for Invocable Actions (Developer Preview)

Use the *InvocableActionExt* (Developer Preview) metadata type to specify how to present inputs and outputs, such as setting the order of inputs or providing descriptions and labels. With this change, action developers can add extended attributes for Apex actions and types, enhancing the user experience in low-code tools like Flow Builder. This change also improves the overall development experience by making it easier to configure complex actions.

To learn more about the *InvocableActionExt* (Developer Preview) metadata type, see the Apex release notes.

Flow Release Updates

Salesforce Flow has several release updates that are scheduled to be enforced in future releases.

Enforcing No-Argument Constructor on Apex Classes Used for Invocable Action Parameters (Release Update)
In order to allow access to certain standard classes that are available to be used as invocable action parameters, we're enforcing a change for built-in Apex actions that also enforces the visibility of the no-argument constructor on any class. This release update was first available in Summer ’24 and was scheduled to be enforced in Spring ’25, but we postponed the enforcement date to Winter ’26. This release update was previously named Enforce Permission Requirements Defined on Built-In Apex Classes Used as Inputs (Release Update).

Restrict User Access to Run Flows (Release Update)
This update was first made available in Winter ’24 and was scheduled to be enforced in Winter ’25, but we postponed the enforcement to Winter ’26. With this update enabled, Salesforce restricts a user’s ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites org permission, which gave all users in the org access to run any flow. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows. Salesforce postponed the enforcement to allow additional time for admins to test and prepare for the change. There is no impact to admins who already enabled the update. We appreciate your adoption of this change.

Enforcing No-Argument Constructor on Apex Classes Used for Invocable Action Parameters (Release Update)

In order to allow access to certain standard classes that are available to be used as invocable action parameters, we're enforcing a change for built-in Apex actions that also enforces the visibility of the no-argument constructor on any class. This release update was first available in Summer ’24 and was scheduled to be enforced in Spring ’25, but we postponed the enforcement date to Winter ’26. This release update was previously named Enforce Permission Requirements Defined on Built-In Apex Classes Used as Inputs (Release Update).

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

When: Salesforce enforces this update in Winter ’26. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

How: When you enable this update, built-in Apex classes that were unavailable become available for

Apex actions. Because of this change, the visibility of the no-argument constuctor for the `invocableVariable` Apex class is also enforced. Public no-argument constuctors in managed packages are no longer visible unless the access code is in the same package. An Apex action that refers to a non-visible no-argument constuctor `invocableVariable` Apex class results in errors.

From Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. To get the Enforcing No-Argument Constructor on Apex Classes Used for Invocable Action Parameters release update, follow the testing and activation steps.

See Also

Release Updates

Restrict User Access to Run Flows (Release Update)

This update was first made available in Winter ’24 and was scheduled to be enforced in Winter ’25, but we postponed the enforcement to Winter ’26. With this update enabled, Salesforce restricts a user’s ability to run a flow. A user must be granted the correct profile or permission set to run the flow. When enabled, this release update deprecates the FlowSites org permission, which gave all users in the org access to run any flow. With this update, flows run more securely because only users who are granted correct profiles or permission sets can run flows. Salesforce postponed the enforcement to allow additional time for admins to test and prepare for the change. There is no impact to admins who already enabled the update. We appreciate your adoption of this change.

Where: This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

When: Salesforce enforces this update in Winter ’26. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab. See the knowledge article for frequently asked questions.

Why: Previously, in some cases, all users could run all flows without profiles or permission sets. Enabling this update restricts user access to users who are granted the profile or permission set to run the flow.

How: To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Restrict User Access to Run Flows, follow the testing and activation steps.

After you enable Restrict User Access to Run Flows, all users must be granted access to run a flow. Add the Run Flows permission to a permission set. For more granular access control, restrict specific flow access to an available permission set. We recommend that you disable the Flow User preference in Setup for each user. If the Flow User preference is enabled in a user’s details in Setup, the user can run all flows. To create, update, and delete a flow, add the Manage Flow permission. See the knowledge article for frequently asked questions.

See Also

Release Updates

Flow Approval Processes

Run an autolaunched flow approval process from a flow. Add a path to run actions if someone recalls an approval submission. Delegates now have access to run approval work items in the Work Guide that's been added to a record page.

Create a Flow Approval Process from the Approvals App

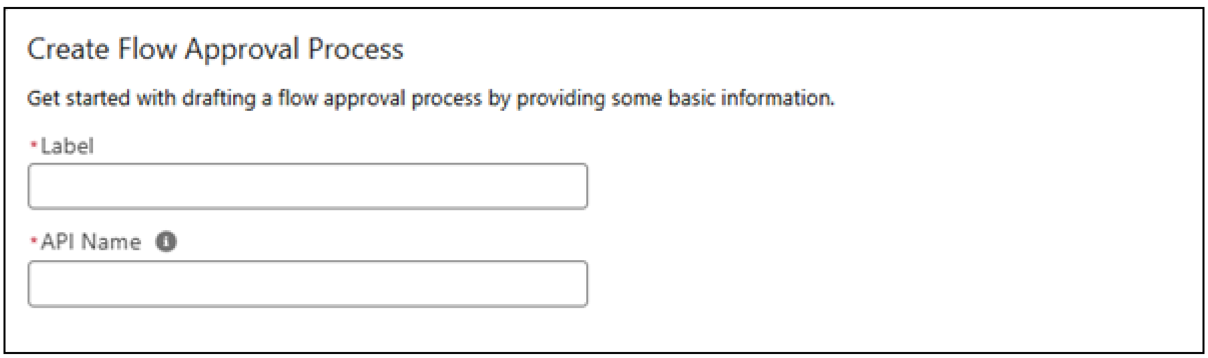
Create an autolaunched flow approval process from within the Approvals app. The wizard makes it easy to set up a draft process with up to 3 levels of approvals, final actions, and a recall path. For more flexibility, you also have the option to build an autolaunched flow approval process from scratch by using Flow Builder.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, all Einstein 1, and Developer editions.

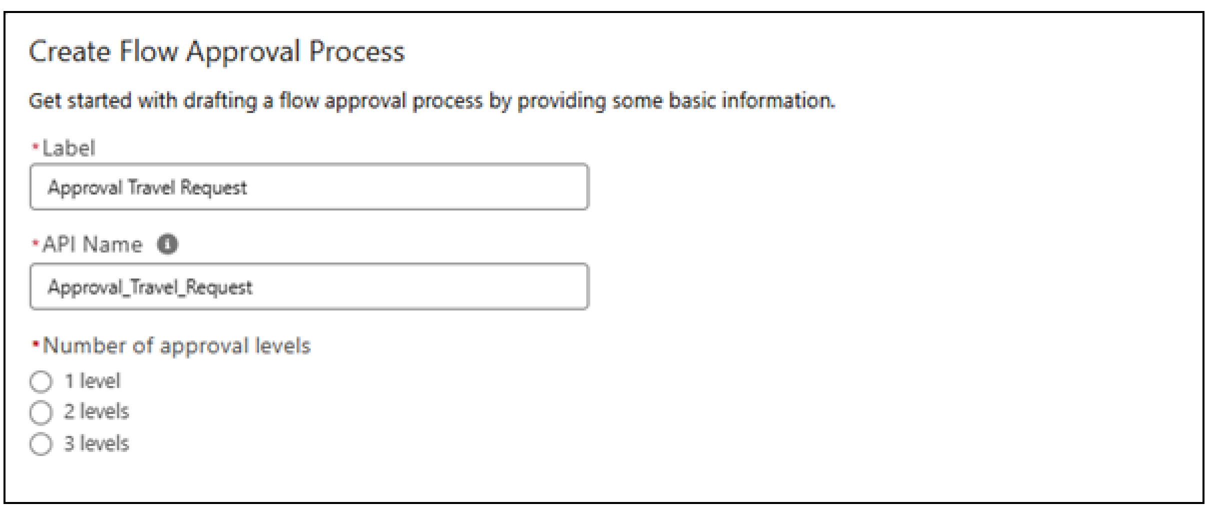
Who: Only users with the Manage Flow permission can create an autolaunched flow approval process from within the Approvals app.

How: In the Approvals app, click **Create Flow Approval Process**, and then select **Use a Wizard**.

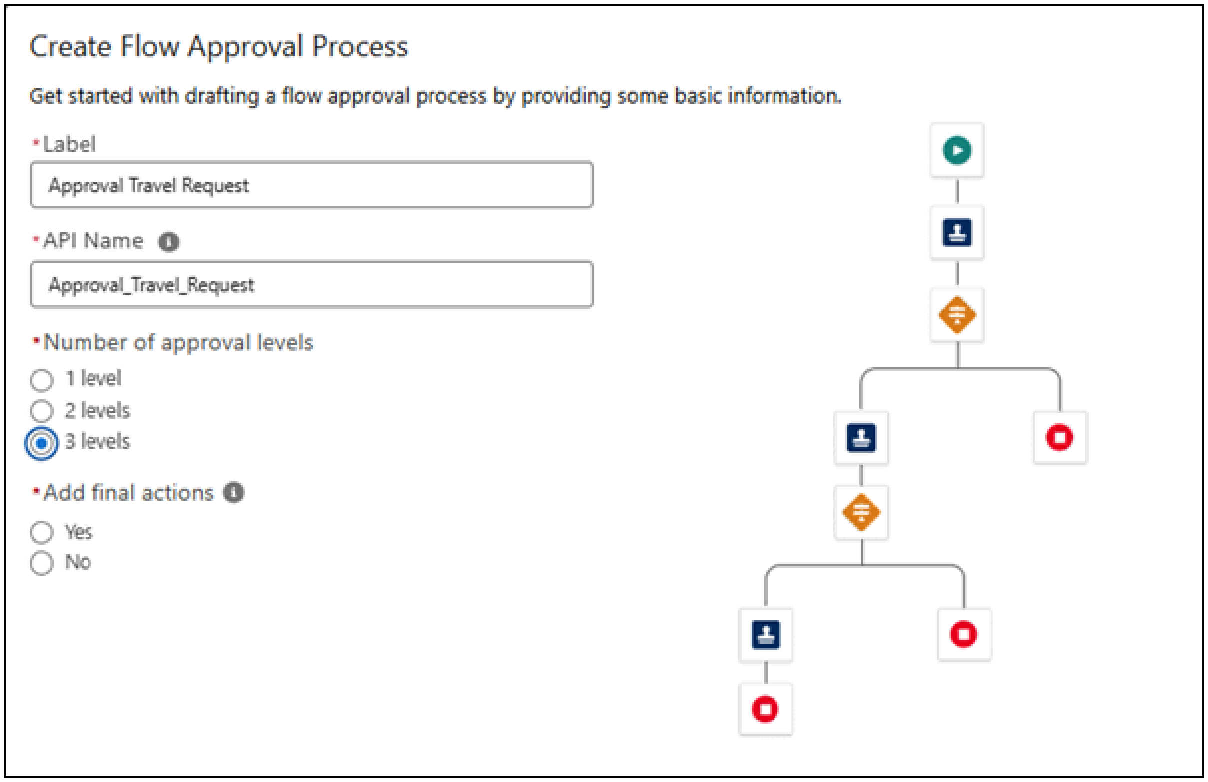
The Create Flow Approval Process window opens.



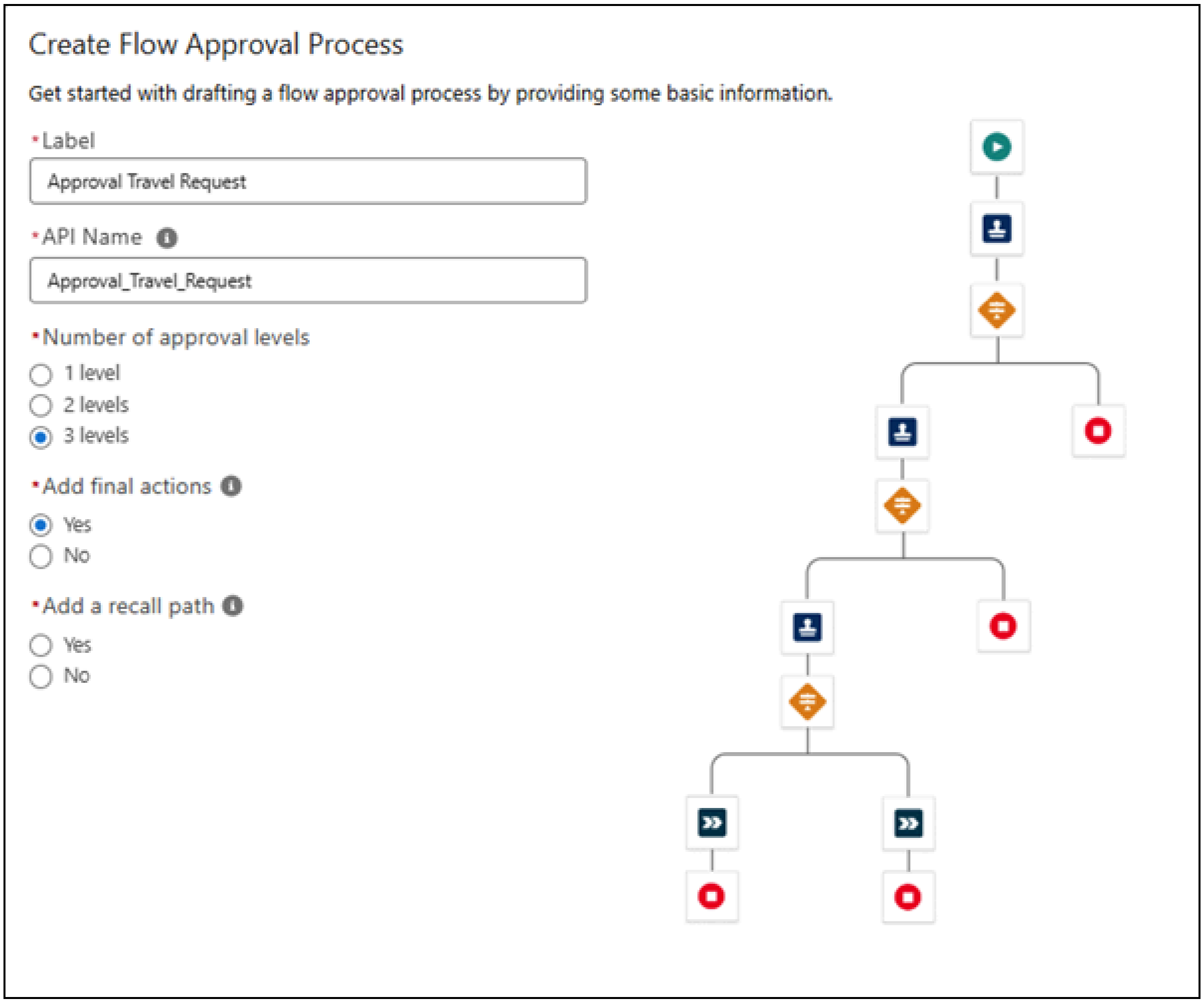
Enter a label and API name for the flow approval process.



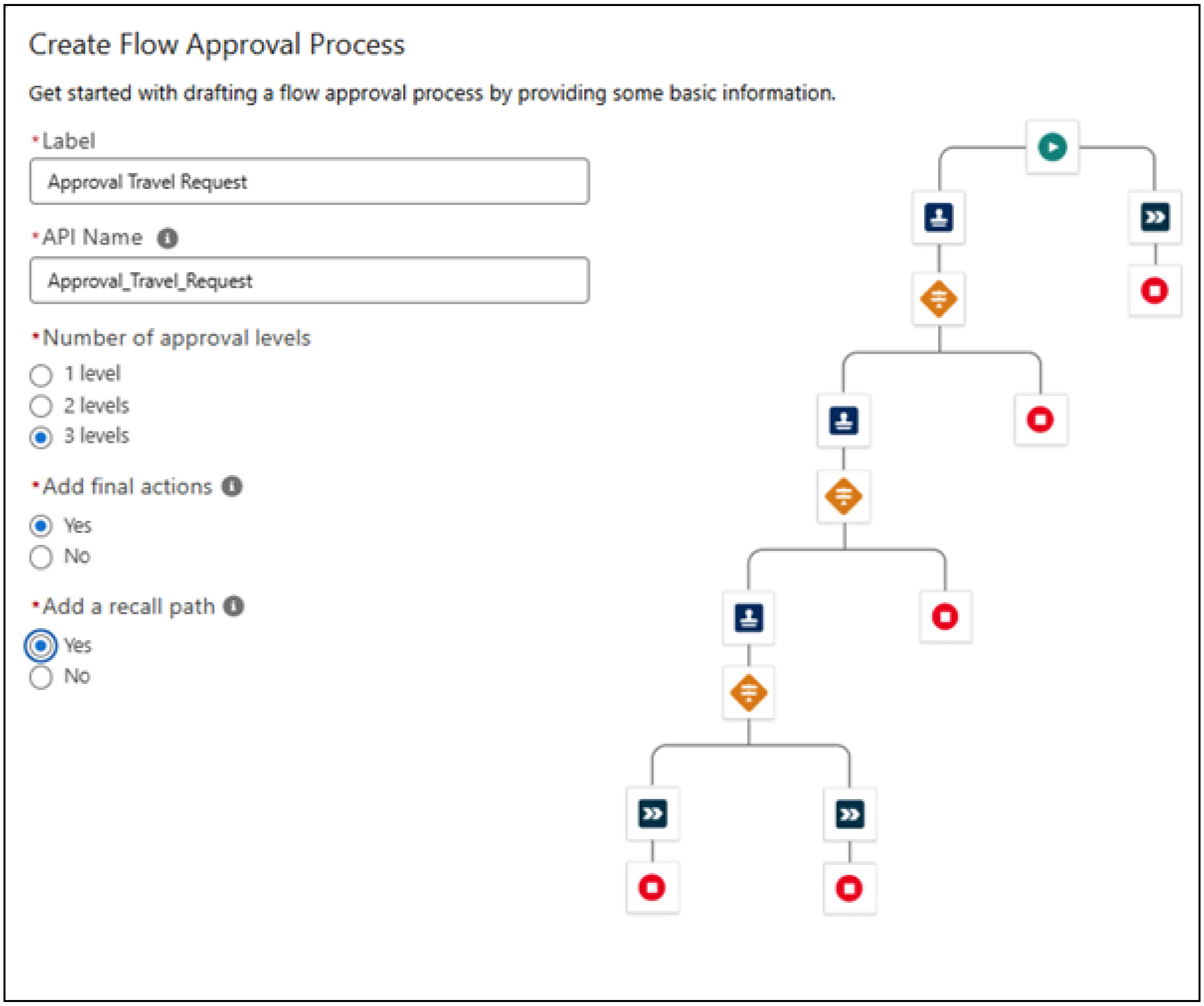
Select the number of approval levels for your flow approval process.



To add final actions to your flow approval process that run after an approval submission has been approved or rejected, select **Yes**. To skip adding final actions, select **No**.



To add a recall path to your flow approval process that runs after someone recalls their approval submission, select **Yes**. If you don't want to add a recall path, select **No**.



Click **Done**, and the draft flow approval process opens in Flow Builder. Configure the draft elements and resources to meet your approval needs.

See Also

Salesforce Help: Flow Core Action: Create Flow Approval Process (can be outdated or unavailable during release preview)

Run a Flow Approval Process from a Flow

Want to get information about an approval submission before it's submitted for review? Use an autolaunched flow and the new dynamic Request an Approval action. After the flow gets the information you need, add an Action element that calls the appropriate active autolaunched flow approval process.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, all Einstein 1, and Developer editions.

How: Create an autolaunched flow. Add elements to collect information about the record to be approved. Or to get information from an agent that you configured, add an Action element, and call the associated custom agent invocable action.

Add an Action element that calls the relevant flow approval process. Then pass the information collected earlier in the flow to the called flow approval process.

After testing the flow, activate it. Make the flow available to users by adding a custom button to the page layout for the affected object.

See Also

Salesforce Help: Flow Core Action: Request an Approval (can be outdated or unavailable during release preview)

Add a Recall Path to a Flow Approval Process

You can now add a recall path to a flow approval process. A recall path contains a stage with background steps that run when someone recalls their approval submission. When the submission is recalled, the stage that was running and its related steps are canceled, and open approval work items are also canceled. The stage in the recall path then runs. When the stage in the recall path is completed, the approval submission is then recalled.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, all Einstein 1, and Developer editions.

Who: Only users with the Modify Flow permission can add a recall path to a flow approval process.

See Also

Salesforce Help: Recall an In-Progress Approval Submission (can be outdated or unavailable during release preview)

Complete Approval Work Items in the Work Guide as a Delegate

When the Flow Orchestration Work Guide is added to an object's record page layout, it lists all open approval work items assigned to the approver viewing the record page. Now delegates can also see and complete open approval work items in the Work Guide.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, all Einstein 1, and Developer editions.

Why: Completing approval work items in the Work Guide is the only method that runs the screen flow associated with the underlying flow approval process approval step. When an approver or their delegate completes an approval work item from the Approval Works Items list view, a default screen flow runs with no information about the record to be reviewed.

If email notifications to approvers are enabled, approvers and their delegates can also approve or reject an approval work item by replying to their approval email notification. When an approver or their delegate replies to an email notification, the approval work item is completed without any screen flow being run.

Cancel an In-Progress Approval Submission

When an in-progress approval submission has an issue or is no longer needed, you can now cancel it. If an approval submission is associated with a flow approval process that has a configured recall path, canceling the approval submission doesn't perform any actions from the recall path.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, all Einstein 1, and Developer editions.

Who: Only users with the Approval Admin permission can cancel in-progress approval submissions.

See Also

Salesforce Help: Cancel an In-Progress Approval Submission (can be outdated or unavailable during release preview)

Other Changes to Flow Approval Processes

Learn about improvements to Flow Approval Processes.

Where: These changes apply to Lightning Experience in Enterprise, Performance, Unlimited, all Einstein 1, and Developer editions.

Why: Flow approval designers can now:

- Use the new Process Simple Approval flow approval process with the Request an Approval dynamic action. The single approval step in the flow approval process calls the new Review Approval Request screen flow. The flow's single screen displays information about the record to be approved in addition to allowing the reviewer to approve or reject the request and leave comments on their decision.
- Enhance users' experiences by translating orchestration stage labels.

Flow Orchestration

Add error handling to orchestrations by using fault paths.

Control Orchestration Error Handling by Using Fault Paths
Define what happens when an orchestration encounters an error by using fault paths. To add error handling, configure a fault path for each stage in your orchestration. Then add elements to each fault path that executes if the attached stage or a step within the attached stage have an error. The elements on a fault path are run only when an error occurs in the attached stage. The ability to use fault paths in an orchestration means that you can reduce the risk of your orchestration ending in an error.

Other Changes to Flow Orchestration
Learn about improvements to Flow Orchestration.

Control Orchestration Error Handling by Using Fault Paths

Define what happens when an orchestration encounters an error by using fault paths. To add error handling, configure a fault path for each stage in your orchestration. Then add elements to each fault path that executes if the attached stage or a step within the attached stage have an error. The elements on a fault path are run only when an error occurs in the attached stage. The ability to use fault paths in an orchestration means that you can reduce the risk of your orchestration ending in an error.

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

Who: Orchestration designers with the Modify Flow user permission.

How: In an orchestration, select a stage, and then select **Add Fault Path**. Add stages and decisions to the fault path to define what happens if the stage or a step within the stage fails. Define fault paths for each stage in an orchestration to reduce the risk of the orchestration ending in an error.

Other Changes to Flow Orchestration

Learn about improvements to Flow Orchestration.

Where: These changes apply to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

Why: Flow Orchestration designers can now:

- Define up to 10 requirements to determine when a step is ready to start or when an orchestration stage or interactive step can be marked as complete. Previously the maximum was 3 requirements.
- Enhance users' experiences by translating orchestration stage labels.

MuleSoft for Flow: Integration

MuleSoft for Flow: Integration is a no-code solution that connects your flows to external systems using third-party connectors. Use these connectors as triggers or actions, creating seamless data and information exchange between systems.

Enhance Data Exchange with Newly Added Third-Party Connectors
Use these newly added third-party connectors in flows for no-code connectivity to external systems. These third-party connectors can be used to facilitate seamless data and information exchange between different systems.

Explore Connector Capabilities and Connections to External Systems with the New Integrations Tab
Easily discover and manage third-party connectors and connections to external systems with the new Integrations tab, which replaces the Connections tab. This tab consolidates all connector triggers, actions, and templates in a single, intuitive interface. You can now create, edit, delete, and test

connections seamlessly, as well as view and manage authentication to external systems. The tab features a horizontal scroll for connector icons and a prominent Create Connection button, making it easier than ever to find and utilize integration assets.

Accelerate Integrations with Templates

Expedite creating flows with pre-built MuleSoft for Flow: Integration templates. These templates provide a head start and apply best practices for common use cases, enabling faster setup and reducing integration complexity. They support common and tailored business integrations.

Streamline Data Retrieval with Configurable Get Records Actions in Salesforce and NetSuite Connectors

Salesforce Connector and NetSuite Connector now feature connector-specific Get Records actions. These actions enable you to retrieve records based on custom filter logic, providing a familiar Get Records experience similar to Flow Builder. This enhancement significantly reduces per-connector customization and makes it easier to retrieve records from external systems that match the specified conditions.

Find and Use Specific Sets of Actions Quickly with Grouped Toolbar Filters

When you enable API Catalog or MuleSoft for Flow: Integration, Flow Builder now includes filter icons that you can use to quickly access specific sets of actions, such as Flow Integration Connectors and Mulesoft APIs. The toolbar also supports tab navigation from Search to Actions Views to Category, enhancing accessibility.

Other Changes to MuleSoft for Flow: Integration

Learn about other improvements to MuleSoft for Flow: Integration.

Enhance Data Exchange with Newly Added Third-Party Connectors

Use these newly added third-party connectors in flows for no-code connectivity to external systems. These third-party connectors can be used to facilitate seamless data and information exchange between different systems.

Where: This change applies to Salesforce Classic and Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions.

Who: To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

Why: These third-party connectors are generally available and are new additions to our previously existing set of third-party connectors.

- ClickUp
- Microsoft Dynamics 365 Business Central
- Mitto (Chat)
- Mitto (SMS)
- Salesforce Commerce Cloud

How: Use these new third-party connectors as actions within a flow.

See Also

Salesforce Help: Third-Party Connectors Reference (can be outdated or unavailable during release preview)
Salesforce Help: Third-Party Connectors and External System Change-Triggered Flows (can be outdated or unavailable during release preview)
Salesforce Help: Create a Flow with a Third-Party Connector as an Action (can be outdated or unavailable during release preview)

Explore Connector Capabilities and Connections to External Systems with the New Integrations Tab

Easily discover and manage third-party connectors and connections to external systems with the new Integrations tab, which replaces the Connections tab. This tab consolidates all connector triggers, actions, and templates in a single, intuitive interface. You can now create, edit, delete, and test connections seamlessly, as well as view and manage authentication to external systems. The tab features a horizontal scroll for connector icons and a prominent Create Connection button, making it easier than ever to find and utilize integration assets.

Where: This change applies to Salesforce Classic and Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions. Connections can be edited or deleted only in the Automation Lightning app and require the MuleSoft for Flow: Integration add-on license, available in multiple offerings.

Who: To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: To access these features, click the **Integrations** tab in the Automation Lightning app.

See Also

Salesforce Help: Integrations Tab (can be outdated or unavailable during release preview)
Salesforce Help: Connect to an External System (can be outdated or unavailable during release preview)

Accelerate Integrations with Templates

Expedite creating flows with pre-built MuleSoft for Flow: Integration templates. These templates provide a head start and apply best practices for common use cases, enabling faster setup and reducing integration complexity. They support common and tailored business integrations.

