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# Salesforce Summer '20 Release Notes

Salesforce, Summer '20

Delivering innovations across the entire Customer 360 Platform to support you in times of change



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# SALESFORCE SUMMER '20 RELEASE NOTES

The Summer '20 release delivers innovations across the entire Customer 360 Platform to support you in times of change.

## IN THIS SECTION:

### [How to Use the Release Notes](#)

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

### [Get Ready for the Release](#)

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

### [How and When Do Features Become Available?](#)

Some features in Summer '20 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: Lightning Experience on iPad, Optimize Your Org, and Work Smart with Split View](#)

Access Lightning Experience on your iPad, use the Lightning Experience Configuration Converter and Salesforce Optimizer App to help you transition to Lightning Experience, and breeze through your records with split view for standard navigation. Also, add walkthroughs to your app, and use improved prompts to help get your users up to speed.

### [Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

Einstein Search is natural. Users can enter common words and phrases in the search box and find the records that they're looking for. Use Einstein OCR (optical character recognition) to turn images such as business cards into alphanumeric text. Get the best Einstein Discovery predictions from three modeling algorithms.

### [Sales: Einstein Call Coaching and Engagement Details for High Velocity Sales, Custom Opportunity Splits, Quick Actions for Task Queues, and Pardot B2B Marketing Features](#)

Use Einstein Call Coaching to analyze conversational data, and review engagement details to see when prospects engage over email. Create more custom opportunity split types. Set up quick actions to assign tasks to queues. Pardot adds Einstein Attribution and the Marketing Campaign Intelligence app. Get more control over opportunity access via territories. Path features come to Kanban. And email integration helps you boost productivity more than ever.

### [Service: Service Cloud Voice, Einstein Reply Recommendations, Multi-Language Einstein Bots, Field Service Lightning Shift Improvements, and More](#)

Talk with your customers via Service Cloud Voice, a new product that integrates the power of Salesforce with the telephony services of Amazon Connect. Recommend chat replies based on similar closed chats to support agents in the Lightning Service Console. Use Einstein Bots in nine languages. Manage Field Service Lightning shifts (beta) more easily with improvements to schedule views.

[Industries: Emergency Response Management, Plus Better Customer Focus with Action Plans, Search Enhancements, Store Visit Management, and More](#)

Vertical solutions from Salesforce Industries are full of features designed to bring you closer to the people who depend on you. Salesforce Emergency Response Management helps you deliver contact tracing, monitoring, and other resources fast when crisis hits. Health Cloud has new emergency response features, plus more ways to support call center workers and connect with patients, along with increased convenience and usability. Financial Services Cloud brings greater usability to Action Plans and helps you leverage your customers' loan application data to create financial accounts. Consumer Goods Cloud helps your field reps focus on the most important data and manage their schedules more easily. Manufacturing Cloud helps keep your sales plans on track by enabling account managers to set account targets and forecast better.

[Analytics: Knowledge Category Filters, New Data Prep Tool, Tree-Based Models](#)

Gain more detailed insights about your knowledge articles by filtering knowledge reports by category. Create recipes with the new, approachable editor, Data Prep (Beta). Get the best predictions from three modeling algorithms.

[Commerce: B2B Commerce on Lightning Experience, Enhanced Order Management Capabilities](#)

Salesforce B2B Commerce on Lightning Experience brings the power of the Salesforce platform to your business-to-business (B2B) commerce solutions. Enhanced capabilities in Salesforce Order Management include support for multiple currencies, gross tax type on orders, refunds on cancellations, order product discounts, unmanaged orders, accounts and contacts, and payment processing with Adyen.

[Communities: Enhanced Personalization, Revamped Menu Components, and Guest User Security](#)

Personalization sees a slew of enhancements available in both Experience Builder and the API. Display different link sets in navigation components, such as the revamped Tile Menu, and so much more. Various security enhancements help keep your data safe. And starting in Winter '21, you no longer have the option of opting out of enabling guest user security settings, so now is the time to prepare.

[Salesforce CMS: New Image and Document Types, Mass Import, and B2B Integration](#)

Manage your Salesforce CMS content more easily with new image and document content types. Quickly import multiple content items, such as images, news, documents, or custom content types. And use your CMS content in B2B Commerce on Lightning Experience.

[Files: Increased File Security and Retiring Support for Adobe Flash Rendition](#)

Allow your users to download all custom file types as attachments. Switch your file rendition in Connect REST API from Adobe Flash to SVG.

[Mobile: Salesforce Mobile App and Notifications Enhancements](#)

Get more done without leaving the Salesforce mobile app with personalized navigation and mobile activity reminders (pilot). Send more push notifications, and send custom notifications to external apps. Anyone with access to a Lightning community can now access the Mobile Publisher Playgroun app (beta).

[Salesforce Sustainability Cloud: Better Carbon Tracking and Improved International Support](#)

Gain easy access to key performance indicators and emissions trends with new Einstein Analytics dashboards. Take advantage of increased flexibility and support of Sustainability Cloud. Enter data with SI (metric) units and change the language to one of six languages. Run Sustainability Cloud in your Government Cloud org.

[myTrailhead: Enhance Your Company's Branding with Customized Navigation Settings](#)

Choose the pages to direct your users to when they click the help icon or log out of myTrailhead. Create custom links for your myTrailhead page footer. Delete filters that you don't need from the Products category on the Modules and Trails pages. We removed Salesforce branding elements from myTrailhead so they don't confuse your users.

[Work.com: Introducing Emergency Response Management, Workplace Command Center, Shift Management, and Trail Tracker](#)

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.

### [Customization: Lightning Flow Enhancements, Einstein Prediction Builder Improvements, and Lightning App Builder Updates](#)

Build, configure, report on, and debug flows more easily with enhancements to Flow Builder and flow management. Improve predictions and efficiently manage them in Einstein Prediction Builder. Design and navigate your Lightning pages in new ways in the Lightning App Builder.

### [Security, Privacy, and Identity: Security Command Center \(Beta\), Authentication Enhancements, OCSP Stapling, and Real-Time Event Monitoring Threat Detection \(Generally Available\)](#)

The new Security Command Center (Beta) makes monitoring security settings for multiple tenants easy. You can review all your tenants' security settings, activity, and Health Check scores in one place. We updated two-factor authentication and delegated authentication. HTTPS connects faster with OCSP stapling. Real-Time Event Monitoring Threat Detection is generally available, and you can choose to receive alerts to threats by app, email, or SMS.

### [Deployment: New Change Set Components](#)

New change set components are available.

### [Development: Create Your Own Salesforce App](#)

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

### [Quip: Template Metrics, Einstein Analytics Live App, Full Support in VPC and Sandbox, and More](#)

See how your users employ Quip templates with Quip for Customer 360 metrics. Bring your Einstein Analytics dashboards into Quip. Use all Quip for Customer 360 features in a sandbox. Keep your Quip documents with full VPC support. Add relationship maps to your Account Plans so that your reps can easily find key contacts and account history.

### [Marketing: Transactional Sending and Behavioral Triggers in Journey Builder, Ecommerce Optimizer App in Datorama, Einstein in Interaction Studio](#)

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

### [Release Updates: Critical Updates and Security Alerts in One Location, Permission Changes for Apex, and More](#)

Enjoy a cleaner view of important updates and alerts in one location. Ensure that your org stays up to date on all changes that affect its performance, security, and users.

### [Spotlight on Content](#)

We added Pardot Help enhancements, Financial Services Cloud Administrator Guide updates, new Trailhead modules, and instructional videos. We also updated our Trust and Compliance documentation.

### [Other Salesforce Products and Services](#)

## How to Use the Release Notes

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

- We offer [PDF](#) and [HTML](#) versions.
- For the HTML version, your browser's settings determine the language you see. To change the language, scroll to the bottom, click **Change Language**, and select a language.
- The release notes include details about new and modified features. For information on known issues, visit the [Salesforce Known Issues site](#).



**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.

## IN THIS SECTION:

### [Use Filters to Zero In on the News That Matters Most](#)

The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

### [Know What's in Salesforce Lightning Experience and What's in Salesforce Classic](#)

Everybody's excited about Lightning Experience and everything it offers. But we also understand that lots of orgs continue to use Salesforce Classic—either exclusively or in tandem with Lightning Experience as it evolves.

### [You Asked for It!](#)

We delivered the features you asked for on IdeaExchange.

### [Release Note Changes](#)

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

### [Your Feedback Matters](#)

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

## Use Filters to Zero In on the News That Matters Most

The filters narrow down the list of release notes on the right side of your screen, not the content on the left.

### **Experience**

See which features are available in Lightning Experience, the Salesforce mobile app, and Salesforce Classic.

### **Edition**

Which feature enhancements are available to you depends on your edition. Filter the release notes to show only the enhancements that are available in your edition.

### **Feature Impact**

Some features require you to enable or configure them before users can get the benefits. As an admin, filter the release notes to focus on or hide just those features. Or maybe you want to see only the features that are automatically enabled for your users.

### **Product Area**

See only the products that your org uses. If your org does sales but not support, set up your release notes so that only the sales-related news appears.

To narrow down the list of release notes, click **Show Filters** on the right side.

The screenshot shows a sidebar with various filtering options. Under 'Experience', 'Lightning Experience' and 'Mobile' are checked. Under 'Edition', 'Professional Edition' is selected. Under 'Feature Impact', 'Enabled for users' is selected. Under 'Product Area', several categories are listed with checkboxes: Analytics (checked), API (unchecked), Chatter (checked), Email Integration (unchecked), Communities (unchecked), Data.com (unchecked), Force.com Customization (unchecked), Force.com Development (unchecked), Mobile (unchecked), Sales (checked), Service (unchecked), and Work.com (unchecked). At the bottom left is a link 'Fewer Product Areas' and at the bottom right is a 'Reset' button.

You can share your filtered list of release notes with anyone. Select filters, copy the URL, and then distribute that URL however you want.

## Know What's in Salesforce Lightning Experience and What's in Salesforce Classic

Everybody's excited about Lightning Experience and everything it offers. But we also understand that lots of orgs continue to use Salesforce Classic—either exclusively or in tandem with Lightning Experience as it evolves.

One key to success during this time of transition is understanding what's available in one, both, or all the Salesforce experiences. To guide you, we added experience information to the applicable release notes at the highest level: for entire clouds or for individual features within clouds. Let's look at a couple of examples.

- A new Service Cloud feature is available in *both desktop experiences*, so the **Where** section of the release note says, "This change applies to Lightning Experience and Salesforce Classic."
- A new Sales Cloud feature is available in Lightning Experience *only*, so the **Where** section of the release note says, "This change applies to Lightning Experience only."

If a key feature is also available in the Salesforce mobile app, we mention that in the **Where** section of the release note. But you can also check the Mobile section for a complete list of what's new.

## You Asked for It!

We delivered the features you asked for on IdeaExchange.

**IdeaExchange**

**Salesforce Overall**

**Idea delivered**

<b>IdeaExchange</b>	<b>Idea delivered</b>
Support Split View (Like Console) in Standard Navigation	Work Through Lists with Ease Using Split View for Standard Navigation
Allow iPad browsers to view Lightning Experience	Access Lightning Experience on iPad Devices (Generally Available)
Allow user authored Walkthroughs	Create Multi-Step Walkthroughs for In-App Training
<b>Sales</b>	
Expand the Number of Oppy Splits Available	Use a Higher Split Limit to Make Opportunity Splits More Effective
Add Pardot "Add to Nurture" Button on List Views in Salesforce	Add to Prospect Lists and Engagement Studio Programs from Records and List Views
'Add to Nurture List' action should show related Engagement Programs	
Bulk add leads to nurtures in Salesforce Engage	
Securely redirect http to https	Make Pardot Assets More Secure for Prospects
Create true Pardot Sandbox environments	Test Configuration Changes with Developer Sandboxes for Pardot (Generally Available)
<b>Service</b>	
Allow Sharing Rule assignments to Knowledge Articles	Use Salesforce Sharing with Lightning Knowledge (Beta)
Sharing Settings for Knowledge__kav object	
<b>Customization</b>	
Process Builder: Fire Only on Update	Trigger a Flow to Run After a Record Is Saved
Launch a Flow Direct from Platform Event	Trigger a Flow to Run When a Platform Event Message Is Received
Allow Platform Events to Launch a Flow	
Flow Builder: Automatic Output Handling for Subflows	Configure Subflow Elements Without Assigning Output Values
Allow Generic sObject Collections as Input Parameters for Flow Screen Components	Create Flow Screen Components That Work for Multiple Objects (Beta)
<b>Security and Identity</b>	
Case Insensitive validation on Federation Id for SSO implementation	Seamlessly Integrate Federation IDs with Identity Providers
Event Monitoring: Real-Time Alerts	Detect Errors When an Org Exceeds the Concurrent Long-Running Apex Limit
Make Transaction Security Policy messages customizable	Customize Transaction Security Block Messages

## Release Note Changes

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

## September 9, 2020

### **Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals (Update)**

Added a new Release Update to allow users to use standard external profiles to self-register and log into communities.

### **Crunch More Data with Einstein Discovery**

Removed this limit increase for now. Needs some more work before it's ready for prime time.

### **Automatic Usage Summaries for Evergreen Usage-Based Subscriptions**

Removed this feature while we make some changes. Needs some more work before it's ready for prime time.

### **Metadata API**

Added information about the new `processOrder` field on the ApprovalProcess metadata type.

### **Control the Order of Active Approval Processes Programmatically**

Added the maximum value you can define for the new `processOrder` field.

## September 2, 2020

### **Transition CPQ to Permission Set Licenses (Update)**

Noted that we added an **Assign Licenses** button to the readiness tool. Use the button to quickly assign permission set licenses to all your package users.

## August 26, 2020

### **We Updated Terms for the Identity Only License**

Each Identity Only licensed-user is now limited to 10 custom objects.

### **Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android**

Added information about Einstein Analytics for Android users.

### **Enable Dependency Access Checks In Lightning Components (Update, Postponed) on page 518**

Clarified behavior of this release update.

### **Salesforce Sustainability Cloud: Better Carbon Tracking and Improved International Support**

Updated the Sustainability Cloud release notes to include new features.

### **Enforce Data Access in Flow Formulas (Update, Postponed)**

Clarified that the update impacts flow merge fields.

### **Get the Best Predictions from Three Modeling Algorithms**

Added GBM and XGBoost algorithms back to Einstein Discovery release notes.

## August 19, 2020

### **Help Chat Agents Respond Faster with Einstein Reply Recommendations (Generally Available)**

Clarified that participants in the Einstein Reply Recommendations pilot must assign agents a new permission set.

### **Detect Entities in Text with the Einstein Named Entity Recognition (NER) Model (Beta)**

Added a release note that announces the availability of Einstein NER.

### **Encrypt Data Associated with the Employee Object**

Use Shield Platform Encryption to encrypt personal data contained in records based on the Employee object.

## August 12, 2020

### Simplify Configuring Sign-In with Apple

Use a new method to set up Sign-In with Apple for your org.

### Opt Out of Enforcing Guest User Object Permission Changes (Update)

In Salesforce orgs created before Winter '21, this update opts out your org from enforcing guest user object permission changes aimed at increasing your data security.

### Management Suite Renamed to WDC

Added a release note about a product name change to WDC.

### Management Suite Renamed to WDC

Added a release note two new metadata types, InboundNetworkConnection and OutboundNetworkConnection, that define and establish a private connection.

## August 5, 2020

### Explore New Apps Tailored for B2B Marketers

Updated Marketing Campaign Intelligence release note to announce that B2B Marketing Analytics Plus is generally available.

### Enable Dependency Access Checks In Lightning Components (Update, Postponed)

We postponed the auto-activation date until Spring '21.

### Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile (Update, Postponed)

Added a link to a managed package with a Guest User Access Report.

### Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Postponed) on page 517

Added a link to the AuraEnabled Scanner tool.

### Removed: Gradient Boost Machine (GBM) and XGBoost

We've pulled these tree-based algorithms for some fine-tuning. We'll let you know once they're back.

### Step Up Productivity with Einstein Search in Professional Edition (Beta)

Einstein Search is now available with Professional edition.

### Deliver Einstein Article Recommendations in Five New Languages (Pilot)

Clarified that article recommendations appear in only one language at a time on a case.

### Metadata API

SessionSettings, a subtype of SecuritySettings, has a new field, `lockerServiceAPIVersion`.

### Encrypt Emergency Service Application Request Information

You can now encrypt sensitive information in service requests with Shield Platform Encryption.

### New and Changed Aura Components

Changed the support information for using HTML tags in `lightning:map`.

### New and Changed Lightning Web Components

Changed the support information for using HTML tags in `lightning-map`.

### Require Permission to View Record Names in Lookup Fields (Update, Postponed)

Changed the enforcement timing of this release update from Winter '21 to Spring '21.

### Turn off permissions

Use the MutingPermissionSet metadata type. Available since API version 46.0, MutingPermissionSet is added to the Metadata API Developer Guide.

## Introducing Emergency Response Management for Public Health

Version 2 includes new features and updates like Contact Outreach and Volunteer Management.

## Introducing Emergency Response Management for Public Sector

Version 2 includes new features and updates like business reopening and location access requests, training certification, and inspections using the mobile Inspection App. And we're introducing the Grants Management portal.

## App Store and Google Play Updates

Added a note for Summer '20 patch updates for the Salesforce mobile app.

## New and Changed Objects

You can rename the tab for the Employee object, which automatically changes some field labels to match.

## Get Support for Microsoft® Edge Chromium

Updated release note to mention Edge Chromium support for Salesforce Classic.

## Scan a Barcode in a Lightning Web Component (Beta)

Add barcode scanning functionality to your Lightning web components.

## Salesforce for Outlook Is Being Retired in December 2020

Added a link the Salesforce for Outlook migration guide, [Move from Salesforce for Outlook to the Next-Generation Products](#).

## New and Changed Objects

The Employee object includes a `UserId` field to link Employee records to users.

# July 23, 2020

## Removed: Control Displayed Fields in Knowledge Search Results

Due to user-interface-related issues, we removed the grid layout for Knowledge search results from the Summer '20 Release. If you have questions about this feature in future releases, please post them to the [Trailblazer Community](#).

# July 22, 2020

## Create Dynamic Queue Routing for Einstein Bots on page 199

Added a release note describing updated routing to transfer conversations to a Chat Button queue.

## New and Changed Lightning Web Components

Added a change to the `lightning-datatable` component for the `text` data type.

## New and Changed Aura Components

Added a change to the `lightning:datatable` component for the `text` data type.

## Removed: Reflect Upstream Changes in Lightning Screen Component Values After Next Transitions

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.

## Map New Shape Layers on page 121

Added shape layers available after Spring '20 in Salesforce Maps.

## Territory Planning: Scenario Comparisons, Collaboration, and Sharing and Permissions on page 122

Added requirement for enabling feed tracking to collaborate in Salesforce Maps territory plans and alignments, control sharing and permissions, and require approval for updates to alignments.

## Tooling API New and Changed Objects

Added information about removing the `headerBackgroundImg`, `CustomPrechatComponent`, `LiveChatButtonId`, and `LiveChatDeploymentId` fields from the `EmbeddedServiceLiveAgent` object.

Added information about the new `navBarTextColor` and `secondaryNavBarColor` fields on the `EmbeddedServiceBranding` object.

Added information about the `ContrastInvertedColor` field on the `EmbeddedServiceBranding` object.

Added information about documentation for common fields on the `EmbeddedServiceBranding` object.

### **[Help Chat Agents Respond Faster with Einstein Reply Recommendations \(Generally Available\)](#)**

Clarified that Einstein Reply Recommendations is available only in English.

### **[Apply Delegated Authentication to Your Salesforce Org](#)**

Added more instructions on how to use this feature.

### **[Test Emails Removed from Engagement Datasets](#)**

Added a release note about a bug fix that affects Pardot's email engagement metrics.

### **[New and Changed Objects on page 576](#)**

Added the `CaseSubjectParticle` object.

Added information on the search-enabled fields on Work.com objects

### **[Blob Schema Blocked for iframes](#)**

Added a CSP change introduced in Spring '20.

### **[Salesforce CLI: New and Changed Commands on page 630 and Organize Your Code with Multiple Package Directories on page 630](#)**

Added recent updates to the core CLI plug-in, which releases weekly.

### **[Access Nested Fields of Apex-Defined Data Types in Flows on page 428](#)**

Added a release note about removing data access limitations for Apex-defined data types in flows.

## **July 15, 2020**

### **[Tooling API New and Changed Objects](#)**

Updated documentation for the `OwnerChangeOptionInfo` object.

### **[Transition CPQ to Permission Set Licenses \(Update\)](#)**

Added more information about a new warning message that appears for users who haven't upgraded to permission set licenses.

### **[Salesforce Anywhere: Streamline and Optimize Salesforce Collaboration \(Beta\)](#)**

Updated information about edition availability.

### **[Salesforce Anywhere: Streamline and Optimize Salesforce Collaboration \(Beta\)](#)**

Updated information about edition availability.

### **[Prevent Consecutive API Navigation Calls in Visualforce Pages \(Update\)](#)**

Added a new release update.

### **[New and Changed Objects](#)**

Updated behavior changes for the Work.com objects to include list views showing all records for an object.

### **[Delete Filters from the Products List on myTrailhead](#)**

Introduced a new feature that allows users to remove certain filter values from myTrailhead.

### **[Configure Invocable Actions in Flow Builder More Easily \(Beta\) on page 438](#)**

Added a release note that announces the support of custom property editors for configuring invocable actions.

### **[Create Custom Property Editors for Invocable Actions \(Beta\) on page 541](#)**

Added a release note that announces the support of custom property editors for configuring invocable actions.

## July 8, 2020

### Salesforce Maps: COVID-19 Hotspot Monitoring, Territory Planning Scenarios, and Advanced Setup Improvements

Introduced Salesforce Maps new features and enhancements for Summer '20!

### Spotlight on Content

Added information about our latest content enhancements, including Pardot Help additions, Financial Services Cloud Administrator Guide updates, new Trailhead modules, and new videos.

### Reach Out to Customers with Agent Initiated Conversations on Facebook and WhatsApp (Open Beta)

Added information about a beta feature for Messaging.

### Dependency Changes to Messaging

Added a dependency change for Service Cloud Messaging regarding High Velocity Sales.

### Metadata API

Added information about removing the `headerBackgroundImg` field on the `EmbeddedServiceLiveAgent` type.

Added information about the new `navBarTextColor` and `secondaryNavBarColor` fields on the `EmbeddedServiceBranding` metadata type.