Where: This change applies to Salesforce Classic and Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions. Connections can be edited or deleted only in the Automation Lightning app and require the MuleSoft for Flow: Integration add-on license, available in multiple offerings.

Who: To use MuleSoft for Flow: Integration templates, users need one of these permissions.

- Create or Edit Flows
- View Flows

To create and edit flows in the Automation Lightning app, regardless of sharing settings, users need one of these permissions.

- Manage Flow
- Create or Edit Flows
- View Flows
- View All Non-Admin Flows

To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

Why: These templates are generally available.

- Salesforce to Salesforce Account Sync
- Salesforce to Salesforce Contact Sync
- Salesforce to NetSuite Account Sync
- Create Ticket in Zendesk
- Create Customer in QuickBooks

How: To access the templates, go to the Integrations tab in the Automation Lightning app and select a connector to view its available templates.

See Also

Salesforce Help: Third-Party Connectors and External System Change-Triggered Flows (can be outdated or unavailable during release preview)

Salesforce Help: Create a Flow with a Third-Party Connector as a Trigger (can be outdated or unavailable during release preview)

Streamline Data Retrieval with Configurable Get Records Actions in Salesforce and NetSuite Connectors

Salesforce Connector and NetSuite Connector now feature connector-specific Get Records actions. These actions enable you to retrieve records based on custom filter logic, providing a familiar Get Records experience similar to Flow Builder. This enhancement significantly reduces per-connector customization and makes it easier to retrieve records from external systems that match the specified conditions.

Where: This change applies to Salesforce Classic and Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions. Connections can be edited or deleted only in the Automation Lightning app and require the MuleSoft for Flow: Integration add-on license, available in multiple offerings.

Who: To use these connector-specific Get Records actions, users need one of these permissions.

- Create or Edit Flows
- View Flows

To create and edit flows in the Automation Lightning app, regardless of sharing settings, users need one of these permissions.

- Manage Flow
- Create or Edit Flows
- View Flows
- View All Non-Admin Flows

To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: Select the **Get Records** action in Salesforce Connector or NetSuite Connector. In the Set Input Values for the Selected Action section, click **Select Fields** and apply filter logic.

See Also

Salesforce Help: Salesforce Connector (can be outdated or unavailable during release preview)
Salesforce Help: NetSuite Connector (can be outdated or unavailable during release preview)
Salesforce Help: Create a Flow with a Third-Party Connector as an Action (can be outdated or unavailable during release preview)

Find and Use Specific Sets of Actions Quickly with Grouped Toolbar Filters

When you enable API Catalog or MuleSoft for Flow: Integration, Flow Builder now includes filter icons that you can use to quickly access specific sets of actions, such as Flow Integration Connectors and Mulesoft APIs. The toolbar also supports tab navigation from Search to Actions Views to Category, enhancing accessibility.

Where: This change applies to Salesforce Classic and Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions. Connections can be edited or deleted only in the Automation Lightning app and require the MuleSoft for Flow: Integration add-on license, available in multiple offerings.

How: Go to Flow Builder and open the action configurator panel. Access the grouped toolbar to find and use actions quickly. To quickly access the actions relevant to your needs, filter by connectors, Mulesoft APIs, or action type.

Other Changes to MuleSoft for Flow: Integration

Learn about other improvements to MuleSoft for Flow: Integration.

Where: These changes apply to Salesforce Classic and Lightning Experience in Professional (with API access add-on), Performance, Enterprise, and Unlimited editions. Connections can be edited or deleted only in the Automation Lightning app and require the MuleSoft for Flow: Integration add-on license, available in multiple offerings.

Test Connections Easily

Check your connections easily to ensure their validity. With this feature, your connections are automatically tested when you open a flow, preventing errors and ensuring a smoother development experience.

Who: To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: To access this feature, click the **Flows** tab in the Automation Lightning app and open a flow.

Manage Connections with Greater Clarity and Confidence

The Integrations tab now features an enhanced user experience, providing clear guidance when editing or deleting active connections. This improvement displays connection usage details, helping you understand the impact of your actions before proceeding. By visualizing the connections in use, administrators can make informed decisions, minimize disruptions, and ensure smoother workflows.

Who: To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: To access these features, click the **Integrations** tab in the Automation Lightning app.

Easily Add an Asynchronous Path in Record-Triggered Flows

When creating a Record-Triggered flow, you must add an asynchronous path when the flow involves external systems. The **Add Asynchronous Path** toggle is now more prominently displayed on the Start node, ensuring you don't overlook this crucial step for successful integrations.

Who: To use MuleSoft for Flow: Integration, users need one of the these permissions.

- Create or Edit Flows
- View Flows

To create and edit flows in the Automation Lightning app, regardless of sharing settings, users need one of these permissions.

- Manage Flow
- Create or Edit Flows
- View Flows
- View All Non-Admin Flows

To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: Open the **Start** node of a Record-Triggered flow. In the Is this flow making an external callout or connecting to an external system? section, enable the **Add Asynchronous Path** option.

Control Input Parameter Visibility for Cleaner Flow Configurations

When configuring connector actions in flows, control which optional input parameters are included in the request. You now have better control over null behavior, reduced clutter in the configuration panel, and streamlined flow design. Previously, all optional input parameters were visible, even if they were not needed.

Who: To use MuleSoft for Flow: Integration, users need one of these permissions.

- Create or Edit Flows
- View Flows

To create and edit flows in the Automation Lightning app, regardless of sharing settings, users need one of these permissions.

- Manage Flow
- Create or Edit Flows
- View Flows
- View All Non-Admin Flows

To create, view, edit, and delete connections, users need the Manage Integration Connections permission.

How: Open an action element within your flow. In the Set Input Values for the Selected Action section, in Body, click **Select Fields**.

See Also

Salesforce Help: Flow Types
Salesforce Help: Third-Party Connectors and External System Change-Triggered Flows (can be outdated or unavailable during release preview)
Salesforce Help: Use Third-Party Connectors in Flows (can be outdated or unavailable during release preview)
Salesforce Help: Integrations Tab (can be outdated or unavailable during release preview)
Salesforce Help: Connect to an External System (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

Create external client apps in App Manager and connected apps in External Client App Settings. Enable SAML on external client apps. Manage more policy types in Policy Center, including policies from Data Cloud. Investigate suspicious login activity, and store threat detection event data by default. Monitor security settings across your Government Cloud Plus organizations from Security Center dashboard. Move to interactive conversations about your security posture with Security agent actions. Monitor blocked redirections that originate from hyperlinks in URL and Long Text Area Fields in Salesforce Classic. And the Trusted URL and Browser Policy Violations list in Setup shows more CSP violations. Database Encryption beta in Sandboxes. Data Cloud External Key Management available. New deterministic encryption tenant secret workflow. AES-GCM Mode and P1363 Signing in Crypto class.

Domains
To avoid disruption, update references to legacy (non-enhanced) host names.

Identity and Access Management
Create external client apps from App Manager, create connected apps from External Client App Settings, and enable SAML on external client apps. Configure single sign-on (SSO) with clicks instead of code. App developers now control whether JWT-based access tokens are enabled. Get user information more easily from identity providers.

Policy Center
Manage more policy types in Policy Center, including policies from Data Cloud.

Privacy Center
Retain files and attachments with privacy policies. See more metrics when you preview Data Management policies.

Salesforce Shield
Build out an informed security posture with Agentforce for Security, multi-org Security Center support for Government Cloud Plus instances, and more information about suspicious login activity. Expanded key options include External Key Management for Data Cloud and a new AES-GCM Mode for the Crypto class.

Security Center
Monitor and manage security settings across all of your Government Cloud Plus organizations from a centralized Security Center dashboard. Add depth to your security posture with Security Center Extension.

Agentforce for Identity
Create and configure an external client app by asking the Agent for Setup.

Agentforce for Security
Move beyond passive security metric data monitoring to interactive conversations about your security posture. Query security metrics by data type, tenant, or date, and receive agent-generated risk assessments and actionable remediation plans, through new Security agent actions. Quickly learn details about the policies in your Policy Center setup.

Own from Salesforce
Protect and manage your company's data with secure end-to-end solutions. Own from Salesforce products help you minimize risk, address compliance, and keep your data reliable, relevant, and

scalable.

Other Security Changes
Monitor blocked redirections that originate from hyperlinks in URL and Long Text Area Fields in Salesforce Classic. And the Trusted URL and Browser Policy Violations list in Setup shows more CSP violations.

Domains

To avoid disruption, update references to legacy (non-enhanced) host names.

Update References to Legacy Host Names (Release Update)
Prevent disruption for your customers and end users when the temporary redirection of legacy (non-enhanced) Salesforce host names ends. With this release update, legacy host name redirections end in production and demo orgs. Those redirections already ended in all other orgs in Winter ’25. This update was first available in Spring ’25 and is enforced in Spring ’26.

Update Instanced URLs in API Traffic
To prevent disruption after infrastructure updates that change your instance name, replace instanced URLs in API traffic with your org’s My Domain login URL.

Update References to Legacy Host Names (Release Update)

Prevent disruption for your customers and end users when the temporary redirection of legacy (non-enhanced) Salesforce host names ends. With this release update, legacy host name redirections end in production and demo orgs. Those redirections already ended in all other orgs in Winter ’25. This update was first available in Spring ’25 and is enforced in Spring ’26.

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

When: In Winter ’26, Salesforce automatically disables legacy host name redirections unless you opt out of that change before your org gets that release. You can enable and disable legacy host name redirections until Salesforce enforces this update in Spring ’26. With that enforcement, you can’t reenable legacy host name redirections. To get the major-release upgrade date for your instance, go to Trust Status, search for your My Domain name or instance, and then click the maintenance tab.

How: To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Update References to Legacy Host Names, follow the testing and activation steps.

You can opt out of the automatic enablement of this change in Winter ’26. From the My Domain page in Setup, in the Redirections section, click **Edit**. Turn on **Maintain legacy redirections during the Winter ’26 upgrade**, and then save your changes. Repeat that step in each production or demo org where you want to opt out of that behavior. That setting has no impact on the final enforcement of this update.

See Also

Salesforce Help: Prepare for the End of Redirections for Non-Enhanced Domains (can be outdated or unavailable during release preview)
Salesforce Help: Enhanced Domains Timeline (can be outdated or unavailable during release preview)
Release Updates

Update Instanced URLs in API Traffic

To prevent disruption after infrastructure updates that change your instance name, replace instanced URLs in API traffic with your org's My Domain login URL.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions except Database.com.

See Also
Use Your Org's My Domain Login URL in API Calls (Release Update)

Identity and Access Management

Create external client apps from App Manager, create connected apps from External Client App Settings, and enable SAML on external client apps. Configure single sign-on (SSO) with clicks instead of code. App developers now control whether JWT-based access tokens are enabled. Get user information more easily from identity providers.

Enhance Your Mobile App With Three New Plugins for External Client Apps (Beta)
You can now configure mobile features and notifications by using the External Client App framework. With the new mobile app plugin for external client apps, you can set up mobile-specific features, such as screen lock upon a custom timeout value. With the new push notification plugin, you can turn on a mobile app's push notifications for an Android or iOS device. With the new notifications plugin, you can configure your mobile app to receive custom notifications.

Build Single Sign-On Registration Handlers Without Code
Set up single sign-on (SSO) with clicks instead of code. When you use the authentication provider framework for SSO into Salesforce, build your registration handler with Flow Builder instead of with Apex. Get a head start on your flow design with a new template. The template shows you how to create and update users who log in to your org or Experience Cloud site via a third-party identity provider. It includes two new invocable actions that help you get user information from the identity provider and create complete user records. It also gives you an easy way to manage user access without the mixed DML errors that you get in Apex. With flow, control user access by adding and removing permission sets at runtime in a single assignment.

Get Information from Identity Providers More Easily
To simplify the process of creating and updating users for single sign-on (SSO) configurations that use the authentication provider framework, we made it easier to access information that's returned by the identity provider. If the identity provider returns a user info response or an ID token, we now automatically expose this information in the Apex `Auth.UserData` object. With the user info response and ID token automatically exposed, it's easier to set up your registration handler to access

complex claims for advanced use cases.

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

If you see this release update, your Salesforce instance uses our original single-configuration SAML framework, which supports single sign-on (SSO) with only one external identity provider. With this release update, we're removing support for the single-configuration SAML framework and supporting only the multiple-configuration SAML framework. To preserve your existing configuration, follow the steps to apply this update. Otherwise, your SSO configuration stops working when this update is enforced for production instances in Spring '26.

Verify SAML Integrations (Release Update)

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

Triple Data Encryption Standard (Triple DES) for SAML Single Sign-On Stops Working in Winter '26

In Winter '26, SAML single sign-on (SSO) configurations that use the Triple Data Encryption Standard (Triple DES) algorithm stop working. This change applies to all SSO configurations that use the Triple DES algorithm, whether you use Salesforce as an identity provider or as a service provider. To improve security, use the Advanced Encryption Standard (AES) algorithms, AES 128 or AES 256, instead.

Control JWT-Based Access Token Enablement as an App Developer

For external client apps and connected apps, we removed the ability for subscribers to control whether JSON Web Token (JWT)-based access tokens are enabled in the app policies. If a developer enables JWT-based access tokens in the app settings, all installed versions of the app automatically issue JWT-based access tokens.

See Which Sessions Are Associated with JWT-Based Access Tokens

To track and manage sessions more precisely, you can now determine which sessions are associated with JSON Web Token (JWT)-based access tokens. On the Session Management page in Setup, create a view that includes the new Associated with JWT field.

Login Type Is Changed for a Session Associated With Lightning Experience Logins

For consistency, we changed the login type for one of the sessions that's established when a user logs in. Previously, the login type for this session was Unknown. Now, the login type for this session is Application.

Take Advantage of Accessibility Improvements for Login Error Messages

To improve accessibility, we updated two error messages that are displayed on the Salesforce login page. Each message now starts with an "Error" prefix as a visual indicator.

Control Connected App Creation on New Orgs

Find the New Connected App button on the External Client App Settings page. This functionality is controlled by the Allow creation of connected apps preference, which is disabled by default for new orgs. Now that external client apps support OAuth, SAML, and many of the same use cases as connected apps, we recommend that you use external client apps whenever possible. External client apps are now created in App Manager.

Create External Client Apps in App Manager

The New External Client App button is now available in Setup on App Manager. With SAML available in addition to OAuth, external client apps are more useful than ever. These features make external client apps the clear choice for connecting external applications with all of your Salesforce data. Connected apps can now be created in External Client App Settings.

Integrate Service Providers as External Client Apps with SAML 2.0

Use the SAML settings for external client apps to integrate a service provider with your Salesforce org. Set up SAML single sign-on when the service provider or identity provider initiates the flow.

Built-In Authenticators and WebAuthn Security Keys Are Allowed by Default in New Orgs

To give users access to phishing-proof identity verification methods, the settings to allow verification with WebAuthn-based methods are enabled by default in new orgs. Users can register built-in authenticators such as Touch ID or Windows Hello and physical security keys such as U2F keys. They can use these methods to complete identity verification challenges such as multi-factor authentication (MFA).

Enhance Your Mobile App With Three New Plugins for External Client Apps (Beta)

You can now configure mobile features and notifications by using the External Client App framework. With the new mobile app plugin for external client apps, you can set up mobile-specific features, such as screen lock upon a custom timeout value. With the new push notification plugin, you can turn on a mobile app's push notifications for an Android or iOS device. With the new notifications plugin, you can configure your mobile app to receive custom notifications.

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

Note The mobile app, push notification, and notification plugins for External Client Apps are pilot or beta services that are subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of these pilot or beta services is at the Customer's sole discretion.

How: In External Client App Manager, create an external client app, and then configure the Mobile App Settings, Push Notification Settings, or Notification Settings. After you create the external client app, you can modify the Mobile App Policies and Push Notification Policies in the settings of the external client app.

See Also

Salesforce Help: Configure the External Client App's Mobile App Settings and Policies (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Configure the Push Notification Plugin (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Configure the External Client App's Notification Settings (Beta) (can be outdated or unavailable during release preview)

Salesforce Help: Mobile, Push Notification, or Notification Plugin Enablement with Metadata API (Beta) (can be outdated or unavailable during release preview)

Build Single Sign-On Registration Handlers Without Code

Set up single sign-on (SSO) with clicks instead of code. When you use the authentication provider framework for SSO into Salesforce, build your registration handler with Flow Builder instead of with Apex. Get a head start on your flow design with a new template. The template shows you how to create and update users who log in to your org or Experience Cloud site via a third-party identity provider. It includes two new invocable actions that help you get user information from the identity provider and create complete user records. It also gives you an easy way to manage user access without the mixed DML errors that you get in Apex. With flow, control user access by adding and removing permission sets at runtime in a single assignment.

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

Why: Previously, to set up an authentication provider, you were required to develop a registration handler with Apex. Now, with support for Flow Builder, you can set up and maintain your implementation without an Apex-trained developer.

Although Apex registration handlers are ideal for high-scale, high-performance use cases, flow registration handlers can simplify your implementations for most SSO use cases.

How: In Flow Builder, set up a flow that 1) takes user information from the identity provider, 2) looks for a matching user record in Salesforce, and 3) accordingly creates or updates a user. To get started, use the Authentication Provider User Registration template, which is under the new Identity User Registration Flow type. The template shows you how to use these new invocable actions.

- Get User Data from JSON String–By retrieving specific attributes from complex, nested JSON structures, this action makes it easier to get user information from identity providers that use the OpenID Connect protocol. It helps you parse the ID token and user info responses that the identity provider sends to Salesforce after the user authenticates.
- Generate User Data–If the identity provider doesn't give you enough information to create a complete user record in Salesforce, use this action to generate placeholder values for fields that are required to create a user. You can update the values later.

On the Auth. Providers page in Setup, define an authentication provider and set your flow as the registration handler. To confirm that your flow creates and updates users as expected, test the end-to-end SSO process with a new user and with an existing user.

See Also

Salesforce Help: Example: Authentication Provider Registration Handler Flow (can be outdated or unavailable during release preview)
Salesforce Help: Authentication Provider SSO with Salesforce as the Relying Party (can be outdated or unavailable during release preview)
Salesforce Help: Automate Tasks with Flows (can be outdated or unavailable during release preview)

Get Information from Identity Providers More Easily

To simplify the process of creating and updating users for single sign-on (SSO) configurations that use the authentication provider framework, we made it easier to access information that's returned by the identity provider. If the identity provider returns a user info response or an ID token, we now automatically expose this information in the Apex `Auth.UserData` object. With the user info response and ID token automatically exposed, it's easier to set up your registration handler to access complex claims for advanced use cases.

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

Why: Previously, it was difficult to access the user info response and ID token in your registration handler. It required a custom authentication provider and complex code. Now, this process is easier for custom authentication providers and is also accessible for predefined authentication provider types, such as Google and Microsoft. In particular, if you use Salesforce with Azure Active Directory B2C, this change can make your implementation much simpler.

How: Define an authentication provider in Setup. Create a registration handler by using Apex or Flow Builder.

During SSO, Salesforce creates an `Auth.UserData` object with information from the identity provider. In this object, the full user info response is stored in the `userInfoJsonString` property.

The ID token is stored in the `idToken` property as an encoded JSON Web Token (JWT) and in the `idTokenJsonString` property as a decoded JWT payload.

For custom authentication providers that use the `AuthProviderPluginClass` class or the `AuthProviderPlugin` interface, store the ID token in the new `idToken` property in the `Auth.AuthProviderTokenResponse` object. When you use the `AuthProviderPluginClass.handleCallback` method or the `AuthProviderPlugin.handleCallback` method, both of which take the `Auth.AuthProviderTokenResponse` as a parameter, these methods return an `Auth.UserData` object with the ID token and user info response exposed.

Important Salesforce doesn't validate the JWT signature. To validate the JWT signature, use methods in the `Auth.JWTUtil` class.

If you use Apex, to access attribute values, use the Apex JSON parser or deserialize the information stored in these properties into a custom class structure. If you use a flow for your registration handler, use the new Get User Data from JSON String invocable action to pull a specific attribute value.

In your registration handler, when you create or update users, include the information that you retrieved from the identity provider.

See Also

Salesforce Help: Authentication Provider SSO with Salesforce as the Relying Party (can be outdated or unavailable during release preview)
Apex Reference Guide: UserData Class (can be outdated or unavailable during release preview)
Apex Reference Guide: AuthProviderTokenResponse Class (can be outdated or unavailable during release preview)

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

If you see this release update, your Salesforce instance uses our original single-configuration SAML framework, which supports single sign-on (SSO) with only one external identity provider. With this release update, we're removing support for the single-configuration SAML framework and supporting only the multiple-configuration SAML framework. To preserve your existing configuration, follow the steps to apply this update. Otherwise, your SSO configuration stops working when this update is enforced for production instances in Spring '26.

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

When: This update is enforced for production instances in Spring '26 and was enforced for sandboxes in Summer '24. To get the major release upgrade date for your instance, go to Trust Status, search for your instance, and click the maintenance tab.

This update was first made available in Spring '24. It was scheduled to be enforced for all instances in Summer '24, but we enforced it only for sandboxes in Summer '24. We postponed the enforcement date for production instances to Spring '25 and then postponed it again to Spring '26.

Why: We're no longer supporting the single-configuration SAML SSO framework that you're currently using. When this update is enforced, you're required to use a multiple-configuration SAML framework. To keep using your existing SAML SSO configuration, migrate to the multiple-configuration framework. Otherwise, your SAML SSO stops working for you when this update is enforced.

How: These changes apply to your existing SAML SSO configuration.

- SAML responses from your identity provider must include the `audience` attribute.
- Your Salesforce login URL changes.
- If Salesforce can't parse a SAML response, it isn't recorded in the login history.

Make sure that you understand these changes, update your configuration accordingly, and test all changes in a sandbox before enabling this update. If you don't, your configuration stops working when this update is enforced.

To review this update, from Setup, in the Quick Find box, enter *Release Updates*, and then select **Release Updates**. For Migrate to a Multiple-Configuration SAML Framework, follow the testing and activation steps.

See Also

Salesforce Help: SAML SSO with Salesforce as the Service Provider

Salesforce Help: Salesforce as a SAML Identity Provider
Salesforce Help: Configure SAML SSO Between Salesforce Orgs or Experience Cloud Sites
Salesforce Help: Single Logout

Verify SAML Integrations (Release Update)

Salesforce is upgrading its SAML framework as part of regular ongoing maintenance. This maintenance update improves the Salesforce security posture and, as a result, improves your security posture. This update can impact integrations that use SAML, including single sign-on (SSO) and single logout. This update was first announced in Winter ’25 and is enforced in Summer ’25. To avoid potential service interruptions, test your SAML integrations as soon as Summer ’25 sandboxes become available.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

When: This update is enforced in Summer ’25. You can start testing this update when your sandbox is upgraded to Summer ’25. Complete testing by the time your production instance is scheduled to be upgraded to Summer ’25. This window is approximately six weeks. The deadline to complete testing can be different from the deadline that’s displayed in the release update UI. To learn how to plan your testing timeline, see the How section in this release note.

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

Why: As part of ongoing maintenance, Salesforce is upgrading its SAML framework in Summer ’25. Although we don’t expect much production impact, to minimize the risk of production outages, we recommend that you test your SAML integrations as soon as Summer ’25 sandboxes become available.

How: To understand how enforcement of the SAML upgrade impacts you, assess your orgs and Experience Cloud sites to see where you use SAML, including these integrations.

- SAML SSO where users log in to Salesforce via a third-party identity provider, such as Okta
- SAML SSO where users log in to a third-party app via Salesforce. These configurations use connected apps.
- SAML SSO between Salesforce orgs or Experience Cloud sites
- All SAML single logout configurations

Set up a sandbox with the same SAML integrations that you use in production. Make sure that the sandbox is on a preview instance.

To see when your sandbox will be upgraded to Summer ’25, go to Trust Status and search for your sandbox instance. Select your instance and click **Maintenance**. Look for an entry where the subject is `Summer ’25 Major Release`. This date is when you can start testing your SAML integrations.

Next, to get your production upgrade date, search for your production instance in Trust Status. Again, select your instanc, click **Maintenance**, and look for an entry where the subject is `Summer ’25 Major Release`. Plan to complete testing and resolve any issues by this date.

When your sandbox is upgraded to Summer '25, test your SAML integrations thoroughly. If you have any issues, contact Salesforce Customer Support. Make sure to contact Support and resolve issues before your production instance upgrade date. Otherwise, you can experience service interruptions in production.

To review this update, from Setup, in the Quick Find box, enter `Release Updates`, and then select **Release Updates**. For Verify SAML Integrations, follow the testing and activation steps.

See Also

Salesforce Help: SAML SSO with Salesforce as the Service Provider
Salesforce Help: Salesforce as a SAML Identity Provider
Salesforce Help: Configure SAML SSO Between Salesforce Orgs or Experience Cloud Sites
Salesforce Help: Single Logout

Triple Data Encryption Standard (Triple DES) for SAML Single Sign-On Stops Working in Winter '26

In Winter '26, SAML single sign-on (SSO) configurations that use the Triple Data Encryption Standard (Triple DES) algorithm stop working. This change applies to all SSO configurations that use the Triple DES algorithm, whether you use Salesforce as an identity provider or as a service provider. To improve security, use the Advanced Encryption Standard (AES) algorithms, AES 128 or AES 256, instead.

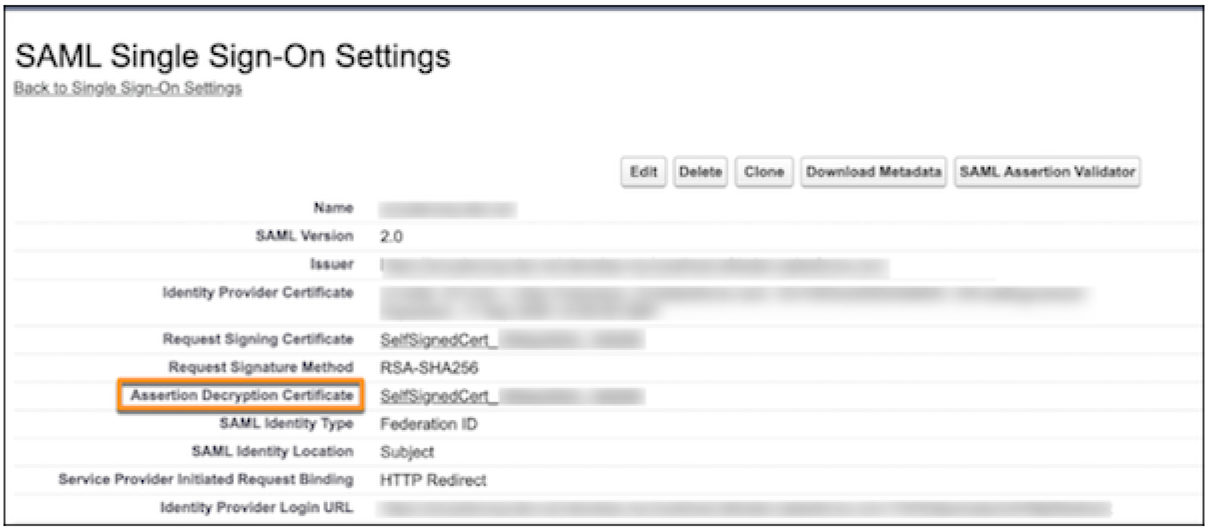
Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

When: In Spring '25, we removed the ability to use Triple DES encryption for new configurations, but we continued to support Triple DES for configurations that were created before Spring '25. Now, we're letting you know that these configurations stop working in Winter '26. There's no change to Triple DES support in Summer '25, but we recommend that you prepare for Winter '26 and improve your SSO security by updating your configurations as soon as possible.

Why: The Triple DES algorithm uses a cryptographic key that's too short to be secure. The AES 128 and AES 256 algorithms use longer keys that make these algorithms harder to attack. For more information about encryption algorithm security from the National Institute of Standards and Technology, go to https://csrc.nist.gov/pubs/sp/800/131/a/r3/ipd.

How: If you use Salesforce as an identity provider, check your connected app SAML configuration. First, go to your connected app Web App Settings and check the Block Encryption Algorithm setting. If Block Encryption Algorithm is set to Triple DES, update your configuration to use a more secure algorithm. On the service provider, update your settings to decrypt the new algorithm.

If you use Salesforce as a service provider, check with your identity provider to see what encryption algorithm they use. If they use the Triple DES algorithm, work with your identity provider to use a more secure algorithm and to generate a new decryption certificate. In Salesforce, update the Assertion Decryption Certificate in your SAML Single Sign-On Settings.



See Also

Salesforce Help: Configure SSO with Salesforce as a SAML Service Provider (can be outdated or unavailable during release preview)

Salesforce Help: Salesforce as a SAML Identity Provider (can be outdated or unavailable during release preview)

Control JWT-Based Access Token Enablement as an App Developer

For external client apps and connected apps, we removed the ability for subscribers to control whether JSON Web Token (JWT)-based access tokens are enabled in the app policies. If a developer enables JWT-based access tokens in the app settings, all installed versions of the app automatically issue JWT-based access tokens.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

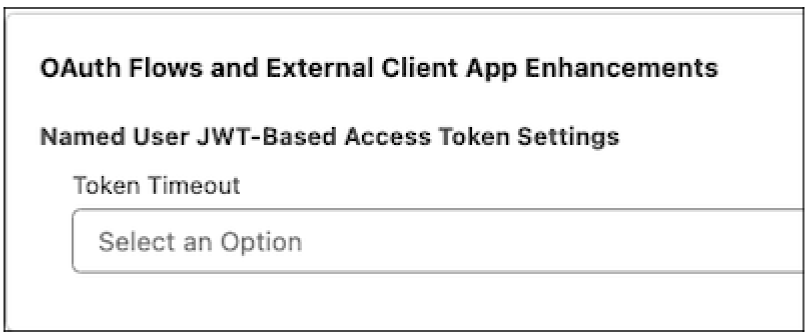
Why: Previously, to enable JWT-based access tokens for installed apps, there were two steps.

- A developer enabled JWT-based access tokens in the app settings. This action exposed a subscriber-side policy for enabling JWT-based access tokens.
- Subscribers who installed the app enabled the policy.

We required subscribers to explicitly opt in because JWT-based access tokens didn't have the same functionality as opaque access tokens. We wanted subscribers to understand the implications of using JWT-based access tokens before enabling them.

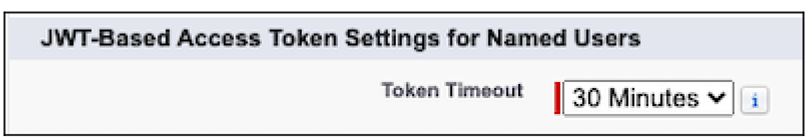
As of Spring '25, JWT-based access tokens have feature parity with opaque access tokens. Because it's no longer necessary for subscribers to opt in, we removed this policy for external client apps and connected apps in Summer '25. Developers now fully control whether JWT-based access tokens are enabled. Subscribers still control the token timeout value.

How: For external client apps, the Issue JSON Web Token (JWT)-based access tokens for named users policy is removed and the token timeout policy is under a new heading.



Note Depending on the OAuth settings that are enabled by the developer, this section can show additional policies.

For connected apps, the Issue JSON Web Token (JWT)-based access tokens policy is removed and the UI displays only the token timeout policy.



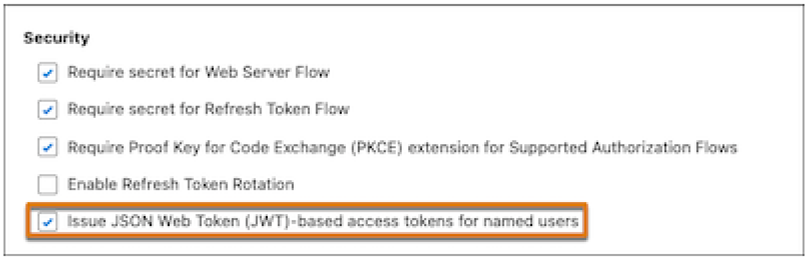
As an app developer, this change can break your integrations for subscribers if both of these criteria apply to you.

- You enabled JWT-based access tokens in the app settings.
- You didn't develop your app to exclusively issue JWT-based access tokens.

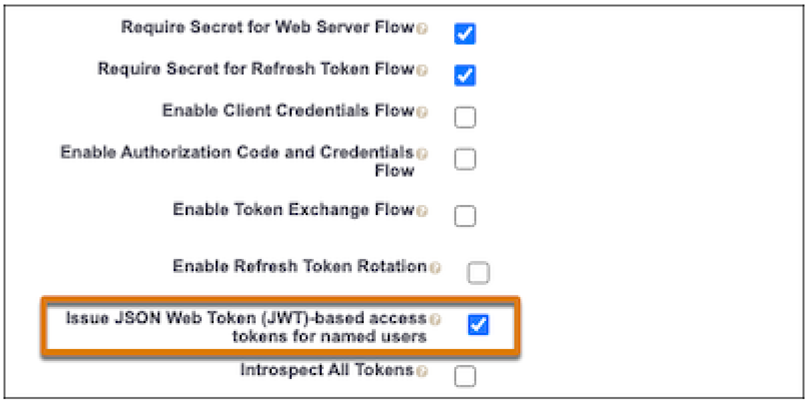
In this case, it's possible that your subscribers haven't enabled JWT-based access tokens and that their installed apps have been issuing opaque access tokens with no issues. With this change, subscribers can experience performance issues when their installed apps start issuing JWT-based access tokens.

To confirm that your integrations still work when this change takes effect, take these steps.

First, for external client apps and connected apps, check whether your apps have the Issue JSON Web Token (JWT)-based access tokens for named users setting enabled. For external client apps, this setting is in the API (Enable OAuth Settings) section in the Security category.



For connected apps, this setting is in the API (Enable OAuth Settings) section.



If your apps have this setting enabled, confirm that your app works if it exclusively issues JWT-based access tokens instead of opaque access tokens. If it doesn't work, disable the setting. Alternatively, develop your app to be compatible with JWT-based access tokens.

See Also

Salesforce Help: JWT-Based Access Tokens (can be outdated or unavailable during release preview)

Salesforce Help: Issue JSON Web Token (JWT)-Based Access Tokens (can be outdated or unavailable during release preview)

See Which Sessions Are Associated with JWT-Based Access Tokens

To track and manage sessions more precisely, you can now determine which sessions are associated with JSON Web Token (JWT)-based access tokens. On the Session Management page in Setup, create a view that includes the new Associated with JWT field.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

How: Here's a session view that includes the Associated with JWT field.

Remove

	Username ↑	Session Type	Associated with JWT	User Type	Login Type
☐	[redacted]	UI	No	Standard	Application
☐	[redacted]	Setup	No	Standard	Application
☐	[redacted]	Aura	No	Standard	Application
☐	[redacted]	API	Yes	Standard	Application
☐	[redacted]	InternalServiceCall	No	Standard	Application

See Also

Salesforce Help: JWT-Based Access Tokens (can be outdated or unavailable during release preview)
Salesforce Help: View User Session Information on the Session Management Page (can be outdated or unavailable during release preview)

Login Type Is Changed for a Session Associated With Lightning Experience Logins

For consistency, we changed the login type for one of the sessions that's established when a user logs in. Previously, the login type for this session was Unknown. Now, the login type for this session is Application.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

Why: When a user accesses Lightning Experience, Salesforce establishes multiple sessions, including sessions of these types: Aura, Content, TempAuraExchange, TempContentExchange, TempUiFrontdoor, and UI, all with Application as the login type. In Spring '25, we added a session for which the session type was API and the login type was Unknown. With this Summer '25 change, the login type for this session now matches the other sessions associated with Lightning Experience logins. Its session type is still API.

See Also

Salesforce Help: View User Session Information on the Session Management Page (can be outdated or unavailable during release preview)
Salesforce Help: User Session Types (can be outdated or unavailable during release preview)

Take Advantage of Accessibility Improvements for Login Error Messages

To improve accessibility, we updated two error messages that are displayed on the Salesforce login page. Each message now starts with an "Error" prefix as a visual indicator.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions.

How: If a user enters the wrong credentials, the Salesforce login page now displays "Error: Please check your username and password. If you still can't log in, contact your Salesforce administrator."

If a user enters their username but not their password, the login page now displays "Error: Please enter your password."

Control Connected App Creation on New Orgs

Find the New Connected App button on the External Client App Settings page. This functionality is controlled by the Allow creation of connected apps preference, which is disabled by default for new orgs. Now that external client apps support OAuth, SAML, and many of the same use cases as connected apps, we recommend that you use external client apps whenever possible. External client apps are now created in App Manager.

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

Why: As part of the External Client Apps rollout, connected apps are disabled by default on all new orgs. External client apps offer the ability to connect external applications with Salesforce data while maintaining security and clearly defined user roles. External client apps are designed with the security of second-generation managed packaging in mind.

How: From Setup, in the Quick Find box, enter *External Client Apps*, and then select **Settings**. Turn on **Allow creation of connected apps** .

Create External Client Apps in App Manager

The New External Client App button is now available in Setup on App Manager. With SAML available in addition to OAuth, external client apps are more useful than ever. These features make external client apps the clear choice for connecting external applications with all of your Salesforce data. Connected apps can now be created in External Client App Settings.

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

Why: As part of the new generation of connected apps, external client apps offer the ability to connect external applications with Salesforce data. Compared to connected apps, external client apps provide increased security and clearly defined user roles. External client apps are designed with the security of second-generation managed packaging in mind.

How: From Setup, in the Quick Find box, enter *App*, and then select **App Manager**. Click **New External Client App**.

Integrate Service Providers as External Client Apps with SAML 2.0

Use the SAML settings for external client apps to integrate a service provider with your Salesforce org. Set up SAML single sign-on when the service provider or identity provider initiates the flow.

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

How: Create an external client app, and complete its basic information. In the Web App (Enable SAML

Settings) section, select Enable SAML.

Built-In Authenticators and WebAuthn Security Keys Are Allowed by Default in New Orgs

To give users access to phishing-proof identity verification methods, the settings to allow verification with WebAuthn-based methods are enabled by default in new orgs. Users can register built-in authenticators such as Touch ID or Windows Hello and physical security keys such as U2F keys. They can use these methods to complete identity verification challenges such as multi-factor authentication (MFA).

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in all editions. This change applies only to orgs created in Summer ’25 and later. For orgs created before Summer ’25, there’s no change to these settings.

How: On the Identity Verification page in Setup, these two settings are now enabled by default in new orgs.

- Let users verify their identity with a built-in authenticator such as Touch ID or Windows Hello
- Let users verify their identity with a physical security key (U2F or WebAuthn)

When an end user registers for MFA, they have the option to set up these methods.

See Also

Salesforce Help: Enable Built-In Authenticators for Identity Verification in Salesforce Orgs (can be outdated or unavailable during release preview)

Salesforce Help: Enable Security Keys for Identity Verification in Salesforce Orgs (can be outdated or unavailable during release preview)

Policy Center

Manage more policy types in Policy Center, including policies from Data Cloud.

Manage More Policy Types in Policy Center
Control your Data Security policy types from Data Cloud, and Data Detect policies, directly in the Policy Center app. We also renamed the existing Data Management policy type to Data Retention for clarity.

Manage More Policy Types in Policy Center

Control your Data Security policy types from Data Cloud, and Data Detect policies, directly in the Policy Center app. We also renamed the existing Data Management policy type to Data Retention for clarity.

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

Who: Policy Center is available to users with the Modify All Policy Center Policies and View All Policy Center Policies permissions. The Data Security policy type is available to users with the Data Cloud license and corresponding user permissions. The Data Detect policy type is available to users with the Salesforce Shield add-on subscription participating in the Data Detect beta.

See Also

Salesforce Help: Policy Types Available in Policy Center (can be outdated or unavailable during release preview)

Privacy Center

Retain files and attachments with privacy policies. See more metrics when you preview Data Management policies.

Retain Files and Attachments with Privacy Policies
If you copy records to a Privacy Center retention store, you can now include any files and attachments associated with those records. File and attachment retention is available with both Data Management and Right to Be Forgotten policies. You can view the files in your retention store by adding a new component to record pages.

See Policy Preview Metrics for Files and Attachments
Previews help you avoid accidental data loss by estimating the number of affected records before you publish a Data Management policy. You can now also see the number of files and attachments to be deleted and retained, so you have better insight into your policy's data impact.

Retain Files and Attachments with Privacy Policies

If you copy records to a Privacy Center retention store, you can now include any files and attachments associated with those records. File and attachment retention is available with both Data Management and Right to Be Forgotten policies. You can view the files in your retention store by adding a new component to record pages.

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

See Also

Salesforce Help: Retain Records on an Object (can be outdated or unavailable during release preview)
Salesforce Help: View Files and Attachments (can be outdated or unavailable during release preview)

See Policy Preview Metrics for Files and Attachments

Previews help you avoid accidental data loss by estimating the number of affected records before you publish a Data Management policy. You can now also see the number of files and attachments to be deleted and retained, so you have better insight into your policy's data impact.

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

How: On the Preview tab for your Data Management policy, under Details, select **Files and Attachments**.

See Also

Salesforce Help: Preview a Data Management Policy (can be outdated or unavailable during release preview)

Salesforce Shield

Build out an informed security posture with Agentforce for Security, multi-org Security Center support for Government Cloud Plus instances, and more information about suspicious login activity. Expanded key options include External Key Management for Data Cloud and a new AES-GCM Mode for the Crypto class.

Data Detect

Data Detect (beta) helps you identify sensitive data within your org so you can take steps to protect it. It uses native platform-native technology so that you don't rely on third-party services or port your data outside of Salesforce. Use Data Detect to expedite data categorization by aligning data sensitivity levels and categories to actual field data.

Event Monitoring

Investigate crucial threat detection event information by default Explore information about suspicious login activity. Trigger automated actions and create cases with ease using by Platform-Event triggered flows powered by Real Time Events. Monitor and take action to block malicious users .

Shield Platform Encryption

Database Encryption beta in Sandboxes. Data Cloud External Key Management available. New deterministic encryption tenant secret workflow. AES-GCM Mode and P1363 Signing in Crypto class.

Get More out of Shield Products with Shield Extension

All Shield customers can now install and use Own from Salesforce's Shield Extension managed package. It includes Platform Encryption Analyzer, Field History Explorer, and History Retention Policy Manager. Use the Platform Encryption Analyzer to save time when identifying and preparing sensitive data for field-level encryption. Field History Explorer and History Retention Policy Manager provide a convenient user interface for managing field tracking across multiple objects and fields, and auditing changes to values in tracked fields.

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Data Detect (beta) helps you identify sensitive data within your org so you can take steps to protect it. It uses native platform-native technology so that you don't rely on third-party services or port your data outside of Salesforce. Use Data Detect to expedite data categorization by aligning data sensitivity levels and categories to actual field data.

Get the Beta Version of Data Detect as an App in Salesforce (Beta)

The Salesforce app version of Data Detect is now available in beta. The Managed Package Data Detect version still exists.

Improve Sensitive Data Detection in Text Fields Across Your Salesforce Org (Beta)

Expanded pattern matching now identifies 21 default sensitive data types. You can perform object-level scans, or select individual fields.

Get the Beta Version of Data Detect as an App in Salesforce (Beta)

The Salesforce app version of Data Detect is now available in beta. The Managed Package Data Detect version still exists.

Where: This change applies to Lightning Experience (not available in all orgs) in Enterprise, Unlimited, and Developer editions where Data Detect is installed.

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

When: Full beta functionality begins in May 2025.

How: To opt in for beta, contact your Salesforce account executive. After the org permission is enabled, users can access the Data Detect app from the App launcher.

Improve Sensitive Data Detection in Text Fields Across Your Salesforce Org (Beta)

Expanded pattern matching now identifies 21 default sensitive data types. You can perform object-level scans, or select individual fields.

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Event Monitoring

Investigate crucial threat detection event information by default Explore information about suspicious login activity. Trigger automated actions and create cases with ease using by Platform-Event triggered flows powered by Real Time Events. Monitor and take action to block malicious users .

Explore Information About Suspicious Login Activity with the Login Anomaly Event
Investigate when there is an unusual login attempt, such as a login at an atypical time of day or

uncommon end-point with the new Login Anomaly event from the Threat Detection app.

Store Data for Threat Detection Events by Default

Access and investigate crucial threat detection event information by default. Threat Detection data storage is now automatically enabled for all threat detection events, giving you immediate access to critical data.

Access Real Time Events in Flows

Trigger automated actions and create cases with ease by using Platform-Event triggered flows powered by select Real Time Events.

Leverage ListViewEvent for Recently Viewed List Views

Generate real-time events and create Transaction Security Policies when users access the Recently Viewed list view so that you can monitor and take action to block malicious users.

Import Event Data from Shield's Event Monitoring into Data Cloud (Beta)

Use Platform Events Connector to import real-time events generated from Salesforce Event Monitoring into Data Cloud. This connector makes it possible for organizations to harness Data Cloud's advanced analytics tools to detect risks early, investigate unusual behavior, and prevent data misuse.

Utilize Near Real-Time Apex Callout Spans (Pilot)

Leverage near real-time insights into Salesforce Apex HTTP callouts with the new distributed tracing feature, which publishes Apex callout spans as Platform Events. Built to be compatible with third-party solutions, this feature significantly reduces mean time to recovery (MTTR) during service disruptions.

Explore Information About Suspicious Login Activity with the Login Anomaly Event

Investigate when there is an unusual login attempt, such as a login at an atypical time of day or uncommon end-point with the new Login Anomaly event from the Threat Detection app.

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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

Store Data for Threat Detection Events by Default

Access and investigate crucial threat detection event information by default. Threat Detection data storage is now automatically enabled for all threat detection events, giving you immediate access to critical data.

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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

Access Real Time Events in Flows

Trigger automated actions and create cases with ease by using Platform-Event triggered flows powered by select Real Time Events.

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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: From Setup, in the Quick Find box, enter *Flow*, and select **Flows**. Then click **New Flow**, click **Platform Event-Triggered Flow**, and click **Create**. You can then select the Login, List View, Report, File, Bulk Api Result, or Login As events provided by Event Monitoring.

Leverage ListViewEvent for Recently Viewed List Views

Generate real-time events and create Transaction Security Policies when users access the Recently Viewed list view so that you can monitor and take action to block malicious users.

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

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

Import Event Data from Shield's Event Monitoring into Data Cloud (Beta)

Use Platform Events Connector to import real-time events generated from Salesforce Event Monitoring into Data Cloud. This connector makes it possible for organizations to harness Data Cloud's advanced analytics tools to detect risks early, investigate unusual behavior, and prevent data misuse.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, and Unlimited editions where Event Monitoring is enabled.

> **Note** Platform Events Connector is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

When: This feature is available starting in March 2025.

Who: The event data that's available to import with the Platform Events Connector (Beta) is available only to customers who have purchased the Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

How: In Data Cloud Setup, under Other Connectors, create a connection by using the available Salesforce Platform Events Connector. Then on the Data Streams tab, select the connection as your source.

Utilize Near Real-Time Apex Callout Spans (Pilot)

Leverage near real-time insights into Salesforce Apex HTTP callouts with the new distributed tracing feature, which publishes Apex callout spans as Platform Events. Built to be compatible with third-party solutions, this feature significantly reduces mean time to recovery (MTTR) during service disruptions.

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

Note Near Real-Time Apex Callout Spans is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion. Contact your Salesforce account executive to enroll.

Who: This change is available to customers who purchased Salesforce Shield or Salesforce Event Monitoring add-on subscriptions.

Shield Platform Encryption

Database Encryption beta in Sandboxes. Data Cloud External Key Management available. New deterministic encryption tenant secret workflow. AES-GCM Mode and P1363 Signing in Crypto class.

Delivered Idea: Encrypt Your Entire Database (Beta/Sandbox Release)
Database Encryption is now available for testing in sandboxes for certain Hyperforce orgs. Database Encryption allows you to sort, filter and reference encrypted data without functional or performance tradeoffs. You can still apply Field Level Encryption to individual fields if required.

Increase Control of Data Cloud Encryption Keys with External Key Management
Platform Encryption for Data Cloud now supports External Key Management (EKM) as an option for managing your root key. With EKM, your external AWS KMS generates and secures the data encryption keys (DEKs) that Shield Platform Encryption uses to secure your Data Cloud data. This gives Data Cloud customers increased control of their encryption keys.

Benefit from an Improved Deterministic Tenant Secret Workflow
When you generate or rotate deterministic encryption tenant secrets, a new in-app assistant helps you avoid issues that can occur with sync jobs for deterministic tenant secrets.

Enhance Security with AES-GCM Mode and P1363 Signing
The Crypto class now supports AES-GCM (Advanced Encryption Standards Galois Counter Mode) for 128-bit, 192-bit, and 256-bit encryption for encryption and decryption operations. AES-GCM increases security by using a different initialization vector (IV) for each encryption. This change also includes support for the 256-bit, 384-bit, and 512-bit P1363 signature format for signing and verifying.

Implement Field-Level Encryption Faster with Platform Encryption Analyzer

The Platform Encryption Analyzer by Own from Salesforce is now available to all Shield Platform Encryption customers. See all of your fields and identify which are compatible with field-level encryption. You can also see which fields are compatible but blocked by a configuration. With this information, you can take action to adjust configurations and quickly get back to the work of implementing your encryption policy.

Encrypt Your Entire Database (Beta/Sandbox Release)

Database Encryption is now available for testing in sandboxes for certain Hyperforce orgs. Database Encryption allows you to sort, filter and reference encrypted data without functional or performance tradeoffs. You can still apply Field Level Encryption to individual fields if required.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all environments) in Enterprise, Performance, Unlimited, and Developer editions using Hyperforce in a cell where Database Encryption is enabled. (If so, the **Encrypt the Transactional Database** toggle will be available.) Check with your AE to learn if your org can make use of Database Encryption in the sandbox.

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

How: In your sandbox, on the Encryption Settings page, choose the **Encrypt the Transactional Database** toggle. Salesforce begins encrypting all new data. Existing data is not encrypted, until you synchronize your data with Self Service Background Encryption. Your other encryption settings (Fields and Files, Search Indexs, and Event Log Data) are unchanged.

See Also

Salesforce Help: Sync Data with Self-Service Background Encryption Service (can be outdated or unavailable during release preview)

Increase Control of Data Cloud Encryption Keys with External Key Management

Platform Encryption for Data Cloud now supports External Key Management (EKM) as an option for managing your root key. With EKM, your external AWS KMS generates and secures the data encryption keys (DEKs) that Shield Platform Encryption uses to secure your Data Cloud data. This gives Data Cloud customers increased control of their encryption keys.

Where: his change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions that also have a Salesforce Shield or Shield Platform Encryption license, a Cache-only Key license, a Data Cloud license, and Platform Encryption for Consumption.

How: To leverage external key management for Data Cloud encryption, enable the feature in Encryption Settings. This triggers an initial generation of a Salesforce-managed key and subsequent data encryption.

After that operation is complete, you can generate and connect to an external key management service, such as AWS KMS, by registering the provided Salesforce key policy with your chosen service.

See Also

Salesforce Help: Encrypt Data Cloud with Customer-Managed Root Keys (can be outdated or unavailable during release preview)

Benefit from an Improved Deterministic Tenant Secret Workflow

When you generate or rotate deterministic encryption tenant secrets, a new in-app assistant helps you avoid issues that can occur with sync jobs for deterministic tenant secrets.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all environments) in Enterprise, Performance, Unlimited, and Developer editions that also have a Shield or Shield Platform Encryption license.

Why: Shield Platform Encryption provides customers with two encryption algorithms for their tenant secrets: probabilistic and deterministic. When using deterministic encryption and managing deterministic tenant secrets, in-app prompts can save you time by giving you more guidance. The new assistant is an additional resource that can help you review the tradeoffs with deterministic encryption. Shield customers can also consider Database Encryption, which offers transparant encryption without the tradeoffs

How: Now, when you click **Generate Tenant Secret** from the Fields and Files (Deterministic) tab of the Key Management page, a confirmation box appears. Before you can create a new deterministic tenant secret, you must acknowledge that:

1. You read the Salesforce Help document, "Considerations for Deterministic Encryption." To go directly to that page, click the **Read Helpdoc** button.
2. You understand that syncing your data is an important step. You can synchronize most encrypted data yourself from the Encryption Statistics page in Setup. If you need help with synchronizing your data for any type of content not listed in the instruction, you must create a case for the sync job.

Only after you click the **I Acknowledge and Proceed** button is the Create Secret button available.

See Also

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

Salesforce Help: How to Request Background Encryption Service from Salesforce Customer Support (can be outdated or unavailable during release preview)

Enhance Security with AES-GCM Mode and P1363 Signing

The Crypto class now supports AES-GCM (Advanced Encryption Standards Galois Counter Mode) for 128-bit, 192-bit, and 256-bit encryption for encryption and decryption operations. AES-GCM increases security by using a different initialization vector (IV) for each encryption. This change also includes support for the 256-bit, 384-bit, and 512-bit P1363 signature format for signing and verifying.

Where: This change applies to Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions that have the Shield or Shield Platform Encryption license.

How: Call the `encrypt`, `decrypt`, `encryptWithManagedIV` and `decryptWithManagedIV` methods and specify one of the new GCM options for the **algorithmName** parameter and a Blob value for the **aaData** parameter. With `encryptWithManagedIV` and `decryptWithManagedIV`, you can optionally specify a GCM-compliant Blob value for the new **aaData** (additional authentication data) parameter.

To take advantage of the P1363 signing format, specify one of the new signing algorithm names in the `sign`, `signWithCertificate`, `signXML`, or `verify` methods.

Implement Field-Level Encryption Faster with Platform Encryption Analyzer

The Platform Encryption Analyzer by Own from Salesforce is now available to all Shield Platform Encryption customers. See all of your fields and identify which are compatible with field-level encryption. You can also see which fields are compatible but blocked by a configuration. With this information, you can take action to adjust configurations and quickly get back to the work of implementing your encryption policy.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions that have Salesforce Shield or Shield Platform Encryption add-on subscriptions.

When: The Shield Extension managed package is available March 2025.

See Also
Get More out of Shield Products with Shield Extension

Get More out of Shield Products with Shield Extension

All Shield customers can now install and use Own from Salesforce's Shield Extension managed package. It includes Platform Encryption Analyzer, Field History Explorer, and History Retention Policy Manager. Use the Platform Encryption Analyzer to save time when identifying and preparing sensitive data for field-level encryption. Field History Explorer and History Retention Policy Manager provide a convenient user interface for managing field tracking across multiple objects and fields, and auditing changes to values in tracked fields.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions that have Salesforce Shield, Shield Platform Encryption, or Field Audit Trail add-on subscriptions.

When: The Shield Extension managed package is available March 2025.