Added information about the new `isDisplayedOnPageLoad` field on the `EmbeddedServiceMenuItem` subtype of the `EmbeddedServiceMenuSettings` metadata type.

### New and Changed Aura Components

Added new attributes for the `lightning:fileUpload` component.

### New and Changed Lightning Web Components

Added new attributes for the `lightning-file-upload` component.

### Allow Guests to Safely Upload Files

Added information on how to allow guest users to upload files in communities.

### Permission Changes for Service Cloud Features

Clarified the features affected by the permission changes.

### Change Record Owners in Lightning Knowledge

Added information about assigning ownership of Knowledge articles to queues.

### Require Permission to View Record Names in Lookup Fields (Update, Postponed)

Added information clarifying this release update's behavior in Lightning Experience vs. Salesforce Classic and for lookup search.

### Integration No Longer Supported with Older Versions of Outlook and Windows on page 162

Added information about the updates required to continue to run the Outlook integration after December 2020.

### Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

Updated activation date for this release update.

### Return Null Values in Process and Flow Formulas (Update, Postponed)

Updated activation date for this release update.

### Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

Updated activation date for this release update.

### Enable Partial Save for Invocable Actions (Update, Postponed)

Updated activation date for this release update.

### Create Guest User Sharing Rules by Default

Added a release note about guest user sharing rules being enabled by default in all Salesforce orgs with communities or sites.

### Create Guest User Sharing Rules Before Enabling Secure Record Access

Added a release note about changes to guest user sharing rules to help you prepare for guest user security improvements.

**Enhance the Customer Experience with Customer Lifecycle Maps**

Updated the add-on license name.

**Keep Working with Tab-Focused Dialogs (Previously Released Update)**

Updated activation date for this release update.

**Route My Domains Through Salesforce Edge (Update, Enforced)**

Added a link to a Knowledge Article.

## July 1, 2020

**New and Changed Aura Components**

Updated the list of shortcuts available for the `number` type on `lightning:input`.

Added a change for `lightning:inputAddress` placeholders.

**New and Changed Lightning Web Components**

Updated the list of shortcuts available for the `number` type on `lightning-input`.

Added a change for `lightning-input-address` placeholders.

**Get Insights Into Sales Calls with Einstein Call Coaching**

Added information about Call Coaching limitations.

**Find User-Owned Objects: Use “My” in a Natural Language Search (Beta)**

Explained the behavior when the word “my” is used in a natural language search.

**New and Changed Modules for Lightning Web Components**

Added the new `lightning/uiAppsApi` wire adapter module.

**User Interface API**

Added the new `navItemNames` parameter for the `/ui-api/nav-items` resource.

**Trigger a Flow to Run After a Record Is Saved**

Updated the release note, formerly titled “Trigger a Flow That Performs Actions After a Record Is Saved,” to reflect text and behavior changes in the user interface. Also added some details and corrected some information.

**Trigger a Flow to Run When a Platform Event Message Is Received**

Updated the release note, formerly titled “Trigger a Flow When a Platform Event Message Is Received,” to reflect text and behavior changes in the user interface.

**Create Flows with the Enhanced New Flow Window and Start Element**

Updated the release note, formerly titled “Create and Edit Flows More Easily with the Improved New Flow Window and Start Element,” to reflect text and behavior changes in the user interface.

**Channel-Object Linking: Records for Voice (Beta)**

Corrected the availability of this feature to Beta.

**Find the Right Resources with the Shield Learning Map**

Added a release note about the new Shield Learning Map.

**New and Changed Objects**

Added information about new fields for the `KnowledgeSettings` object and the `CaseSettings` object.

## June 26, 2020

### New and Changed Objects

Behavior changes for the Location, Employee, Crisis, EmployeeCrisisAssessment, and InternalOrganizationUnit objects and new associated objects.

## June 24, 2020

### Track Your Flows' Usage of Limited Resources

Removed flows' CPU-time consumption from debug logs in Summer '20 because we discovered inconsistencies that we need more time to fix.

### Configure Subflow Elements Without Assigning Output Values

Added a release note announcing simplified configuration for Subflow elements in flows.

### Metadata API

Added information about the new `storeOutputAutomatically` field on the FlowSubflow subtype of the Flow metadata type.

Added information explaining that the `fullName` field on FlowTranslation is now optional.

### Configure Loop Elements Without Creating Loop Variables

Added a release note announcing simplified configuration for Loop elements in flows.

### Second-Generation Packaging Improvements: Delete Earlier Flows from Packages

Added note that describes how admins can now delete earlier flow versions from unlocked packages and second-generation managed packages from package install.

### Prepare Your Community for Upcoming CSP Changes

Added a note about the removal of the **Allow Inline Scripts and Script Access to Any Third-party Host** CSP setting in Spring '21.

### Permission Changes for Sales Cloud Features

Added access change for organization-wide email addresses for user profiles.

### New and Changed Aura Components

Added a change to `lightning:input` that describes the updated behavior on the `min` and `max` attributes for the `date` and `datetime` types.

### New and Changed Lightning Web Components

Added a change to `lightning-input` that describes the updated behavior on the `min` and `max` attributes for the `date` and `datetime` types.

### Send Surveys Between Orgs Using Managed Packages

Added a note about the capability to send survey records from one org to another using managed packages.

### Update Jest Dependencies to v25.5.4 If You Update `sfdx-lwc-jest` to v0.9.0

Added note directing customers to update their Jest dependencies or their tests might stop working.

### Test Configuration Changes with Developer Sandboxes for Pardot (Generally Available)

Clarified that Pardot Developer Sandboxes can be provisioned from any Salesforce Sandbox.

### Get to the Point with Report Highlights

Added note about new Report Highlights feature for the Salesforce mobile app for iOS.

## June 17, 2020

### Removed: Route Chats Using Skills-Based Routing Without Code

Removed the ability to set up skills-based routing for chats in Omni-Channel attribute setup because this feature isn't ready for showtime.

### See Refreshed Data When Editing Records on Visualforce Pages

Added a release note for a fix that refreshes stale data on Visualforce pages.

### Allow Custom File Types to Download as Attachments

Added a note for a new security preference in Files that allows custom files to download as attachments only.

### Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)

Automatic activation of this update in production orgs is postponed to Summer '21.

### Metadata API

Added information about the new `componentAttributes` value in the existing `propertyOverrides` property on the `ExperienceBundle` metadata type.

### Configure Custom Flow Screen Components More Easily (Beta)

Added a release note that announces the support of custom property editors for configuring custom flow screen components.

### Create Custom Property Editors for Lightning Web Components (Beta)

Added a release note that announces the support of custom property editors for configuring custom flow screen components.

### Flow Builder Toolbar Improvements

Added a release note that announces improvements to status message of flows in the Flow Builder toolbar.

### Create Scratch Orgs with More Features

Added note about new scratch org features.

### Get Search Results for More Objects

Added a note listing newly searchable objects and fields.

### Describe Global

Added a note to explain that `If-Modified-Since` checks for org-wide events.

### Discover New and Changed Commands

Added recent updates to v48 of the core CLI plug-in, which releases weekly.

### Improve SSO with Custom Community URLs

Added a release note that announces the option to use custom community URLs for single sign-on.

## June 11, 2020

### View Invoice Line Balances on Assets

Added a note about the new asset field Invoice Line Balance.

### Manage Invoice Line Due Dates

Added a note about the new invoice line fields Days Past Due and Due Date.

### New Validations for Creating Order Items

Added a note about new validations for creating order items.

## June 10, 2020

### Communicate Across Salesforce UI Technologies with Lightning Message Service (Generally Available)

Clarified note about the `scope` parameter behavior and values.

**Close Finance Periods with More Transactions**

Added a note about a reduced chance for errors when closing finance periods related to large numbers of transactions.

**Add the C360 Global Profiles Component to More Page Layouts**

Added a note about newly supported pages for the C360 Global Profiles component.

**Create More Records from Global Profiles**

Added a note about creating records from C360 Global Profiles search for Customer 360 Data Manager users.

**Salesforce B2B Commerce: Design, Build, and Launch a Business-to-Business Commerce Solution**

Added a sentence to highlight that admins have the ability to import orders as order summaries.

**Updated Text Format Options for Text Template Flow Resource**

Added a note that explains updated UI labels for using Rich Text and Plain Text formatting in the Flow Builder Text Template element.

**Let Flow Users Search for Records by Any Searchable Field**

Added a note about Flow users now being able to use any searchable fields when searching for records.

**Einstein Intent Now Supports Multiple Languages**

Added information about new languages supported by Einstein Intent.

**Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)**

Added a note about a Visualforce restriction when using the Apple Safari browser. Updated release update name to new wording in Summer '20 release.

**See Increased Screen Real Estate for Other Configuration Settings in Property Editors**

Added a note about the Label, API Name, and Description fields being minimized when you edit an element or flow properties in Flow Builder.

**Choose Whether to Show or Hide Closed Statuses in the Care Plan Status Field**

Added a release note about the Status picklist in Care Plans.

**Einstein Voice Assistant Is Being Retired (Beta)**

Added new release note announcing that Einstein Voice Assistant (Beta) is being retired and removed all other Einstein Voice Assistant release notes.

**New and Changed Aura Components**

Added information about a change to lightning:map.

**New and Changed Lightning Web Components**

Added information about a change to lightning-map.

## June 3, 2020

**Spotlight on Content**

Updated our Trust and Compliance documentation.

**Guest Users Don't Automatically Get Inverse Relationship Records on page 259**

Added information about impact of guest user security enhancements.

**Lightning Web Components in Custom Tabs Are Reactive on page 514**

Added code snippet to illustrate how to declare the currentPageReference variable in your component.

**New and Changed Aura Components**

Added information about suffix support on name fields for the lightning:inputField component.

**New and Changed Lightning Web Components**

Added information about suffix support on name fields for the lightning-input-field component.

**Build Fast, Efficient Experiences with the LWC-Based Template (Developer Preview)**

Clarified that the template is available as a developer preview this release.

**Test More Shield Platform Encryption Functionality in Scratch Orgs on page 482**

Fixed the spelling of the new MinKeyRotationInterval scratch org feature.

**Enable Person Account Syncing Without Contacting Support**

Changed the date on Pardot features previously set to release in May that will now release in June.

**View Timely Advanced Email Analytics for List Email Reports**

Changed the date on Pardot features previously set to release in May that will now release in June.

**Make Pardot Assets More Secure for Prospects**

Changed the date on Pardot features previously set to release in May that will now release in June.

**Create New Pardot Accounts with Handlebars Merge Language Enabled By Default**

Changed the date on Pardot features previously set to release in May that will now release in June.

**Pardot Changes Coming In June**

Changed the date on Pardot features previously set to release in May that will now release in June.

**Pardot**

Changed the date on Pardot features previously set to release in May that will now release in June.

**Einstein Bots: Increased Limits on page 199**

Added a release note to highlight the increase of active bots per org from 10 to 20.

**Store Records for Unmanaged Orders in Salesforce Order Management**

Clarified that this applies to B2B Commerce in addition to SOM, and changed the permission API names to their UI labels.

## June 1, 2020

**Work.com: Introducing Emergency Response Management, Workplace Command Center, Shift Management, and Trail Tracker**

Work.com now includes Workplace Command Center, Shift Management, and Trail Tracker.

## May 27, 2020

**You Asked for It!**

Added Ideas that we delivered.

**Know When Companies Are Cutting Costs**

Added a release note about the new insight for Einstein Account Insights.

**Get Opportunity Scores Based on Products, Quotes, and Price Books**

Added a release note about the updated scoring model for Einstein Opportunity Scoring.

**Reflect Upstream Changes in Lightning Screen Component Values After Next Transitions**

Added a note about changed behavior for Next transitions in screen flows.

**Get Improved Shift Management (Generally Available)**

Shift management is now generally available.

**Manage Loads for Your Trucks and Workers**

Added a tip about updating the FSL custom permission sets if the Count rule isn't listed as a work rule type.

**Save Space with the Improved Event Monitoring Analytics App**

Clarified that users can access the improvements by upgrading their Event Monitoring Analytics App.

**Enable Improved Caching of Org Schema (Previously Released Update)**

Added a link to a Knowledge Article.

**Emails from the Automated Process User**

Added a new release notes topic that explains how admins can provide an email address for Automated Process User, to be used as the email sender for flow email actions.

**Take Charge of Your Security with Security Command Center (Beta)**

Added a release note about the new Security Command Center (Beta) app.

**Integrate Data Smoothly with the Improved Event Monitoring Analytics App**

Added a release note about data integration performance improvements with the Event Monitoring Analytics App.

**Get Deeper Insights with Enhanced Event Logs**

Added information about new standard reporting options onBot Sessions, and included information about the new objects available in the API: Conversation Definition Session, Conversation Event Log, and Conversation Definition Session Engagement.

## May 20, 2020

**Better Error Handling for Finance Periods**

Added a note about upgrading users adding new picklist values to the finance period's Status field.

**Opt Out of Guest User Security Policies for Payment Sites and Hosted Payment Platforms**

Added a link to a related Known Issue record.

**Get the Trailblazer.me Experience on Salesforce Help**

Added a note about a new login process for Salesforce Help. This change affects how users log in when clicking items in the Help Menu.

**Modify All Data, View All Data, Edit, and Delete Permissions on Guest User Profiles in Orgs Created in Summer '20 on page 376**

Added a new release note to clarify the changes in record access and permissions in guest user profiles in newly created orgs in Summer '20.

**Modify All Data, View All Data, Edit, and Delete Permissions on Guest User Profiles in Orgs Created Before Summer '20 on page 377**

Clarified the release note on changes in record access and permissions in guest user profiles in orgs created before Summer '20.

**Introducing Salesforce Emergency Response Management**

Added a section announcing the new Emergency Response Management features for Public Health, Health Cloud, and Public Sector.

**Protect Your Community with Emergency Response Management**

Added a note about the new Emergency Response Management features for Health Cloud.

**Work.com: Introducing Emergency Response Management, Workplace Command Center, Shift Management, and Trail Tracker**

Added the Work.com section to introduce our new solutions designed to help businesses reopen, including Emergency Response Management.

**New and Changed Objects**

Added release notes about the new FlowInterviewLog, FlowInterviewLogShare, FlowInterviewLogOwnerSharingRule, and FlowInterviewLogEntry objects.

## May 13, 2020

**Lightning Sync for Google Not Available for New Customers**

Revised the terms of the Winter '21 Lightning Sync for Google end of sale.

### Lightning Sync for Microsoft Exchange Not Available for New Customers

Revised the terms of the Winter '21 Lightning Sync for Microsoft Exchange end of sale.

### Pass In the Record When Launching a Flow from a Lightning Page or a Quick Action

Added a release note on how Lightning Flow makes it easier to pass records into flows.

### Lightning Flow Management: Prebuilt Report for Screen Flows, Emails from the Automated Process User, Resource Consumption in Debug Logs, Flow Error Emails for Platform Events, and Second Generation Packaging Improvements

Added a release note about tracking flows' usage of limited resources. Also added a release note about getting error emails when platform event messages don't start or resume the subscribed flows and processes. And added a release note about a new report that provides you with details about the flows you build.

### Tooling API New and Changed Objects

Added a release note about the new `SystemModeWithoutSharing` enum in the `runInMode` field on the Flow object.

### Metadata API

Added a release note about the new `SystemModeWithoutSharing` enum in the `runInMode` field on Flow.

### Control How to Serialize and Deserialize Apex Types

Corrected a syntax error in the code sample for `@JsonAccess` annotation.

### New and Changed Objects

Added a release note about the new `DataMapperExecutionStatus` field on the SurveyResponse object.

## May 4, 2020

### Salesforce Summer '20 Release Notes

Published preview release notes.

## Your Feedback Matters

We know how important our documentation is to your company's success. We want to know what works for you and what doesn't.

- **Trailblazer Community**—Post your feedback in the [Release Readiness Trailblazers](#) group. To help us track and respond to your feedback, use a hashtag that indicates the release, such as #Winter20Feedback.
- **Feedback forms**—As you're working with our documentation in Salesforce Help, release notes, or developer guides, look for the feedback form and vote up or down. Add comments if you have them.
- **Twitter**—When you follow @salesforcedocs on Twitter, you receive notices whenever we publish new documentation or make significant updates to existing documentation. Tweet us at [@salesforcedocs](#).

## Get Ready for the Release

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

## What's New This Release

- [Release Overview Deck \(ROD\)](#). Create internal training for your users, review setup screens, and learn how to use features.
- [Release Matrix](#). Quickly see which features immediately affect your users.
- [Summer '20 Pre-release Signup](#). Sign up for a pre-release org to get early access to the new features.
- [Release Readiness Live](#). Register and make the most of the new features.

- [Release Demos](#). Get quick video overviews of what's coming this release.
- [Summer '20 Release Website](#). Check out the new features.
- [Summer '20 Release Highlights Module](#). Get the Summer '20 Trailhead badge.
- [Release in a Box](#). Use this kit to prepare and present the new release to your org and users.

## Release Readiness Essentials

- [Release Readiness Trailblazers](#). Access resources and experts for all things release readiness.
- [Release Milestones](#). See key dates for the release.
- [Trust Status Maintenances](#). See sandbox and other release dates and times. Click Instances and your instance to see your maintenance dates.
- [Sandbox Refresh Calculator](#). Plan if and when you need to refresh your existing sandbox orgs.
- [Sandbox Preview Video](#). Learn how to navigate the sandbox preview process.
- [Sandbox Preview Instructions](#). Get early access to new features in your sandbox.
- [Customer Success Event Calendar](#). Register for release overview webinars and access recordings.
- [Certification Release Maintenance Schedule](#). Keep your certification updated in Trailhead.
- [Prepare for Salesforce Releases](#). Use Trailhead to create your release strategy.
- [Releases Email Journey](#). Prepare for releases by subscribing to emails.

## How and When Do Features Become Available?

Some features in Summer '20 affect all users immediately after the release goes live. Consider communicating these changes to your users beforehand so that they're prepared. Other features require direct action by an administrator before users can benefit from the new functionality.

## Supported Browsers

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

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get Support for Microsoft® Edge Chromium</a>	<input checked="" type="checkbox"/>			
<a href="#">Supported Browsers and Devices for Lightning Experience</a>	<input checked="" type="checkbox"/>			
<a href="#">Supported Browsers and Devices for Salesforce Classic</a>	<input checked="" type="checkbox"/>			
<a href="#">Supported Browsers for Einstein Analytics</a>	<input checked="" type="checkbox"/>			

## Salesforce Overall

Access Lightning Experience on your iPad, use the Lightning Experience Configuration Converter and Salesforce Optimizer App to help you transition to Lightning Experience, and breeze through your records with split view for standard navigation. Also, add walkthroughs to your app, and use improved prompts to help get your users up to speed.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Access Lightning Experience on iPad Devices (Generally Available)</a>	<input checked="" type="checkbox"/>			
<a href="#">Work Through Lists with Ease Using Split View for Standard Navigation</a>	<input checked="" type="checkbox"/>			
<a href="#">Lightning Experience Transition: Transition Assistant, Optimizer, Configuration Converter</a>				
<a href="#">Get More Guidance from the Lightning Experience Transition Assistant</a>		<input checked="" type="checkbox"/>		
<a href="#">Speed Up Org Maintenance with the Optimizer App</a>		<input checked="" type="checkbox"/>		
<a href="#">Streamline Transition Tasks with the Lightning Experience Configuration Converter (Generally Available)</a>		<input checked="" type="checkbox"/>		
<a href="#">Review Your Lightning Readiness More Quickly</a>		<input checked="" type="checkbox"/>		
<a href="#">Lightning Experience Engagement: Walkthroughs, In-App Guidance Builder, Prompts</a>				
<a href="#">Create Multi-Step Walkthroughs for In-App Training</a>		<input checked="" type="checkbox"/>		
<a href="#">Meet the In-App Guidance Builder</a>		<input checked="" type="checkbox"/>		
<a href="#">Change the Page Location of Prompts</a>		<input checked="" type="checkbox"/>		
<a href="#">Move Floating Prompts Around</a>	<input checked="" type="checkbox"/>			
<a href="#">Enjoy the Updated Design of Docked Prompts</a>	<input checked="" type="checkbox"/>			
<a href="#">Learn About Salesforce In-App Content</a>		<input checked="" type="checkbox"/>		
<a href="#">Management Suite Renamed to WDC</a>	<input checked="" type="checkbox"/>			
<a href="#">Salesforce Anywhere: Streamline and Optimize Salesforce Collaboration (Beta)</a>		<input checked="" type="checkbox"/>		
<a href="#">Salesforce Surveys: Deeper Org Integration and More Tools for the Builder</a>				
<a href="#">Turn Responses into Salesforce Records</a>		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Personalize Surveys with Your Salesforce Data</a>			<input checked="" type="checkbox"/>	
<a href="#">Gather Post-Chat Customer Feedback</a>			<input checked="" type="checkbox"/>	
<a href="#">Transform Customer Experience with Customer Lifecycle Maps</a>			<input checked="" type="checkbox"/>	
<a href="#">Pick Defaults and Let the Survey Run</a>	<input checked="" type="checkbox"/>			
<a href="#">Understand Participant Likes and Dislikes</a>	<input checked="" type="checkbox"/>			
<a href="#">Gather Critical Participant Information with Short Text</a>		<input checked="" type="checkbox"/>		
<a href="#">Share Survey Invitations Using QR Codes</a>		<input checked="" type="checkbox"/>		
<a href="#">Give Your Global Audience an Improved Experience</a>		<input checked="" type="checkbox"/>		
<a href="#">Send Surveys Between Orgs Using Managed Packages</a>	<input checked="" type="checkbox"/>			
<a href="#">See All Question Types at Once</a>	<input checked="" type="checkbox"/>			
<a href="#">Make it Easier for Survey Participants Outside Your Org to Respond</a>			<input checked="" type="checkbox"/>	
<a href="#">Question Type Name Change</a>	<input checked="" type="checkbox"/>			
<b><a href="#">Customer Lifecycle Analytics: Topic Analysis, Customer Lifecycle Maps, Response Analysis, Internal Survey Analysis, and Enhanced Configuration Wizard</a></b>				
<a href="#">Analyze Topics and Track Business Performance</a>			<input checked="" type="checkbox"/>	
<a href="#">Enhance the Customer Experience with Customer Lifecycle Maps</a>			<input checked="" type="checkbox"/>	
<a href="#">Get Deeper Insights Into Survey Responses</a>			<input checked="" type="checkbox"/>	
<a href="#">Analyze Responses from Participants Within Your Company</a>			<input checked="" type="checkbox"/>	
<a href="#">Use the Improved Configuration Wizard to Automatically Create Datasets</a>			<input checked="" type="checkbox"/>	
<b><a href="#">Lightning Scheduler: Automatic Resource Assignment, Anonymous Scheduling, Enhanced Scheduling Experience for Global Users, and More</a></b>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Streamline Appointment Scheduling with Automatic Service Resource Assignment</a>			<input checked="" type="checkbox"/>	
<a href="#">Hide Service Resource Names with Anonymous Scheduling</a>			<input checked="" type="checkbox"/>	
<a href="#">Streamline Your Flows with the Review Inbound or Outbound Service Appointment Component</a>			<input checked="" type="checkbox"/>	
<a href="#">Get Appointment Slots of Service Resources with the Available Territory Slots API</a>			<input checked="" type="checkbox"/>	
<a href="#">Other Changes to Lightning Scheduler</a>			<input checked="" type="checkbox"/>	
<b>Search</b>				
<b>Einstein Search: Available with Professional Edition, Clearer Setup Process, Natural Language Search Examples, and Better Recommended Results on the Salesforce Mobile App (Beta)</b>				
<a href="#">Step Up Productivity with Einstein Search in Professional Edition (Beta)</a>		<input checked="" type="checkbox"/>		
<a href="#">Get Everything Einstein Search Has to Offer (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Search with Everyday Words Using Einstein Natural Language Search (Beta)</a>		<input checked="" type="checkbox"/>		
<a href="#">Say Goodbye to the Shield Encryption Limitation for Einstein Search Personalization (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Benefit from Simpler Einstein Search Permission Names (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Get Better Recommended Results on the Salesforce Mobile App (Beta)</a>		<input checked="" type="checkbox"/>		
<a href="#">Find User-Owned Objects: Use "My" in a Natural Language Search (Beta)</a>		<input checked="" type="checkbox"/>		
<a href="#"><b>Get Search Results for More Objects</b></a>		<input checked="" type="checkbox"/>		
<a href="#"><b>Redirect Notices for External URLs</b></a>		<input checked="" type="checkbox"/>		
<a href="#"><b>Get the Trailblazer.me Experience on Salesforce Help</b></a>		<input checked="" type="checkbox"/>		
<a href="#"><b>Einstein Voice Assistant Is Being Retired (Beta)</b></a>			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Lightning Extension's Dark Mode Feature is Temporarily Disabled</a>	<input checked="" type="checkbox"/>			
<a href="#">Require Secure HTTPS Connections (Update, Enforced)</a>			<input checked="" type="checkbox"/>	
<a href="#">Open Hyperlinks in Formula Fields Correctly (Update, Enforced)</a>			<input checked="" type="checkbox"/>	
<a href="#">Keep Working with Tab-Focused Dialogs (Previously Released Update)</a>			<input checked="" type="checkbox"/>	
<a href="#">Create More Records from Global Profiles</a>				

## Sales

Use Einstein Call Coaching to analyze conversational data, and review engagement details to see when prospects engage over email. Create more custom opportunity split types. Set up quick actions to assign tasks to queues. Pardot adds Einstein Attribution and the Marketing Campaign Intelligence app. Get more control over opportunity access via territories. Path features come to Kanban. And email integration helps you boost productivity more than ever.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>High Velocity Sales</b>				
<a href="#">Get Insights Into Sales Calls with Einstein Call Coaching</a>			<input checked="" type="checkbox"/>	
<a href="#">Email Engagement</a>			<input checked="" type="checkbox"/>	
<b>Sales Cadences</b>				
<a href="#">Branch Sales Cadences Based on Email Replies</a>	<input checked="" type="checkbox"/>			
<a href="#">Remove Prospects from Sales Cadences Automatically Based on Criteria You Select</a>	<input checked="" type="checkbox"/>			
<a href="#">Organize Sales Cadence Emails as a Thread</a>	<input checked="" type="checkbox"/>			
<a href="#">See Sales Cadence and Rep Performance at a Glance (Generally Available)</a>	<input checked="" type="checkbox"/>			
<a href="#">Advance the Sales Cadence Without Waiting</a>	<input checked="" type="checkbox"/>			
<a href="#">Choose Whether to Track Emails in High Velocity Sales</a>			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get a Cleaner View of Sales Cadence Tasks in the Activity Timeline</a>			<input checked="" type="checkbox"/>	
<b>Salesforce Maps</b>				
<b>Salesforce Maps: COVID-19 Hotspot Monitoring and Esri™ ArcGIS Living Atlas of the World</b>				
<a href="#">Monitor COVID-19 Hotspots with an Esri™ ArcGIS Online Layer</a>			<input checked="" type="checkbox"/>	
<a href="#">Plot Content from Esri™ ArcGIS Living Atlas of the World</a>			<input checked="" type="checkbox"/>	
<a href="#">Get a Better Handle on Permissions and Your Reps' Settings</a>			<input checked="" type="checkbox"/>	
<a href="#">See Layers Instead of Folders on Mobile Devices</a>			<input checked="" type="checkbox"/>	
<a href="#">Map New Shape Layers</a>			<input checked="" type="checkbox"/>	
<b>Territory Planning: Scenario Comparisons, Collaboration, and Sharing and Permissions</b>				
<a href="#">Compare Territory Model Changes and Create Alignments with Scenario Planning</a>		<input checked="" type="checkbox"/>		
<a href="#">Collaborate in Territory Plans and Alignments</a>		<input checked="" type="checkbox"/>		
<a href="#">Control Sharing and Permissions</a>		<input checked="" type="checkbox"/>		
<a href="#">Require Approval for Updates to Alignments</a>			<input checked="" type="checkbox"/>	
<a href="#">Create Data Sets with Less Hassle</a>		<input checked="" type="checkbox"/>		
<a href="#">Create Big Data Sets with Fewer Limits</a>		<input checked="" type="checkbox"/>		
<a href="#">Import Attributes to Data Sets and Supplement Alignments at Any Time</a>		<input checked="" type="checkbox"/>		
<a href="#">Use Expanded Publishing Options</a>		<input checked="" type="checkbox"/>		
<a href="#">Publish the Map and Its Legend to PDF (Generally Available)</a>		<input checked="" type="checkbox"/>		
<b>Advanced: Redesigned Setup Experience</b>				
<b>Sales Cloud Einstein</b>				
<a href="#">Enjoy Consistent Field Labels for Opportunity Scores</a>		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">See Only the Scoring Factors That You Have Access To</a>	<input checked="" type="checkbox"/>			
<a href="#">Get Opportunity Scores Based on Products, Quotes, and Price Books</a>	<input checked="" type="checkbox"/>			
<a href="#">See Activity Data Reflected in Lead Scores</a>			<input checked="" type="checkbox"/>	
<a href="#">Know When Companies Are Cutting Costs</a>	<input checked="" type="checkbox"/>			
<b>Core Sales Features</b>				
<b>Opportunities</b>				
<a href="#">Use a Higher Split Limit to Make Opportunity Splits More Effective</a>			<input checked="" type="checkbox"/>	
<a href="#">Set Up Alerts for Big Deals in Lightning Experience</a>			<input checked="" type="checkbox"/>	
<a href="#">Enjoy Consistent Field Labels for Opportunity Scores</a>	<input checked="" type="checkbox"/>			
<b>Orders</b>				
<a href="#">New Validations for Creating Order Items</a>	<input checked="" type="checkbox"/>			
<a href="#">Enable Orders Without Price Books</a>	<input checked="" type="checkbox"/>			
<b>Enterprise Territory Management</b>				
<a href="#">Get More Control Over Who Sees What</a>		<input checked="" type="checkbox"/>		
<a href="#">Customize the Territory Object Labels</a>		<input checked="" type="checkbox"/>		
<b>Other Changes in Core Sales Features</b>				
<a href="#">Streamline Pricing Management with Product and Pricing Custom Report Types</a>	<input checked="" type="checkbox"/>			
<a href="#">Labels Improved for Enterprise Territory Management Details</a>	<input checked="" type="checkbox"/>			
<a href="#">Labels Improved on Big Deal Alerts Setup Page</a>		<input checked="" type="checkbox"/>		
<a href="#">Customizable Forecasting Was Retired</a>		<input checked="" type="checkbox"/>		
<a href="#">Original Territory Management Is Being Retired</a>		<input checked="" type="checkbox"/>		
<b>Productivity Features</b>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Email Experience</b>				
Use Email Threading in Sales Cadence Emails	<input checked="" type="checkbox"/>			
Track Emails for Lightning Experience No Longer Disables High Velocity Sales		<input checked="" type="checkbox"/>		
Connect Globally with Email Address Internationalization			<input checked="" type="checkbox"/>	
Improve Email Security with Redesigned DKIM Keys (Update, Enforced)		<input checked="" type="checkbox"/>		
<b>Email Templates</b>				
<b>Activities</b>				
Use Quick Actions to Assign Tasks to Queues	<input checked="" type="checkbox"/>			
Send Mobile Activity Reminders (Pilot)			<input checked="" type="checkbox"/>	
<b>Einstein Activity Capture</b>				
Know When Customers Are Not Interested with New Email Insight	<input checked="" type="checkbox"/>			
Add Users to an Einstein Activity Capture Configuration with SOAP API		<input checked="" type="checkbox"/>		
View Threaded Emails in a Single Page	<input checked="" type="checkbox"/>			
<b>Lightning Dialer</b>				
<b>Kanban</b>				
Get Guidance on Your Company's Processes in Kanban Views			<input checked="" type="checkbox"/>	
Celebrate Milestones with Confetti in Kanban Views			<input checked="" type="checkbox"/>	
<b>Inbox Mobile App</b>				
<b>Integration with Google</b>				
<b>Gmail™ Integration</b>				
Turn Off Email Tracking in the Gmail Integration with One Salesforce Setting			<input checked="" type="checkbox"/>	
Track Email Engagements Across Applications in the Gmail Integration			<input checked="" type="checkbox"/>	
Enable Quick Text to Access Text Shortcuts in the Gmail Integration			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Add Text Shortcuts to Emails with Keystrokes Instead of Clicks in the Gmail Integration	<input checked="" type="checkbox"/>			
Disabled Inbox Features in the Gmail Integration for Some Salesforce Editions			<input checked="" type="checkbox"/>	
Status Change for Sent Emails Logged from the Gmail Integration	<input checked="" type="checkbox"/>			
<b>Lightning Sync for Google</b>				
Lightning Sync for Google Not Available for New Customers		<input checked="" type="checkbox"/>		
Delegate Set up to Admins with More Restrictive Permissions		<input checked="" type="checkbox"/>		
<b>Integration with Microsoft®</b>				
<b>Outlook® Integration</b>				
Integration No Longer Supported with Older Versions of Outlook and Windows			<input checked="" type="checkbox"/>	
Turn Off Email Tracking in the Outlook Integration with One Salesforce Setting			<input checked="" type="checkbox"/>	
Track Email Engagements Across Applications in the Outlook Integration		<input checked="" type="checkbox"/>		
Enable Quick Text to Access Text Shortcuts in the Outlook Integration		<input checked="" type="checkbox"/>		
Disabled Inbox Features in the Outlook Integration for Some Salesforce Editions			<input checked="" type="checkbox"/>	
Status Change for Sent Emails Logged from the Outlook Integration	<input checked="" type="checkbox"/>			
<b>Lightning Sync for Microsoft® Exchange®</b>				
Lightning Sync for Microsoft Exchange Not Available for New Customers		<input checked="" type="checkbox"/>		
Delegate Set up to Admins with More Restrictive Permissions		<input checked="" type="checkbox"/>		
Required Changes for Some Microsoft Office 365 Customers			<input checked="" type="checkbox"/>	
<b>Salesforce for Outlook</b>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Salesforce for Outlook Is Being Retired in December 2020			<input checked="" type="checkbox"/>	
Restore Access If Service Is Interrupted Before December 2020			<input checked="" type="checkbox"/>	
Find Version-Specific Salesforce for Outlook Release Notes			<input checked="" type="checkbox"/>	
<b>Salesforce CPQ and Billing</b>				
<b>Salesforce CPQ</b>				
Optimize Column Sizes on Quote Line Editor			<input checked="" type="checkbox"/>	
Choose When to Bypass the Preserve Bundle Structure Requirement on Amendments		<input checked="" type="checkbox"/>		
Transition CPQ to Permission Set Licenses (Update)			<input checked="" type="checkbox"/>	
<b>Salesforce Billing</b>				
Better Error Handling for Finance Periods	<input checked="" type="checkbox"/>			
Opt Out of Guest User Security Policies for Payment Sites and Hosted Payment Platforms		<input checked="" type="checkbox"/>		
Close Finance Periods with More Transactions		<input checked="" type="checkbox"/>		
Manage Invoice Line Due Dates	<input checked="" type="checkbox"/>			
View Invoice Line Balances on Assets	<input checked="" type="checkbox"/>			
<b>Pardot</b>				
<b>Pardot Changes Coming In June</b>				
Make Pardot Assets More Secure for Prospects			<input checked="" type="checkbox"/>	
Enable Person Account Syncing Without Contacting Support			<input checked="" type="checkbox"/>	
View Timely Advanced Email Analytics for List Email Reports	<input checked="" type="checkbox"/>			
Create New Pardot Accounts with Handlebars Merge Language Enabled By Default		<input checked="" type="checkbox"/>		
<b>Pardot Changes Coming In Summer '20</b>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Manage Pardot Users with Salesforce			<input checked="" type="checkbox"/>	
Retiring B2B Marketing Analytics Legacy Apps			<input checked="" type="checkbox"/>	
Upgrade to Salesforce-Pardot Connector v2			<input checked="" type="checkbox"/>	
Test Configuration Changes with Developer Sandboxes for Pardot (Generally Available)			<input checked="" type="checkbox"/>	
First-Party Tracking (Beta)			<input checked="" type="checkbox"/>	
Reuse Snippet API Names	<input checked="" type="checkbox"/>			
Pardot API: New and Changed Items			<input checked="" type="checkbox"/>	
Prospect List View Changing for Some Users	<input checked="" type="checkbox"/>			
Follow the Path to Easier B2B Marketing Analytics Setup			<input checked="" type="checkbox"/>	
Explore New Apps Tailored for B2B Marketers			<input checked="" type="checkbox"/>	
Access and Customize Pardot Dataflows			<input checked="" type="checkbox"/>	
See Engagement Data on Opportunity Records			<input checked="" type="checkbox"/>	
Get AI-Enhanced Attribution Data on Your Campaign Records			<input checked="" type="checkbox"/>	
Add to Prospect Lists and Engagement Studio Programs from Records and List Views			<input checked="" type="checkbox"/>	
Test Emails Removed from Engagement Datasets				
<b>Other Changes in the Sales Cloud</b>				
<b>Data.com Prospector and Data.com Clean Have Been Retired</b>			<input checked="" type="checkbox"/>	
<b>Removed Users and Licenses Page for Inbox from Salesforce Setup</b>	<input checked="" type="checkbox"/>			
<b>Permission Changes for Sales Cloud Features</b>		<input checked="" type="checkbox"/>		

## Service

Talk with your customers via Service Cloud Voice, a new product that integrates the power of Salesforce with the telephony services of Amazon Connect. Recommend chat replies based on similar closed chats to support agents in the Lightning Service Console. Use Einstein Bots in nine languages. Manage Field Service Lightning shifts (beta) more easily with improvements to schedule views.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Einstein for Service</b>				
<a href="#">Help Chat Agents Respond Faster with Einstein Reply Recommendations (Generally Available)</a>			<input checked="" type="checkbox"/>	
<a href="#">Deliver Einstein Article Recommendations in Five New Languages (Pilot)</a>			<input checked="" type="checkbox"/>	
<a href="#">Close Cases Faster with Einstein Case Wrap-Up (Pilot)</a>			<input checked="" type="checkbox"/>	
<b>Einstein Bots</b>				
<a href="#">Get Deeper Insights with Enhanced Event Logs</a>	<input checked="" type="checkbox"/>			
<a href="#">Increase Customer Satisfaction with Skills-Based Routing for Bots</a>	<input checked="" type="checkbox"/>			
<a href="#">Expand Your Audience with Facebook Messenger (Generally Available)</a>	<input checked="" type="checkbox"/>			
<a href="#">Gain Understanding with Bot Model Enhancements (Generally Available)</a>	<input checked="" type="checkbox"/>			
<a href="#">Say "Bonjour" to Multi-Language Bots</a>	<input checked="" type="checkbox"/>			
<a href="#">Maintain Your Bot with Bot Builder Upgrades</a>	<input checked="" type="checkbox"/>			
<a href="#">Use Chat Data to Strengthen Intent Models (Pilot)</a>	<input checked="" type="checkbox"/>			
<a href="#">Get Foundational Docs on Intent Management and Bot Event Data</a>	<input checked="" type="checkbox"/>			
<a href="#">Einstein Bots: Increased Limits</a>	<input checked="" type="checkbox"/>			
<a href="#">Create Dynamic Queue Routing for Einstein Bots</a>	<input checked="" type="checkbox"/>			
<b>Einstein Case Classification</b>				
<a href="#">Recommend and Automate Values for Lookup Fields</a>	<input checked="" type="checkbox"/>			

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Identify Cases With Low-Confidence Predictions		<input checked="" type="checkbox"/>		
Update Your Page Layouts			<input checked="" type="checkbox"/>	
<b>Field Service</b>				
Bring Results into Focus with Optimization Insights (Beta)		<input checked="" type="checkbox"/>		
Manage Loads for Your Trucks and Workers		<input checked="" type="checkbox"/>		
Take Scheduling Challenges in Stride		<input checked="" type="checkbox"/>		
Save Clicks in the Dispatcher Console		<input checked="" type="checkbox"/>		
Get Improved Shift Management (Generally Available)		<input checked="" type="checkbox"/>		
Customize the Gantt in More Ways		<input checked="" type="checkbox"/>		
Give Users More Confetti		<input checked="" type="checkbox"/>		
Share Maintenance Plans and Service Contracts as Needed		<input checked="" type="checkbox"/>		
Track Asset Availability and Reliability			<input checked="" type="checkbox"/>	
Track Your Team's Expenses		<input checked="" type="checkbox"/>		
Use Criteria-Based Sharing Rules for Time Sheets		<input checked="" type="checkbox"/>		
Link Directly to Actions and Flows in the Mobile App			<input checked="" type="checkbox"/>	
Push Notification Limits Have Increased		<input checked="" type="checkbox"/>		
<b>Channels</b>				
<b>Voice: Intelligent Telephony Inside the Service Console</b>				
Talk with Customers with the Power of Customer 360 at Your Fingertips			<input checked="" type="checkbox"/>	
Put the Right Agents on the Call with Transfer, Merge, and Speed Dial			<input checked="" type="checkbox"/>	
View Contact Center Analytics at a Glance			<input checked="" type="checkbox"/>	
Extend Voice with the Capabilities of Amazon Connect			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Boost Agent Productivity with Real-Time Call Transcription			<input checked="" type="checkbox"/>	
<b>Messaging</b>				
Expand Your Reach with Short Code Messages in Canada			<input checked="" type="checkbox"/>	
Add the "End Messaging Session" User Permission			<input checked="" type="checkbox"/>	
Reduce Your Agents' Workload with Einstein Bots for Facebook			<input checked="" type="checkbox"/>	
Manage Customer Consent for Multiple Languages			<input checked="" type="checkbox"/>	
Use Conversation Toolkit Events for Messaging			<input checked="" type="checkbox"/>	
Reach Out to Customers with Agent Initiated Conversations on Facebook and WhatsApp (Open Beta)			<input checked="" type="checkbox"/>	
Dependency Changes to Messaging			<input checked="" type="checkbox"/>	
<b>Channel-Object Linking</b>				
<b>Embedded Service for Mobile Apps</b>	<input checked="" type="checkbox"/>			
<b>Embedded Service for Web</b>				
See a Live Channel Menu Preview			<input checked="" type="checkbox"/>	
Respond with a Dynamic Channel Menu			<input checked="" type="checkbox"/>	
Enhance Conversations with an Improved Chat Header			<input checked="" type="checkbox"/>	
Customize the Chat Header with a Lightning Web Component			<input checked="" type="checkbox"/>	
Provide Animations for Channel Menu and Chat with Accessibility			<input checked="" type="checkbox"/>	
Transform Chat Sessions from Start to End			<input checked="" type="checkbox"/>	
Add Post-Chat Surveys for Five-Star Service			<input checked="" type="checkbox"/>	
<b>Knowledge</b>				
<b>Use Salesforce Sharing with Lightning Knowledge (Beta)</b>				<input checked="" type="checkbox"/>

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Change Record Owners in Lightning Knowledge</a>		<input checked="" type="checkbox"/>		
<a href="#">Track More Article Usage with Linked Articles</a>	<input checked="" type="checkbox"/>			
<a href="#">Filter Knowledge Reports by Data Category</a>	<input checked="" type="checkbox"/>			
<a href="#">Routing</a>				
<a href="#">Determine Agent Capacity Based on Work Item Status (Generally Available)</a>			<input checked="" type="checkbox"/>	
<a href="#">Prioritize Additional Routing Skills</a>			<input checked="" type="checkbox"/>	
<a href="#">Other Changes</a>				
<a href="#">Show Extended Record and Polymorphic Relationships with the Related Record Component</a>			<input checked="" type="checkbox"/>	
<a href="#">Permission Changes</a>	<input checked="" type="checkbox"/>			