How: When you have the Shield, Shield Platform Encryption, or Field Audit Trail licenses provisioned, install the Shield Extension Managed package. Then configure permissions for specific feature tabs. For information about installation, permissions, and using Shield Extension features, visit the Own from Salesforce Knowledge Base.

See Also

Own from Salesforce Knowledge Base: Getting Started with Shield Extension
Own from Salesforce Knowledge Base: Secure

Security Center

Monitor and manage security settings across all of your Government Cloud Plus organizations from a centralized Security Center dashboard. Add depth to your security posture with Security Center Extension.

Implement Multi-Organization Support in Government Cloud Plus Instances
Monitor and manage security settings across all of your Government Cloud Plus organizations from a centralized Security Center dashboard.

Add Depth to Your Security Posture with Security Center Extension
Security Center customers now have access to the Security Center Extension managed package as part of their license. Use the Who Sees What Explorer to analyze access for users, objects, records, and more. With the Data Classification feature, understand what kind of data you have. Then apply sensitivity levels and compliance categories that make it easier to match data with applicable security and access controls. With Security Insights, you define custom risk profiles and threshold scores and apply those definitions to a range of security posture configurations. You can then adjust security posture settings to bring your Salesforce implementation into alignment with your security policies.

Implement Multi-Organization Support in Government Cloud Plus Instances

Monitor and manage security settings across all of your Government Cloud Plus organizations from a centralized Security Center dashboard.

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

Who: This change applies to customers with Government Cloud Plus and the Security Center add-on subscription.

Add Depth to Your Security Posture with Security Center Extension

Security Center customers now have access to the Security Center Extension managed package as part of their license. Use the Who Sees What Explorer to analyze access for users, objects, records, and more. With the Data Classification feature, understand what kind of data you have. Then apply sensitivity levels and compliance categories that make it easier to match data with applicable security and access controls. With Security Insights, you define custom risk profiles and threshold scores and apply those definitions to a range of security posture configurations. You can then adjust security posture settings to bring your Salesforce implementation into alignment with your security policies.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions that have the Security Center add-on subscription.

When: The Security Center Extension managed package is available March 2025.

How: When the Security Center license is provisioned, install the Security Center Extension Managed package. Then configure permissions for specific features. For information about installation, permissions, and using Security Center Extension features, visit the Own from Salesforce Knowledge Base.

See Also

Own from Salesforce Knowledge Base: Getting Started with Security Center Extension
Own from Salesforce Knowledge Base: Secure

Agentforce for Identity

Create and configure an external client app by asking the Agent for Setup.

Create an External Client App by Using Agentforce
The Agent for Setup now has the ability to create external client apps. With the Create External Client App action, you can create and configure your external client app by asking the Agent for Setup.

Create an External Client App by Using Agentforce

The Agent for Setup now has the ability to create external client apps. With the Create External Client App action, you can create and configure your external client app by asking the Agent for Setup.

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

Who: Agentforce (Default) is available to users with the Use Agentforce Default Agent user permission.

How: When you enable Agentforce in your org, the Agent for Setup tile automatically shows up in Agent Builder. Customize your agent in Agent Builder by adding topics, actions, and system messages, and then take it for a spin. Activate it and then get ready to use the power of AI in setup.

Agentforce for Security

Move beyond passive security metric data monitoring to interactive conversations about your security posture. Query security metrics by data type, tenant, or date, and receive agent-generated risk assessments and actionable remediation plans, through new Security agent actions. Quickly learn details about the policies in your Policy Center setup.

Identify Security Deviations by Using Agentforce
Cut through Salesforce notification overload using conversational, proactive security posture alerts with the Get Security Alerts agent action.

Unlock Insights from Your Security Data
Translate your security posture into plain language with the Get Security Metric Data agent action. Ask questions, get answers, and spot threats before they strike – all through simple conversation.

Leverage Risk and Remediation Insights
Deliver clear, conversational risk identification and prioritized remediation plans with the Classify Security Risk agent action so that admins know the “what” and the “how” of security responses.

Gain Insights About Policies with Agentforce
Streamline analysis of your data security and management policies with the Get Policy Details action. See a quick and detailed summary of even your most complex policies.

Identify Policies by Policy Type
Simplify policy management and maximize your efficiency with the Get Policies by Policy Type action. Indicate the policy type that you want, and let Agentforce compile the list for you.

Compile Policies by Object
Leverage the speed of Agentforce with the Get Policies by Object action. Instantly get a complete list of policies that contain a specific object instead of manually searching.

Identify Security Deviations by Using Agentforce

Cut through Salesforce notification overload using conversational, proactive security posture alerts with the Get Security Alerts agent action.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Security Center and Agentforce Platform add-on subscriptions.

Who: This change applies to customers with the Security Center add-on subscription. Agentforce (Default) is available to users with the Use Agentforce Default Agent user permission.

How: In Agent Builder, create a new Topic for “Security Support” or similar. Assign the **Get Security Alerts Action** to the Topic and activate your agent.

Unlock Insights from Your Security Data

Translate your security posture into plain language with the Get Security Metric Data agent action. Ask questions, get answers, and spot threats before they strike – all through simple conversation.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Security Center and Agentforce Platform add-on subscriptions.

Who: This change applies to customers with the Security Center add-on subscription. Agentforce

(Default) is available to users with the Use Agentforce Default Agent user permission.

How: In Agent Builder, create a new Topic for “Security Support” or similar. Assign the **Get Security Metric Data** Action to the Topic and activate your agent.

Leverage Risk and Remediation Insights

Deliver clear, conversational risk identification and prioritized remediation plans with the Classify Security Risk agent action so that admins know the “what” and the “how” of security responses.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with Security Center and Agentforce Platform add-on subscriptions.

Who: This change applies to customers with the Security Center add-on subscription. Agentforce (Default) is available to users with the Use Agentforce Default Agent user permission.

How: In Agent Builder, create a new Topic for “Security Support” or similar. Assign the **Classify Security Risk** Action to the Topic and activate your agent.

Gain Insights About Policies with Agentforce

Streamline analysis of your data security and management policies with the Get Policy Details action. See a quick and detailed summary of even your most complex policies.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Einstein Platform add-on.

Who: Policy Center is available to users with the Modify All Policy Center Policies and View All Policy Center Policies permissions. Agentforce (Default) is available to users with the Use Agentforce Default Agent user permission.

How: In Agent Builder, create a new topic for “Policy Details” or similar. Assign the **Get Policy Details** action to your Topic. Then activate your Agent.

Identify Policies by Policy Type

Simplify policy management and maximize your efficiency with the Get Policies by Policy Type action. Indicate the policy type that you want, and let Agentforce compile the list for you.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Einstein Platform add-on.

Who: Policy Center is available to users with the Modify All Policy Center Policies and View All Policy Center Policies permissions. Agentforce (Default) is available to users with the Use Agentforce Default Agent user permission.

How: In Agent Builder, create a new topic for “Policies by Type” or similar. Assign the **Get Policies by Policy Type** action to your Topic. Then activate your Agent.

Compile Policies by Object

Leverage the speed of Agentforce with the Get Policies by Object action. Instantly get a complete list of policies that contain a specific object instead of manually searching.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Einstein Platform add-on.

Who: Policy Center is available to users with the Modify All Policy Center Policies and View All Policy Center Policies permissions. Agentforce (Default) is available to users with the Use Agentforce Default Agent user permission.

How: In Agent Builder, create a new topic for “Policies by Object” or similar. Assign the **Get Policies by Object** action to your Topic. Then activate your Agent.

Own from Salesforce

Protect and manage your company’s data with secure end-to-end solutions. Own from Salesforce products help you minimize risk, address compliance, and keep your data reliable, relevant, and scalable.

- **Backup & Recover** protects your data with automated backups and proactive notifications of loss or corruption. Recover the right data quickly from any backup in your history with granular visibility into what’s changed.
- **Discover** activates your company’s historical data for more accurate trend analysis and operational reporting. Uncover sales trends, forecast buying patterns, and unlock customer insights to answer key business questions and drive smarter decisions.
- **Archive** removes data from production environments to prevent overage costs, improve performance, and ensure compliance. Track data and file storage, and find areas to free up space.
- **Data Mask & Seed** helps you respond quickly to right-to-be-forgotten requests by erasing any personal data. Anonymize personal data with templates instead of manual scripts. Easily seed quality data into any sandbox for development, training, or testing purposes.
- **Shield Extension** prepares your business and data for secure and seamless Agentforce deployment. Monitor threats and navigate compliance while protecting sensitive and critical customer data.
- **Security Center Extension** organizes all of your permissions and controls into one dashboard so that you can address overpermissioning, user access, and data exposures efficiently.
- **Secure** is the original Own from Salesforce product for identifying sensitive data in your implementation, classifying it, and taking action to protect that data.

Read detailed release notes about latest product updates and changes in the Own from Salesforce Product Release Notes.

Other Security Changes

Monitor blocked redirections that originate from hyperlinks in URL and Long Text Area Fields in Salesforce Classic. And the Trusted URL and Browser Policy Violations list in Setup shows more CSP violations.

Track Blocked Redirections from Hyperlinks in Salesforce Classic
To help you maintain your Trusted URLs for Redirects allowlist, Salesforce now logs blocked redirections that originate from hyperlinks in URL and Long Text Area Fields in Salesforce Classic. Previously, the Trusted URL and Browser Policy Violations list and Blocked Redirect event type captured blocked redirections only within components and pages.

Secure Redirections from Hyperlinks in Lightning Experience (Beta)
Protect your users by limiting redirections from hyperlinks in URL fields to only the external URLs that you trust. You can block those redirections or show a warning message that requires the user to confirm that they want to leave Salesforce before they're redirected. This feature is newly available to users that access Salesforce via Lightning Experience.

Get More Comprehensive Feedback on CSP Violations
Test changes to your Content Security Policy (CSP) with more confidence. Salesforce now records all CSP violations that originate from Lightning for the `img-src` (image), `font-src` (fonts), and `frame-src` (iframe content) directives. Previously, Salesforce sampled resource violations, which meant that resource violations generated for testing purposes rarely generated a CSP violation event.

Update Your Trusted URLs for the Latest CSP Directives (Release Update)
This update has been canceled. We continue to encourage you to work the Trusted URL and Browser Policy Violations list in Setup and to enable Adopt updated CSP directives in Session Settings. Also, that setting continues to be enabled by default in new orgs.

Track Blocked Redirections from Hyperlinks in Salesforce Classic

To help you maintain your Trusted URLs for Redirects allowlist, Salesforce now logs blocked redirections that originate from hyperlinks in URL and Long Text Area Fields in Salesforce Classic. Previously, the Trusted URL and Browser Policy Violations list and Blocked Redirect event type captured blocked redirections only within components and pages.

Where: This change applies to the Trusted URLs and Browser Policy Violations list in Lightning Experience and Salesforce Classic (not available in all orgs) in Enterprise, Performance, Unlimited, and Developer editions. The Blocked Redirect event type is available in Enterprise, Unlimited, and Developer editions. That event type is available in the API but not in the Event Monitoring Analytics app. The violations list and event type contain blocked redirections from hyperlinks only for users that access Salesforce with Salesforce Classic.

How: To view the violations list, from Setup, find and select **Trusted URL and Browser Policy Violations**. To gather information about blocked redirections over time, schedule a daily query of the Blocked Redirection event type.

See Also

Salesforce Help: Manage Trusted URL and Browser Policy Violations (can be outdated or unavailable during release preview)

Object Reference for the Salesforce Platform: Blocked Redirect Event Type (can be outdated or unavailable during release preview)

Secure Redirections from Hyperlinks in Lightning Experience (Beta)

Protect your users by limiting redirections from hyperlinks in URL fields to only the external URLs that you trust. You can block those redirections or show a warning message that requires the user to confirm that they want to leave Salesforce before they're redirected. This feature is newly available to users that access Salesforce via Lightning Experience.

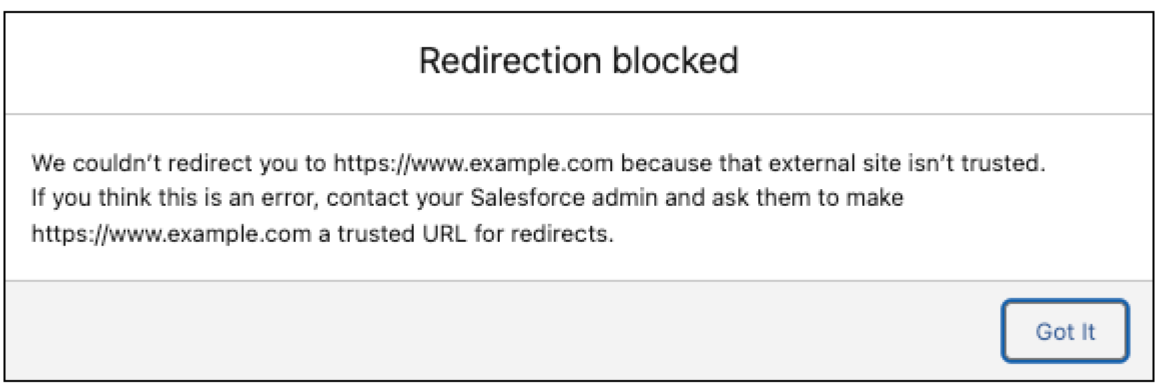
Where: This change applies to Lightning Experience in all editions.

Note Secure redirections to untrusted URLs in Lightning Experience is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

How: On the Trusted URLs for Redirects Setup page, specify the external URLs that you trust. Then for Redirections to Untrusted URLs (beta), select **Never** or **With User's Permission**.

Here are examples of the messages that a user sees when they click a hyperlink in a URL field and the target URL isn't on the Trusted URLs for Redirects allowlist.

When you select **Never**, the redirection is blocked.



When you select **With Users Permission**, the user can choose to proceed to the untrusted URL.

See Also

Salesforce Help: Secure External Redirections from Hyperlinks in Salesforce (can be outdated or unavailable during release preview)

Get More Comprehensive Feedback on CSP Violations

Test changes to your Content Security Policy (CSP) with more confidence. Salesforce now records all CSP violations that originate from Lightning for the `img-src` (image), `font-src` (fonts), and `frame-src` (iframe content) directives. Previously, Salesforce sampled resource violations, which meant that resource violations generated for testing purposes rarely generated a CSP violation event.

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

Why: To preserve performance, Salesforce uses throttling, a technique that limits the number of generated events when the volume is exceptionally high. Therefore, if your org generates a high volume of resource violations over a short period of time, some of those violations can fail to generate a CSP violation event. Throttling supports timely feedback during testing better than sampling.

How: To view the CSP violations for your org, use the Trusted URL and Browser Policy Violations list in Setup or the CSP Violation event type.

See Also

Salesforce Help: Manage Trusted URL and Browser Policy Violations (can be outdated or unavailable during release preview)

Object Reference for the Salesforce Platform: CSP Violation Event Type (can be outdated or unavailable during release preview)

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

This update has been canceled. We continue to encourage you to work the Trusted URL and Browser Policy Violations list in Setup and to enable Adopt updated CSP directives in Session Settings. Also, that setting continues to be enabled by default in new orgs.

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

When: This update was canceled and no longer appears in the Release Update page in Setup.

Why: This release update replaced the canceled Adopt Updated Content Security Policy (CSP) Directives release update, which was also canceled.

See Also

Salesforce Help: Manage Trusted URL and Browser Policy Violations (can be outdated or unavailable during release preview)

Service

Check out the latest features from Service Cloud to supercharge productivity across your organization. Service Cloud features are released as often as monthly, so check here for the latest information.

Product Area	Release Note
	April '25
Agentforce Employee Service	Boost Efficiency and Enhance Employee Experience with Agentforce for Self-Service
Agentforce Service Assistant	• Update Permissions for Agentforce Service Assistant Users (Release Update) • Redraft Service Plans to Include New Case Information • Ground Service Assistant in Your Knowledge Base • Provide Service Plan Email Updates to Customers • Monitor Service Plan Performance with Service Insights
Customer Experience Intelligence	• Gain Precise Insights with Normalized CSAT Scores • Enhance Data-Driven Insights with Rich Text Enabled Case Comments
Channels: Email	• Tailor the Email Summaries Prompt in Prompt Builder • Notify Senders About Email-to-Case Processing Errors • Draft With Einstein Improvement • Transition to the Lightning Editor for Email Composers in Email-to-Case (Generally Available) (Release Update) • Disable Ref ID and Transition to New Email Threading Behavior (Release Update)
Channels: Messaging	• Let Service Reps and Supervisors View Translated Transcripts and Respond

Product Area	Release Note
	in the Customer’s Preferred Language • Hide the Option for Service Reps to Set a Messaging Session as Inactive • Bring Your Own Channel • Bring More Expertise to Customer Interactions with Multi-Rep Conferencing • Customize Your Messaging for Web Chat Button • Secure Your Conversations in Messaging for Web with reCAPTCHA • Monitor Link Clicks and Window Closes with New Event Listeners • Procure and Set Up SMS Codes • Update Messaging Channel Settings in Bulk
Channels: Voice	• Assign Dedicated Phone Numbers to Service and Sales Reps • Manage Capacity via Status-Based Capacity for Voice (Generally Available) • Focus on Primary Tasks by Using Voice in an App with Standard Navigation (Generally Available) • Improve Rep Productivity with Real-Time Provider Status Visibility and Syncing • Access and Configure the Latest AWS Services for Your Contact Center • Get the Latest Enhancements for Your Amazon Connect Contact Center • Get Control Over Provisioning AWS Artifacts During Contact Center SetupReset Inaccessible AWS Root User Credentials Easily • Add Users in Bulk to a Contact Center Easily • Get Minimal Downtime With Automated Rep Global Sign-In • Manage Voice Calls with a Headset More Easily • Deliver Voicemails More Reliably with Modified Contact Flows
Channels: Chat	Legacy Chat Is Being Retired
Einstein Reply Recommendations	Accelerate Case Resolution and Boost Service Efficiency with Einstein Follow-Up Emails
Employee Service	• Drive Employee Enablement Program Completions with Enhanced Oversight • Accelerate Employee Enablement Program Creation with Prebuilt Templates • Optimize Employee Enablement Program with Dashboard and Reports • Enhance Employee Enablement Programs with Surveys • Accelerate Service Process Creation • Rapidly Deploy Service Processes with Prebuilt Templates • Improve Efficiency and Employee Experience with Agentforce for Self-

Product Area	Release Note
	Service • Streamline Support Interactions with Integrated Slack Experience • Leverage Data Visualization to Enhance HR Service Delivery with Service Insights • Manage Workday Employee Data by Using Prebuilt MuleSoft Integrations • Changed Object in Employee Service
Entitlements and Milestones	• Set Up SLA Management Faster with the New Simplified Setup Experience (Beta) • Delivered Idea: Improve Customer Engagement with Rich Text and Media in Case Comments (Beta) • Boost Rep Efficiency and Minimize Violations by Automatically Mapping Entitlements
Feedback Management	• Enhance Your Survey Design with Dynamic Emoji • Get a Visual Representation of Participants' Survey Progress • Gather More Data with Users Uploading More Attachments • Improve Response Rates by Creating Surveys with Compatible URLs
Knowledge	• Gather Feedback to Improve Your Knowledge Base (Generally Available) • Unify Knowledge with the Box Connector • Improve Article Navigation with a Table of Contents • Get More Done in the Lightning Article Editor
Salesforce Go	Simplify Service Cloud Feature Discovery and Setup
Self Service	Resolve User Search Queries Faster by Sharing Data Category Selection with Agentforce Service Agent (Beta)
Routing	• Declutter Omni Supervisor with Only Relevant AI Agents • Provide Better AI Support with Real-time Monitoring of Email Conversations • Respond Quickly to Changes in Service Channel Demand with Agentforce • Simplify Your Service Cloud Reporting with Prebuilt Dashboards and Reports • Expand Language Access for Messaging Supervision • Show Estimated Wait Times When Routing Work to Skills
Service Adoption	Salesforce Go from My Service Journey

AI Agents for Service Cloud

With the AI Agents for Service, your employees quickly complete common business tasks with Agentforce Employee Service, service reps close cases faster using case resolution guidance provided by Service Assistant, and new features for Agentforce Service Agent improve the routing of customer interactions in messaging channels to the agent.

Agentforce Service Agent Release Notes Have Moved
You can find the latest updates on the Agentforce Service Agent agent type and default template in the Agentforce and Einstein Platform release notes.

Agentforce Employee Service
Elevate your employee experience with a library of prebuilt templates for creating effective enablement programs. Streamline service delivery with Agentforce, ensuring efficient and automated support. Boost productivity and efficiency with the Employee Service Slack app, allowing employees to manage requests and service representatives to resolve tickets seamlessly, all within Slack. Enhance HR service operations through advanced data visualization. Seamlessly manage Workday data in Salesforce using the new MuleSoft integration apps.

Agentforce Service Assistant
As an assistive agent in the Case record page, Service Assistant helps your service reps resolve cases faster with real-time case summaries and step-by-step resolution guidance grounded in your unique Salesforce data. Service Assistant features are released as often as monthly. Find the latest features and improvements here.

Agentforce Service Agent Release Notes Have Moved

You can find the latest updates on the Agentforce Service Agent agent type and default template in the Agentforce and Einstein Platform release notes.

See Also
Agentforce & Einstein Platform

Agentforce Employee Service

Elevate your employee experience with a library of prebuilt templates for creating effective enablement programs. Streamline service delivery with Agentforce, ensuring efficient and automated support. Boost productivity and efficiency with the Employee Service Slack app, allowing employees to manage requests and service representatives to resolve tickets seamlessly, all within Slack. Enhance HR service operations through advanced data visualization. Seamlessly manage Workday data in Salesforce using the new MuleSoft integration apps.

Boost Efficiency and Enhance Employee Experience with Agentforce for Self-Service
Use the Agentforce Employee Service template, along with its predefined topics and actions to build an agent that helps resolve common employee support requests. With Agentforce, your employees can easily check their leave balance, generate an employment verification letter, access enablement

program details, submit expense claims, request leave, update direct deposit information, and manage their profile details. Always available, Agentforce ensures your employees' cases are handled quickly and efficiently.

Boost Efficiency and Enhance Employee Experience with Agentforce for Self-Service

Use the Agentforce Employee Service template, along with its predefined topics and actions to build an agent that helps resolve common employee support requests. With Agentforce, your employees can easily check their leave balance, generate an employment verification letter, access enablement program details, submit expense claims, request leave, update direct deposit information, and manage their profile details. Always available, Agentforce ensures your employees' cases are handled quickly and efficiently.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To use this feature, users need the Employee Hub Community User and Employee Service: Agentforce permission set licenses and these add-on licenses: Agentforce Service Agent, Agentforce Service Agent Manager, Customer Community Plus, Service Cloud Employee Hub Community User, and Service Cloud Employee Hub HR Service Workspace.

How: In Setup, find and select **Agentforce Agents**. Click **New Agent**, and then click **Create from a Template**. Select **Agentforce Employee Service**, and then configure and activate the agent. To access the agent, your employees can type relevant utterance in Agentforce.

Agentforce Service Assistant

As an assistive agent in the Case record page, Service Assistant helps your service reps resolve cases faster with real-time case summaries and step-by-step resolution guidance grounded in your unique Salesforce data. Service Assistant features are released as often as monthly. Find the latest features and improvements here.

Month	Release Notes
June '25	Update Permissions for Agentforce Service Assistant Users (Release Update)
April '25	• Ground Service Assistant in Your Knowledge Base • Service Planner is now Service Assistant • Redraft Service Plans to Include New Case Information • Provide Service Plan Email Updates to Customers • Monitor Service Plan Performance with Service

Month	Release Notes
	Insights

Update Permissions for Agentforce Service Assistant Users (Release Update)

Starting in Winter ’26, access to Service Assistant is provided only through the Service Planner User permission set license. At that time, permissions for Service Assistant will be removed from the Salesforce license, and feature access through that license isn’t available.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions with Service Cloud and with Einstein for Service and Einstein 1 editions.

When: The changes are enforced in Winter ’26.

Why: Service Assistant permissions assigned through the Salesforce license will be removed. Access to Agentforce Service Assistant is available only through the Service Planner User permission set license starting in Winter '26.

How: Profiles that currently have feature permissions through the Salesforce license now require the Service Planner User permission set license. Assign the Service Planner User permission set license to users who currently access Agentforce Service Assistant through the Salesforce license. Doing so makes sure they maintain feature access starting in Winter ’26.

Case Management

Case Management adds the Business Hours Age field to case reports, and the Close Case button on the case details page in Lightning Experience. The Business Hours Age field allows teams to track accurate case age without raising a support case. It helps support teams work within realistic timelines and provide timely customer service.The Close Case button makes the case closing process easier and faster for service reps.

Enable Business Hours Age to Track Accurate Case Age Without Raising a Support Case
Include the Business Hours Age field on case reports without raising a support case. Business Hours Age helps you track accurate case age. This helps your support teams work within realistic timelines and provide timely customer service.

Delivered Idea: Close Cases Faster by Adding the Close Case Button to the Case Details Page in Lightning Experience
After resolving a customer’s case, service reps can close the case directly from the case details page by clicking the Close Case button. This saves time that would be wasted navigating elsewhere to close the case.

Enable Business Hours Age to Track Accurate Case Age Without Raising a Support Case

Include the Business Hours Age field on case reports without raising a support case. Business Hours Age helps you track accurate case age. This helps your support teams work within realistic timelines and provide timely customer service.

Where: This change applies to Lighting Experience and Salesforce Classic in Developer, Enterprise, Unlimited, Performance, Professional, Shell, and Spark editions.

Why: Before this change, you had to raise a support case to turn on the Business Hours Age field on a case report. With this change, you can add the Business Hours Age field on a case report. This saves you the time spent in raising and tracking a support case. The Business Hours Age field helps in setting accurate milestones and managing escalations.

How: In **Setup**, search for **Reports** and select it. Select a report and select**Edit**. Search for **Business Hours Age** in **Columns**, and select it. Select **Save**, the Business Hours Age field will be visible on the case report.

See Also
Enable Business Hours Age in Case Report

Close Cases Faster by Adding the Close Case Button to the Case Details Page in Lightning Experience

After resolving a customer's case, service reps can close the case directly from the case details page by clicking the Close Case button. This saves time that would be wasted navigating elsewhere to close the case.

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

Why: Before this change, you had to create a custom button to close cases. You had to navigate to the custom button to close a case.

With this change, the Close Case button is available in page layouts and you can add it to the case details page. By using the Close Case button, service reps can directly close a case from the case details page. This makes the process easier for service reps, who close cases on a regular basis and increases their efficiency.

How: For new customers: The Close Case button is enabled by default and will be visible on the case details page.

For existing customers: Navigate to **Setup** and click **Object Manager**. In **Object Manager**, search for **Case Page Layouts** and select it. From **Mobile and Lightning Actions**, drag the **Close Case** button into the **Salesforce Mobile and Lightning Experience Actions** section. Click **Save**.

You can configure whether the Close Case button appears on the case details page directly or in the dropdown menu on the page. You can also configure what fields are displayed on the Close Case page.

See Also

Add the Close Case Button to Lightning Experience

Customer Experience Intelligence

Get a clear understanding of customer satisfaction levels across survey channels and touchpoints with normalized CSAT scores. Get a more comprehensive picture of customer feedback by using rich text enabled case comments.

Gain Precise Insights with Normalized CSAT Scores
View customer satisfaction (CSAT) scores on a consistent scale of 0 to 5, regardless of the original scale used in the customer survey. This makes it easier to accurately interpret your customer satisfaction levels and identify areas for improvement.