## Industries

Vertical solutions from Salesforce Industries are full of features designed to bring you closer to the people who depend on you. Salesforce Emergency Response Management helps you deliver contact tracing, monitoring, and other resources fast when crisis hits. Health Cloud has new emergency response features, plus more ways to support call center workers and connect with patients, along with increased convenience and usability. Financial Services Cloud brings greater usability to Action Plans and helps you leverage your customers' loan application data to create financial accounts. Consumer Goods Cloud helps your field reps focus on the most important data and manage their schedules more easily. Manufacturing Cloud helps keep your sales plans on track by enabling account managers to set account targets and forecast better.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Emergency Response Management</a>				
<a href="#">Introducing Contact Tracing for Employees</a>	<input checked="" type="checkbox"/>			
<a href="#">Introducing Emergency Response Management for Public Health</a>				
<a href="#">Contact Outreach</a>				
<a href="#">Contact Encounter Business API</a>				
<a href="#">Encrypt Contact Encounter Information</a>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Introducing Emergency Response Management for Public Sector</b>				
Encrypt Emergency Service Application				
Request Information				
Add Grants Management to the Emergency Response Community				
<b>Introducing Volunteer Management</b>				
<b>Emergency Response Management Has New and Changed Objects</b>				
<b>Health Cloud</b>				
<b>Protect Your Community with Emergency Response Management</b>				
Group Tasks by Problems and Goals	✓			
Track Task Closure with Progress Rings	✓			
Other UI Changes in Care Plans	✓			
<b>Provider Search Enhancements</b>				
Troubleshoot Provider Search Data Synchronization	✓			
Use Person Accounts in Provider Search		✓		
Sort Provider Search Results by Name or Distance	✓			
Plan Visits More Accurately with Real-World Distances	✓			
<b>Engage Patients Through Remote Monitoring</b>				
<b>Plan and Carry Out Surgical Visits with Intelligent Sales for Health Cloud</b>				
Plan Visits and Manage Field Inventory with the Desktop App		✓		
Get More Out of Visits with the Mobile App		✓		
<b>Register Healthcare Devices or Create Shipping Requests</b>				
<b>Show Consent Forms for Assets, Products, and Registered Devices</b>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Enroll a Patient in the Same Care Program Multiple Times</a>				<input checked="" type="checkbox"/>
<a href="#">Associate a Healthcare Professional with a Care Program Provider</a>				<input checked="" type="checkbox"/>
<a href="#">Guest Users Don't Automatically Get Inverse Relationship Records</a>				<input checked="" type="checkbox"/>
<a href="#">Choose Whether to Show or Hide Closed Statuses in the Care Plan Status Field</a>				<input checked="" type="checkbox"/>
<a href="#">Uncover AI-Powered Insights Fast with Einstein Analytics for Healthcare Enhancements</a>				<input checked="" type="checkbox"/>
<a href="#">Health Cloud Has New and Changed Objects</a>			<input checked="" type="checkbox"/>	
<a href="#">Health Cloud: New and Changed Metadata Types</a>			<input checked="" type="checkbox"/>	
<b>Financial Services Cloud</b>				
<a href="#">Insurance for Financial Services Cloud: Enhanced Support for Multiline Policies, New Display Options for Policies and Insurance Agent Portal, and New Related Lists</a>				
<a href="#">Get More Control Over Policy Count and Premium Calculations for Multiline Policies</a>				<input checked="" type="checkbox"/>
<a href="#">Policy Component: Policy Hierarchies, Policy Type Filters, Optional Claims Lists, and More</a>				<input checked="" type="checkbox"/>
<a href="#">Gain Visibility into Household Policies and Claims with Rollup-by-Lookup Summaries</a>				<input checked="" type="checkbox"/>
<a href="#">Hide Sensitive Life Event or Business Milestone Types in the Insurance Agent Portal</a>				<input checked="" type="checkbox"/>
<a href="#">Show Participant Policies on the Policy Component in the Insurance Agent Portal</a>				<input checked="" type="checkbox"/>
<a href="#">Let Your Insurance Data Work Even Harder with Financial Services Einstein App Enhancements</a>				<input checked="" type="checkbox"/>
<a href="#">Other Changes in Insurance for Financial Services Cloud</a>				<input checked="" type="checkbox"/>
<a href="#">Action Plans: Assign Tasks to Queues, Add Tasks and Items, and Use Action Plans in Communities</a>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Assign Action Plan Template Tasks to Queues		<input checked="" type="checkbox"/>		
Let Action Plan Users Add Tasks and Items		<input checked="" type="checkbox"/>		
Use Action Plans in Partner Communities		<input checked="" type="checkbox"/>		
<b>Actionable Relationship Center: Drive Contextual Action for Your Customer Relationships and Hierarchies (GA)</b>		<input checked="" type="checkbox"/>		
<b>Mortgage: Create Financial Accounts from Residential Loan Application Data</b>		<input checked="" type="checkbox"/>		
<b>Mortgage: Create Loan Opportunity Relationships</b>		<input checked="" type="checkbox"/>		
<b>Let Your Wealth Management Data Work Even Harder with Financial Services Einstein App Enhancements</b>			<input checked="" type="checkbox"/>	
<b>Streamline Financial Services Cloud Behavior with the Disable Primary Contact ID Setting</b>		<input checked="" type="checkbox"/>		
<b>New Permission Set License: Financial Services Cloud Extension</b>		<input checked="" type="checkbox"/>		
<b>New Permission Set: Aura-Enabled Apex Class Access</b>		<input checked="" type="checkbox"/>		
<b>New and Changed Financial Services Cloud Objects</b>		<input checked="" type="checkbox"/>		
<b>New and Changed Financial Services Cloud Metadata Types</b>		<input checked="" type="checkbox"/>		
<b>New Financial Services Cloud Invocable Actions</b>		<input checked="" type="checkbox"/>		
<b>REST API</b>		<input checked="" type="checkbox"/>		
<b>Consumer Goods Cloud</b>				
<b>Customize the Mobile App to Field Reps' Needs</b>			<input checked="" type="checkbox"/>	
<b>Manage Stores, Accounts, and Promotions with Embedded Salesforce Maps</b>			<input checked="" type="checkbox"/>	
<b>Plan Visits Faster with Templates</b>	<input checked="" type="checkbox"/>			

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Grow Your Business and Improve Retail Execution</b>			<input checked="" type="checkbox"/>	
Do More at the Store by Adding Flows to Action Plan Templates	<input checked="" type="checkbox"/>			
Increase Efficiency on Visits	<input checked="" type="checkbox"/>			
Other Field Name Changes			<input checked="" type="checkbox"/>	
<b>Einstein Object Detection: Data Safety, Improved Detection, and Some Key Updates</b>				
Get Improved Data Security for Inactive Orgs	<input checked="" type="checkbox"/>			
Detect an Object Using the Most Accurate Models	<input checked="" type="checkbox"/>			
Improve Models with Data Augmentation	<input checked="" type="checkbox"/>			
Know Critical Details About Your Models	<input checked="" type="checkbox"/>			
Know the Status of Your Datasets and Models	<input checked="" type="checkbox"/>			
Upload a Dataset File	<input checked="" type="checkbox"/>			
View Related Records for Datasets and Model Metrics			<input checked="" type="checkbox"/>	
View All Records Easily	<input checked="" type="checkbox"/>			
<b>Consumer Goods Cloud Has Changed Objects</b>				
<b>Manufacturing Cloud: Shape Your Business Growth Plans, Focus on Specific Account Forecasts, and Improve Comparison Between Planned and Actual Metrics of Sales</b>				
<b>Account Manager Targets: Translate Growth Plans into Measurable Targets (Generally Available)</b>				
Set Expectations for Your Team Members by Assigning Targets	<input checked="" type="checkbox"/>			
Update Assignment Values with a Single Click	<input checked="" type="checkbox"/>			
Distribute Targets by Account and Product, and by Time Period			<input checked="" type="checkbox"/>	
Respond to Changes in Your Organization's Hierarchy	<input checked="" type="checkbox"/>			
Track Target Assignments for an Account in a Single Page	<input checked="" type="checkbox"/>			

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Analyze Granular Account Manager Target Data with Reports			<input checked="" type="checkbox"/>	
Manage Data Volume Consumption of Account Manager Targets			<input checked="" type="checkbox"/>	
<b>Account Forecasts: Focused Forecasting and Granular Reporting</b>				
Plan Account Forecasts Better with Forecasting for Key Accounts and Products			<input checked="" type="checkbox"/>	
Recalculate All Account Forecasts with a Single Click			<input checked="" type="checkbox"/>	
Analyze Granular Account Forecasts Data with Reports			<input checked="" type="checkbox"/>	
Manage Data Volume Consumption of Account Forecasts			<input checked="" type="checkbox"/>	
<b>Sales Agreements: View Revenue Metrics in a Single Currency and Refine Your Data with Reports</b>				
View All Revenue Metrics of a Sales Agreement in the Same Currency		<input checked="" type="checkbox"/>		
Analyze Granular Sales Agreement Data with Reports			<input checked="" type="checkbox"/>	
<b>Monitor Business Performance with a Single Dashboard (Beta)</b>		<input checked="" type="checkbox"/>		
Analyze Forecast Changes and Improve Your Business			<input checked="" type="checkbox"/>	
Manufacturing Cloud Has New Objects			<input checked="" type="checkbox"/>	
Manufacturing Cloud Has New and Changed Metadata Types			<input checked="" type="checkbox"/>	
Manufacturing Cloud Has New and Changed Tooling API Objects			<input checked="" type="checkbox"/>	
Manufacturing Cloud Has New and Changed Invocable Actions			<input checked="" type="checkbox"/>	

## Analytics

Gain more detailed insights about your knowledge articles by filtering knowledge reports by category. Create recipes with the new, approachable editor, Data Prep (Beta). Get the best predictions from three modeling algorithms.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Reports and Dashboards</b>				
<a href="#">Filter Knowledge Reports by Category</a>	<input checked="" type="checkbox"/>			
<a href="#">Attach .csv Files to Report Subscriptions (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Enable Enhanced Folder Sharing (Update)</a>			<input checked="" type="checkbox"/>	
<a href="#">Work with up to 5 Unique Fields in Report Row-Level Formulas</a>	<input checked="" type="checkbox"/>			
<a href="#">Build Reports Based on Price Book Entries</a>	<input checked="" type="checkbox"/>			
<a href="#">Discover Details About the Flows You Build with the Screen Flows Report</a>	<input checked="" type="checkbox"/>			
<a href="#">In Salesforce console, report links open in a new subtab</a>	<input checked="" type="checkbox"/>			
<b>Einstein Analytics</b>				
<b>Data Integration</b>				
<a href="#">Prepare Data with the Next Generation of Data Prep (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Get a Sense of How Your Customers and Prospects Feel</a>	<input checked="" type="checkbox"/>			
<a href="#">Output Your Einstein Analytics Data to Amazon S3 (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Write Your Einstein Analytics Data to Snowflake (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Sync Complete TinyInt Column Values from Select AWS RDS Connectors</a>	<input checked="" type="checkbox"/>			
<a href="#">Filter Data Synced from the Google BigQuery Standard SQL Connector</a>	<input checked="" type="checkbox"/>			
<a href="#">Sync Remote Data to Government Cloud Orgs with Connectors That Comply with FIPS 140 Requirements</a>	<input checked="" type="checkbox"/>			
<a href="#">Always Get the Latest Data by Scheduling Recipes to Run After Syncs</a>	<input checked="" type="checkbox"/>			
<a href="#">Keep Your Data More Up-To-Date with Shorter Schedule Intervals</a>	<input checked="" type="checkbox"/>			

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Keep Tabs on Recipe Jobs with Notifications	<input checked="" type="checkbox"/>			
Restore Previous Dataflow Versions Easily with History Feature		<input checked="" type="checkbox"/>		
<b>Prebuilt Templates and Apps</b>				
Personalize Your Service Appointments with Insights from the Appointment Analytics App		<input checked="" type="checkbox"/>		
Discover Featured Templates in the Template Gallery	<input checked="" type="checkbox"/>			
<b>Analytics App Building</b>				
Accelerate Analytics Template Development with the Analytics VS Code Extension		<input checked="" type="checkbox"/>		
Explore Multiple Datasets with a Single Query (Generally Available)	<input checked="" type="checkbox"/>			
Gain Insights on Data Directly in Snowflake (Beta)			<input checked="" type="checkbox"/>	
Accent Vital Pivot Table Data with Formatting	<input checked="" type="checkbox"/>			
Summarize Data by Multiple Measures in Pivot Tables	<input checked="" type="checkbox"/>			
Add Dynamic Values to Dashboard Text Without Code	<input checked="" type="checkbox"/>			
Sort Data in Dashboards with a Single Click	<input checked="" type="checkbox"/>			
Choose Where Users Open Embedded Dashboards	<input checked="" type="checkbox"/>			
<b>Einstein Discovery</b>				
Get the Best Predictions from Three Modeling Algorithms			<input checked="" type="checkbox"/>	
Build Accurate Models Using Random Forest Algorithms (Pilot)		<input checked="" type="checkbox"/>		
Replace Deployed Models Easily			<input checked="" type="checkbox"/>	
Compare Story Versions Using What Changed Insight Cards			<input checked="" type="checkbox"/>	
Score Salesforce Records in Bulk			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Remove Bias from Your Insights and Predictions				<input checked="" type="checkbox"/>
Assess Model Quality for Linear Regressions with Root Mean Square Error				<input checked="" type="checkbox"/>
Get Transparent Access to Model Details				<input checked="" type="checkbox"/>
Track Prediction Performance with Background Monitoring				<input checked="" type="checkbox"/>
Recalculate Correlations for Updated Variable Settings				<input checked="" type="checkbox"/>
<b>Analytics for Everyone</b>				
Subscribe to Tables (Beta)				<input checked="" type="checkbox"/>
Experience the Enhanced Einstein Analytics Watchlist (Beta)		<input checked="" type="checkbox"/>		
Create a Learning Journey in the Dashboard Learning Resources Panel	<input checked="" type="checkbox"/>			
Learn More with Popular Topics in the Learning Center	<input checked="" type="checkbox"/>			
Analytics Mobile Apps: Explore More in the Salesforce App	<input checked="" type="checkbox"/>			

## Commerce

Salesforce B2B Commerce on Lightning Experience brings the power of the Salesforce platform to your business-to-business (B2B) commerce solutions. Enhanced capabilities in Salesforce Order Management include support for multiple currencies, gross tax type on orders, refunds on cancellations, order product discounts, unmanaged orders, accounts and contacts, and payment processing with Adyen.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>B2B Commerce on Lightning Experience</b>				
<b>Salesforce B2B Commerce: Design, Build, and Launch a Business-to-Business Commerce Solution</b>				
Access B2B Commerce Objects from the Salesforce Core Platform			<input checked="" type="checkbox"/>	
Manage Content, Entitlements, Price Books, and Buyers with the Commerce App			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Create a B2B Checkout Flow Using Lightning Flow Manager			<input checked="" type="checkbox"/>	
Make Products Discoverable to Buyers Through Search			<input checked="" type="checkbox"/>	
Create a Beautiful Buyer Experience with the B2B Commerce Template			<input checked="" type="checkbox"/>	
<b>Salesforce Order Management</b>				
Enable Multiple Currencies			<input checked="" type="checkbox"/>	
Service Orders Using Gross or Net Tax Values	<input checked="" type="checkbox"/>			
Process Refunds on Canceled Order Items			<input checked="" type="checkbox"/>	
Apply Discounts to Order Product Summaries	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Store Records for Unmanaged Orders in Salesforce Order Management		<input checked="" type="checkbox"/>		
Represent Shoppers with Standard Accounts and Contacts Instead of Person Accounts		<input checked="" type="checkbox"/>		
Process Asynchronous Payment Transactions with Adyen		<input checked="" type="checkbox"/>		
Access New Processing Features with Updated Standard Flows			<input checked="" type="checkbox"/>	
Update Salesforce Order Management from Version 224 to Version 226			<input checked="" type="checkbox"/>	

## Communities

Personalization sees a slew of enhancements available in both Experience Builder and the API. Display different link sets in navigation components, such as the revamped Tile Menu, and so much more. Various security enhancements help keep your data safe. And starting in Winter '21, you no longer have the option of opting out of enabling guest user security settings, so now is the time to prepare.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Lightning Communities</b>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Prepare Your Community for Upcoming CSP Changes</a>		<input checked="" type="checkbox"/>		
<a href="#">Override Standard Actions in Lightning Communities</a>		<input checked="" type="checkbox"/>		
<a href="#">Take Personalization Further with Navigation Menus, Tile Menus, and CMS Collections</a>		<input checked="" type="checkbox"/>		
<a href="#">Reset Mission Activity Counts</a>		<input checked="" type="checkbox"/>		
<a href="#">Better Manage Your Community Pages</a>		<input checked="" type="checkbox"/>		
<a href="#">Generate Sitemaps for Your Community Pages</a>		<input checked="" type="checkbox"/>		
<a href="#">Add Dynamic SEO Properties to Content Detail Pages</a>		<input checked="" type="checkbox"/>		
<a href="#">Super Customize Your Community with the Revamped Tile Menu</a>		<input checked="" type="checkbox"/>		
<a href="#">Get Flexible with the New User Profile Menu Component</a>		<input checked="" type="checkbox"/>		
<a href="#">Get More Options for Multi-Level Navigation in Your Community</a>		<input checked="" type="checkbox"/>		
<a href="#">Developer Productivity</a>				
<a href="#">Build Fast, Efficient Experiences with the LWC-Based Template (Developer Preview)</a>			<input checked="" type="checkbox"/>	
<a href="#">Get Information About the Current Community in Lightning Web Components</a>		<input checked="" type="checkbox"/>		
<a href="#">ExperienceBundle Supports Theme Layout Properties</a>		<input checked="" type="checkbox"/>		
<a href="#">Guest User</a>				
<a href="#">Block Certain Fields in the User Record for Orgs with Communities and Portals (Previously Released Security Alert and Update, Enforced)</a>			<input checked="" type="checkbox"/>	
<a href="#">Automatically Assign Records Created by Guest Users to a Default Owner (Previously Released Security Alert)</a>			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Opt Out of Enforcing Guest User Object Permission Changes (Update)</a>			<input checked="" type="checkbox"/>	
<a href="#">Opt Out of Guest User Security Policies Before Summer '20 (Previously Released Update)</a>			<input checked="" type="checkbox"/>	
<a href="#">Guest Users Can't Be Assigned as Owners of Already Existing Records</a>			<input checked="" type="checkbox"/>	
<a href="#">Secure Guest Users' Org-Wide Defaults and Sharing Model (Previously Released Security Alert, Enforced)</a>			<input checked="" type="checkbox"/>	
<a href="#">Create Guest User Sharing Rules Before Enabling Secure Record Access</a>			<input checked="" type="checkbox"/>	
<a href="#">View All Users and Other Permissions Disabled in Guest User Profiles (Previously Released Security Alert, Enforced)</a>			<input checked="" type="checkbox"/>	
<a href="#">Modify All Data, View All Data, Edit, and Delete Permissions on Guest User Profiles in Orgs Created in Summer '20</a>			<input checked="" type="checkbox"/>	
<a href="#">Modify All Data, View All Data, Edit, and Delete Permissions on Guest User Profiles in Orgs Created Before Summer '20</a>			<input checked="" type="checkbox"/>	
<a href="#">Allow Guests to Safely Upload Files</a>			<input checked="" type="checkbox"/>	
<a href="#">Reduce Object Permissions for Guest Users by the Winter '21 Release (Security Alert)</a>			<input checked="" type="checkbox"/>	
<a href="#">Opt Out of Turning Off Community-Specific Setting for Guest Users to See Other Members (Previously Released Update)</a>			<input checked="" type="checkbox"/>	
<a href="#">Ensure Guest User Access to Emails Created with Visualforce Email Templates</a>			<input checked="" type="checkbox"/>	
<a href="#">Override Entity Permissions When Using &lt;apex:inputField&gt;</a>			<input checked="" type="checkbox"/>	

**Security and Sharing**

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Set Up Two-Factor Authentication for External Identity with a User Permission</a>		<input checked="" type="checkbox"/>		
<a href="#">Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals (Update)</a>		<input checked="" type="checkbox"/>		
<a href="#">Assign Your Community's Login Page Type to Embedded Login</a>		<input checked="" type="checkbox"/>		
<a href="#">Improve Your Community's Login Experience with Custom URLs</a>		<input checked="" type="checkbox"/>		
<a href="#">Other Changes in Communities</a>				
<a href="#">Share Data with Partners via External Account Hierarchies</a>		<input checked="" type="checkbox"/>		
<a href="#">Focused Conversations with an Improved Chat Header</a>		<input checked="" type="checkbox"/>		
<a href="#">See a Live Channel Menu Preview</a>		<input checked="" type="checkbox"/>		

## Salesforce CMS

Manage your Salesforce CMS content more easily with new image and document content types. Quickly import multiple content items, such as images, news, documents, or custom content types. And use your CMS content in B2B Commerce on Lightning Experience.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Centralize Your CMS Content with Image and Document Types</a>		<input checked="" type="checkbox"/>		
<a href="#">Import Content Into Your Salesforce CMS Workspace</a>		<input checked="" type="checkbox"/>		
<a href="#">Add Dynamic SEO Properties to Content Detail Pages</a>		<input checked="" type="checkbox"/>		
<a href="#">Personalize CMS Collections</a>		<input checked="" type="checkbox"/>		
<a href="#">Use Salesforce CMS Content with B2B Commerce on Lightning Experience</a>		<input checked="" type="checkbox"/>		
<a href="#">Create CMS Workspaces and Channels User Permission</a>		<input checked="" type="checkbox"/>		

## Files

Allow your users to download all custom file types as attachments. Switch your file rendition in Connect REST API from Adobe Flash to SVG.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Allow Custom File Types to Download as Attachments</a>			<input checked="" type="checkbox"/>	
<a href="#">Switch Your File Rendition in Connect REST API</a>			<input checked="" type="checkbox"/>	

## Mobile

Get more done without leaving the Salesforce mobile app with personalized navigation and mobile activity reminders (pilot). Send more push notifications, and send custom notifications to external apps. Anyone with access to a Lightning community can now access the Mobile Publisher Playground app (beta).