Enhance Data-Driven Insights with Rich Text Enabled Case Comments
Use rich text elements, such as bold, italic, underline, bulleted list, and numbered list, in case comments to gain richer, data-driven insights. Although images and videos aren't processed by the Large Language Model (LLM), you can use the text improvements to understand and respond to customer feedback better.

Gain Precise Insights with Normalized CSAT Scores

View customer satisfaction (CSAT) scores on a consistent scale of 0 to 5, regardless of the original scale used in the customer survey. This makes it easier to accurately interpret your customer satisfaction levels and identify areas for improvement.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Data Cloud and Feedback Management enabled, and the Customer Exprc Intel add-on.

Who: To view normalized CSAT scores, users need the CRM Analytics user and the CXI Analytics user permission set.

Enhance Data-Driven Insights with Rich Text Enabled Case Comments

Use rich text elements, such as bold, italic, underline, bulleted list, and numbered list, in case comments to gain richer, data-driven insights. Although images and videos aren't processed by the Large Language Model (LLM), you can use the text improvements to understand and respond to customer feedback better.

Where: This change applies to Lightning Experience in Enterprise and Unlimited editions with Data Cloud enabled and the Customer Exprc Intel add-on.

Who: To enable rich text formatting, users need the Customize Application permission set.

How: In Support Settings, select **Enable Rich Text for Case Comments**.

Channels

Channels enhancements include new and updated features for voice, messaging, and email. We're deprecating chat, and you're encouraged to migrate to messaging as a replacement.

Email
Customize your Einstein Email Summaries from the prompt itself, and check out improvements to Email-to-Case and Draft With Einstein.

Messaging
Messaging enhancements include new and updated features for standard and enhanced messaging, Messaging for In-App and Web, and Bring Your Own Channel messaging.

Voice
Assign dedicated phone numbers to individual service and sales reps, allowing customers to reach their preferred rep directly. With standard app support for Voice, status-based capacity is now available in all service channel types, including voice calls. Status-based capacity for Voice provides more flexibility, enabling reps to access multiple call records simultaneously without affecting session ownership.

Chat
Legacy chat is scheduled for retirement.

Email

Customize your Einstein Email Summaries from the prompt itself, and check out improvements to Email-to-Case and Draft With Einstein.

Tailor the Email Summaries Prompt in Prompt Builder
Use Prompt Builder to alter the length and tone of Einstein Email Summaries for your business needs.

Notify Senders About Email-to-Case Processing Errors
You asked, we listened. With this new organization preference, end users are notified when Email-to-Case can't process the email they sent to your organization.

Draft With Einstein Improvement
The EmailMessage.AutomationType field is now set to AI-Assisted for EmailMessage records created by Draft with Einstein, including saved drafts and emails sent without being saved as a draft.

Transition to the Lightning Editor for Email Composers in Email-to-Case (Generally Available) (Release Update)
When enabled, this release update replaces the email editor in the docked and case feed email composers. This update was generally available in Lightning Experience in Spring '24 and has no scheduled enforcement date.

Disable Ref ID and Transition to New Email Threading Behavior (Release Update)
This update turns off Ref ID threading and transitions to Lightning threading in Email-to-Case. With the new Email-to-Case threading behavior, incoming emails aren't matched using Ref IDs. Instead, they're

matched using a secure token in the email subject or body. If no match is found, Email-to-Case checks metadata from the email headers. This update was first available in Winter ‘21 and has no scheduled enforcement date.

Hourly Single Email Send Limit Updated for Case Lightning Email Composer
The hourly single email send limit now includes emails sent using the Case Lightning Email Composer. This change ensures that each user can send emails to a maximum of 250 external recipients per hour.

Tailor the Email Summaries Prompt in Prompt Builder

Use Prompt Builder to alter the length and tone of Einstein Email Summaries for your business needs.

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

Who: Users with the Einstein Conversation Translate User License can view and send translated messages.

How: In Setup, open the Service Email Summary template. In the Prompt Template Workspace, rewrite the first sentence to suit your preferences. You can also specify the number and length of sentences you want for single emails and for email chains.

See Also

Salesforce Help: Show Work Summaries for Email

Notify Senders About Email-to-Case Processing Errors

You asked, we listened. With this new organization preference, end users are notified when Email-to-Case can’t process the email they sent to your organization.

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

How: This preference is off by default. Enable it on the Email-to-Case page in Setup. As an organization administrator, you are already notified in the event of an Email-to-Case processing issue. If you allow end users to get this notification as well, they might try to re-send the email. This can cause duplication if you do the same.

Draft With Einstein Improvement

The EmailMessage.AutomationType field is now set to AI-Assisted for EmailMessage records created by Draft with Einstein, including saved drafts and emails sent without being saved as a draft.

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

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

When enabled, this release update replaces the email editor in the docked and case feed email composers. This update was generally available in Lightning Experience in Spring '24 and has no scheduled enforcement date.

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

Why: Salesforce is replacing the email editor in the docked and case feed email composers and switching to a modern editor based in HTML 5. The new editor provides similar functionality in Lightning Experience. New features include:

- Full-screen mode
- Printing
- Undo and Redo buttons
- Format painting
- Emoji picker
- Resizability
- A more responsive toolbar

You asked for a cleaner visual experience, and we listened. We also removed the automatically displayed table controls, word and character counts, and the window about formatting pasted text.

How: This update is available to Salesforce orgs with Email-to-Case enabled. If your org was created in Winter '24 or later, you see the new editor by default. If your org was created before Winter '24, you can enable it on the Release Updates page in Setup. After the release update is enabled, users see similar functionality when they compose and edit emails. To revert to the previous editor, disable the release update.

See Also

Release Updates

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

This update turns off Ref ID threading and transitions to Lightning threading in Email-to-Case. With the new Email-to-Case threading behavior, incoming emails aren't matched using Ref IDs. Instead, they're matched using a secure token in the email subject or body. If no match is found, Email-to-Case checks metadata from the email headers. This update was first available in Winter '21 and has no scheduled enforcement date.

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

Why: Ref ID is currently in maintenance mode. New features and bug fixes will be added only to the new

Lightning threading. To ensure the best experience for your customers, we recommend enabling this release update, after testing it in your sandbox.

Similar to Ref ID threading, token-based threading inserts a formatted string into the email body or subject, but this string is now created in a way that meets Salesforce security standards. When Lightning threading is enabled, new outbound emails don't include a Ref ID.

How: To review this update, from Setup, in the Quick Find box, enter Release Updates, and then select Release Updates. For Disable Ref ID and Transition to New Email Threading Behavior, follow the testing and activation steps.

See Also

Knowledge Article: Disable Ref ID and Switch to Lightning Threading
Release Updates

Hourly Single Email Send Limit Updated for Case Lightning Email Composer

The hourly single email send limit now includes emails sent using the Case Lightning Email Composer. This change ensures that each user can send emails to a maximum of 250 external recipients per hour.

Where: This change applies to Lightning Experience.

Why: This update ensures consistency in email sending limits across different use cases. It replaces the previous limitation that applied to emails sent from the Email Composer in Lightning Experience.

How: To send automated case emails, use QuickActionRequest.

Messaging

Messaging enhancements include new and updated features for standard and enhanced messaging, Messaging for In-App and Web, and Bring Your Own Channel messaging.

Let Service Reps and Supervisors View Translated Transcripts and Respond in the Customer's Preferred Language
Einstein Conversation Translate shows a customer's messages in the service rep's preferred language in the Enhanced Conversation component. The feature then translates the service rep's message to the customer so that it appears in the customer's preferred language in the messaging conversation window. Supervisors can review translated conversations in Omni Supervisor. Previously, service reps who didn't speak a customer's language couldn't assist them.

Hide the Option for Service Reps to Set a Messaging Session as Inactive
You asked, we listened. Declutter the Enhanced Conversation component menu by hiding the option to set Inactive status. Previously, service reps always had the option to set an unresponsive customer as Inactive.

Bring Your Own Channel
Enhance customer service with warm transfers and conferencing for Bring Your Own Channel. Provider partners can customize messaging conferencing dynamically by using Interaction Service API.

Additionally, preview file attachments for Bring Your Own Channel.

Bring More Expertise to Customer Interactions with Multi-Rep Conferencing

Despite their expertise, service reps sometimes don't have all the answers to a customer's problem. With Conferencing, a rep can invite upto five agents for Messaging In-App and Web and up to two agents for third-party channels to collaborate in a single chat, ensuring a more thorough and efficient resolution. Previously, Messaging for In-App and Web supported only single-rep chats, which limited support for complex issues.

Customize Your Messaging for Web Chat Button

Align your chat experience with your brand by customizing the Messaging for Web chat button on your contact center website. Previously, admins were limited to using a default icon, but they can now set a custom image URL for a more personalized look.

Secure Your Conversations in Messaging for Web with reCAPTCHA

Looking to safeguard your Messaging for Web channels from automated threats? To make sure only human users initiate new messaging sessions and to enhance your defense against spam bots, enable reCAPTCHA v3.

Monitor Link Clicks and Window Closes with New Event Listeners

Set up notifications for when a user clicks a static text message link in a messaging conversation and when they close a messaging window through the UI or API.

Procure and Set Up SMS Codes

Procure your SMS codes for enhanced SMS channels in a faster, easier, and compliant way. SMS code procurement is now streamlined. You can request 10-digit long codes (10DLC US and Canada) and toll-free long codes (US only) directly within Setup without filing a case for Salesforce Customer Support. The estimated code provisioning time is now reduced from four to two weeks. And, you can now request your brand and campaign for 10DLC SMS channels (US and Canada) directly from the Setup.

Update Messaging Channel Settings in Bulk

Streamline your workflow by updating settings for multiple enhanced Messaging channels simultaneously. Use a CSV file to make bulk changes, significantly reducing the time and effort required compared to individual channel edits.

Streamline Business Messaging with WhatsApp Flows

Use WhatsApp Flows to guide your customers through a structured business interaction, like booking an appointment or requesting feedback. Use a Form messaging component to define and customize your flow.

Get Timely Feedback with Post-Conversation Surveys

Easily send customers post-conversation surveys directly within your customer’s preferred messaging channel, immediately after a service interaction. With this new functionality, you don’t need to create a messaging component. You can set up automated surveys with just a few clicks.

Route Work Directly to Agentforce

Save time by routing work items directly to Agentforce service agents, without using an Omni-Channel flow.

Let Service Reps and Supervisors View Translated Transcripts and Respond in the Customer's Preferred Language

Einstein Conversation Translate shows a customer's messages in the service rep's preferred language in the Enhanced Conversation component. The feature then translates the service rep's message to the customer so that it appears in the customer's preferred language in the messaging conversation window. Supervisors can review translated conversations in Omni Supervisor. Previously, service reps who didn't speak a customer's language couldn't assist them.

Where: This change applies to enhanced messaging channels and Messaging for In-App and Web. View required editions.

Who: Users with the Einstein Conversation Translate User License can view and send translated messages.

How: On the Einstein Conversation Translate Settings page in Setup, turn on Einstein Conversation Translate.

See Also

Salesforce Help: Translate a Messaging Conversation (can be outdated or unavailable during release preview)

Hide the Option for Service Reps to Set a Messaging Session as Inactive

You asked, we listened. Declutter the Enhanced Conversation component menu by hiding the option to set Inactive status. Previously, service reps always had the option to set an unresponsive customer as Inactive.

Where: This change applies to enhanced messaging channels and Messaging for In-App and Web. View required editions.

How: In the Lightning App Builder, open the Einstein Conversation component editor. Select **Hide customer inactive action**.

See Also

Salesforce Help: Add Messaging to the Service Console (can be outdated or unavailable during release preview)

Bring Your Own Channel

Enhance customer service with warm transfers and conferencing for Bring Your Own Channel. Provider partners can customize messaging conferencing dynamically by using Interaction Service API. Additionally, preview file attachments for Bring Your Own Channel.

Enhance Customer Service with Warm Transfers and Conferencing for Bring Your Own Channel
Add new reps to a conversation with a customer. Enable seamless rep to rep hand-offs through warm

transfers so that a rep taking over the conversation has all the necessary context to resolve the customer issue quickly. You can also add multiple reps to a conversation to collaborate on complex issues. Previously, conversations were limited to only two participants: a rep and a messaging end user.

Customize Messaging Conferencing Dynamically for Bring Your Own Channel for CCaaS
To customize the messaging experience for service reps based on business requirements, modify rep access to UI controls programmatically. Starting in Summer '25, Contact Center as a Service (CCaaS) provider partners can turn off or on Messaging conferencing by using Interaction Service API.

Preview Images and Files Sent in a Bring Your Own Channel Messaging Session
To quickly get context, view the image preview that appears if a rep or messaging end user sends an attachment during a Bring Your Own Channel conversation. Click the thumbnail image of a PDF to preview its contents.

Enhance Customer Service with Warm Transfers and Conferencing for Bring Your Own Channel

Add new reps to a conversation with a customer. Enable seamless rep to rep hand-offs through warm transfers so that a rep taking over the conversation has all the necessary context to resolve the customer issue quickly. You can also add multiple reps to a conversation to collaborate on complex issues. Previously, conversations were limited to only two participants: a rep and a messaging end user.

Where: This change applies to Bring Your Own Channel for Messaging and Bring Your Own Channel for CCaaS. View required editions.

See Also

- Bring More Expertise to Customer Interactions with Multi-Rep Conferencing
- *Bring Your Own Channel for CCaaS Developer Guide:* Add Multiple Participants to a Messaging Conference
- *Bring Your Own Channel for Messaging Developer Guide:* Add Multiple Participants to a Messaging Conference

Customize Messaging Conferencing Dynamically for Bring Your Own Channel for CCaaS

To customize the messaging experience for service reps based on business requirements, modify rep access to UI controls programmatically. Starting in Summer '25, Contact Center as a Service (CCaaS) provider partners can turn off or on Messaging conferencing by using Interaction Service API.

Where: This change applies to Bring Your Own Channel for CCaaS. View required editions.

How: Pass information about action enabled or disabled in the payload for the `/agentWork` endpoint in Interaction Service API.

See Also

- *Bring Your Own Channel for CCaaS Developer Guide:* Dynamically Control Messaging Actions
- *Interaction Service API:* Create an AgentWork Record

Preview Images and Files Sent in a Bring Your Own Channel Messaging Session

To quickly get context, view the image preview that appears if a rep or messaging end user sends an attachment during a Bring Your Own Channel conversation. Click the thumbnail image of a PDF to preview its contents.

Where: This change applies to Bring Your Own Channel for Messaging and Bring Your Own Channel for CCaaS. View required editions.

How: To send attachments, call the `/capabilities` endpoint in Interaction Service API to register the file attachment capability. Then, call the `/interactions` endpoint to send an event from the client side to Salesforce if a messaging end user sends a file. Specify the correct file size for `interactions.contentLength` to make sure that the file attachment uploads properly.

See Also

Salesforce Help: Send Images and Files in Messaging Sessions (can be outdated or unavailable during release preview)
Salesforce Developer Reference Interaction Service API
GitHub Interaction Service API

Bring More Expertise to Customer Interactions with Multi-Rep Conferencing

Despite their expertise, service reps sometimes don't have all the answers to a customer's problem. With Conferencing, a rep can invite upto five agents for Messaging In-App and Web and up to two agents for third-party channels to collaborate in a single chat, ensuring a more thorough and efficient resolution. Previously, Messaging for In-App and Web supported only single-rep chats, which limited support for complex issues.

Where: This change applies to Messaging for In-App and Web and Bring Your Own Channel. View required editions

How: In Setup, go to Presence Configurations and customize your Transfer Destination settings to enable conferencing. You'll receive messages when a service rep joins or leaves the conversation and can see typing indicators to track responses.

See Also

Salesforce Help: Add Messaging to the Service Console (can be outdated or unavailable during release preview)
Salesforce Help: Customize Profiles, Queues, and Flows for Service Rep Chat Transfers and Conferencing (can be outdated or unavailable during release preview)
Salesforce Help: Add Conferencing to Messaging Session (can be outdated or unavailable during release preview)

Customize Your Messaging for Web Chat Button

Align your chat experience with your brand by customizing the Messaging for Web chat button on your contact center website. Previously, admins were limited to using a default icon, but they can now set a custom image URL for a more personalized look.

Where: This change applies to Messaging for Web. View required editions

Why: A well-placed and visually appealing chat button boosts visibility, makes it easier for users to access support, drives higher engagement, and reinforces brand consistency.

How: Go to the Branding section of the Embedded Service Deployment Settings page, open your deployment and click **Branding**. Under Image settings, upload a URL for your **Chat Button** image.

Secure Your Conversations in Messaging for Web with reCAPTCHA

Looking to safeguard your Messaging for Web channels from automated threats? To make sure only human users initiate new messaging sessions and to enhance your defense against spam bots, enable reCAPTCHA v3.

Where: This feature applies to Messaging for Web and is currently available only to REST API and Web customers – not yet for Mobile. View required editions

Why: Unprotected messaging channels are vulnerable to spam, resource waste, and diminished user experience. reCAPTCHA strengthens security by blocking bots, ensuring your team can focus on genuine customer interactions.

How: Sign up on the Google reCAPTCHA website and register your domain for reCAPTCHA v3. In Setup, turn on **reCAPTCHA Verification** in Messaging settings, add your API keys from reCAPTCHA registration,and click **Save**. Publish to apply the changes.

Monitor Link Clicks and Window Closes with New Event Listeners

Set up notifications for when a user clicks a static text message link in a messaging conversation and when they close a messaging window through the UI or API.

Where: This change applies to Messaging for Web. View required editions.

How: Use the `window.addEventListener` method to register a handler for the `onEmbeddedMessageLinkClicked` and `onEmbeddedMessagingWindowClosed` events.

See Also

Salesforce Developer Guide: Event Listeners

Procure and Set Up SMS Codes

Procure your SMS codes for enhanced SMS channels in a faster, easier, and compliant way. SMS code procurement is now streamlined. You can request 10-digit long codes (10DLC US and Canada) and toll-free long codes (US only) directly within Setup without filing a case for Salesforce Customer Support. The estimated code provisioning time is now reduced from four to two weeks. And, you can now request your brand and campaign for 10DLC SMS channels (US and Canada) directly from the Setup.

Where: This change applies to enhanced SMS Messaging channels. View required editions.

How: To use this feature, see Salesforce Help (may be outdated or unavailable during release preview):

- Create Long Code SMS Channels (US and Canada)
- Create Toll-Free Long Code Channels (US)
- Request a Brand for a 10-Digit Long Code (US and Canada)
- Request a Campaign for a 10-Digit Long Code (US and Canada)

Update Messaging Channel Settings in Bulk

Streamline your workflow by updating settings for multiple enhanced Messaging channels simultaneously. Use a CSV file to make bulk changes, significantly reducing the time and effort required compared to individual channel edits.

Where: This change applies to enhanced Messaging channels and Messaging for In-App and Web. View required editions.

How: To use this feature, follow the steps in Update Messaging Channels in Bulk in Salesforce Help (may be outdated or unavailable during release preview).

Streamline Business Messaging with WhatsApp Flows

Use WhatsApp Flows to guide your customers through a structured business interaction, like booking an appointment or requesting feedback. Use a Form messaging component to define and customize your flow.

Where: This change applies to WhatsApp channels. View required editions.

How: Add the WhatsApp Flows format to a Form messaging component in the Messaging Component Builder. Then customize the Flow details and messages that customers interact with.

Get Timely Feedback with Post-Conversation Surveys

Easily send customers post-conversation surveys directly within your customer's preferred messaging channel, immediately after a service interaction. With this new functionality, you don't need to create a messaging component. You can set up automated surveys with just a few clicks.

Where: This change applies to enhanced messaging channels and Messaging for In-App and Web. View required editions. Feedback Management Starter or Growth is required to use this feature.

Why: This feature uses a new one-questionconversational survey type in Feedback Management, designed to be simple and seamless. The survey renders natively within the messaging thread and adapts to each channel's capabilities, showing rich, interactive elements where they're supported.

How: Create a survey in Salesforce Feedback Management. On the Messaging Settings page, find your channel and select **Configure Survey** in the channel action menu. Under Survey Invitation Settings, select **Conversational**. In the dropdown menu, select the Conversational Survey you just created.

Responses are recorded in Salesforce Surveys.

Route Work Directly to Agentforce

Save time by routing work items directly to Agentforce service agents, without using an Omni-Channel flow.

Where: This change applies to enhanced messaging channels and Messaging for In-App and Web. View required editions.

How: On the Messaging Settingspage in Setup, connect your activated service agent to your messaging channel.

Voice

Assign dedicated phone numbers to individual service and sales reps, allowing customers to reach their preferred rep directly. With standard app support for Voice, status-based capacity is now available in all service channel types, including voice calls. Status-based capacity for Voice provides more flexibility, enabling reps to access multiple call records simultaneously without affecting session ownership.

Assign Dedicated Phone Numbers to Service and Sales Reps
Route calls directly to specific sales or service reps by assigning them unique direct inward dialing (DID) phone numbers. This setup differs from most Service Cloud use cases where each contact center phone number is mapped to multiple service reps in a contact center and calls are routed based on routing configurations. Now you can associate unique phone numbers to specific reps in Salesforce. Reps can dial out to customers while showing their direct number on Caller ID, and customers can reach their preferred rep directly.

Manage Capacity via Status-Based Capacity for Voice (Generally Available)
Measure rep capacity based on the status of a rep's accepted work. Status-based capacity was previously available for other service channels, but it's now available for Voice. Thanks to status-based capacity, voice calls are available on Lightning apps with standard navigation. Using status-based capacity instead of tab-based capacity changes the rep experience for voice calls. In standard (not console) apps, reps have more freedom to simultaneously view multiple voice call records without session ownership being affected. This feature is now generally available.

Focus on Primary Tasks by Using Voice in an App with Standard Navigation (Generally Available)
Get more flexibility in Service Cloud Voice for app type and capacity model. Help service reps stay focused on their primary tasks by using Service Cloud Voice in apps with standard navigation. Previously, Service Cloud Voice relied on tab-based capacity, which was only available in console apps. With standard app support for Voice, status-based capacity is now available in all service channel

types, including voice calls. This feature is now generally available.

Improve Rep Productivity with Real-Time Provider Status Visibility and Syncing

Help reps stay aware of their status in both Salesforce and Amazon Connect with real-time visibility. If they see a rare discrepancy between platform statuses or an error in their Amazon Connect status, reps can manually trigger a sync to push their Omni-Channel status to Amazon Connect. Doing so helps them stay available to receive calls and resolve issues faster, without having to involve a supervisor or admin.

Access and Configure the Latest AWS Services for Your Contact Center

Stay up to date with the latest AWS services and capabilities by using Salesforce Contact Center with Amazon Connect (SCC). From your Service Cloud Voice setup page, launch SCC and use it to access and configure Amazon Connect features and AWS services for your contact center, such as Amazon Connect Chat. SCC is now available for Voice manually integrated with your Amazon Connect instance through XML import.

Get the Latest Enhancements for Your Amazon Connect Contact Center

Take advantage of the Service Cloud Voice enhancements and error fixes for your Amazon Connect contact center. Summer ’25 includes Contact Center version 18.0. To test the updates before they go live in production, deploy them to your sandbox.

Get Control Over Provisioning AWS Artifacts During Contact Center Setup

During contact center setup, admins now have the added flexibility to create CloudFormation templates and provision AWS artifacts in the AWS account themselves. This flexibility ensures better security compliance and provides tailored control over the contact center setup.

Reset Inaccessible AWS Root User Credentials Easily

If you're an admin, you can now use the Voice Connect API to reset an inaccessible root user email address of an AWS member account. This feature saves you time and reduces dependency on external support, ensuring smoother and more efficient operations.

Add Users in Bulk to a Contact Center Easily

You can now use Bulk 2.0 APIs to easily add users in bulk to contact centers, significantly reducing the time required to onboard new users. You can also use this feature to update contact center user details in bulk. Detailed error messages are provided if a bulk addition fails, ensuring quick and efficient troubleshooting.

Get Minimal Downtime With Automated Rep Global Sign-In

If you have disaster recovery or Amazon Connect Global Resiliency (ACGR) set up, reps signing in to the primary contact center are also automatically signed in to the secondary instance. This Active-Active connect configuration ensures minimal downtime during disaster recovery and maintains customer service continuity.

Manage Voice Calls with a Headset More Easily

Reps can manage voice calls more efficiently and conveniently using a headset to accept, mute, unmute, hold, and end calls. This feature now supports a variety of headset brands, such as Plantronics, Sennheiser, Jabra, Yealink, and VBeT.

Deliver Voicemails More Reliably with Modified Contact Flows

To improve rep productivity and for a better customer experience, the contact flows for voicemails are now modified to set the value of callOrigin field as Voicemail. This update ensures voicemails are correctly tracked and delivered to the rep.

Assign Dedicated Phone Numbers to Service and Sales Reps

Route calls directly to specific sales or service reps by assigning them unique direct inward dialing (DID) phone numbers. This setup differs from most Service Cloud use cases where each contact center phone number is mapped to multiple service reps in a contact center and calls are routed based on routing configurations. Now you can associate unique phone numbers to specific reps in Salesforce. Reps can dial out to customers while showing their direct number on Caller ID, and customers can reach their preferred rep directly.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

See Also

Salesforce Help: Route Calls Directly to and from Reps (can be outdated or unavailable during release preview)

Manage Capacity via Status-Based Capacity for Voice (Generally Available)

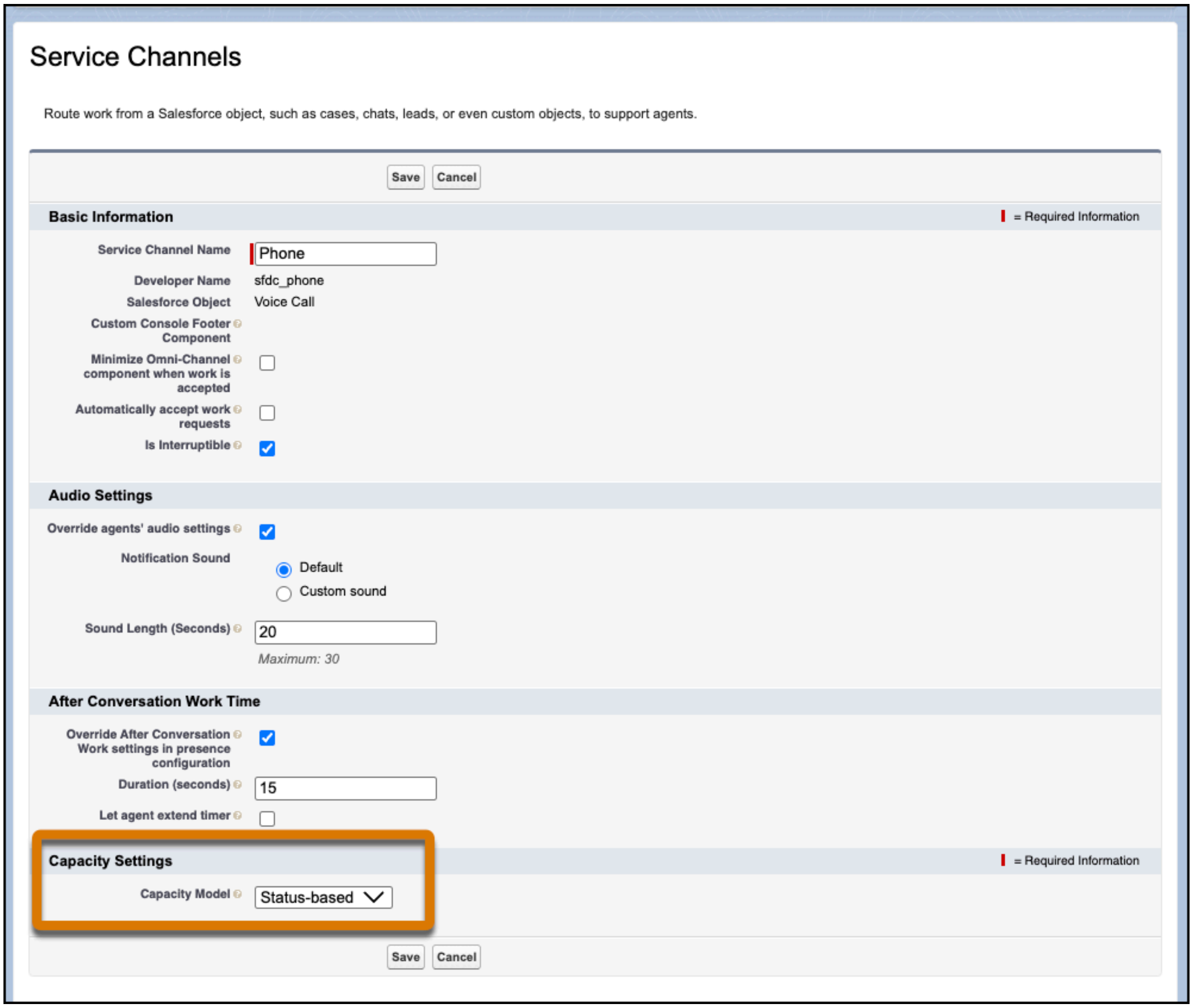
Measure rep capacity based on the status of a rep's accepted work. Status-based capacity was previously available for other service channels, but it's now available for Voice. Thanks to status-based capacity, voice calls are available on Lightning apps with standard navigation. Using status-based capacity instead of tab-based capacity changes the rep experience for voice calls. In standard (not console) apps, reps have more freedom to simultaneously view multiple voice call records without session ownership being affected. This feature is now generally available.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect
- Service Cloud Voice with Partner Telephony

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

How: On the Omni-Channel Settings page in Setup, make sure that enhanced Omni-Channel routing is enabled and then select Enable Status-Based Capacity Model. Then, on the Service Channels page in Setup, create a Service Channel for the Voice Call object and select Status-Based as the Capacity Model.