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Salesforce Mobile App</b>				
<b>Everything That's New in the Salesforce Mobile App</b>				
<a href="#">Salesforce Mobile App Requirements Have Changed</a>	<input checked="" type="checkbox"/>			
<a href="#">Retiring Salesforce Mobile Web Browser Experience</a>	<input checked="" type="checkbox"/>			
<a href="#">Access All Lists on Android Object Home Pages</a>	<input checked="" type="checkbox"/>			
<a href="#">Clear Your Cache Anytime on Android</a>	<input checked="" type="checkbox"/>			
<a href="#">Get to the Point with Report Highlights</a>	<input checked="" type="checkbox"/>			
<a href="#">Reorder Navigation Menu Items for Lightning Apps</a>	<input checked="" type="checkbox"/>			
<a href="#">Open Links with One Tap on iOS</a>	<input checked="" type="checkbox"/>			
<a href="#">Keep Your Reps on Time and on Task with Mobile Activity Reminders (Pilot)</a>	<input checked="" type="checkbox"/>			
<a href="#">Push Notification Limits Have Increased</a>		<input checked="" type="checkbox"/>		
<a href="#">Protect Your Data with Enhanced Mobile Security Updates</a>				<input checked="" type="checkbox"/>

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">App Store and Google Play Updates</a>	<input checked="" type="checkbox"/>			
<a href="#">Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android</a>	<input checked="" type="checkbox"/>			
<b>Notifications</b>				
<a href="#">Send Custom Notifications to External Apps with Notification Builder Platform</a>			<input checked="" type="checkbox"/>	
<a href="#">Send More Push Notifications with Increased Limits</a>		<input checked="" type="checkbox"/>		
<b>Mobile Publisher</b>				
<a href="#">Switch Between Testing Modes with the Publisher Playground App (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Easier Access to the Publisher Playground App (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Push Notification Limits Have Increased</a>			<input checked="" type="checkbox"/>	
<a href="#">Salesforce Anywhere</a>	<input checked="" type="checkbox"/>			

## Sustainability

Gain easy access to key performance indicators and emissions trends with new Einstein Analytics dashboards. Take advantage of increased flexibility and support of Sustainability Cloud. Enter data with SI (metric) units and change the language to one of six languages. Run Sustainability Cloud in your Government Cloud org.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Track Your Carbon Footprint with Einstein Analytics Dashboards</a>			<input checked="" type="checkbox"/>	
<a href="#">Install and Run Sustainability Cloud in Government Cloud Orgs</a>			<input checked="" type="checkbox"/>	
<a href="#">Change the Language for Sustainability Cloud</a>			<input checked="" type="checkbox"/>	
<a href="#">Enter Energy Use and Emissions Data in SI Units</a>	<input checked="" type="checkbox"/>			
<a href="#">Get More Reference Data</a>		<input checked="" type="checkbox"/>		
<a href="#">Calculate Your Captured Data</a>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Choose Miles or Kilometers for Air and Ground Travel Records</a>	<input checked="" type="checkbox"/>			
<a href="#">Delineate Your Renewable Energy Sources</a>	<input checked="" type="checkbox"/>			

## myTrailhead

Choose the pages to direct your users to when they click the help icon or log out of myTrailhead. Create custom links for your myTrailhead page footer. Delete filters that you don't need from the Products category on the Modules and Trails pages. We removed Salesforce branding elements from myTrailhead so they don't confuse your users.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Customize the URLs for the Help and Logout Landing Pages</a>	<input checked="" type="checkbox"/>			
<a href="#">Customize the Footer Links on myTrailhead</a>	<input checked="" type="checkbox"/>			
<a href="#">Salesforce and Trailhead Branding Elements No Longer Appear on myTrailhead</a>	<input checked="" type="checkbox"/>			
<a href="#">Delete Filters from the Products List on myTrailhead</a>	<input checked="" type="checkbox"/>			

## 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.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Achieve Mission Success When Disaster Strikes</a>		<input checked="" type="checkbox"/>		
<a href="#">Manage Your Return to Work in One Place with Workplace Command Center</a>			<input checked="" type="checkbox"/>	
<a href="#">Invite People Back to Work with Shift Management</a>			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Ensure Workforce Readiness with Trail Tracker for Work.com</a>			<input checked="" type="checkbox"/>	
<a href="#">Manage the Contact Tracing Process for Employees</a>		<input checked="" type="checkbox"/>		

## Customization

Build, configure, report on, and debug flows more easily with enhancements to Flow Builder and flow management. Improve predictions and efficiently manage them in Einstein Prediction Builder. Design and navigate your Lightning pages in new ways in the Lightning App Builder.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Lightning Flow</b>				
<b>Flow Builder</b>				
<a href="#">Trigger a Flow to Run After a Record Is Saved</a>		<input checked="" type="checkbox"/>		
<a href="#">Trigger a Flow to Run When a Platform Event Message Is Received</a>		<input checked="" type="checkbox"/>		
<a href="#">Debug More Flows Faster</a>		<input checked="" type="checkbox"/>		
<a href="#">Create Flows with the Enhanced New Flow Window and Start Element</a>		<input checked="" type="checkbox"/>		
<a href="#">Configure Subflow Elements Without Assigning Output Values</a>		<input checked="" type="checkbox"/>		
<a href="#">Configure Loop Elements Without Creating Loop Variables</a>		<input checked="" type="checkbox"/>		
<a href="#">Take Some Tips from Guidance for Flow Builder</a>		<input checked="" type="checkbox"/>		
<a href="#">Pass In the Record When Launching a Flow from a Lightning Page or a Quick Action</a>		<input checked="" type="checkbox"/>		
<a href="#">Access Nested Fields of Apex-Defined Data Types in Flows</a>		<input checked="" type="checkbox"/>		
<a href="#">Run Flows That Bypass User Permissions</a>		<input checked="" type="checkbox"/>		
<a href="#">Updated Text Format Options for Text Template Flow Resource</a>		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
See Increased Screen Real Estate for Other Configuration Settings in Property Editors		<input checked="" type="checkbox"/>		
Let Flow Users Search for Records by Any Searchable Field		<input checked="" type="checkbox"/>		
Flow Builder Toolbar Improvements		<input checked="" type="checkbox"/>		
<b>Lightning Flow Management</b>				
Analyze Screen Flow Usage	<input checked="" type="checkbox"/>			
Track Your Flows' Usage of Limited Resources		<input checked="" type="checkbox"/>		
Get Notified When a Platform Event Message Doesn't Start or Resume a Subscribed Flow or Process		<input checked="" type="checkbox"/>		
Emails from the Automated Process User			<input checked="" type="checkbox"/>	
Second-Generation Packaging Improvements: Delete Earlier Flows from Packages			<input checked="" type="checkbox"/>	
<b>Lightning Flow Extensions</b>				
Configure Custom Flow Screen Components More Easily (Beta)		<input checked="" type="checkbox"/>		
Configure Invocable Actions in Flow Builder More Easily (Beta)		<input checked="" type="checkbox"/>		
Create Flow Screen Components That Work for Multiple Objects (Beta)		<input checked="" type="checkbox"/>		
Access Apex-Defined Variables from Outside Flows		<input checked="" type="checkbox"/>		
Use Salesforce Anywhere Chat and Alerts in Your Processes and Flows (Beta)		<input checked="" type="checkbox"/>		
<b>Lightning Flow Release Updates</b>				
Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)			<input checked="" type="checkbox"/>	
Enable Partial Save for Invocable Actions (Update, Postponed)			<input checked="" type="checkbox"/>	
Enforce Data Access in Flow Formulas (Update, Postponed)			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Postponed)			<input checked="" type="checkbox"/>	
Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)			<input checked="" type="checkbox"/>	
Return Null Values in Process and Flow Formulas (Update, Postponed)			<input checked="" type="checkbox"/>	
Require User Access to Apex Classes Invoked by Flow (Update, Retired)			<input checked="" type="checkbox"/>	
<b>Einstein Prediction Builder: Define Your Prediction Set, Run Reports, and Enable Predictions from the Scorecard</b>				
Define Your Prediction Set in Einstein Prediction Builder			<input checked="" type="checkbox"/>	
Run Reports from Einstein Prediction Builder			<input checked="" type="checkbox"/>	
Enable Einstein Predictions from the Scorecard			<input checked="" type="checkbox"/>	
Check Data for More Field Types in Einstein Prediction Builder			<input checked="" type="checkbox"/>	
Read the Scorecard More Easily in Einstein Prediction Builder			<input checked="" type="checkbox"/>	
<b>Lightning App Builder</b>				
Break Up Your Record Details with Dynamic Forms (Non-GA Preview)			<input checked="" type="checkbox"/>	
Add Dynamic Actions to the Highlights Panel for Custom Objects (Beta)			<input checked="" type="checkbox"/>	
Use Tab and Arrow Keys to Navigate the Component Palette			<input checked="" type="checkbox"/>	
Add the C360 Global Profiles Component to More Page Layouts				
<b>Globalization</b>				
Translate Product Details with Data Translation			<input checked="" type="checkbox"/>	
Enable ICU Locale Formats (Previously Released Update)			<input checked="" type="checkbox"/>	
Maori Language Label and United Kingdom Locale Formats Were Updated	<input checked="" type="checkbox"/>			

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Improved Translation Documentation</a>	<input checked="" type="checkbox"/>			
		Sharing		
<a href="#">Secure Guest Users' Org-Wide Defaults and Sharing Model Are Enforced</a>		<input checked="" type="checkbox"/>		
<a href="#">Create Guest User Sharing Rules by Default</a>		<input checked="" type="checkbox"/>		
		Approvals		
<a href="#">Update Email Alerts That Use Corrected Approval Merge Fields</a>	<input checked="" type="checkbox"/>			
<a href="#">Control the Order of Active Approval Processes Programmatically</a>		<input checked="" type="checkbox"/>		
		General Setup		
<a href="#">View Records Using Full View (Generally Available)</a>			<input checked="" type="checkbox"/>	
<a href="#">Use the New Minimum Access User Profile</a>	<input checked="" type="checkbox"/>			
<a href="#">Translate Lightning Page Tab Labels in Setup</a>		<input checked="" type="checkbox"/>		
<a href="#">Salesforce IoT Explorer Edition Is Being Retired</a>		<input checked="" type="checkbox"/>		
<a href="#">See Automatically Updated Entity Permissions in Setup Audit Trail</a>	<input checked="" type="checkbox"/>			
<a href="#">Push Notification Limits Have Increased</a>		<input checked="" type="checkbox"/>		
<a href="#">Require Permission to View Record Names in Lookup Fields (Update, Postponed)</a>			<input checked="" type="checkbox"/>	
<a href="#">Permission Changes for Customization Features</a>		<input checked="" type="checkbox"/>		

## Security, Privacy, and Identity

The new Security Command Center (Beta) makes monitoring security settings for multiple tenants easy. You can review all your tenants' security settings, activity, and Health Check scores in one place. We updated two-factor authentication and delegated authentication. HTTPS connects faster with OCSP stapling. Real-Time Event Monitoring Threat Detection is generally available, and you can choose to receive alerts to threats by app, email, or SMS.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Authentication and Identity</b>				
We Updated Terms for the Identity Only License	<input checked="" type="checkbox"/>			
Initiate Two-Factor Authentication with Apex		<input checked="" type="checkbox"/>		
Enable Two-Factor Authentication for External Users			<input checked="" type="checkbox"/>	
API Only Users Can Register for Two-Factor Authentication in the Salesforce UI	<input checked="" type="checkbox"/>			
Allow Highly Trusted Users to Skip Identity Verification			<input checked="" type="checkbox"/>	
Apply Delegated Authentication to Your Salesforce Org			<input checked="" type="checkbox"/>	
Seamlessly Integrate Federation IDs with Identity Providers			<input checked="" type="checkbox"/>	
Customize Your Embedded Login Page Type			<input checked="" type="checkbox"/>	
Improve SSO with Custom Community URLs	<input checked="" type="checkbox"/>			
Discover Login Page Attributes with New JSON Response Fields		<input checked="" type="checkbox"/>		
Simplify Configuring Sign-In with Apple		<input checked="" type="checkbox"/>		
Access Pardot API Services with Connected Apps			<input checked="" type="checkbox"/>	
Filter Login History by Application and Login Types		<input checked="" type="checkbox"/>		
<b>Domains</b>				
Streamline External Certificate Verification with OCSP Stapling		<input checked="" type="checkbox"/>		
Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)			<input checked="" type="checkbox"/>	
Stabilize the Hostname for My Domain URLs in Sandboxes (Update, Enforced)			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Route My Domains Through Salesforce Edge (Update, Enforced)</a>		<input checked="" type="checkbox"/>		
<a href="#">My Domain Name Length Requirement Was Changed</a>		<input checked="" type="checkbox"/>		
<b>Salesforce Shield</b>				
<b>Platform Encryption: Scratch Org Features for Testing, and Goodbye to Blocked Events</b>				
<a href="#">Encrypt Fields for Emergency Response Management and More</a>			<input checked="" type="checkbox"/>	
<a href="#">Test More Shield Platform Encryption Functionality in Scratch Orgs</a>			<input checked="" type="checkbox"/>	
<a href="#">Avoid Blocked Events When Encrypting Through Metadata API</a>		<input checked="" type="checkbox"/>		
<a href="#">Remove the Manage Encryption Keys Permission from the System Admin Profile (Previously Released Update)</a>			<input checked="" type="checkbox"/>	
<a href="#">Encrypt Data Associated with the Employee Object</a>			<input checked="" type="checkbox"/>	
<b>Event Monitoring: General Availability of Threat Detection Real-Time Events, Transaction Security Support for Threat Detection Events, Legacy Transaction Security Retiring</b>				
<a href="#">Detect Threats to your Org (Generally Available)</a>			<input checked="" type="checkbox"/>	
<a href="#">Get Notified About a Detected Threat</a>			<input checked="" type="checkbox"/>	
<a href="#">View Threat Detection Events</a>			<input checked="" type="checkbox"/>	
<a href="#">Detect Errors When an Org Exceeds the Concurrent Long-Running Apex Limit</a>			<input checked="" type="checkbox"/>	
<a href="#">Renamed User Permission</a>			<input checked="" type="checkbox"/>	
<a href="#">Fewer Duplicate Datasets in Analytics App</a>			<input checked="" type="checkbox"/>	
<a href="#">Customize Transaction Security Block Messages</a>			<input checked="" type="checkbox"/>	
<a href="#">Improved Condition Builder Interface</a>			<input checked="" type="checkbox"/>	
<a href="#">Changed User Perm Requirements for Transaction Security</a>			<input checked="" type="checkbox"/>	
<a href="#">Migrate Legacy Policies</a>			<input checked="" type="checkbox"/>	
<a href="#">Analytics App Performance Improvements</a>			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Find the Right Resources with the Shield Learning Map</a>			<input checked="" type="checkbox"/>	
<a href="#">Data Protection and Privacy: Customer Consent Channels and Consent API Calls</a>				
<a href="#">Store a New Contact Point and Customer Consent Information</a>		<input checked="" type="checkbox"/>		
<a href="#">Customize and Store More Customer Consent Channels</a>		<input checked="" type="checkbox"/>		
<a href="#">Improve the Accuracy of Consent API Calls</a>		<input checked="" type="checkbox"/>		
<a href="#">Other Changes</a>				
<a href="#">Secure Your Cross-Cloud Integrations with Private Connect (Generally Available)</a>		<input checked="" type="checkbox"/>		
<a href="#">Take Charge of Your Security with Security Command Center (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Use Stronger Hashing Algorithms with Apex Crypto Class</a>		<input checked="" type="checkbox"/>		
<a href="#">Assign New Records Created by Salesforce Sites Guest Users to a Default Owner</a>		<input checked="" type="checkbox"/>		
<a href="#">Permission Changes for Security Features</a>		<input checked="" type="checkbox"/>		

## Deployment

New change set components are available.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">New and Changed Components for Change Sets</a>	<input checked="" type="checkbox"/>			

## Development

Whether you're using Lightning components, Visualforce, Apex, or our 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
<b>Lightning Components</b>				
<a href="#">Communicate Across Salesforce UI Technologies with Lightning Message Service (Generally Available)</a>		<input checked="" type="checkbox"/>		
<a href="#">Share CSS Styles Among Lightning Web Components</a>		<input checked="" type="checkbox"/>		
<a href="#">Delete Lightning Components from Managed Packages</a>				<input checked="" type="checkbox"/>
<a href="#">Develop Flow Screen Components That Work for Multiple Objects (Beta)</a>		<input checked="" type="checkbox"/>		
<a href="#">Create Custom Property Editors for Lightning Web Components (Beta)</a>		<input checked="" type="checkbox"/>		
<a href="#">Scan a Barcode in a Lightning Web Component (Beta)</a>		<input checked="" type="checkbox"/>		
<a href="#">Aura Components in the ui Namespace Are Being Deprecated</a>			<input checked="" type="checkbox"/>	
<a href="#">Check User Permissions for Lightning Web Components</a>		<input checked="" type="checkbox"/>		
<a href="#">Get Information About the Current Lightning Community</a>		<input checked="" type="checkbox"/>		
<a href="#">Check Whether a Lightning Web Component Is Connected to the DOM</a>		<input checked="" type="checkbox"/>		
<a href="#">Set an Uppercase JavaScript Property Via an HTML Attribute</a>		<input checked="" type="checkbox"/>		
<a href="#">Get Child Elements by Tag or Class Name in Lightning Web Components</a>		<input checked="" type="checkbox"/>		
<a href="#">DOM API Changes May Require UI Test Updates</a>		<input checked="" type="checkbox"/>		
<a href="#">Lightning Components Use Native Android Date Picker</a>		<input checked="" type="checkbox"/>		
<a href="#">Lightning Web Components in Custom Tabs Are Reactive</a>		<input checked="" type="checkbox"/>		
<a href="#">Update Jest Dependencies to v25.5.4 If You Update sfdo-lwc-jest to v0.9.0</a>		<input checked="" type="checkbox"/>		
<a href="#">Blob Schema Blocked for iframes</a>		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Release Updates (Formerly Critical Updates): Postponed Updates</b>				
Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile (Update, Postponed)			<input checked="" type="checkbox"/>	
Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Postponed)			<input checked="" type="checkbox"/>	
Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Postponed)			<input checked="" type="checkbox"/>	
Enable Dependency Access Checks In Lightning Components (Update, Postponed)			<input checked="" type="checkbox"/>	
Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Postponed)			<input checked="" type="checkbox"/>	
Disable Access to Non-global Controller Methods in Managed Packages (Update, Postponed)			<input checked="" type="checkbox"/>	
Enforce Access Modifiers on Apex Properties in Lightning Component Markup (Update, Postponed)			<input checked="" type="checkbox"/>	
<b>Security Alerts: Restricted Access to @AuraEnabled Apex Methods Based on User Profile</b>				
Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile (Security Alert)			<input checked="" type="checkbox"/>	
Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Security Alert)			<input checked="" type="checkbox"/>	
<b>Einstein Platform Services</b>				
<b>Einstein Vision: Detect Text in Images with Einstein OCR, Detect Products on Shelves with an Optimized Algorithm</b>				
Detect Text in an Image with Einstein OCR (Generally Available)		<input checked="" type="checkbox"/>		
Detect Products on Retail Shelves with an Optimized Algorithm		<input checked="" type="checkbox"/>		
<b>Einstein Language: Build Einstein Intent Models in Multiple Languages, Create Einstein Intent Models That Support Out-of-Domain Text</b>				

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
Einstein Intent Now Supports Multiple Languages		<input checked="" type="checkbox"/>		
Create Einstein Intent Models That Support Out-of-Domain Text		<input checked="" type="checkbox"/>		
Detect Entities in Text with the Einstein Named Entity Recognition (NER) Model (Beta)		<input checked="" type="checkbox"/>		
<b>Visualforce</b>				
Communicate Across Salesforce UI Technologies with the Lightning Message Service (Generally Available)		<input checked="" type="checkbox"/>		
Shorten Your Visualforce URLs (Update, Postponed)			<input checked="" type="checkbox"/>	
Prevent Consecutive API Navigation Calls in Visualforce Pages (Update)		<input checked="" type="checkbox"/>		
Update sforce.one Object Targeting for Nested iframes		<input checked="" type="checkbox"/>		
Update Visualforce Pages for Native Android Date Picker		<input checked="" type="checkbox"/>		
Access Controllers From Visualforce Pages in Different Packages with @namespaceAccessible		<input checked="" type="checkbox"/>		
Permission Changes for Visualforce Page Info		<input checked="" type="checkbox"/>		
See Refreshed Data When Editing Records on Visualforce Pages		<input checked="" type="checkbox"/>		
New Attribute on <apex:inputField> Overrides Entity Edit Permissions		<input checked="" type="checkbox"/>		
<b>Packaging</b>				
Schedule and Push Upgrades to Unlocked and Second-Generation Managed Packages (Beta)		<input checked="" type="checkbox"/>		
Can't Untangle Your Metadata? Try Org-Dependent Unlocked Packages (Beta)		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get an Early Look at Converting First-Generation Managed Packages (Developer Preview)</a>				<input checked="" type="checkbox"/>
<a href="#">Get Ready for Unlocked Package Code Coverage Enforcement</a>			<input checked="" type="checkbox"/>	
<b>Apex</b>				
<a href="#">Control How to Serialize and Deserialize Apex Types</a>			<input checked="" type="checkbox"/>	
<a href="#">Detect Errors When an Org Exceeds the Concurrent Long-Running Apex Limit</a>			<input checked="" type="checkbox"/>	
<a href="#">Enable Improved Caching of Org Schema (Previously Released Update)</a>			<input checked="" type="checkbox"/>	
<a href="#">Require View Setup Permission to Enqueue Async Apex Jobs (Update)</a>			<input checked="" type="checkbox"/>	
<a href="#">Require View Setup Permission to Access Apex Test Data (Update)</a>			<input checked="" type="checkbox"/>	
<a href="#">Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers (Pilot)</a>			<input checked="" type="checkbox"/>	
<a href="#">Delete up to 2,000 Big Object Records in Batch</a>			<input checked="" type="checkbox"/>	
<a href="#">Push Notification Limits Have Increased</a>			<input checked="" type="checkbox"/>	
<a href="#">Create Custom Property Editors for Invocable Actions (Beta)</a>			<input checked="" type="checkbox"/>	
<b>API</b>				
<a href="#">Understand Dependencies Between Metadata Components in Your Org Using the MetadataComponentDependency Object in Bulk API 2.0 (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Corrected Concurrent API Request Limit for Sandboxes</a>			<input checked="" type="checkbox"/>	
<b>Custom Metadata Types</b>				
<a href="#">Create Relationships to Entity Particles from Custom Metadata Types</a>			<input checked="" type="checkbox"/>	
<a href="#">Custom Metadata Types CLI Commands</a>			<input checked="" type="checkbox"/>	

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<b>Scratch Orgs: New Features</b>				
<a href="#">Create Scratch Orgs with More Features</a>		<input checked="" type="checkbox"/>		
<b>Sandboxes</b>				
<a href="#">Powerful New Ways to Secure your Data using Data Mask</a>		<input checked="" type="checkbox"/>		
<a href="#">Track Source Changes in Sandboxes Automatically (Beta)</a>		<input checked="" type="checkbox"/>		
<b>Lightning Design System: Mobile and Touch Support Grows Along with Other Component Enhancements</b>				
<a href="#">Improve Your App's Mobile and Touch User Interface</a>				
<a href="#">Lightning Design System Component Updates</a>		<input checked="" type="checkbox"/>		
<b>AppExchange Partners</b>				
<a href="#">Analyze Subscriber Behavior with AppExchange App Analytics</a>			<input checked="" type="checkbox"/>	
<b>Change Data Capture</b>				
<a href="#">Enrich Change Event Messages with Extra Fields (Beta)</a>			<input checked="" type="checkbox"/>	
<a href="#">Receive Change Event Notifications for One More Object</a>		<input checked="" type="checkbox"/>		
<a href="#">Subscribe to the /data/ChangeEvents Channel Even Without All Required Permissions</a>		<input checked="" type="checkbox"/>		
<a href="#">Enabling Event Encryption Through Metadata API Requires an Event Bus Tenant Secret</a>		<input checked="" type="checkbox"/>		
<b>Platform Events</b>				
<a href="#">Get the Status of Asynchronous Platform Event Publish Operations (Pilot)</a>			<input checked="" type="checkbox"/>	
<a href="#">Use Platform Events to Trigger a Flow</a>		<input checked="" type="checkbox"/>		
<a href="#">Develop Solutions for Workplace Command Center for Work.com</a>		<input checked="" type="checkbox"/>		

## Quip

See how your users employ Quip templates with Quip for Customer 360 metrics. Bring your Einstein Analytics dashboards into Quip. Use all Quip for Customer 360 features in a sandbox. Keep your Quip documents with full VPC support. Add relationship maps to your Account Plans so that your reps can easily find key contacts and account history.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Get Actionable Metrics on Your Quip Templates</a>			<input checked="" type="checkbox"/>	
<a href="#">Create Relationship Maps in a Quip Document</a>	<input checked="" type="checkbox"/>			
<a href="#">Add Live Einstein Analytics Dashboards to Quip Documents (Generally Available)</a>	<input checked="" type="checkbox"/>			
<a href="#">Keep Your Documents in Sync with Live Paste in Lightning Flow</a>	<input checked="" type="checkbox"/>			
<a href="#">Keep Your Data Secure with Quip for Customer 360 Features in VPC</a>			<input checked="" type="checkbox"/>	
<a href="#">Test Quip for Customer 360 Features in a Salesforce Sandbox</a>			<input checked="" type="checkbox"/>	
<a href="#">Control Which Salesforce Orgs Are Connected to Quip</a>			<input checked="" type="checkbox"/>	
<a href="#">Deploy Quip for Customer 360 Faster</a>			<input checked="" type="checkbox"/>	
<a href="#">Customize Mail Merge Defaults in a Quip Document</a>			<input checked="" type="checkbox"/>	
<a href="#">Get Enhanced Salesforce Live Apps in Quip</a>	<input checked="" type="checkbox"/>			
<a href="#">Remove Quip Documents from Lightning Components</a>	<input checked="" type="checkbox"/>			

## Release Updates (Formerly Critical Updates) and Security Alerts

Enjoy a cleaner view of important updates and alerts in one location. Ensure that your org stays up to date on all changes that affect its performance, security, and users.

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Review Important Org Changes with Release Updates (Beta)</a>		<input checked="" type="checkbox"/>		

Feature	Enabled for users	Enabled for administrators/developers	Requires administrator setup	Contact Salesforce to enable
<a href="#">Release Updates (Formerly Critical Updates)</a>			<input checked="" type="checkbox"/>	
<a href="#">Security Alerts</a>			<input checked="" type="checkbox"/>	

## Supported Browsers

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

### IN THIS SECTION:

#### [Get Support for Microsoft® Edge Chromium](#)

Lightning Experience and Salesforce Classic supports the latest version of Microsoft Edge Chromium for Windows. Lightning Experience and Salesforce Classic support for the non-Chromium version of Microsoft Edge ends on December 31, 2020.

#### [Supported Browsers and Devices for Lightning Experience](#)

See the supported browsers and devices for Lightning Experience.

#### [Supported Browsers and Devices for Salesforce Classic](#)

See the supported browsers and devices for Salesforce Classic.

#### [Supported Browsers for Einstein Analytics](#)

The supported browsers for Einstein Analytics are Microsoft® Edge, Microsoft Internet Explorer® 11, and the most recent stable versions of Mozilla® Firefox® and Google Chrome™. Analytics isn't supported on Apple® Safari®.

## Get Support for Microsoft® Edge Chromium

Lightning Experience and Salesforce Classic supports the latest version of Microsoft Edge Chromium for Windows. Lightning Experience and Salesforce Classic support for the non-Chromium version of Microsoft Edge ends on December 31, 2020.

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

**How:** To see which version of Edge you're using, check its icon. The Microsoft Edge Chromium browser uses the  icon, while non-Chromium Edge uses the  icon.

## Supported Browsers and Devices for Lightning Experience

See the supported browsers and devices for Lightning Experience.

**Where:** Lightning Experience is available in the Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.



#### Note:

- Salesforce doesn't support non-browser applications that embed WebView or similar controls to render content for Salesforce Classic or Lightning Experience. Examples of approaches that embed this type of control include Salesforce Mobile SDK,

Microsoft's WebBrowser Control, Electron's embedded Chromium browser, iOS's UIWebView and WKWebView, and Android's WebView.

- You can't access Lightning Experience in a mobile browser. Instead, we recommend using the Salesforce mobile app when you're working on a mobile device.
- You can access Lightning Experience on iPad Safari. For more information, see [Lightning Experience on iPad Safari Considerations](#).
- Lightning Experience doesn't support incognito or other private browsing modes.

## Desktops and Laptops

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

**!** **Important:** Support for Internet Explorer 11 to access Lightning Experience is retiring beginning in Summer '16.

- You can continue to use IE11 to access Lightning Experience until December 16, 2017.
- If you opt in to [Extended Support for IE11](#), you can continue to use IE11 to access Lightning Experience until December 31, 2020.
- IE11 has [significant performance issues](#) in Lightning Experience.
- It is strongly recommended that you do not use Internet Explorer 11 with Community Builder.
- This change doesn't impact Salesforce Classic.

**!** **Important:** Support for the non-Chromium version of Microsoft Edge in Lightning Experience and Salesforce Classic is ending on December 31, 2020. Lightning Experience and Salesforce Classic continue to support Microsoft Edge Chromium for Windows.

	<b>Microsoft® Internet Explorer®</b>	<b>Microsoft® Edge (non-Chromium)</b>	<b>Microsoft® Edge Chromium</b>	<b>Google Chrome™</b>	<b>Mozilla® Firefox®</b>	<b>Apple® Safari®</b>
Lightning Experience	IE 11 only (EOL December 31, 2020)	Supports latest stable browser version (EOL December 31, 2020)	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Supports latest browser stable version
Lightning Communities	IE 11 only	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version
Special setup considerations?	No	No	No	No	No	No
Limitations?	<a href="#">Yes</a>	<a href="#">Yes</a>	<a href="#">Yes</a>	No	<a href="#">Yes</a>	<a href="#">Yes</a>

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

## Tables

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

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

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

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

## Phones

For the best experience, use the Salesforce mobile app.

## Supported Browsers and Devices for Salesforce Classic

See the supported browsers and devices for Salesforce Classic.

**Where:** Salesforce Classic is available in all editions.

-  **Note:** Using Salesforce Classic in a mobile browser isn't supported. Instead, we recommend using the Salesforce mobile app when you're working on a mobile device.

-  **Important:** Support for the non-Chromium version of Microsoft Edge in Lightning Experience and Salesforce Classic is ending on December 31, 2020. Lightning Experience and Salesforce Classic continue to support Microsoft Edge Chromium for Windows.

	<b>Microsoft® Internet Explorer®</b>	<b>Microsoft® Edge (non-Chromium)</b>	<b>Microsoft® Edge Chromium</b>	<b>Google Chrome™</b>	<b>Mozilla® Firefox®</b>	<b>Apple® Safari®</b>
Salesforce Classic	IE 11 only	Supports latest stable browser version (EOL December 31, 2020)	Supports latest stable browser version			
Salesforce Classic Console	IE 11 only	Supports latest stable browser version (EOL December 31, 2020)	Supports latest stable browser version	Supports latest stable browser version	Supports latest stable browser version	Not supported

	<b>Microsoft® Internet Explorer®</b>	<b>Microsoft® Edge (non-Chromium)</b>	<b>Microsoft® Edge Chromium</b>	<b>Google Chrome™</b>	<b>Mozilla® Firefox®</b>	<b>Apple® Safari®</b>
Special setup considerations?	Yes	No	No	No	Yes	No
Limitations?	Yes	Yes	Yes	No	No	Yes

 **Note:** The browser vendor defines “latest” for their own browser. Check with your browser vendor to determine the latest version available.

## Supported Browsers for Einstein Analytics

The supported browsers for Einstein Analytics are Microsoft® Edge, Microsoft Internet Explorer® 11, and the most recent stable versions of Mozilla® Firefox® and Google Chrome™. Analytics isn’t supported on Apple® Safari®.

## Salesforce Overall: Lightning Experience on iPad, Optimize Your Org, and Work Smart with Split View

Access Lightning Experience on your iPad, use the Lightning Experience Configuration Converter and Salesforce Optimizer App to help you transition to Lightning Experience, and breeze through your records with split view for standard navigation. Also, add walkthroughs to your app, and use improved prompts to help get your users up to speed.

### IN THIS SECTION:

#### [Access Lightning Experience on iPad Devices \(Generally Available\)](#)

Enjoy the full desktop version of Lightning Experience on your iPad using Safari.

#### [Work Through Lists with Ease Using Split View for Standard Navigation](#)

Do you often find yourself working through multiple records in a list? With split view, you can see a list view and a record side by side. To move on to a new record, select it from the split view, and the new record opens with the list still in view. No more navigating back and forth between your list and your records. Split view is great for going through records in sequence or for quickly skimming through a set of records. The split view panel is collapsible for extra flexibility.

#### [Lightning Experience Transition: Transition Assistant, Optimizer, Configuration Converter](#)

Prepare your org and users with tools that automate and speed up the transition to Lightning Experience.

#### [Lightning Experience Engagement: Walkthroughs, In-App Guidance Builder, Prompts](#)

Walkthroughs join the In-App Guidance family. There’s a new builder in town that’s perfect for creating prompts and walkthroughs. Users can move floating prompts around.

#### [Management Suite Renamed to WDC](#)

The suite of sales-management and service-management tools long known as Work.com has been renamed to WDC. All the features are still available, but all product and documentation references say WDC instead of Work.com

#### [Salesforce Anywhere: Streamline and Optimize Salesforce Collaboration \(Beta\)](#)

Centralize the Salesforce collaboration experience and increase team productivity with Salesforce Anywhere. Your users can chat with teammates inside Salesforce and get customized alerts about Salesforce data changes. And, when your users are on the go, they can use the Salesforce Anywhere mobile app to stay up to date.

### [Salesforce Surveys: Deeper Org Integration and More Tools for the Builder](#)

Create or update records based on customer responses, personalize surveys with merge fields, and gather feedback post-chat or across a customer's lifecycle. Set initial default settings for surveys. Improve response rates with more question types, a cool new way to share invitations, and improved translator experience.

### [Lightning Scheduler: Automatic Resource Assignment, Anonymous Scheduling, Enhanced Scheduling Experience for Global Users, and More](#)

Let your users breeze through appointment scheduling with automatic resource assignment. Anonymize appointments to protect your resources' privacy and to have the flexibility to reassign different resources if initially assigned resources become unavailable. To better serve global users, Lightning Scheduler now supports kilometers in addition to miles, and users now see appropriate date and time formats on flow screens based on their locale.

### [Search: Find Information Faster and Get the Most Relevant Results](#)

Amp up your productivity using Search. You can find the records you want more easily and take action right from the search results page.

### [Redirect Notices for External URLs](#)

To provide greater security, we now process and redirect links to external URLs, or any location outside Salesforce.

### [Get the Trailblazer.me Experience on Salesforce Help](#)

Salesforce Help now uses Trailblazer.me for sign-up, login, and profile and settings management. When users open a link from the Help Menu directing them to Salesforce Help, they log into their Trailblazer.me account first.

### [Einstein Voice Assistant Is Being Retired \(Beta\)](#)

Einstein Voice Assistant is scheduled to be retired on July 10, 2020.

### [Lightning Extension's Dark Mode Feature is Temporarily Disabled](#)

Dark mode is disabled while we resolve some performance issues. We're working to make it available again.

### [Require Secure HTTPS Connections \(Update, Enforced\)](#)

Require Secure HTTPS Connections was an update in Spring '20 and was enforced in production orgs on May 1, 2020. As part of updates related to Google Chrome's SameSite cookie changes, HTTPS connections are required to access Salesforce. HTTP connections are no longer permitted. This update enabled the Require secure connections (HTTPS) setting on the Session Settings Setup page and prevented it from being disabled. The Require secure connections (HTTPS) for all third-party domains setting isn't affected by this update.

### [Open Hyperlinks in Formula Fields Correctly \(Update, Enforced\)](#)

If you have formula fields that contain a `HYPERTLINK` function, Lightning Experience ignores the target value when attempting to open the link. This update ensures that the target value for hyperlinks is honored, whether it's explicitly configured or set by default. This update was first made available in Winter '19 and is enforced in Summer '20.

### [Keep Working with Tab-Focused Dialogs \(Previously Released Update\)](#)

In Lightning console apps, dialogs no longer stop you from interacting with the rest of the UI. This release update limits the focus of dialogs triggered by a workspace tab or subtab to only the tab that triggered it. This release update was first made available in Winter '20.

### [Create More Records from Global Profiles](#)

Save time and reduce errors by cutting down on manual data entry when creating records from global profile data with C360 Global Profiles search. Create records on lead and contact standard objects along with the previously supported account object in your org.

## Access Lightning Experience on iPad Devices (Generally Available)

Enjoy the full desktop version of Lightning Experience on your iPad using Safari.

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

#### SEE ALSO:

[Salesforce Help: Technical Requirements for Tablets](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Lightning Experience on iPad Safari Considerations](#) (can be outdated or unavailable during release preview)

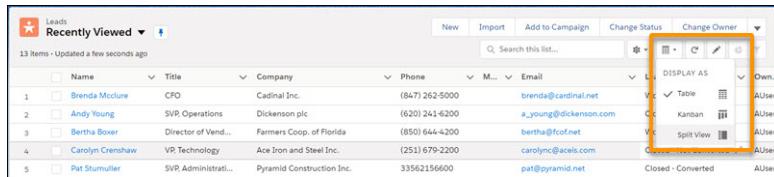
## Work Through Lists with Ease Using Split View for Standard Navigation

Do you often find yourself working through multiple records in a list? With split view, you can see a list view and a record side by side. To move on to a new record, select it from the split view, and the new record opens with the list still in view. No more navigating back and forth between your list and your records. Split view is great for going through records in sequence or for quickly skimming through a set of records. The split view panel is collapsible for extra flexibility.

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

**When:** This functionality is available on a rolling basis during the Summer '20 release.

**How:** To access split view, select **Split View** from the Display As dropdown menu. If you select split view for an object, that object automatically loads in split view until you change its Display As view.



In split view, open a record to see it next to your list. To collapse the list view, click ▲ (1). Click ▶ (1) to expand the list again.



**Note:** Split view supports only objects that are on the navigation bar. To use split view, make sure that the object is added as a navigation item on the navigation bar. Split view previously was available only for the console navigation style.

#### SEE ALSO:

[Salesforce Help: Work with List Views in Lightning Experience](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Personalize the Navigation Bar in Lightning Experience](#) (can be outdated or unavailable during release preview)

[IdeaExchange: Support Split View \(Like Console\) in Standard Navigation](#) (can be outdated or unavailable during release preview)

## Lightning Experience Transition: Transition Assistant, Optimizer, Configuration Converter

Prepare your org and users with tools that automate and speed up the transition to Lightning Experience.

#### IN THIS SECTION:

[Get More Guidance from the Lightning Experience Transition Assistant](#)

To help with your Lightning Experience transition, we added more tools and resources to the Transition Assistant.

[Speed Up Org Maintenance with the Optimizer App](#)

Introducing the Salesforce Optimizer app, the interactive way to review and act on expert recommendations for maintaining your Salesforce org's implementation. No need to install a package, just enable the app, click to run, and sit back while we inspect your org. Quickly identify issues that require immediate attention by using the sortable results list view. Read through the Salesforce recommendations to plan next steps. Use quick links on result pages to go directly to the applicable Setup page. Previously, you could only consume Optimizer content by scrolling through an English language report delivered as a PDF file.

[Streamline Transition Tasks with the Lightning Experience Configuration Converter \(Generally Available\)](#)

All tabs in the Lightning Experience Configuration Converter are now generally available. The Configuration Converter helps you prepare your org for Lightning Experience by streamlining or automating common transition tasks. The Home tab, Hard-Coded URL tab, Visualforce Pages tab, and AppExchange Packages tabs were previously released as beta features.

[Review Your Lightning Readiness More Quickly](#)

Get started by visiting the Readiness Check's new home page, now available outside the Transition Assistant.

## Get More Guidance from the Lightning Experience Transition Assistant

To help with your Lightning Experience transition, we added more tools and resources to the Transition Assistant.

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

**Why:** Here's what's new.

- **In the Roll Out Phase**

- Implement stage: Set up more productivity-enhancing features for your users. There are new steps for adding a Path to objects, turning on News, customizing the Lightning Experience Home Page, and customizing the components on your object's record pages.

- Adjust stage: Get help moving your Classic knowledge base to Lightning Knowledge using the Lightning Knowledge Migration Tool.

- **In the Optimize Phase**

- Motivate stage: Give your users onboarding assistance and contextual guidance by setting up in-app prompts that are specific to your business and use cases.

## Speed Up Org Maintenance with the Optimizer App

Introducing the Salesforce Optimizer app, the interactive way to review and act on expert recommendations for maintaining your Salesforce org's implementation. No need to install a package, just enable the app, click to run, and sit back while we inspect your org. Quickly identify issues that require immediate attention by using the sortable results list view. Read through the Salesforce recommendations to plan next steps. Use quick links on result pages to go directly to the applicable Setup page. Previously, you could only consume Optimizer content by scrolling through an English language report delivered as a PDF file.

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

**Who:** Users must have the Customize Application, Modify All Data, and Manage Users user permissions to access the Optimizer app. Unlike the Salesforce Optimizer PDF report, which was only available in English, the app is translated into end-user languages.

**Why:** The app makes it easier to be strategic about planning org maintenance. Instead of scrolling through pages of a static PDF report for results and next steps, use the sortable results list view. The Optimizer's split-view console navigation makes it easy to review results without losing context.

The screenshot shows the Salesforce Optimizer app interface. On the left, there's a sidebar with navigation options like 'Run Optimizer' and a search bar. The main area has a title 'New Code Using Old API Versions'. It displays a table of findings with columns: Feature, Type, Estimate, Status, and Action Required. One row is highlighted with a yellow circle containing the number '1'. To the right, there's a 'Recommendation' section with a table of items and a note about updating code. Another yellow circle contains the number '2'. At the bottom right, there's a 'Help' section with links to Apex Release Notes, Apex Code Versions Developer Documentation, and Metadata API Developer Guide. A third yellow circle contains the number '3', pointing to a link labeled 'API Basics Trailhead'.

From the list view, it's a click away from the full results (1) and recommendations (2) and the Setup page to make any changes (3) for over 40 features analyzed as part of the Optimizer.

**How:** From Setup in Lightning Experience, enter *Optimizer* in the Quick Find box, then select **Optimizer**.

## Streamline Transition Tasks with the Lightning Experience Configuration Converter (Generally Available)

All tabs in the Lightning Experience Configuration Converter are now generally available. The Configuration Converter helps you prepare your org for Lightning Experience by streamlining or automating common transition tasks. The Home tab, Hard-Coded URL tab, Visualforce Pages tab, and AppExchange Packages tabs were previously released as beta features.

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

**Who:** The Lightning Experience Configuration Converter requires the Customize Application and Modify All Data permissions.

**How:** The Configuration Converter is a standalone tool that lives outside of Salesforce. We recommend that you run it in a sandbox or Developer org first, and then migrate your changes to your production org. To get started, visit <https://lightning-configuration.salesforce.com/> and log in with your org credentials.

## Review Your Lightning Readiness More Quickly

Get started by visiting the Readiness Check's new home page, now available outside the Transition Assistant.

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

**Why:** Access the Readiness Check without navigating the Transition Assistant to get started.

**How:** The Readiness Check is available to admins in sandbox and production environments. To run the Readiness Check in your sandbox environment, visit <https://sb-lightning-readiness-check.salesforce.com/home>. To run it in your production environment, go to <https://lightning-readiness-check.salesforce.com/home>. You can also still run the Readiness Check from the Lightning Experience Transition Assistant.

## Lightning Experience Engagement: Walkthroughs, In-App Guidance Builder, Prompts

Walkthroughs join the In-App Guidance family. There's a new builder in town that's perfect for creating prompts and walkthroughs. Users can move floating prompts around.

### IN THIS SECTION:

#### [Create Multi-Step Walkthroughs for In-App Training](#)

Create a guided, step-by-step experience for your users inside the app with walkthroughs, the latest addition to In-App Guidance. If you subscribe to myTrailhead, show up to 500 walkthroughs to users. Onboarding, training, and feature adoption walkthroughs are quick to create and easy to show to specific users.

#### [Meet the In-App Guidance Builder](#)

It's easier and more intuitive to create prompts and walkthroughs. To make way for walkthroughs, the user interface for authoring in-app guidance is now similar to other builder tools in Salesforce.

#### [Change the Page Location of Prompts](#)

Save time and ensure that prompts appear on the right page for users. If you have a prompt that applies to multiple objects, clone the prompt and move it to a different page. Have an existing prompt that you want to move to a different page? Choose a new page for previously saved prompts.

#### [Move Floating Prompts Around](#)

Despite your best effort at positioning a floating prompt, it could hide the very feature you're highlighting. Now, if a prompt is blocking an area of the page, users can move it.

#### [Enjoy the Updated Design of Docked Prompts](#)

The docked prompt gets a makeover to further align with the look of Lightning Experience. This change doesn't affect character count or functionality.

#### [Learn About Salesforce In-App Content](#)

Stay up to date on the valuable in-app prompts, welcome mats, and popovers Salesforce shows admins and end users.

## Create Multi-Step Walkthroughs for In-App Training

Create a guided, step-by-step experience for your users inside the app with walkthroughs, the latest addition to In-App Guidance. If you subscribe to myTrailhead, show up to 500 walkthroughs to users. Onboarding, training, and feature adoption walkthroughs are quick to create and easy to show to specific users.