Focus on Primary Tasks by Using Voice in an App with Standard Navigation (Generally Available)

Get more flexibility in Service Cloud Voice for app type and capacity model. Help service reps stay focused on their primary tasks by using Service Cloud Voice in apps with standard navigation. Previously, Service Cloud Voice relied on tab-based capacity, which was only available in console apps. With standard app support for Voice, status-based capacity is now available in all service channel types, including voice calls. This feature is now generally available.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect
- Service Cloud Voice with Partner Telephony

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

See Also

Manage Capacity via Status-Based Capacity for Voice (Generally Available)

Improve Rep Productivity with Real-Time Provider Status Visibility and Syncing

Help reps stay aware of their status in both Salesforce and Amazon Connect with real-time visibility. If they see a rare discrepancy between platform statuses or an error in their Amazon Connect status, reps can manually trigger a sync to push their Omni-Channel status to Amazon Connect. Doing so helps them stay available to receive calls and resolve issues faster, without having to involve a supervisor or admin.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

How: Add the Voice Status utility to your app using App Manager. Then, from Setup, edit your Amazon Contact Center details. Under Show Provider Status, select **Add telephony provider presence status to Voice Status utility**.

See Also

Salesforce Help: Monitor and Sync Rep Status (can be outdated or unavailable during release preview)
Salesforce Help: Check Voice Status and Address Provider Status Issues (can be outdated or unavailable during release preview)

Access and Configure the Latest AWS Services for Your Contact Center

Stay up to date with the latest AWS services and capabilities by using Salesforce Contact Center with Amazon Connect (SCC). From your Service Cloud Voice setup page, launch SCC and use it to access and configure Amazon Connect features and AWS services for your contact center, such as Amazon Connect Chat. SCC is now available for Voice manually integrated with your Amazon Connect instance through XML import.

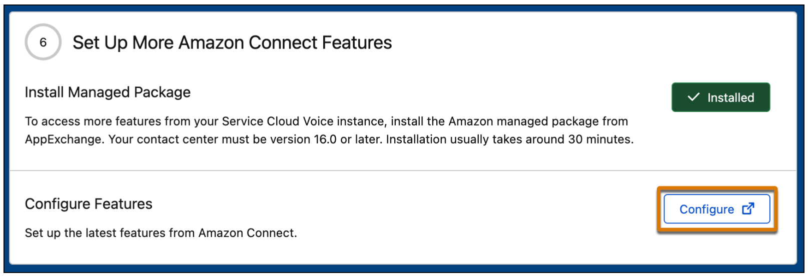
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

For Service Cloud Voice With Amazon Connect, you must have the Additional AWS services add-on license to configure and use Amazon Connect features through Salesforce Contact Center with Amazon Connect. If you have Service Cloud Voice with Amazon Connect, reach out to your Salesforce account executive to request access to SCC. Amazon Connect Chat is currently available for Service Cloud Voice with Partner Telephony from Amazon Connect only.

How: First, set up Service Cloud Voice with Amazon Connect or Service Cloud Voice with Partner Telephony from Amazon Connect. To install the Salesforce Contact Center with Amazon Connect managed package, under Amazon Setup or Partner Telephony Setup, go to Set Up More Amazon Connect Features, and click **Install**. After installation completes, click **Configure** to launch Salesforce Contact Center with Amazon Connect and configure the latest Amazon Connect features.



See Also

Salesforce Help: Salesforce Contact Center with Amazon Connect

Salesforce Help: Add Messaging to a Partner Telephony Contact Center

Amazon Setup and Installation Guide: Salesforce Contact Center with Amazon Connect

Get the Latest Enhancements for Your Amazon Connect Contact Center

Take advantage of the Service Cloud Voice enhancements and error fixes for your Amazon Connect contact center. Summer ’25 includes Contact Center version 18.0. To test the updates before they go live in production, deploy them to your sandbox.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It’s also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

See Also

Knowledge Article: Service Cloud Voice Contact Center Updates (can be outdated or unavailable during release preview)

Get Control Over Provisioning AWS Artifacts During Contact Center Setup

During contact center setup, admins now have the added flexibility to create CloudFormation templates and provision AWS artifacts in the AWS account themselves. This flexibility ensures better security compliance and provides tailored control over the contact center setup.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Partner Telephony from Amazon Connect (Voice manually integrated with your Amazon Connect through XML import)

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

Reset Inaccessible AWS Root User Credentials Easily

If you're an admin, you can now use the Voice Connect API to reset an inaccessible root user email address of an AWS member account. This feature saves you time and reduces dependency on external support, ensuring smoother and more efficient operations.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

See Also

Salesforce Developer Guide: Connect REST API Developer Guide (can be outdated or unavailable during release preview)

Add Users in Bulk to a Contact Center Easily

You can now use Bulk 2.0 APIs to easily add users in bulk to contact centers, significantly reducing the time required to onboard new users. You can also use this feature to update contact center user details in bulk. Detailed error messages are provided if a bulk addition fails, ensuring quick and efficient troubleshooting.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect

- Service Cloud Voice with Partner Telephony from Amazon Connect

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

Get Minimal Downtime With Automated Rep Global Sign-In

If you have disaster recovery or Amazon Connect Global Resiliency (ACGR) set up, reps signing in to the primary contact center are also automatically signed in to the secondary instance. This Active-Active connect configuration ensures minimal downtime during disaster recovery and maintains customer service continuity.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Partner Telephony from Amazon Connect (Voice manually integrated with your Amazon Connect through XML import)

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

Manage Voice Calls with a Headset More Easily

Reps can manage voice calls more efficiently and conveniently using a headset to accept, mute, unmute, hold, and end calls. This feature now supports a variety of headset brands, such as Plantronics, Sennheiser, Jabra, Yealink, and VBeT.

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

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

Deliver Voicemails More Reliably with Modified Contact Flows

To improve rep productivity and for a better customer experience, the contact flows for voicemails are now modified to set the value of callOrigin field as Voicemail. This update ensures voicemails are correctly tracked and delivered to the rep.

Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions. Available in Salesforce orgs with these telephony models.

- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony from Amazon Connect

Service Cloud Voice is available in Sales Cloud, Service Cloud, and Government Cloud with the Service Cloud Voice add-on license. It's also available in Industries Clouds built from Sales Cloud or Service Cloud. View supported editions.

Chat

Legacy chat is scheduled for retirement.

Legacy Chat Is Being Retired
Legacy chat is scheduled for retirement on February 14, 2026, and is in maintenance mode unit then. You can continue to use chat until that date, but we recommned transitioning to Messaging for In-App and Web for modernized customer communication. Messaging offers many of the chat features that you love plus asynchronous conversations that can be picked back up at any time.

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

How: As of February 14, 2026, legacy chat will be removed and you can't access or use chat. To avoid service interruptions to your customers, migrate to Messaging for In-App and Web before that date.

See Also

Knowledge Article: Chat & Live Agent Retirement
Salesforce Help: Considerations when Replacing Chat with Messaging for In-App and Web

Einstein Reply Recommendations

Create friendly follow-up emails to customers with the Follow-Up Service Email prompt template in Prompt Builder.

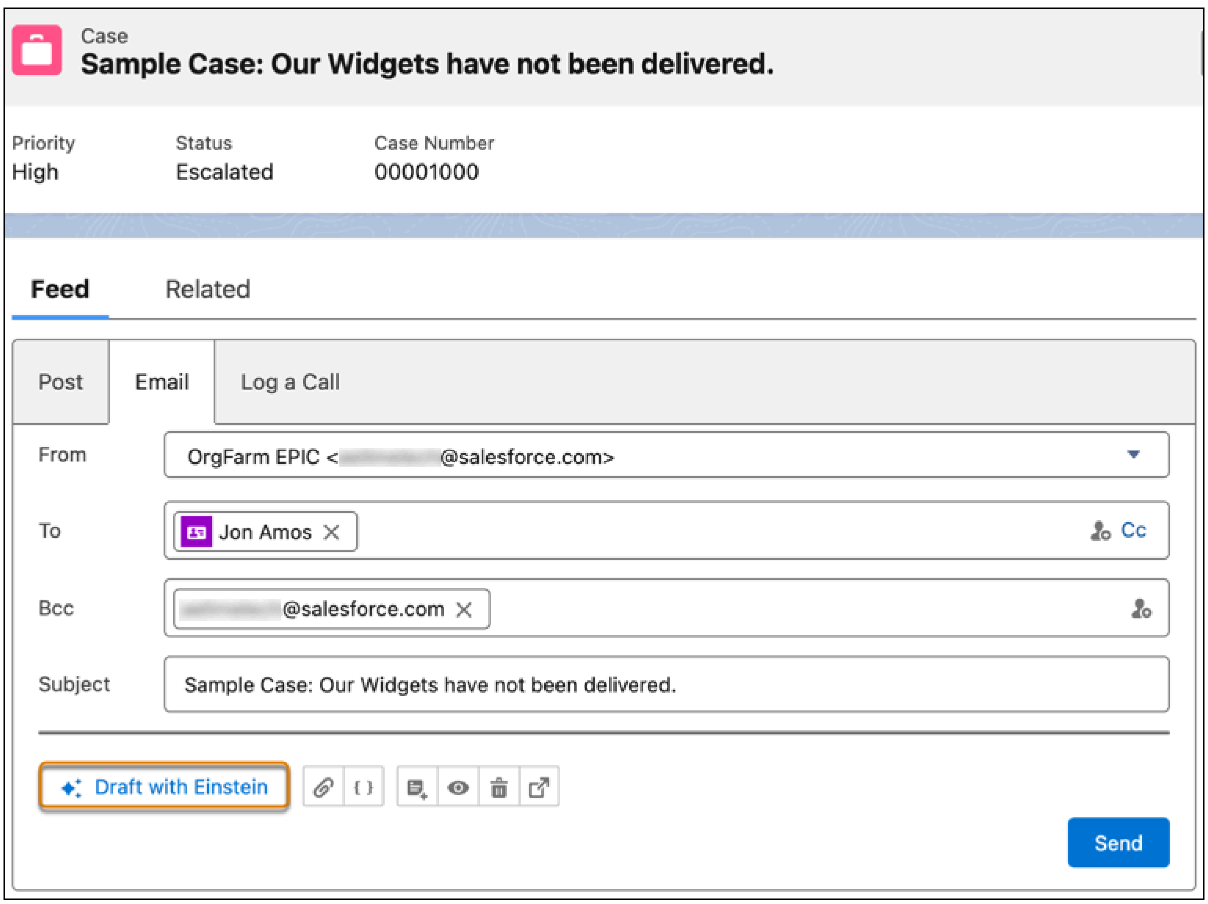
Accelerate Case Resolution and Boost Service Efficiency with Einstein Follow-Up Emails
Create friendly follow-up emails with the Follow-Up Service Email prompt template in Prompt Builder. Service reps can use this template to quickly generate and send follow-up emails to customers who haven't responded.

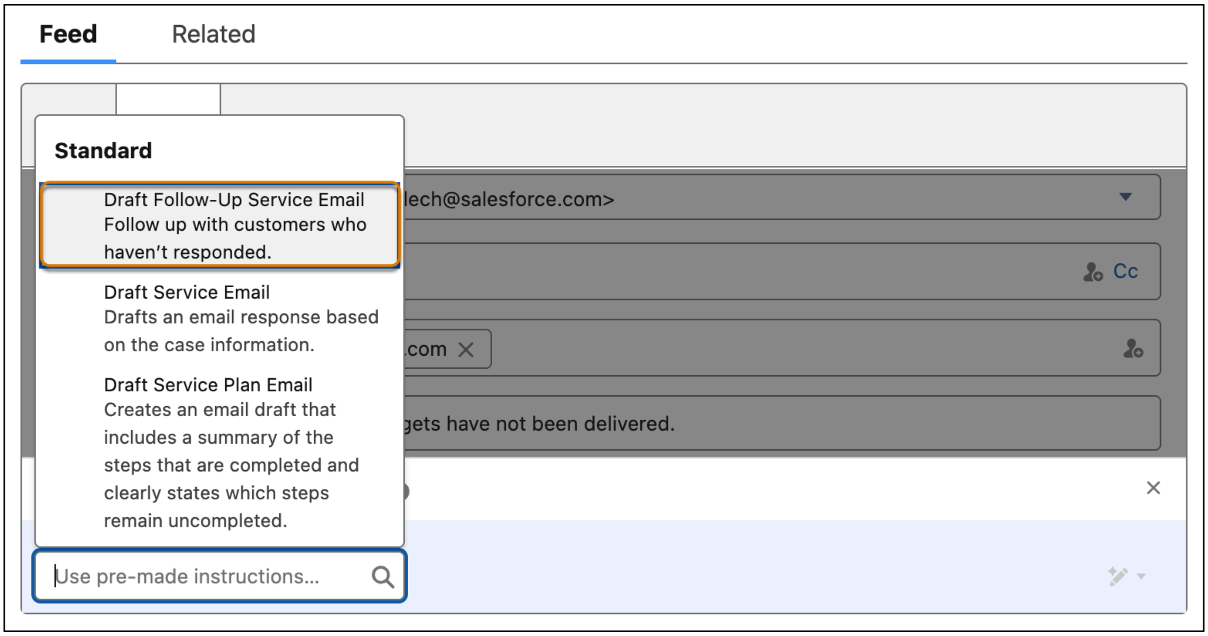
Accelerate Case Resolution and Boost Service Efficiency with Einstein Follow-Up Emails

Create friendly follow-up emails with the Follow-Up Service Email prompt template in Prompt Builder. Service reps can use this template to quickly generate and send follow-up emails to customers who haven't responded.

Where: This change applies to Lightning Experience in Unlimited and Enterprise editions with the Einstein for Service add-on. To purchase the Einstein for Service add-on, contact your Salesforce account executive.

How: In Lightning Experience, the Einstein for Service Follow-Up Email prompt template is built directly into the email composer on the case details page. To draft a follow-up customer service email, open a case record and go to the Email tab in the case feed. In the email composer, click **Draft with Einstein**. Next, click **Use pre-made instructions...** and select the **Draft Follow-Up Service Email** prompt template. Review and edit the email message, if needed. Then, send the email directly from the Lightning email composer, or copy and paste it into an outside email composer.





See Also

Salesforce Help: Create a Follow-Up Service Email with Einstein Generative AI (can be outdated or unavailable during release preview)

Salesforce Help: Agentforce & Einstein Features (can be outdated or unavailable during release preview)

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

Employee Service

Access a library of prebuilt employee enablement program templates to efficiently create programs. Improve employee experience with Agentforce for efficient and automated service delivery. Enhance productivity and efficiency with the Employee Service Slack app. Enable employees to manage requests and service reps to resolve tickets seamlessly, all within Slack. Optimize HR service operations with enhanced data visualization. Manage Workday data in Salesforce by using the new MuleSoft integration apps.

Drive Employee Enablement Program Completions with Enhanced Oversight
Your managers can now view information about the employee enablement programs assigned to their team members. The information includes program name and description, due date, and percentage completion. For quicker insights, managers can filter the programs. With better oversight, managers can track the programs and assist their team members in completing the programs.

Accelerate Employee Enablement Program Creation with Prebuilt Templates
Your enablement admins can now create employee enablement programs faster and more efficiently by using prebuilt program templates. These templates cover essential topics, such as employee onboarding, employee offboarding, medical leave, return to work, and relocation. The templates not only save time but also ensure consistency in engagement programs.

Optimize Employee Enablement Program with Dashboard and Reports
Your enablement admins can gain deeper insights into employee enablement programs and their

impact on employee experience. With the prebuilt dashboard and reports, enablement admins track exercise completion status, analyze program progress, and measure program effectiveness, enabling better oversight of team development and performance.

Enhance Employee Enablement Programs with Surveys

Your enablement admins can now seamlessly incorporate surveys within employee enablement programs. When setting up a new program, they can add a survey and choose from a list of existing surveys. Employees can complete these surveys as part of their enablement program, providing valuable insights into their experience. This integration helps increase survey participation rates, understand employee needs, and drive actions to enhance employee satisfaction and engagement.

Accelerate Service Process Creation

Create service processes faster and more efficiently with prebuilt flows and invocable actions. Your employees can use these service processes in Employee Portal via Service Catalog and Agentforce for common service needs, such as getting enablement program details, submitting expense claims, and updating direct deposit details. The prebuilt flows and invocable actions not only save time but also ensure consistency and quality in service delivery.

Rapidly Deploy Service Processes with Prebuilt Templates

Use the prebuilt templates to quickly create service processes for employees, such as view leave balance, submit leave requests, and update profile information within Employee Portal. Templates improve data accuracy and consistency, streamline HR processes, and enhance the employee experience with self-service capabilities.

Improve Efficiency and Employee Experience with Agentforce for Self-Service

Use the Agentforce Employee Service template and the associated topics and actions to create an agent that resolves common employee support cases. Your employees can check leave balance, get enablement program details, submit expense claims, submit leave requests, update direct deposit details, and update profile information. Agentforce is available 24/7 for resolving your employee cases swiftly and efficiently.

Streamline Support Interactions with Integrated Slack Experience

Enhance productivity and efficiency with the Employee Service Slack app. Employees can report issues and track cases without leaving the platform. Employees also get real-time notifications for updates to their tickets, which helps them monitor their issues effectively.

Leverage Data Visualization to Enhance HR Service Delivery with Service Insights

Give your HR leadership service metrics with real-time dashboards that contain trends for case performance and satisfaction scores. The Service Insights dashboards provide real-time case performance reports, detailed analysis of case satisfaction scores, and summaries of key performance indicators for effective case management.

Manage Workday Employee Data by Using Prebuilt MuleSoft Integrations

Empower your employees to manage their finances and expenses by using the prebuilt service processes or Agentforce in Employee Portal. With the Payment Allocation app, they can create and manage multiple direct deposit accounts, and split their salary between the accounts. Use the Workday Expense Management app to help your employees submit expenses directly in Employee Portal.

Changed Object in Employee Service

Use the changed object to represent a survey exercise.

See Also

Salesforce Help: Support Employees with Employee Service

Drive Employee Enablement Program Completions with Enhanced Oversight

Your managers can now view information about the employee enablement programs assigned to their team members. The information includes program name and description, due date, and percentage completion. For quicker insights, managers can filter the programs. With better oversight, managers can track the programs and assist their team members in completing the programs.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To use this feature, users need the Employee Hub Community User permission set license and the Service Cloud Employee Hub Community User Add-On license.

How: In Employee Portal, click the **Enablement Programs** tab. Then, click the **Team Enablement Programs** subtab.

Accelerate Employee Enablement Program Creation with Prebuilt Templates

Your enablement admins can now create employee enablement programs faster and more efficiently by using prebuilt program templates. These templates cover essential topics, such as employee onboarding, employee offboarding, medical leave, return to work, and relocation. The templates not only save time but also ensure consistency in engagement programs.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To use this feature, users need the Employee Hub Community User permission set license and the Service Cloud Employee Hub Community User Add-On license.

How: From the App Launcher, find and select **Enablement Programs**. Click **New**, select a template, and then click **Create**.

Optimize Employee Enablement Program with Dashboard and Reports

Your enablement admins can gain deeper insights into employee enablement programs and their impact on employee experience. With the prebuilt dashboard and reports, enablement admins track exercise completion status, analyze program progress, and measure program effectiveness, enabling better oversight of team development and performance.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To use this feature, users need the Service Cloud Employee Hub HR Service Workspace Add-On license and the HR Service Workspace HR service personnel permission set license.

How: From the App Launcher, find and select **Dashboards** or **Reports**. Select **All Folders**. Select the **Employee Enablement Program Dashboards** or **Employee Enablement Program Reports** folder.

See Also

Refresh the Employee Enablement Program Reports and Dashboard(can be outdated or unavailable during release preview)

Tracking Employee Enablement Program Progress(can be outdated or unavailable during release preview)

Enhance Employee Enablement Programs with Surveys

Your enablement admins can now seamlessly incorporate surveys within employee enablement programs. When setting up a new program, they can add a survey and choose from a list of existing surveys. Employees can complete these surveys as part of their enablement program, providing valuable insights into their experience. This integration helps increase survey participation rates, understand employee needs, and drive actions to enhance employee satisfaction and engagement.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To use this feature, employees need the Service Cloud Employee Hub Community User Add-On license and the Employee Hub Community User permission set license.

How: From the App Launcher, find and select **Enablement Programs**. Click **New** and add survey to the program. Configure the survey's title, description, and timing. Either select an existing standard survey or create a new one, and save your changes.

See Also

Create an Employee Enablement Program(can be outdated or unavailable during release preview)

Exercise Types in Employee Enablement Program(can be outdated or unavailable during release preview)

Accelerate Service Process Creation

Create service processes faster and more efficiently with prebuilt flows and invocable actions. Your employees can use these service processes in Employee Portal via Service Catalog and Agentforce for common service needs, such as getting enablement program details, submitting expense claims, and updating direct deposit details. The prebuilt flows and invocable actions not only save time but also ensure consistency and quality in service delivery.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To use this feature, users need the Employee Hub Community User permission set license and these add-on licenses: Industry Service Excellence, OmniStudio Designer, OmniStudio Runtime, OmniStudio Runtime CC, Service Cloud Employee Hub Community User Add-On, Unified Catalog, and Unified Catalog Community User.

How: From the App Launcher, find and select **Unified Catalog**. Click **Catalogs** from the navigation menu. To create a new catalog, click **New**, and then click **New Category**. Then, select the new category, and click **New Service**. Configure and activate the service.

Rapidly Deploy Service Processes with Prebuilt Templates

Use the prebuilt templates to quickly create service processes for employees, such as view leave balance, submit leave requests, and update profile information within Employee Portal. Templates improve data accuracy and consistency, streamline HR processes, and enhance the employee experience with self-service capabilities.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To use this feature, users need the Service Cloud Employee Hub HR Service Workspace Add-On license and the HR Service Workspace HR service personnel permission set license.

How: In Setup, find and select **Service Process Studio**, and then click **New Service Process**. Click **Create from Template**, and select the relevant template. Click **Save and Launch**, and then configure the service process definition.

See Also

Prebuilt Service Process Templates(can be outdated or unavailable during release preview)

Improve Efficiency and Employee Experience with Agentforce for Self-Service

Use the Agentforce Employee Service template and the associated topics and actions to create an agent that resolves common employee support cases. Your employees can check leave balance, get enablement program details, submit expense claims, submit leave requests, update direct deposit details, and update profile information. Agentforce is available 24/7 for resolving your employee cases swiftly and efficiently.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To use this feature, users need the Employee Hub Community User and Employee Service: Agentforce permission set licenses and these add-on licenses: Agentforce Service Agent, Agentforce Service Agent Manager, Customer Community Plus, Service Cloud Employee Hub Community User, and Service Cloud Employee Hub HR Service Workspace.

How: In Setup, find and select **Agentforce Agents**. Click **New Agent**, and then click **Create from a Template**. Select **Agentforce Employee Service**, and then configure and activate the agent. To access the agent, your employees can type relevant utterance in Agentforce.

Streamline Support Interactions with Integrated Slack Experience

Enhance productivity and efficiency with the Employee Service Slack app. Employees can report issues and track cases without leaving the platform. Employees also get real-time notifications for updates to their tickets, which helps them monitor their issues effectively.

Where: This change applies to Slack in Unlimited edition with Employee Service.

Why: By using Slack for employee service, organizations can greatly reduce the time and effort spent on switching between contexts. This leads to faster problem resolution and a more cohesive support experience.

How: To set up Slack notifications for employee service cases in Salesforce, you first need Employee Service configured in your organization. Next, install the Slack app on your existing Slack workspace. You can find steps to set up the Employee Services Slack app in Slack Apps Setup under Setup.

Leverage Data Visualization to Enhance HR Service Delivery with Service Insights

Give your HR leadership service metrics with real-time dashboards that contain trends for case performance and satisfaction scores. The Service Insights dashboards provide real-time case performance reports, detailed analysis of case satisfaction scores, and summaries of key performance indicators for effective case management.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To set up Service Insights, users need the Data Cloud Admin permission set and the Tableau Included App Manager permission set. To view Service Insights, users need the Service Cloud Employee Hub HR Service Workspace Add-On license, the HR Service Workspace HR service personnel permission set, the Data Cloud User permission set, and the Tableau Einstein Included App Business User permission set.

How: From the App Launcher, find and select **Service Insights**.

See Also

HR Service Analytics with Service Insights(can be outdated or unavailable during release preview)

Manage Workday Employee Data by Using Prebuilt MuleSoft Integrations

Empower your employees to manage their finances and expenses by using the prebuilt service processes or Agentforce in Employee Portal. With the Payment Allocation app, they can create and manage multiple direct deposit accounts, and split their salary between the accounts. Use the Workday Expense Management app to help your employees submit expenses directly in Employee Portal.

Where: This change applies to Lightning Experience in Unlimited Edition with Employee Service.

Who: To enable the MuleSoft integration apps, users must have the Salesforce Administrator or MuleSoft Administrator user permission.

How: In Setup, find and select **MuleSoft Direct**. Enable the MuleSoft integration apps.

Changed Object in Employee Service

Use the changed object to represent a survey exercise.

Specify the type of learning practice

Use the new enum value, `Survey`, in the **Type** field on the LearningPractice object.