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

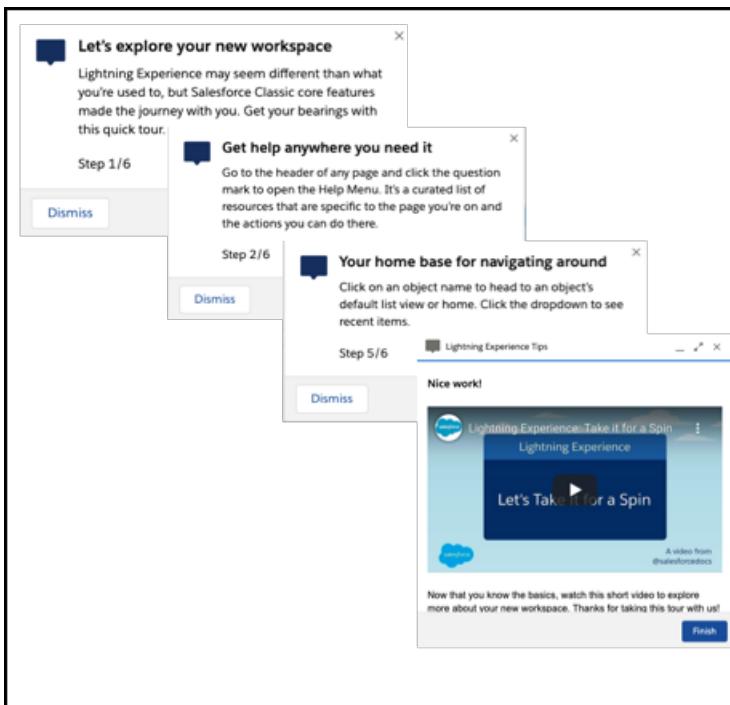
**Who:** Admins with the Modify All Data or Customize Application user permissions can create and manage walkthroughs. Or, delegate a user to do the same by giving them the Modify Metadata Through Metadata API Functions and Manage Prompts user permissions.

To show you custom walkthroughs to users, subscribe to myTrailhead to get the Access Walkthroughs permission set license and the Walkthroughs permission set. Assign the View Walkthroughs user permission to users you want to be able to see walkthroughs. Contact your Salesforce account executive for pricing details.

If you want to show walkthroughs to your users before subscribing, there's a free 30-day trial that lets you display custom walkthroughs to users. Look for the **Start Walkthrough Trial** button on the In-App Guidance Setup page for more information.

**Why:** Walkthroughs are a series of up to 10 connected prompts that provide a guided path for users across a single or multiple pages for in-context learning.

- Onboard new hires to their workspace
- Highlight a series of key but related features
- Provide a navigational or feature overview
- Guide users through a multi-step procedure



As with prompts, walkthroughs are supported for packages.

**How:** From Setup in Lightning Experience, enter *In-App Guidance* in the Quick Find box, and then select **In-App Guidance**. Click **Add** to open the In-App Guidance Builder in a new tab. Navigate to a page, and click **Add** again to place your walkthrough. A right sidebar lets you edit the display, position, and content of the step. A left sidebar lets you navigate and reorder the walkthrough steps.

#### SEE ALSO:

[Salesforce Help: Define a Walkthrough in Lightning Experience](#) (can be outdated or unavailable during release preview)

[Salesforce Help: In-App Guidance in Lightning Experience](#) (can be outdated or unavailable during release preview)

## Meet the In-App Guidance Builder

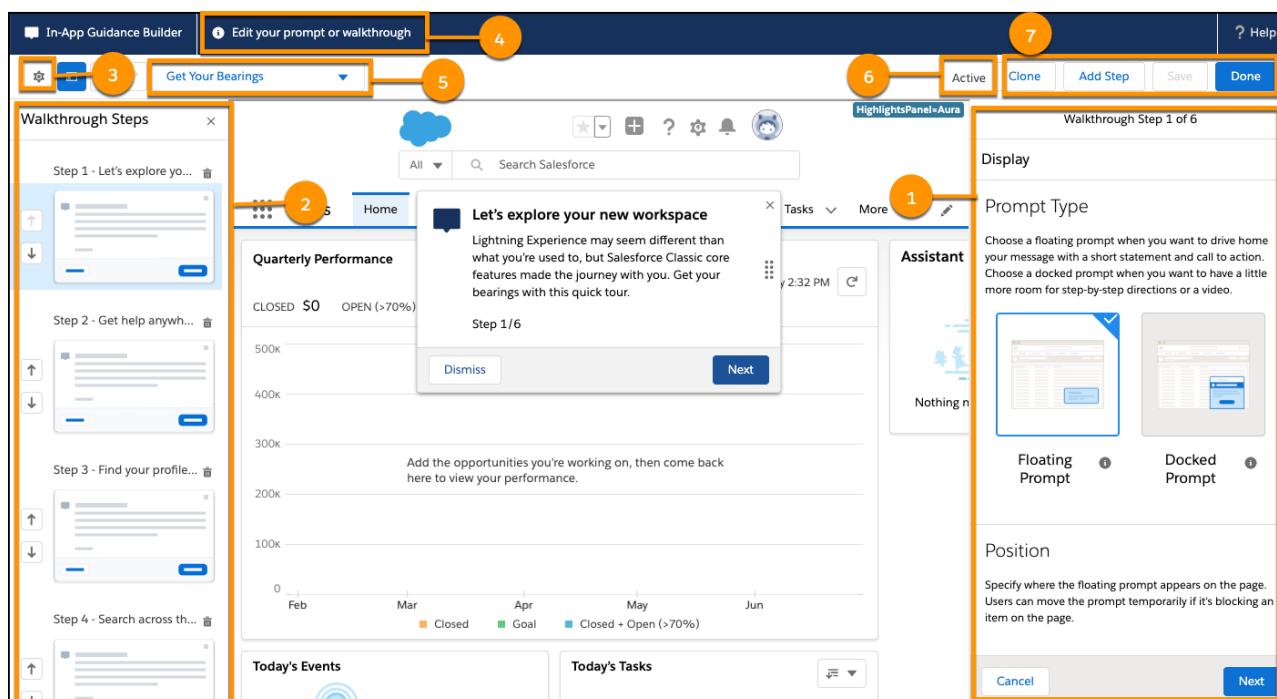
It's easier and more intuitive to create prompts and walkthroughs. To make way for walkthroughs, the user interface for authoring in-app guidance is now similar to other builder tools in Salesforce.

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

**Who:** Admins with the Modify All Data or Customize Application user permissions can create and manage walkthroughs or prompts in the In-App Guidance Builder. Or, delegate a user to do the same by giving them the Modify Metadata Through Metadata API Functions and Manage Prompts user permissions.

There are more requirements to show walkthroughs to users. See the related release note listed for details.

**How:** From Setup in Lightning Experience, enter *In-App Guidance* in the Quick Find box, and then select **In-App Guidance**. Click **Add** to open the In-App Guidance Builder in a new tab.



Click **Add** again to place your prompt or walkthrough. The right sidebar is where you specify the in-app guidance type, prompt type and position, and content (1). When you create a walkthrough, a left sidebar appears to display all the steps of the walkthrough (2). You can delete or reorder steps from the sidebar. The prompt updates as you enter information so you can preview as you work.

After saving new in-app guidance, a settings window appears to customize the action link or button, schedule, profile, and permission settings. And, you can name your prompt and decide to activate it or not. You can always return to the settings by clicking the settings icon in the builder header when editing a prompt (3). The header also includes:

- Helpful instructions (4)
- Other in-app guidance on the page (5)
- The status of the in-app guidance you're editing (6)
- Action buttons (the availability of the buttons depends on the in-app guidance type and if you're previewing or authoring) (7)

#### SEE ALSO:

[Create Multi-Step Walkthroughs for In-App Training](#)

[Salesforce Help: In-App Guidance in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

## Change the Page Location of Prompts

Save time and ensure that prompts appear on the right page for users. If you have a prompt that applies to multiple objects, clone the prompt and move it to a different page. Have an existing prompt that you want to move to a different page? Choose a new page for previously saved prompts.

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

**Why:** For prompts about common features, such as list views, favorites, or the Help Menu, replicate the same information across multiple pages. Instead of copying and pasting content, simply clone an existing prompt and change the location.

Although you can change the location of prompts while editing and cloning, you still can't directly edit the location of prompts installed from packages. You can clone prompts from packages and change the location that way, however.

The ability to change the location also applies to walkthroughs, which are new in the Summer '20 release.

**How:** From Setup in Lightning Experience, enter *In-App Guidance* in the Quick Find box, and then select **In-App Guidance**. Select **Edit** or **Clone** from the row-level action menu. The In-App Guidance Builder opens in a new tab. Navigate to the new location inside the builder. Click **Save**, then **Done**.

#### SEE ALSO:

[Salesforce Help: In-App Guidance in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

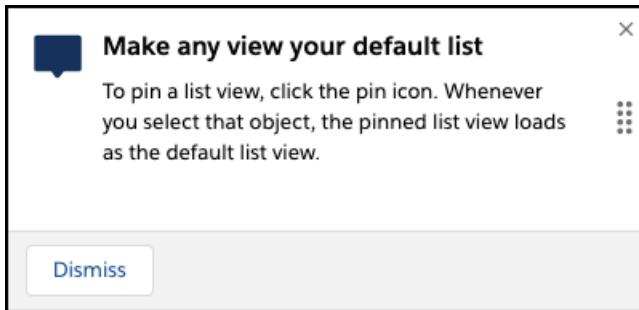
## Move Floating Prompts Around

Despite your best effort at positioning a floating prompt, it could hide the very feature you're highlighting. Now, if a prompt is blocking an area of the page, users can move it.

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

**Who:** Users can move floating prompts whenever they're displayed by clicking the drag-and-drop icon on the right side of the prompt.

When you create or edit prompts in the In-App Guidance Builder, you can do the same, but prompts don't save in that location. Floating prompts can only be saved in one of the six predefined positions.



## SEE ALSO:

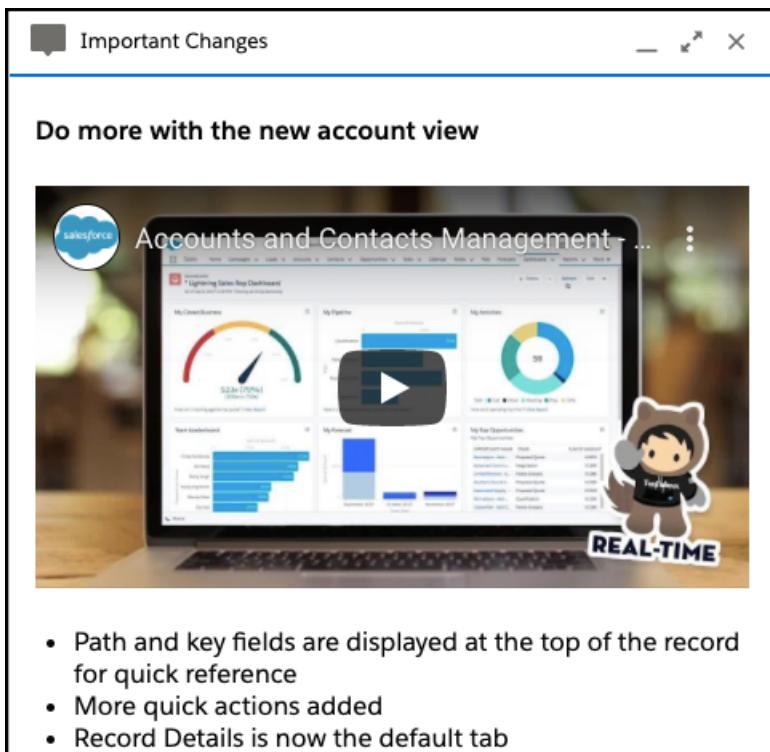
[Salesforce Help: In-App Guidance in Lightning Experience](#) (can be outdated or unavailable during release preview)

## Enjoy the Updated Design of Docked Prompts

The docked prompt gets a makeover to further align with the look of Lightning Experience. This change doesn't affect character count or functionality.

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

**Why:** Say goodbye to the blue title banner and hello to a fresh, streamlined look.



**SEE ALSO:**

[Salesforce Help: In-App Guidance in Lightning Experience](#) (can be outdated or unavailable during release preview)

## Learn About Salesforce In-App Content

Stay up to date on the valuable in-app prompts, welcome mats, and popovers Salesforce shows admins and end users.

**Where:** The availability of in-app content varies by feature.

**Why:** Avoid duplicating information as you create your own prompts or other in-app content.

In the Summer '20 release, Salesforce added the following prompts.

- A floating prompt to remind admins of the open IdeaExchange prioritization period. Only shown to admins.
- A floating prompt to encourage sales managers to try out the Einstein Call Coaching feature within the High Velocity Sales app.
- A docked prompt to encourage admins to turn on the Enhanced Related List feature. Only shown to admins.

You can turn off all in-app content authored by Salesforce from the In-App Guidance Setup page.

**SEE ALSO:**

[Salesforce Help: Salesforce In-App Content in Lightning Experience](#) (can be outdated or unavailable during release preview)

## Management Suite Renamed to WDC

The suite of sales-management and service-management tools long known as Work.com has been renamed to WDC. All the features are still available, but all product and documentation references say WDC instead of Work.com

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

**When:** The product was rebranded May 2020.

**Why:** WDC is a suite of sales-management and service-management tools that help managers and teams learn faster and perform better. For more information, go to [Salesforce Help](#). If you're looking for information about our Work.com solution in response to the COVID-19 crisis, see [Return to the Workplace with Work.com](#).

## Salesforce Anywhere: Streamline and Optimize Salesforce Collaboration (Beta)

Centralize the Salesforce collaboration experience and increase team productivity with Salesforce Anywhere. Your users can chat with teammates inside Salesforce and get customized alerts about Salesforce data changes. And, when your users are on the go, they can use the Salesforce Anywhere mobile app to stay up to date.

**Where:** This feature is available in Lightning Experience in Enterprise, Performance, and Unlimited editions.

 **Note:** Salesforce Anywhere is a Non-GA Service and not a "Service" or part of the "Services", as defined in the Master Subscription Agreement ("MSA") with Salesforce. Such Non-GA Service is subject to the terms and conditions of the [Universal Pilot Research Agreement \("UPRA"\)](#), including the [Data Processing Addendum](#) to the UPRA. Use of this Non-GA Service is at your sole discretion, and any purchase decisions should be made only on the basis of Salesforce generally available products and features. Automatic availability of Salesforce Anywhere depends on your MSA with Salesforce and the type of Services you have purchased. If you do not see Salesforce Anywhere in Setup, contact your Account Executive to get access to Salesforce Anywhere.

**When:** Salesforce Anywhere becomes available on a rolling basis starting July 13, 2020. To ensure that your org is enrolled in the Salesforce Anywhere beta program, complete the [sign-up form](#).

**Who:** To use Salesforce Anywhere, end users must have a Salesforce, Salesforce Platform, or Lightning Platform user license.

Learn about Salesforce Anywhere's Lightning Experience and mobile features in the [Salesforce Anywhere Release Notes](#).

## Salesforce Surveys: Deeper Org Integration and More Tools for the Builder

Create or update records based on customer responses, personalize surveys with merge fields, and gather feedback post-chat or across a customer's lifecycle. Set initial default settings for surveys. Improve response rates with more question types, a cool new way to share invitations, and improved translator experience.

### IN THIS SECTION:

#### [Turn Responses into Salesforce Records](#)

Create or update records based on participant responses. Create a data map to define the values for object fields that are populated on the submission of a response. You can map participant responses to one or more fields, or you can choose a constant value that's populated in a field.

#### [Personalize Surveys with Your Salesforce Data](#)

Provide a personalized and more contextual experience for your participants. Use merge fields to insert your Salesforce org's data into surveys. You can add merge fields to the Welcome Page, and to survey questions.

#### [Gather Post-Chat Customer Feedback](#)

Use surveys to gather customer feedback at the end of an Embedded Chat session. Your customers stay in the chat window to respond.

#### [Transform Customer Experience with Customer Lifecycle Maps](#)

Understand customers' perception of your business by gathering customer feedback at every stage of the customer lifecycle. Create customer lifecycle maps with multiple stages and associate each stage with one or more survey questions. Use the Send Survey Invitation action in the Process Builder to send survey invitations at each stage.

#### [Pick Defaults and Let the Survey Run](#)

Define the initial default settings for the content and sharing rules for invitations sent using automated processes such as Support Settings. When participants outside your Salesforce org choose a language to view the survey in, let them know the language the survey was created in.

#### [Understand Participant Likes and Dislikes](#)

Use the new Like or Dislike question type to define questions that let participants express their opinion.

#### [Gather Critical Participant Information with Short Text](#)

Use the new Short Text question type to gather critical participant information such as contact or personal information. You can also use it to gather text responses of up to 200 characters.

#### [Share Survey Invitations Using QR Codes](#)

You can now download a QR code containing a survey invitation and share it with participants. Participants can simply scan the QR code to open the survey and respond. This invitation isn't tied to the participant's record.

#### [Give Your Global Audience an Improved Experience](#)

Make translated surveys visually appealing by adding images. Also, when translating a question that includes a previous question's response, you can view the translation of the original question.

### [Send Surveys Between Orgs Using Managed Packages](#)

Now you can send surveys from one org to another using managed packages. If you change the survey in the source org, you can move the updated survey to the target org using a new version of the managed package.

### [See All Question Types at Once](#)

Gone are the days of the scroll bar. Use the expanded question selector to view all question types at a glance.

### [Make it Easier for Survey Participants Outside Your Org to Respond](#)

Participants outside your Salesforce org no longer require Edit access on the Survey Response object to respond to surveys.

### [Question Type Name Change](#)

We renamed Text questions to Long Text to distinguish it from the new Short Text question type.

### [Customer Lifecycle Analytics: Topic Analysis, Customer Lifecycle Maps, Response Analysis, Internal Survey Analysis, and Enhanced Configuration Wizard](#)

Use the new Topic Analysis dashboard to analyze the trending topics and learn more about your business. The Customer Lifecycle Map dashboard helps you analyze customer feedback across various stages in the customer lifecycle. On the Response Analysis dashboard, you can now drill down into survey responses by demographics and geography. Automatically create datasets for your app with the improved configuration wizard.

## Turn Responses into Salesforce Records

Create or update records based on participant responses. Create a data map to define the values for object fields that are populated on the submission of a response. You can map participant responses to one or more fields, or you can choose a constant value that's populated in a field.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To create a data map, users need the Salesforce Surveys Advanced Features permission, available with the Salesforce Feedback Management license.

**Why:** For example, you can use a data map to create a follow-up Case record every time a customer provides a particular score for a product. You can map the participant response to the case subject field. You can also map the participant Contact record ID as the case Contact record ID.

**How:** Open a survey, click **Advanced Settings**, and select Survey Data Mapping. Click **New Mapping**. Name the map, choose whether you want to create or update records based on participant responses, and select the object whose records must be created or updated. Choose whether records are created or updated every time or based on conditions. Finally, map the object fields.

**New Mapping**

\* Name: Follow-Up Case

Action Type: Create record

\* Target Object: Case

Condition Type: Every time

Select Condition: All conditions are met

\* Select Question: How would you rate our service?

\* Select Operator: is less than or equal to

\* Response: 3

+ Add Condition

Define Target Object Fields and Values

Field	Information Type	Value
IsEscalated	Boolean	Select a value...
Subject	Response to Question	How would you rate our service?
ContactId	Associated Record	Contact

Add Row

Cancel Save

**SEE ALSO:**

[Salesforce Help: Use Survey Data Maps to Create or Update Records](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Enhance Your Survey Capabilities with the Salesforce Feedback Management License](#) (can be outdated or unavailable during release preview)

## Personalize Surveys with Your Salesforce Data

Provide a personalized and more contextual experience for your participants. Use merge fields to insert your Salesforce org's data into surveys. You can add merge fields to the Welcome Page, and to survey questions.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To define variables and use merge fields, users need the Salesforce Surveys Advanced Features permission, available with the Salesforce Feedback Management license.

**How:** Open a survey, click **Advanced Settings**, and select Merge Field Variables. To ensure that participants don't view data that you don't want them to, define the merge field access. You can configure four types of variables and then use those variables to insert merge

fields. You can create a variable to insert information about the record that's associated with the invitation. You can also define a variable to insert personalized information such as the participant's name. And you can create multiple variables to insert information about your Salesforce org or to insert custom values.

The screenshot shows the 'Merge Field Variables' configuration page. At the top, there is a heading 'Personalize your questions using merge fields' with a sub-instruction: 'Create multiple types of merge field variables and use them to display contextual information to survey participants based on their access level.' Below this, there are two main sections: 'Associated Object' and 'Participant Object'. Under 'Associated Object', the 'Variable Name' is set to 'Info' and the 'Object' is set to 'Case'. Under 'Participant Object', the 'Variable Name' is set to 'Person' and the 'Object' is set to 'Contact'. Both sections include 'Edit' and 'Reset' buttons. At the bottom of the page, there is a link to 'Org and Custom Variables'.

#### SEE ALSO:

[Salesforce Help: Use Merge Fields to Personalize Surveys](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Enhance Your Survey Capabilities with the Salesforce Feedback Management License](#) (can be outdated or unavailable during release preview)

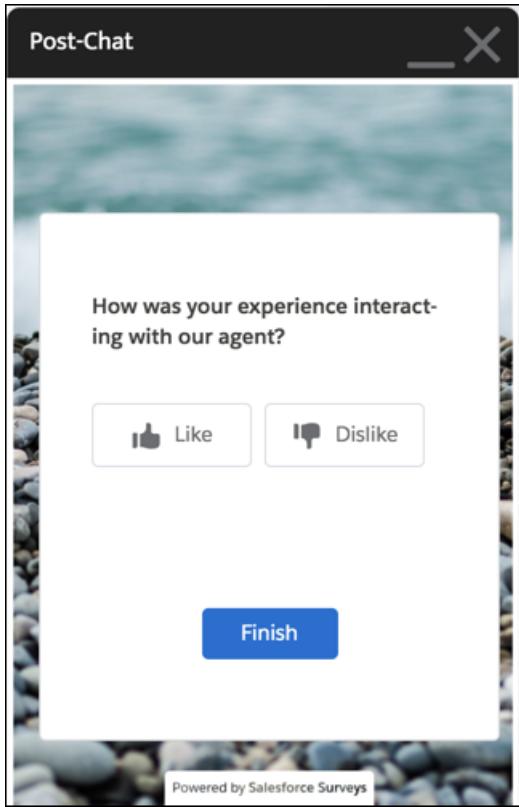
## Gather Post-Chat Customer Feedback

Use surveys to gather customer feedback at the end of an Embedded Chat session. Your customers stay in the chat window to respond.

**Where:** This change applies to Lightning Experience in Performance, Enterprise, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To select a post-chat survey in an Embedded Service deployment, users need the Salesforce Surveys Advanced Features permission, available with the Salesforce Feedback Management license.