Entitlements and Milestones

Enhance your service operations with new capabilities that boost productivity and improve customer experience. Automate entitlement mapping to reduce manual effort and SLA violations. Communicate more effectively with rich text and media in case comments. Set up SLA Management faster with a simplified, intuitive interface designed to streamline configuration and unlock automation.

Set Up SLA Management Faster with the New Simplified Setup Experience (Beta)
Configure SLA Management (previously Entitlement Management) with fewer steps with a simplified user interface. The new configuration interface is more intuitive and accessible, reduces implementation efforts, and improves the overall user experience. In this setup, you can define rules to automatically mark milestones complete. Also, you can automate entitlement mapping so that entitlements are attached to cases, work orders, and incidents based on predefined rules. Switch to the new setup experience to explore automation capabilities and streamline your processes and enhance efficiency.

Delivered Idea: Improve Customer Engagement with Rich Text and Media in Case Comments (Beta)
Add rich text and media to your case comments to improve communication with your customers. Use formatting effects in your comments to make them easier to read. Include images and videos to provide context and clarity and document your interactions better. The rich text supported field replaces the plain text field for case comments. After you enable the rich text supported field, you can’t go back to using the plain text field.

Boost Rep Efficiency and Minimize Violations by Automatically Mapping Entitlements
Automatically map entitlements to the corresponding cases, work orders, and incidents based on predefined rules. This change boosts rep efficiency, minimizes SLA violations, and simplifies administration by eliminating the need to map entitlements to each case, work order, or incident. If needed, service reps can manually change the entitlement auto-applied to a case.

Set Up SLA Management Faster with the New Simplified Setup Experience (Beta)

Configure SLA Management (previously Entitlement Management) with fewer steps with a simplified user interface. The new configuration interface is more intuitive and accessible, reduces implementation efforts, and improves the overall user experience. In this setup, you can define rules to automatically mark milestones complete. Also, you can automate entitlement mapping so that entitlements are attached to cases, work orders, and incidents based on predefined rules. Switch to the new setup experience to explore automation capabilities and streamline your processes and enhance efficiency.

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

> **Note** Simplified SLA Setup (beta) is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

How: From Setup, in the Quick Find box, enter `entitlement settings`, and then select **Entitlement Settings**. Enable **Simplified SLA Setup** to switch to the new simplified setup experience.

Improve Customer Engagement with Rich Text and Media in Case Comments (Beta)

Add rich text and media to your case comments to improve communication with your customers. Use formatting effects in your comments to make them easier to read. Include images and videos to provide context and clarity and document your interactions better. The rich text supported field replaces the plain text field for case comments. After you enable the rich text supported field, you can’t go back to using the plain text field.

Where: This feature is available only in Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

> **Note** Rich Text for Case Comments (beta) is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

How: From Setup, in the Quick Find box, enter `support settings`, and then select **Support Settings**. Click **Edit** and select **Rich Text for Case Comments (Beta)**.

Boost Rep Efficiency and Minimize Violations by Automatically Mapping Entitlements

Automatically map entitlements to the corresponding cases, work orders, and incidents based on predefined rules. This change boosts rep efficiency, minimizes SLA violations, and simplifies administration by eliminating the need to map entitlements to each case, work order, or incident. If needed, service reps can manually change the entitlement auto-applied to a case.

Where: This change is available only with the new simplified setup experience for Entitlements and Milestones. This applies to Lightning Experience in Professional, Enterprise, Performance, Unlimited, and Developer editions with the Service Cloud.

How: From Setup, in the Quick Find box, enter *SLA Policies*, and then select **SLA Policies**. On the Auto Apply Entitlements tab, create and save the auto entitlement rule.

Feedback Management

Create a more visually engaging survey experience with dynamic emoji. Track survey progress easily with a visual indicator. Gather more context for surveys by letting users upload more attachments. Make sure your surveys reach intended recipients by creating surveys that aren't blocked by security apps.

Enhance Your Survey Design with Dynamic Emoji

Create a more visually engaging survey experience by using dynamic emoji for rating questions. Dynamic emoji offer a variety of expressions to make the experience more engaging for your participants.

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

Get a Visual Representation of Participants' Survey Progress

Participants can see how much they have progressed in the survey with a visual progress bar indicator that shows the percentage of progress. This update makes it easier for participants to stay on track and to see how much they have left to go.

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

Gather More Data with Users Uploading More Attachments

Gather more comprehensive and accurate survey data by allowing users to upload up to 20 attachments per survey. Distribute these attachments across multiple attachment questions in the survey or allocate them all to a single attachment question. Using this option, respondents can add context and detail to their responses, with which you can make better decisions.

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

Who: To create surveys with the option to upload up to 20 attachments, users need the Feedback Management - Starter or Feedback Management - Growth licenses.

Improve Response Rates by Creating Surveys with Compatible URLs

Make sure your survey invitations reach their intended recipients by turning on compatible survey URLs. These URIs prevent security apps from blocking the invitations and increases the likelihood of respondents completing your survey.

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

Who: To create surveys with compatible URLs, users need the System Administrator profile.

How: From Survey Settings, turn on **Compatible Survey URLs**.

Knowledge

Gather feedback on your Knowledge articles with Knowledge Feedback. Connect Unified Knowledge to the Box Connector knowledge base. Improve article navigation with Table of Contents (TOC) within articles. Identify gaps in your knowledge base with Self-Learning Knowledge.

Use Knowledge Feedback to capture feedback on your Knowledge articles and assign feedback responses to the appropriate people or teams for action. It's a great way to see how useful your articles are and to identify areas for improvement. This feature helps keep your articles relevant and up to date, making sure that Agentforce responses are accurate and helpful.

Unify Knowledge with the Box Connector

Enhance your Unified Knowledge integration with the Box connector. This integration unifies your company's knowledge across all service rep and customer search experiences and improves generative AI features for Einstein for Service.

Improve Article Navigation with a Table of Contents

Quickly locate the information that you need in Knowledge articles with the automatically generated Table of Contents (TOC) within articles. The TOC provides a clear overview of the articles, making it easy to jump to sections of interest. It improves content discoverability and navigation, and enhances the user experience by providing a consistent structure across articles. You can add the TOC to new and existing articles in your knowledge base, but only to those in HTML format, not PDFs or other nonHTML formats.

Get More Done in the Lightning Article Editor

The improved Lightning Article Editor helps you write Knowledge articles more efficiently and take advantage of streamlined features to create great content. The source code editor in full-screen mode is restored to its original size, ensuring a more comfortable and familiar interface. You can easily paste images into the rich text editor, and the rich text field ensures consistent spacing between paragraphs and unordered lists in edit and view modes. We've also improved translations for a seamless multilingual experience.

Gather Feedback to Improve Your Knowledge Base (Generally Available)

Use Knowledge Feedback to capture feedback on your Knowledge articles and assign feedback responses to the appropriate people or teams for action. It's a great way to see how useful your articles are and to identify areas for improvement. This feature helps keep your articles relevant and up to date, making sure that Agentforce responses are accurate and helpful.

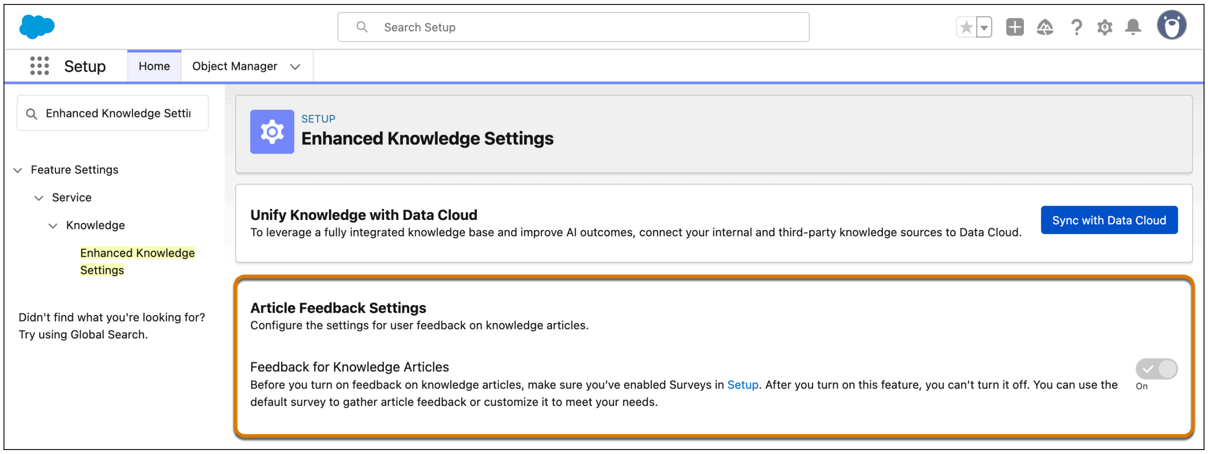
Where: This change applies to Lightning Experience in Unlimited Edition and all other editions with the Knowledge add-on license. This change also applies to Experience Cloud sites built on Aura sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. You must have at least 1 active community license in your org to use this feature.

Note The first 30,000 feedback responses are available at no additional cost. To increase this limit, you can purchase the Knowledge add-on license. To purchase the Knowledge add-on, contact your Salesforce account executive.

Important Turning on Knowledge Feedback is irreversible. After you turn it on, you can't turn it off. Make sure that you're ready for this change. We recommend testing this feature in a sandbox first. Then, turn it on in your org.

How: Before you turn on Knowledge Feedback, make sure that you turn on Lightning Knowledge and

Salesforce Surveys. In Setup, go to the Enhanced Knowledge Settings page. In the Article Feedback Settings section, turn on **Feedback for Knowledge Articles**.



See Also

Salesforce Help: Gather Feedback on Knowledge Articles with Knowledge Feedback (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Knowledge Feedback in Lightning Experience (can be outdated or unavailable during release preview)

Salesforce Help: Set Up Knowledge Feedback in Experience Cloud (can be outdated or unavailable during release preview)

Salesforce Help: Enable Lightning Knowledge (can be outdated or unavailable during release preview)

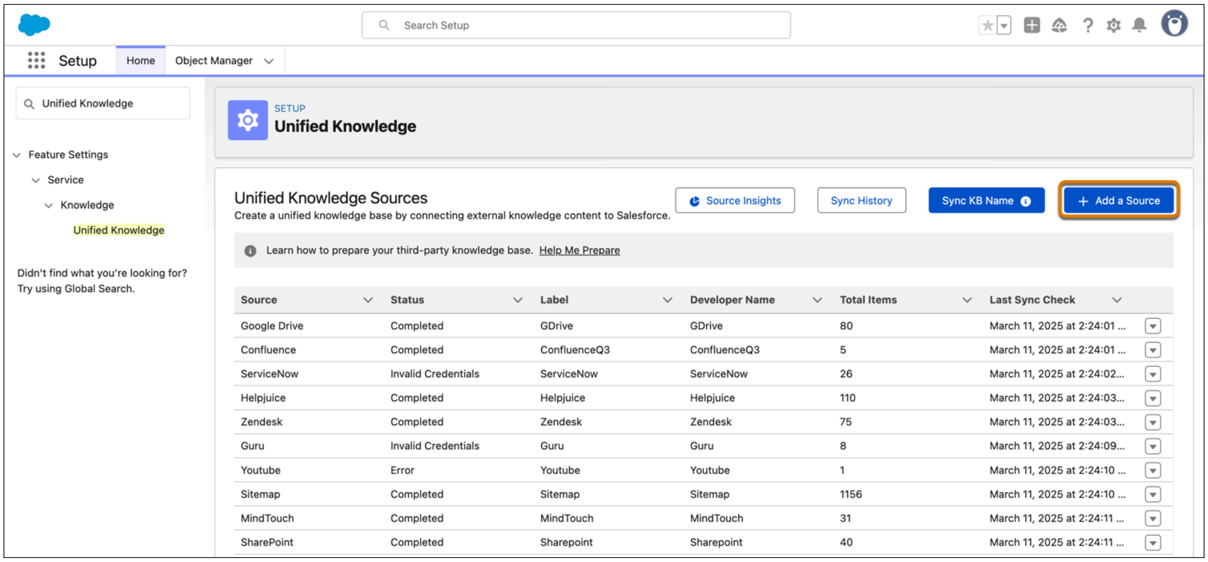
Salesforce Help: Enable Surveys and Configure Survey Settings (can be outdated or unavailable during release preview)

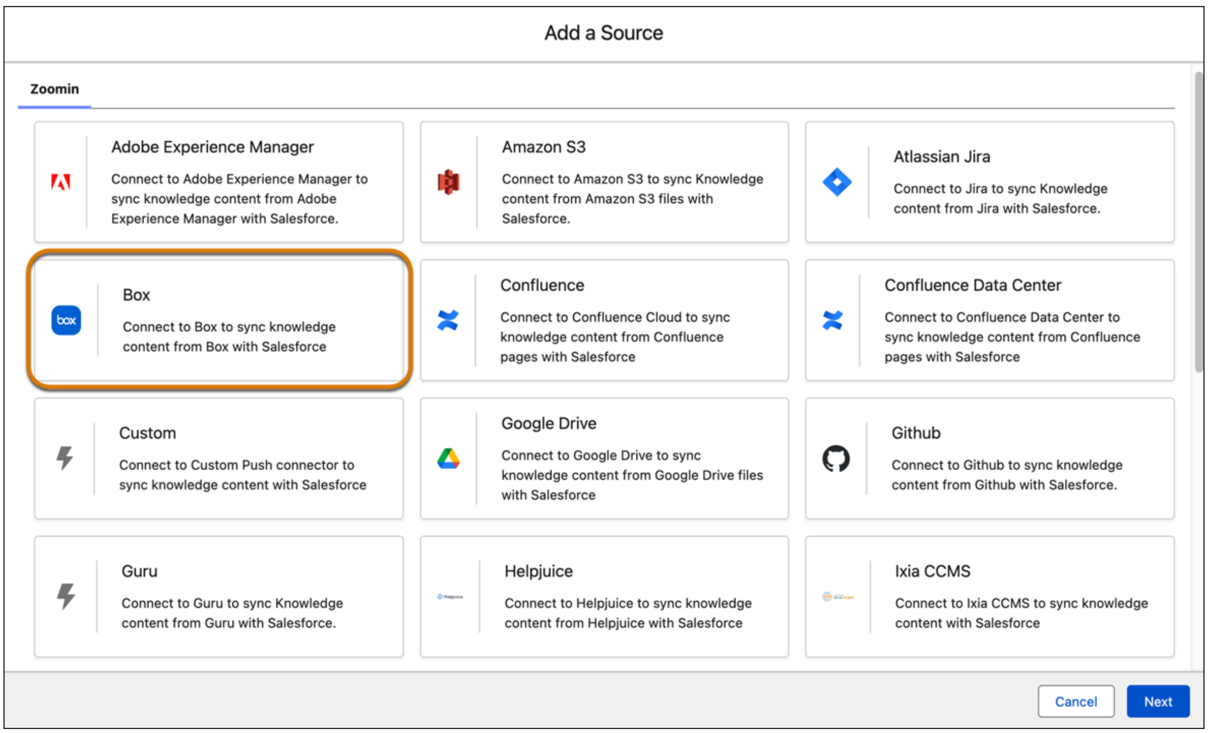
Unify Knowledge with the Box Connector

Enhance your Unified Knowledge integration with the Box connector. This integration unifies your company's knowledge across all service rep and customer search experiences and improves generative AI features for Einstein for Service.

Where: This change applies to Lightning Experience in Unlimited Edition and all other editions with the Knowledge add-on license. Zoomin from Salesforce offers you Unified Knowledge, which is available for trial for 90 days at no additional cost, including three connector instances to third-party knowledge sources. After the trial, you can extend it at no additional cost by contacting your Salesforce account executive.

How: Before adding a connector, review the connector requirements in the Zoomin documentation. Then in Setup, go to the Unified Knowledge page, click **Add a Source**, and then select **Box** in the Zoomin tab.





See Also

Salesforce Help: Unify Knowledge form Various Sources (can be outdated or unavailable during release preview)

Salesforce Help: Zoomin Connector Preparation (can be outdated or unavailable during release preview)

Salesforce Help: Unified Knowledge Considerations (can be outdated or unavailable during release preview)

Salesforce Help: Unified Knowledge for Salesforce (can be outdated or unavailable during release preview)

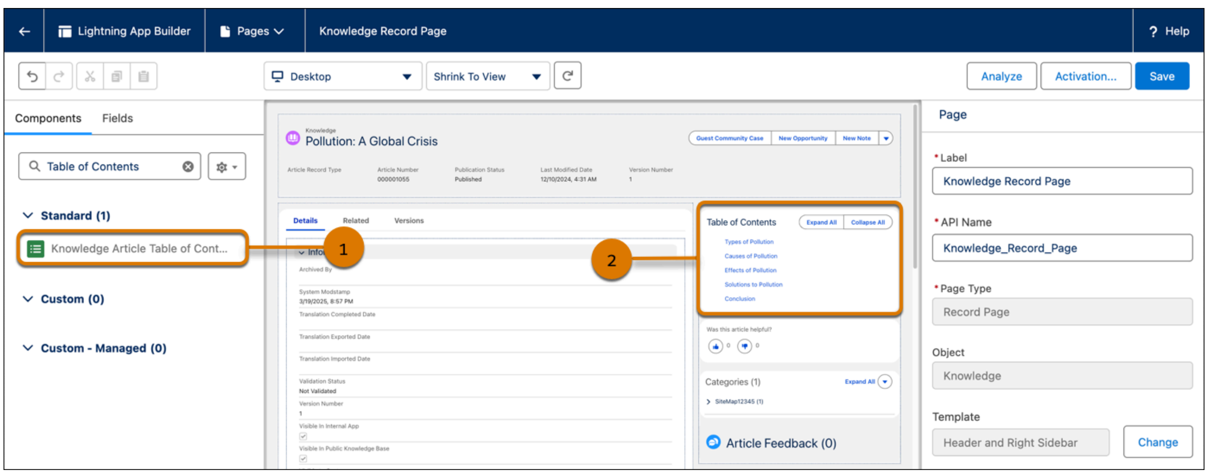
Zoomin Documentation: Box Drive as a Unified Knowledge Source

Improve Article Navigation with a Table of Contents

Quickly locate the information that you need in Knowledge articles with the automatically generated Table of Contents (TOC) within articles. The TOC provides a clear overview of the articles, making it easy to jump to sections of interest. It improves content discoverability and navigation, and enhances the user experience by providing a consistent structure across articles. You can add the TOC to new and existing articles in your knowledge base, but only to those in HTML format, not PDFs or other nonHTML formats.

Where: This change applies to Lightning Experience in Unlimited Edition and all other editions with the Knowledge add-on license. It also applies to Experience Cloud sites built on Aura and LWR sites accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. You must have at least 1 active community license in your org to use this feature.

How: From the App Launcher, find and select **Knowledge**, and then open a Knowledge article. Click Setup and select **Edit Page**. In the Lightning App Builder, from the Standard list of components, drag the Knowledge Article Table of Contents component (1) onto an editable part of the Knowledge Article page (2).



Get More Done in the Lightning Article Editor

The improved Lightning Article Editor helps you write Knowledge articles more efficiently and take advantage of streamlined features to create great content. The source code editor in full-screen mode is restored to its original size, ensuring a more comfortable and familiar interface. You can easily paste images into the rich text editor, and the rich text field ensures consistent spacing between paragraphs and unordered lists in edit and view modes. We've also improved translations for a seamless multilingual experience.

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

See Also

Salesforce Help: Lightning Article Editor (can be outdated or unavailable during release preview)

Salesforce Go

Explore Service Cloud features that are available in your edition and turn on features with ease.

Simplify Service Cloud Feature Discovery and Setup
With Salesforce Go, you can discover, set up, and configure service features, and track feature usage, all from one location in Setup. Learn more about features and get help with configuration by accessing content resources and links. Explore more service products and features, and if you've turned on the Your Account app, you can purchase add-on licenses for some features directly from Salesforce Go.

Simplify Service Cloud Feature Discovery and Setup

With Salesforce Go, you can discover, set up, and configure service features, and track feature usage, all from one location in Setup. Learn more about features and get help with configuration by accessing content resources and links. Explore more service products and features, and if you've turned on the Your Account app, you can purchase add-on licenses for some features directly from Salesforce Go.

Where: Available in Pro Suite, Professional, Enterprise, Unlimited, and Developer editions with Service Cloud.

See Also

Salesforce Help: Simplify Feature Discovery and Setup with Salesforce Go (can be outdated or unavailable during release preview)

Self Service

Self Service introduces a feature that shares data category selections with Agentforce Service Agent in real time. This empowers users in mission-critical situations to resolve their search queries faster. Agentforce Service Agent suggests answers to users' search queries by searching the knowledge base.

Resolve User Search Queries Faster by Sharing Data Category Selection with Agentforce Service Agent (Beta)
Empower your users who are in mission-critical situations with faster resolution to their search queries by passing information about the data categories selected to Agentforce Service Agent in real time. Agentforce Service Agent automatically suggests answers to users' search queries by searching the knowledge base.

Resolve User Search Queries Faster by Sharing Data Category Selection with Agentforce Service Agent (Beta)

Empower your users who are in mission-critical situations with faster resolution to their search queries by passing information about the data categories selected to Agentforce Service Agent in real time. Agentforce Service Agent automatically suggests answers to users' search queries by searching the knowledge base.

Where: This change applies to Messaging for In-App and Web and all the sites accessed through Lightning Experience and Salesforce Classic in Performance, Unlimited, and Developer Editions with the Einstein for Service, Einstein Platform, or Agentforce Service Agent add-on.

Note Share Data Category Selection with Agentforce Service Agent is a pilot or beta service that is subject to the Beta Services Terms at Agreements - Salesforce.com or a written Unified Pilot Agreement if executed by Customer, and applicable terms in the Product Terms Directory. Use of this pilot or beta service is at the Customer's sole discretion.

Why: Passing information in real time about the data categories selected enables Agentforce Service Agent to automatically suggest answers to users' search queries. This leads to faster resolution and overall better support experience.

How: In **Experience Workspaces**, go to the **AI Experiences** tile and turn on the **Share Data Category Selection with Agentforce Service Agent (Beta)** option. When this is enabled, information about data categories selected by users is passed to Agentforce Service Agent in real time. It then starts suggesting answers to search queries.

See Also

Configure Agentforce Service Agent to Initiate Context-Driven Conversations Based on Data Categories Selected by Users (Beta)

Routing

Route voice calls with Omni-Channel Unified Routing–now generally available. Identify contact center efficiencies with prebuilt dashboards and reports. Show estimated wait times when routing work items to skills.

Use Status-Based Capacity with Voice (Generally Available)

Allocate rep capacity based on the status of a rep's accepted work. Status-based capacity was previously available for other service channels, but it's now available for Voice. Thanks to status-based capacity, voice calls are available on Lightning apps with standard navigation. This feature is now generally available.

Declutter Omni Supervisor with Only Relevant AI Agents

Salesforce admins can now configure which AI agents are visible to each supervisor in Omni Supervisor. To enable supervisors to focus on the most important AI Agent conversations to them, modify supervisor configurations. Previously, every supervisor saw all active AI agents, up to 10 Service agents. If there are more agents, the top 10 agents with the most conversations appear in the tab.

Provide Better AI Support with Real-time Monitoring of Email Conversations

To make sure that Agentforce Service Agents are providing quality service via email, supervisors can now monitor the email conversations between Service agents and your customers. Supervisors can now view and manage real-time Service agent email conversations in the AI Agents tab of Omni Supervisor. Previously, supervisors could monitor only messaging conversations.

Respond Quickly to Changes in Service Channel Demand with Agentforce

Streamline your workflows by allowing supervisors to update reps' presence statuses through a conversational interface. To quickly handle spikes and lulls in a service channel, supervisors can make more reps available for a service channel. To specify which reps are available, supervisors can change the reps' presence status by using Agentforce. For example, use this feature to make more reps available for a Messaging channel that has work items building up in the backlog.

Simplify Your Service Cloud Reporting with Prebuilt Dashboards and Reports

With Service Cloud Reporting, track performance, monitor SLA adherence, and boost contact center efficiency. Gain insights into cases, rep performance, and queue efficiency by monitoring critical KPIs such as average handle time. Service Cloud Reporting is available with Enhanced Omni-Channel only.

Eligible Salesforce Orgs Automatically Upgraded to Enhanced Omni-Channel

To take advantage of the latest work-routing features, some Salesforce orgs are automatically upgraded from Standard to Enhanced Omni-Channel. To be eligible, your org must run on Hyperforce and can't have Service Cloud Voice enabled. Because Enhanced Omni-Channel doesn't support standard messaging channels, your org can't have any LiveChatTranscript records created 90 days before the upgrade or any active Standard Messaging channels.

Expand Language Access for Messaging Supervision

Empower supervisors to monitor messaging conversations, regardless of the languages being used by the customer or the service rep. Supervisors can now translate an active or past messaging conversation into their preferred language. This enhancement broadens the scope of supervision, removing the previous language barrier and ensuring comprehensive oversight of all messaging interactions.

Show Estimated Wait Times When Routing Work to Skills

To set customer expectations and improve their satisfaction, you can now share estimated wait times when you route work to a required skill or set of skills. To calculate the time, during the calculation, we use only recently answered work that matches the same required skills. The additional skills are ignored. Previously, we supported Estimated Wait Time when work is routed to queues only. Also, to increase the accuracy of Estimated Wait Time, we simplified the calculation to now use a weighted average, where the more recently added work weighs heavier than the older work.

Other Enhancements to Omni-Channel

Learn about other enhancements that optimize the Omni-Channel experience.

Use Status-Based Capacity with Voice (Generally Available)

Allocate rep capacity based on the status of a rep's accepted work. Status-based capacity was previously available for other service channels, but it's now available for Voice. Thanks to status-based capacity, voice calls are available on Lightning apps with standard navigation. This feature is now generally available.

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

See Also

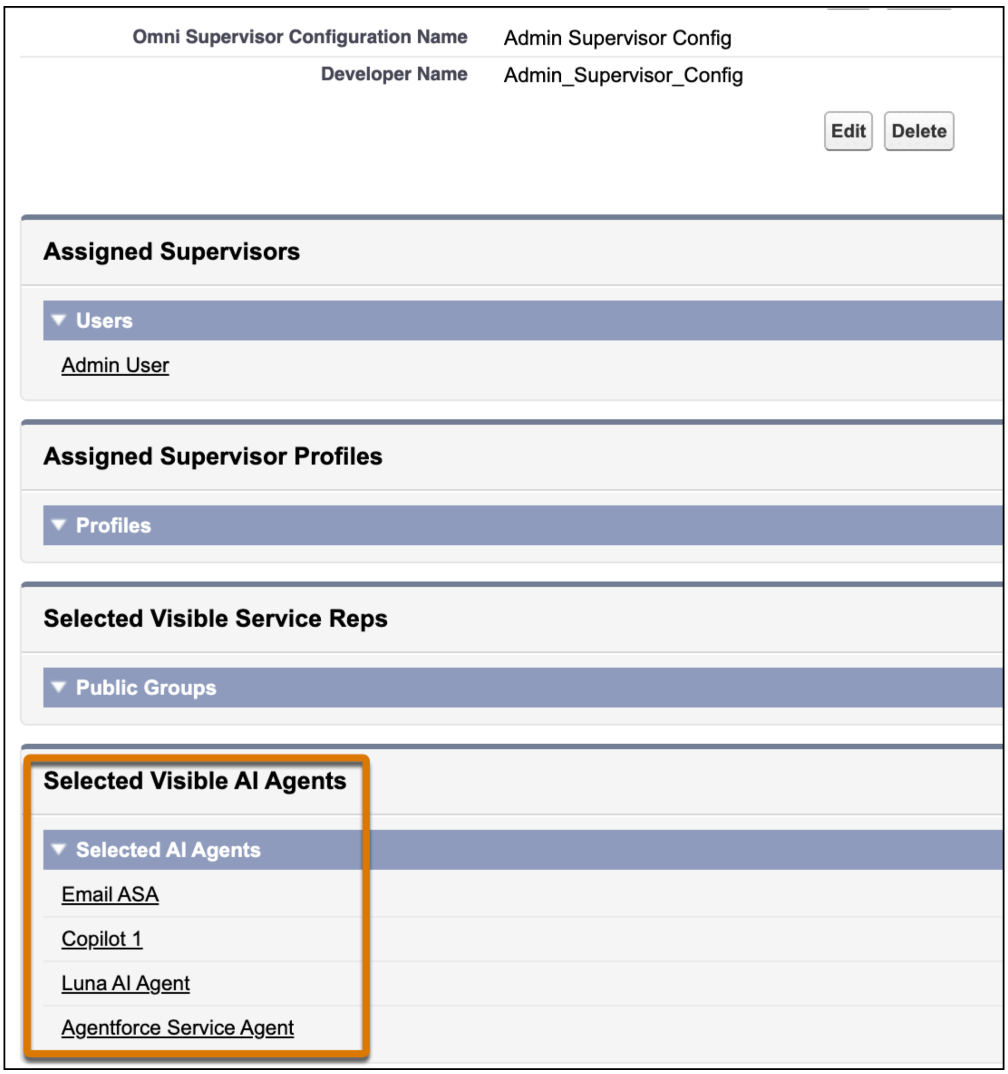
Manage Capacity via Status-Based Capacity for Voice (Generally Available)

Declutter Omni Supervisor with Only Relevant AI Agents

Salesforce admins can now configure which AI agents are visible to each supervisor in Omni Supervisor. To enable supervisors to focus on the most important AI Agent conversations to them, modify supervisor configurations. Previously, every supervisor saw all active AI agents, up to 10 Service agents. If there are more agents, the top 10 agents with the most conversations appear in the tab.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Einstein for Service, Einstein Platform, or Agentforce Service Agent add-on.

How: To control which AI agents that supervisors can monitor, in the relevant supervisor configuration, select which AI agents are visible, and then save the supervisor configuration. If you don't select any AI agents, up to 10 Service AI agents are visible. If there are more agents, the top 10 agents with the most conversations appear in the tab.



See Also

Salesforce Help: Change What Supervisors See in Omni Supervisor (can be outdated or unavailable during release preview)

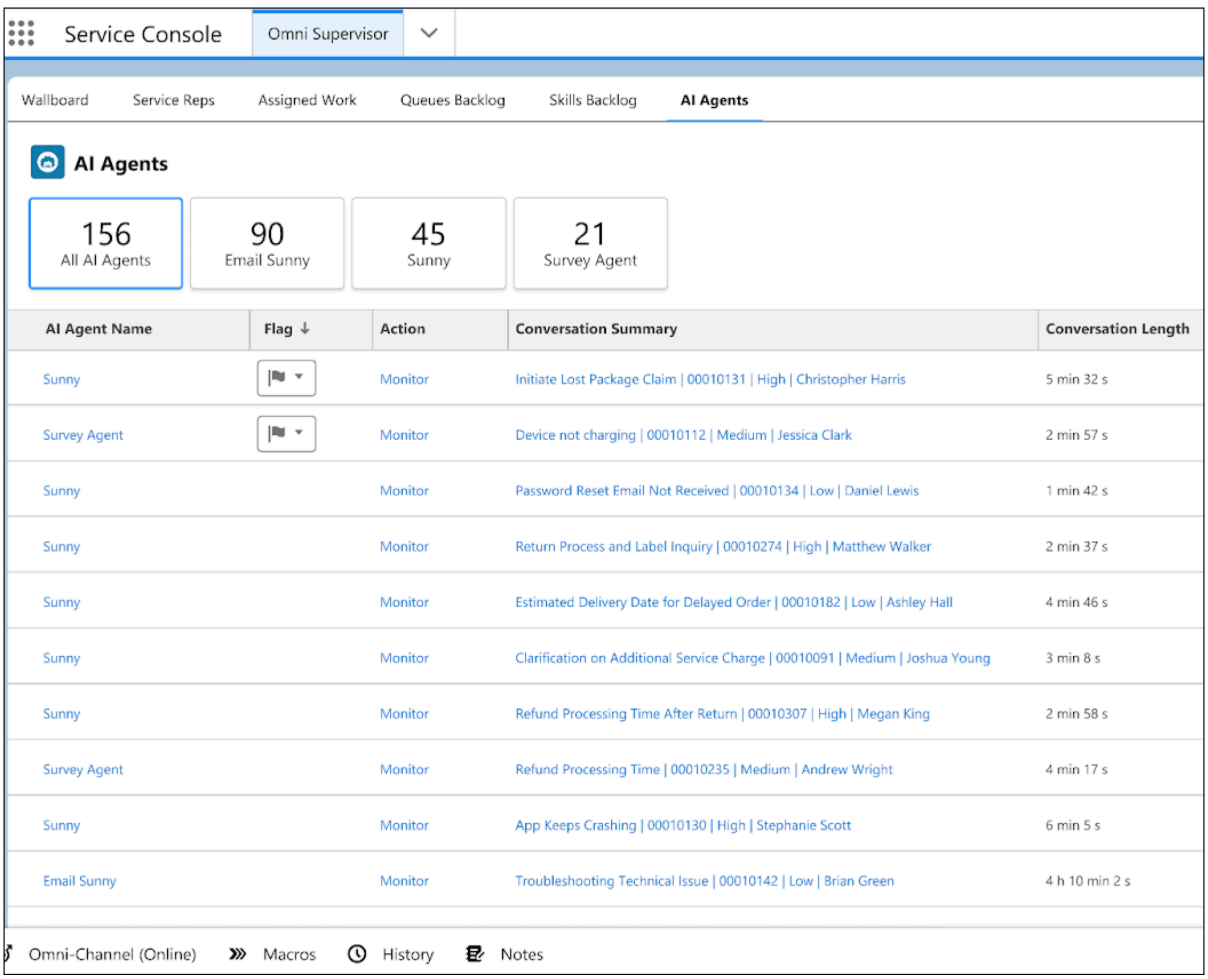
Provide Better AI Support with Real-time Monitoring of Email Conversations

To make sure that Agentforce Service Agents are providing quality service via email, supervisors can now monitor the email conversations between Service agents and your customers. Supervisors can now view and manage real-time Service agent email conversations in the AI Agents tab of Omni Supervisor. Previously, supervisors could monitor only messaging conversations.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Einstein for Service, Einstein Platform, or Agentforce Service Agent add-on.

How: To set up this feature, if you're using a supervisor configuration, make sure that the AI Agents tab and AI agents that are assigned email work are both visible in Omni Supervisor.

To open a related case record about an email exchange between a Service agent and a customer, in the AI Agents tab of Omni Supervisor, a supervisor can click **Monitor**. If the Service agent needs help, the supervisor can reassign the case to a service rep.



See Also

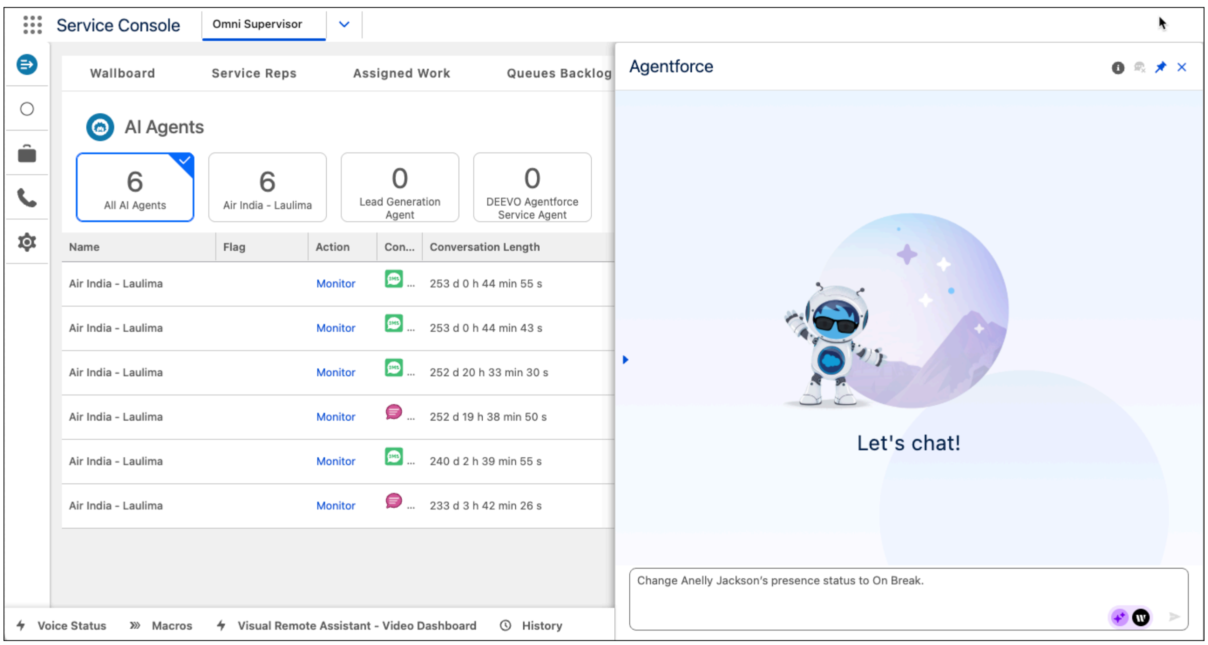
Salesforce Help: Monitor Agentforce Service Agents (can be outdated or unavailable during release preview)

Respond Quickly to Changes in Service Channel Demand with Agentforce

Streamline your workflows by allowing supervisors to update reps' presence statuses through a conversational interface. To quickly handle spikes and lulls in a service channel, supervisors can make more reps available for a service channel. To specify which reps are available, supervisors can change the reps' presence status by using Agentforce. For example, use this feature to make more reps available for a Messaging channel that has work items building up in the backlog.

Where: This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Einstein for Service, Einstein Platform, or Agentforce Service Agent add-on.

How: To change a presence status with Agentforce (Default), click , and then enter your request using presence statuses configured in your org. For example, enter `Change Anelly Jackson's presence status to On Break`. Behind the scenes, Agentforce (Default) uses the Update Omni-Channel User Configuration agent action to update the presence status. A supervisor can change the presence statuses of only the reps who are visible to them based on their supervisor configuration.



See Also

[Agentforce & Einstein Features]
Salesforce Help: Manage Your Workforce More Efficiently with Agentforce (can be outdated or unavailable during release preview)
Salesforce Help: Agent Action: Update Omni-Channel User Configuration (can be outdated or unavailable during release preview)

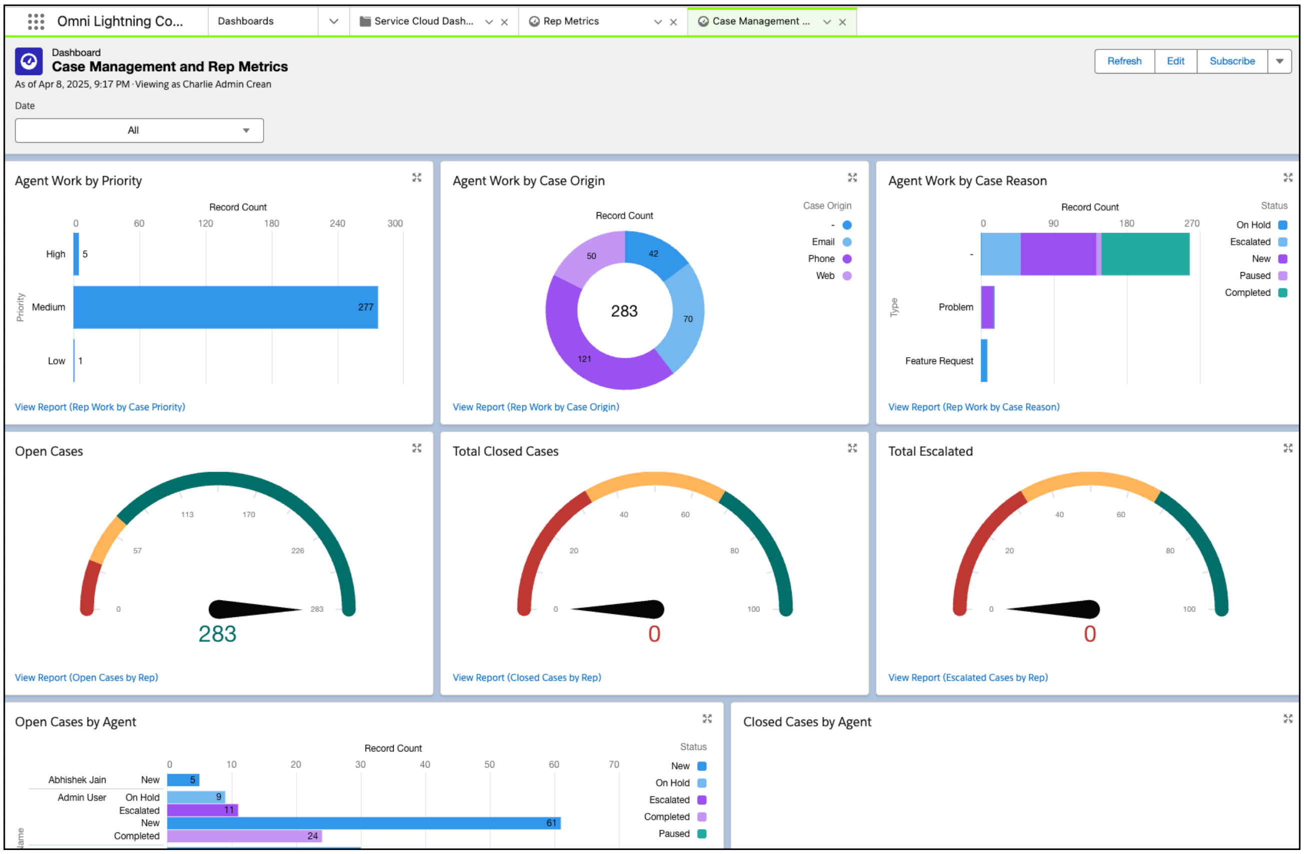
Simplify Your Service Cloud Reporting with Prebuilt Dashboards and Reports

With Service Cloud Reporting, track performance, monitor SLA adherence, and boost contact center efficiency. Gain insights into cases, rep performance, and queue efficiency by monitoring critical KPIs such as average handle time. Service Cloud Reporting is available with Enhanced Omni-Channel only.

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

Who: Users with the View Setup and Configuration user permission can install the Service Cloud Reports from Setup.

How: To get these standard dashboards and reports, from Setup, go to Service Cloud Reports, select the dashboards and reports that you want to install, and then click **Install**. To view the reports and dashboards, open the Reports or Dashboards navigation item in the Service Console, and then select the dashboard or report to open.



If you previously installed these dashboards and reports from the Omni-Channel Performance Dashboard package on AppExchange, uninstall the package, and then install this latest, optimized version.

See Also

Salesforce Help: Install the Prebuilt Reports and Dashboards (can be outdated or unavailable during release preview)

Salesforce Help: View Prebuilt Service Cloud Reports and Dashboards (can be outdated or unavailable during release preview)

Eligible Salesforce Orgs Automatically Upgraded to Enhanced Omni-Channel

To take advantage of the latest work-routing features, some Salesforce orgs are automatically upgraded from Standard to Enhanced Omni-Channel. To be eligible, your org must run on Hyperforce and can't have Service Cloud Voice enabled. Because Enhanced Omni-Channel doesn't support standard messaging channels, your org can't have any LiveChatTranscript records created 90 days before the upgrade or any active Standard Messaging channels.

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

Expand Language Access for Messaging Supervision

Empower supervisors to monitor messaging conversations, regardless of the languages being used by the customer or the service rep. Supervisors can now translate an active or past messaging conversation into their preferred language. This enhancement broadens the scope of supervision, removing the previous language barrier and ensuring comprehensive oversight of all messaging interactions.

Where: This change applies to enhanced messaging channels and Messaging for In-App and Web. View required editions.

Show Estimated Wait Times When Routing Work to Skills

To set customer expectations and improve their satisfaction, you can now share estimated wait times when you route work to a required skill or set of skills. To calculate the time, during the calculation, we use only recently answered work that matches the same required skills. The additional skills are ignored. Previously, we supported Estimated Wait Time when work is routed to queues only. Also, to increase the accuracy of Estimated Wait Time, we simplified the calculation to now use a weighted average, where the more recently added work weighs heavier than the older work.

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

How: To make decisions based on the estimated wait time when you work route to a skill, configure the Check Availability for Routing flow action. For example, if the wait time is too long, you can configure the flow to pick a different queue or not route the work item. If you previously turned on Estimated Wait Time for Messaging for In-App and Web, then the estimated wait time now shows up if you use skills-based routing as well.

If you previously set up Estimated Wait Time, understand that its calculation changed. We now use a weighted average, where the most recently accepted work item with the same routing target is weighted the heaviest. The previous calculation weighted the oldest accepted work item the heaviest. Also, Omni-Channel no longer requires at least 10 accepted work items for the calculation. Now, one accepted work item is enough.

See Also

Salesforce Help: Make Smarter Routing Decisions by Checking Agent Availability (can be outdated or unavailable during release preview)
Salesforce Help: Show Customers an Estimated Wait Time in the Messaging Window (can be outdated or unavailable during release preview)
Knowledge Article: Estimated Wait Time Calculation When Routing Work with Omni-Channel

Other Enhancements to Omni-Channel

Learn about other enhancements that optimize the Omni-Channel experience.

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

Why: Check out these improvements.

- You can now remove the seconds from any timer in Omni Supervisor. Seconds show by default.
- - The supervisor configuration now enforces the skills that a supervisor can see when they click the **Change Skills** button in Omni Supervisor.

See Also

Change a Rep's Queues and Skills with Omni Supervisor (can be outdated or unavailable during release preview)

Service Adoption

Explore different service areas available to you based on business goals and more.

Salesforce Go from My Service Journey
When exploring service capabilities to enhance your implementation, Salesforce admins can click links to Salesforce Go for more content resources, easy setup, configuration, and usage tracking, all in one place. Some links redirect to Setup pages.

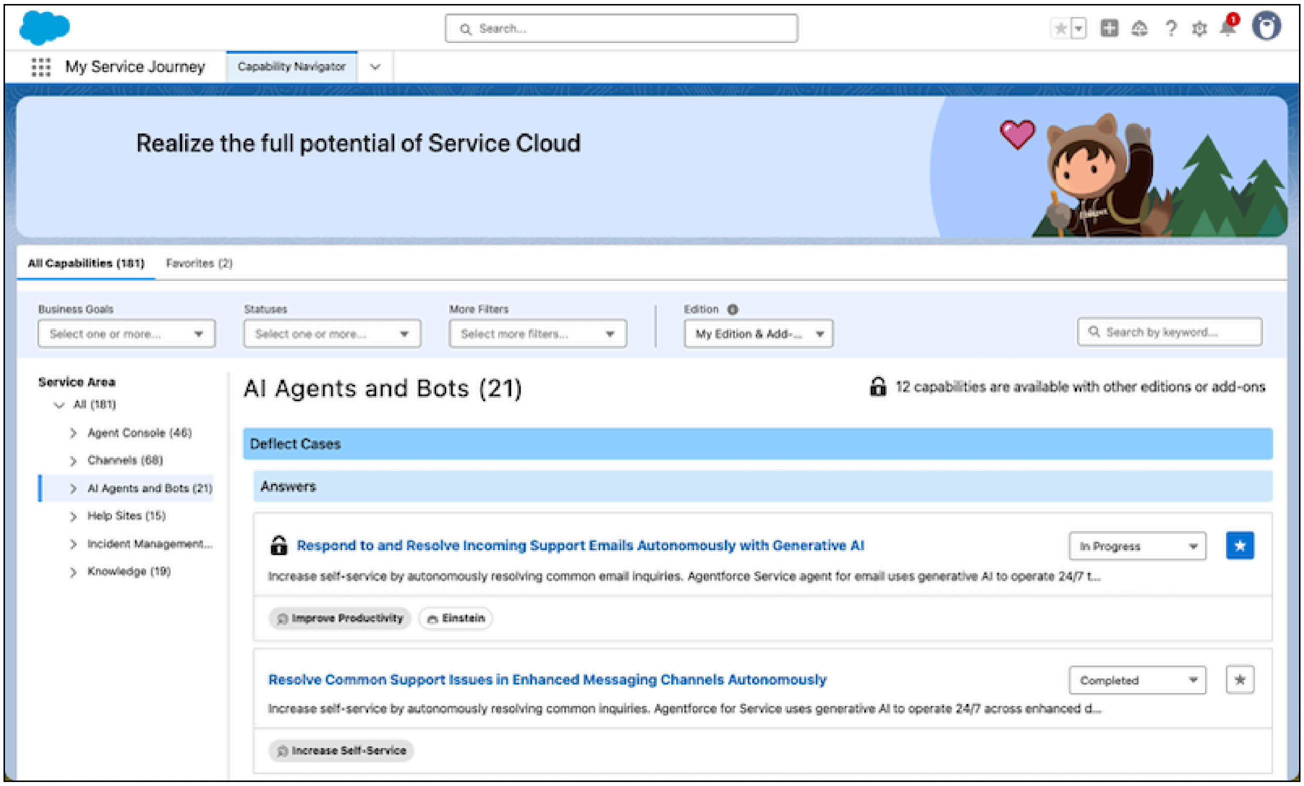
Salesforce Go from My Service Journey

When exploring service capabilities to enhance your implementation, Salesforce admins can click links to Salesforce Go for more content resources, easy setup, configuration, and usage tracking, all in one place. Some links redirect to Setup pages.

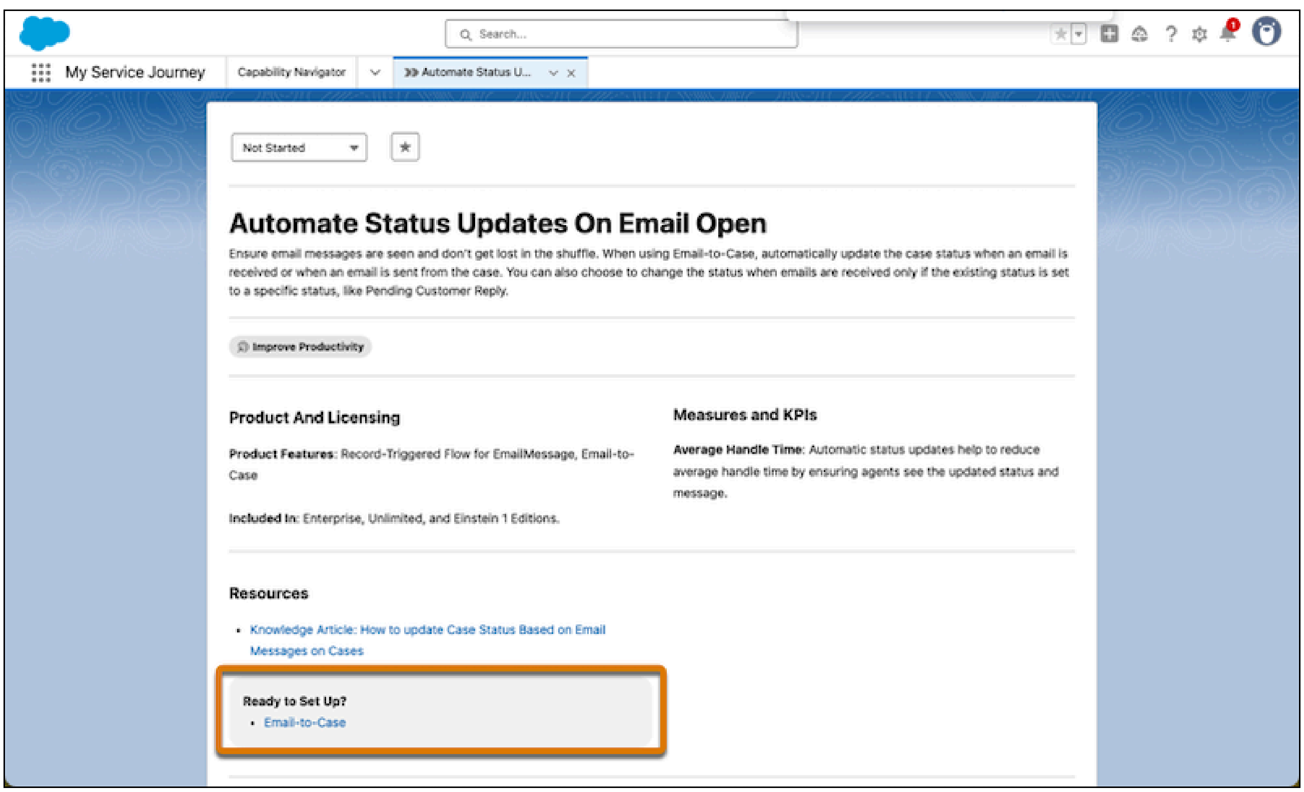
Where: This change applies to Lightning Experience in Enterprise, Unlimited, and Developer editions.

Who: My Service Journey is available to all Service Cloud users. However, only admins can see and click Ready to Set Up? links to Salesforce Go on capabilities. Users can send admins links to the capabilities they want implemented, and admins can then click those links to access Salesforce Go.

How: Launch My Service Journey from the App Launcher. For enhanced exploration of Service Cloud capabilities, add My Service Journey to your console app's navigation menu. This pins capabilities as tabs for quicker access.



If a capability has a Ready to Set Up? link, click it.



See Also

Salesforce Help: Simplify Feature Discovery and Setup with Salesforce Go (can be outdated or unavailable during release preview)
Salesforce Help: Service Cloud Functionality with My Service Journey (can be outdated or unavailable during release preview)
Trailhead: My Service Journey App: Quick Look

Work.com

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

See the Work.com release notes for the latest updates: Work.com Release Notes

Other Salesforce Products and Services

Get the latest information on these new features.

Heroku

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the Heroku Changelog.

IdeaExchange

Share ideas with the Trailblazer community and Salesforce product managers with the IdeaExchange. It features a search experience that aids discoverability, more informative idea records, and search-as-you-type dupe detection to help avoid posting the same idea twice. For more information, visit the IdeaExchange.

Legal Documentation

We made seasonal updates to Salesforce Legal Documents.

Trust & Compliance

For a complete list of changes to the Trust & Compliance documents related to this release, see the Salesforce Trust & Compliance Documentation Change Log.

Business Associate Addendum Restrictions

For a complete list of changes to the Business Associate Addendum Restriction documents, see the Business Associate Addendum Restrictions Change Log.

Acceptable Use Policy

For a complete list of changes to the Acceptable Use Policy documents, see the Acceptable Use Policy Change Log.

Previous Release Notes

Find information about previously-announced features in the release note archive.

Note Older release notes are not updated once a new release is available.

- Spring ’25 Release Notes
- Winter ’25 Release Notes
- Summer ’24 Release Notes
- Spring ’24 Release Notes
- Winter ’24 Release Notes
- Summer ’23 Release Notes
- Spring ’23 Release Notes
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- Lightning Platform Mobile 6.1 for Windows Mobile 5 Release Notes
- Winter '07 Release Notes
- Summer '06 Release Notes
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