**How:** Add Embedded Chat to your website or community. To open a post-chat survey within the chat window in communities and external websites, activate the survey, and select it as the post-chat survey in the corresponding Embedded Service deployment. Also, to open a post-chat survey within the chat window in a website, allow inline framing of surveys within the website's URL on Session Settings page.



#### SEE ALSO:

[Salesforce Help: Gather Post-Chat Feedback](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Allow Surveys to Be Framed Within the Chat Window on Websites](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Enhance Your Survey Capabilities with the Salesforce Feedback Management License](#) (can be outdated or unavailable during release preview)

## Transform Customer Experience with Customer Lifecycle Maps

Understand customers' perception of your business by gathering customer feedback at every stage of the customer lifecycle. Create customer lifecycle maps with multiple stages and associate each stage with one or more survey questions. Use the Send Survey Invitation action in the Process Builder to send survey invitations at each stage.

**Where:** This change applies to Lightning Experience in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To create a map, users need the Salesforce Surveys Advanced Features permission, available with the Salesforce Feedback Management license.

**Why:** To gain actionable insights into customer perception across stages, use the Customer Journey Maps in the Customer Lifecycle Analytics template.

**How:** Enable the Customer Lifecycle Maps setting on the Survey Settings page. Get up and running with the following sample maps.

**Surveys**  
Create surveys and send them to participants. When enabled, email templates and sample surveys are added to your org.

Enabled

**Select the default community for creating public survey invitations.**  
Customer Service Engagement

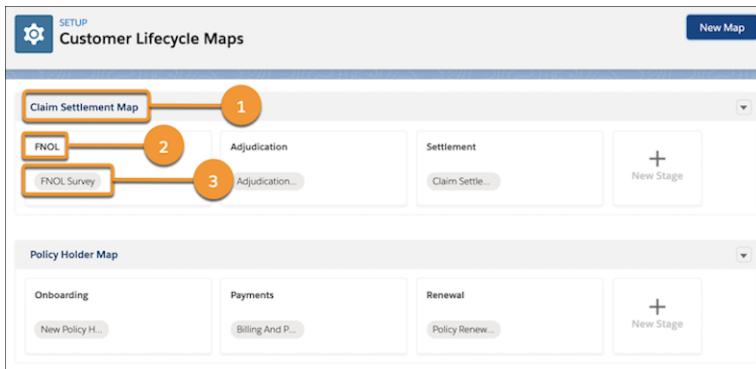
**Survey Owners Can Manage Responses**  
Allow survey owners to manage participant responses.

Enabled

**Customer Lifecycle Maps**  
Send survey invitations to customers at various stages of the customer lifecycle to gather insights and feedback.

Enabled

On the Customer Lifecycle Maps setup page, create a map (1), define stages (2) within the map, and associate survey questions with each stage (3).



#### SEE ALSO:

[Salesforce Help: Track Surveys Sent to Participants Across Their Lifecycle](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Enhance Your Survey Capabilities with the Salesforce Feedback Management License](#) (can be outdated or unavailable during release preview)

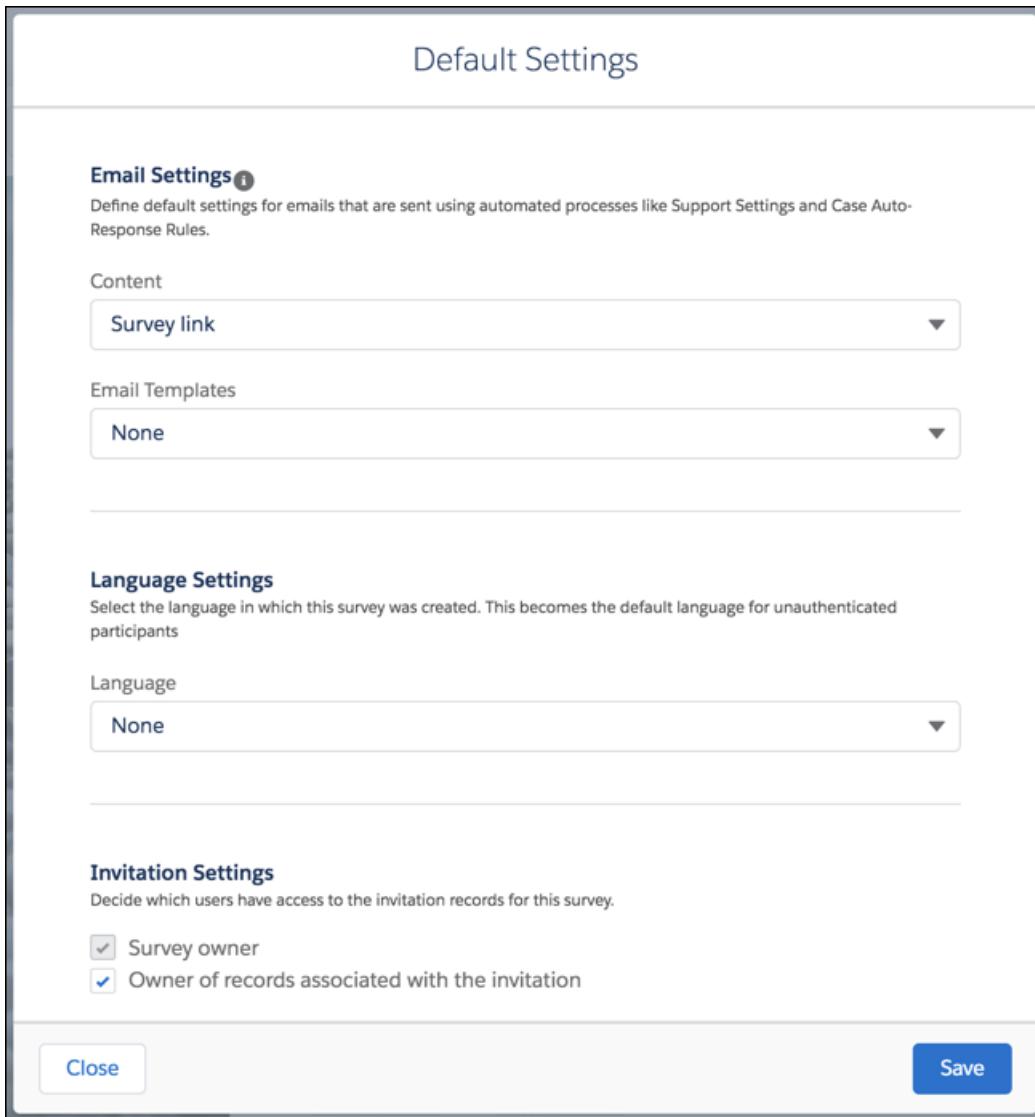
## Pick Defaults and Let the Survey Run

Define the initial default settings for the content and sharing rules for invitations sent using automated processes such as Support Settings. When participants outside your Salesforce org choose a language to view the survey in, let them know the language the survey was created in.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**How:** In the Survey Builder, click  , and select Default Settings.

In Email Settings, choose the content of the email and the template that must be in the email. In Language Settings, choose the language the survey was created in. The language you select is displayed when participants outside your Salesforce org choose the language to view the survey in. In Invitation Settings, choose whether the owner of a record that's associated with the invitation has edit access.



SEE ALSO:

[Salesforce Help: Define the Default Settings \(can be outdated or unavailable during release preview\)](#)

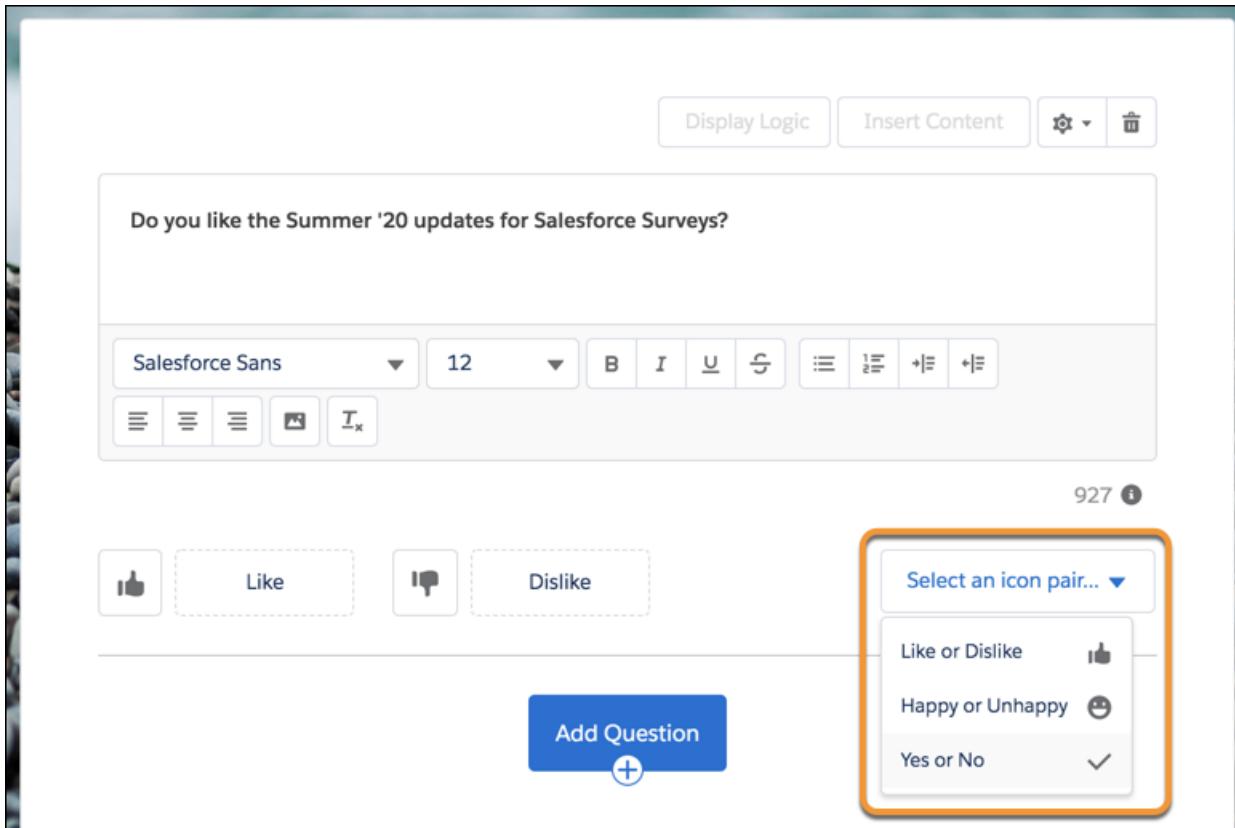
## Understand Participant Likes and Dislikes

Use the new Like or Dislike question type to define questions that let participants express their opinion.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Why:** You can include images of your products in a question and learn whether participants like them. Or, you can use the Like or Dislike question type to gauge whether customers are happy with their case resolution.

**How:** In the Survey Builder, click **Add Question**, and select Like or Dislike. Use one of the three provided sets of icons with their default labels, or customize the labels for your question.



#### SEE ALSO:

[Salesforce Help: Survey Question Types](#) (can be outdated or unavailable during release preview)

## Gather Critical Participant Information with Short Text

Use the new Short Text question type to gather critical participant information such as contact or personal information. You can also use it to gather text responses of up to 200 characters.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**How:** In the Survey Builder, click **Add Question**, and select Short Text.

#### SEE ALSO:

[Salesforce Help: Survey Question Types](#) (can be outdated or unavailable during release preview)

## Share Survey Invitations Using QR Codes

You can now download a QR code containing a survey invitation and share it with participants. Participants can simply scan the QR code to open the survey and respond. This invitation isn't tied to the participant's record.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**How:** On the Send tab of the Survey Builder, click **Get Invitation**. Select your invitation settings, and click **Download QR Code**.

SEE ALSO:

[Salesforce Help: Share QR Code Containing Survey Invitation \(can be outdated or unavailable during release preview\)](#)

## Give Your Global Audience an Improved Experience

Make translated surveys visually appealing by adding images. Also, when translating a question that includes a previous question's response, you can view the translation of the original question.

**Where:** This change applies to Lightning Experience in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** Translators in your Salesforce org who have Translation Workbench permissions can translate surveys in the languages that they have permissions for.

SEE ALSO:

[Salesforce Help: Translate Your Surveys \(can be outdated or unavailable during release preview\)](#)

## Send Surveys Between Orgs Using Managed Packages

Now you can send surveys from one org to another using managed packages. If you change the survey in the source org, you can move the updated survey to the target org using a new version of the managed package.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

SEE ALSO:

[Salesforce Help: Send Survey Records from One Org to Another \(can be outdated or unavailable during release preview\)](#)

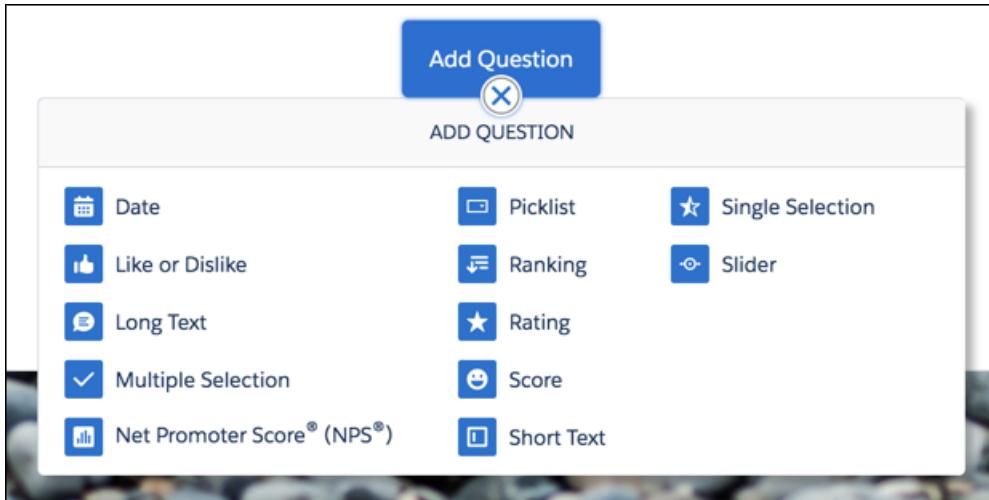
[Salesforce Help: Creating Managed Packages \(can be outdated or unavailable during release preview\)](#)

## See All Question Types at Once

Gone are the days of the scroll bar. Use the expanded question selector to view all question types at a glance.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**How:** Open a survey, click **Add Page**, and click **Add Question**.



## Make it Easier for Survey Participants Outside Your Org to Respond

Participants outside your Salesforce org no longer require Edit access on the Survey Response object to respond to surveys.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

## Question Type Name Change

We renamed Text questions to Long Text to distinguish it from the new Short Text question type.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

## Customer Lifecycle Analytics: Topic Analysis, Customer Lifecycle Maps, Response Analysis, Internal Survey Analysis, and Enhanced Configuration Wizard

Use the new Topic Analysis dashboard to analyze the trending topics and learn more about your business. The Customer Lifecycle Map dashboard helps you analyze customer feedback across various stages in the customer lifecycle. On the Response Analysis dashboard, you can now drill down into survey responses by demographics and geography. Automatically create datasets for your app with the improved configuration wizard.

### IN THIS SECTION:

#### [Analyze Topics and Track Business Performance](#)

With the new Topic Analysis dashboard, you can analyze the trending topics and learn how different areas of your business are performing.

#### [Enhance the Customer Experience with Customer Lifecycle Maps](#)

The Customer Lifecycle Map dashboard gives you actionable insights into customer feedback across different stages of the customer lifecycle. Dashboard visualizations help you identify the stages that need improvement and enhance your customer's experience.

### [Get Deeper Insights Into Survey Responses](#)

The enhanced Response Analysis dashboard lets you drill into the survey responses for each question type. You can analyze responses for each survey question and compare it with responses to questions across different surveys. You can also select multiple questions in a survey and compare their trends and ratings.

### [Analyze Responses from Participants Within Your Company](#)

Use the Customer Lifecycle Analytics app dashboards to analyze feedback from users within your Salesforce org.

### [Use the Improved Configuration Wizard to Automatically Create Datasets](#)

When you create an app from the Customer Lifecycle Analytics template, you can associate objects with your dataflow to automatically add data to your app.

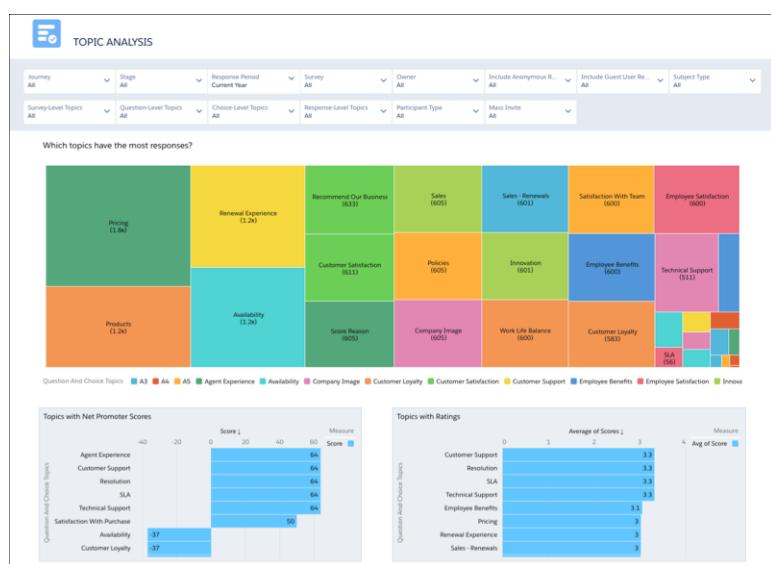
## Analyze Topics and Track Business Performance

With the new Topic Analysis dashboard, you can analyze the trending topics and learn how different areas of your business are performing.

**Where:** This change applies to Lightning Experience in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To create an app from the Customer Lifecycle Analytics template, you must have the Customer Lifecycle Analytics Plus add-on license.

**Why:** Topics group survey data by common themes. When you filter data by a topic, all the survey data tagged with the topic appears on the dashboard. Intuitive visualizations give you valuable insights about what's important to your customers.



**How:** Go to Analytics Studio, click **All Items**, select the **Apps** tab, and click your app. Click the **Dashboards** tab and open the Topic Analysis dashboard.

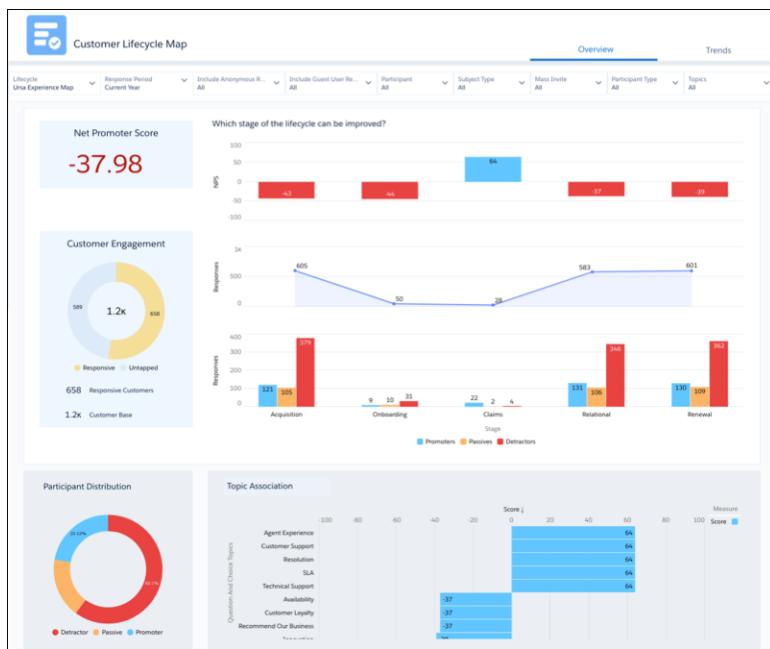
## Enhance the Customer Experience with Customer Lifecycle Maps

The Customer Lifecycle Map dashboard gives you actionable insights into customer feedback across different stages of the customer lifecycle. Dashboard visualizations help you identify the stages that need improvement and enhance your customer's experience.

**Where:** This change applies to Lightning Experience in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To add the Customer Lifecycle Map dashboard to your app, you must have the Salesforce Feedback Management license.

**How:** Go to Analytics Studio, click **All Items**, select the **Apps** tab, and click your app. Click the **Dashboards** tab and open the Customer Lifecycle Map dashboard to analyze customer feedback across stages.



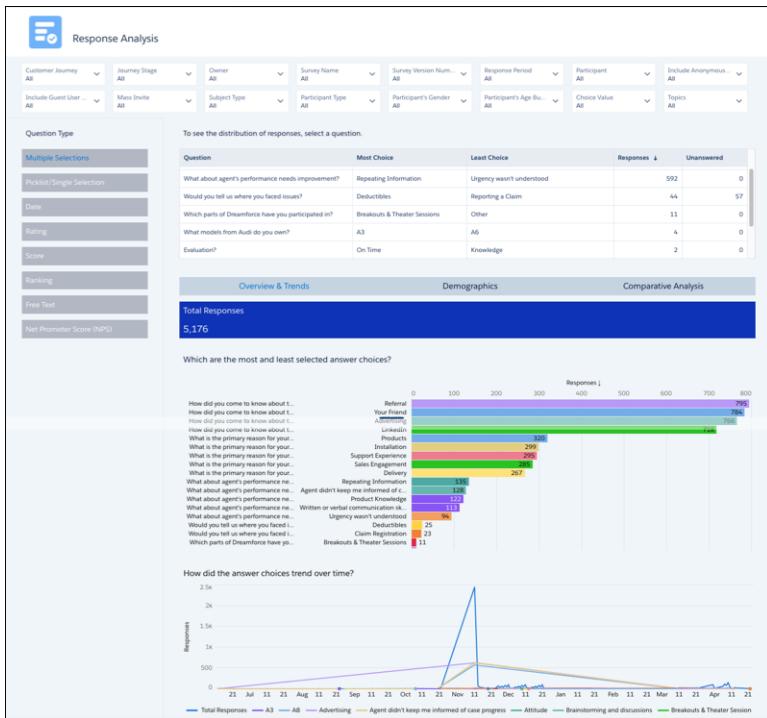
## Get Deeper Insights Into Survey Responses

The enhanced Response Analysis dashboard lets you drill into the survey responses for each question type. You can analyze responses for each survey question and compare it with responses to questions across different surveys. You can also select multiple questions in a survey and compare their trends and ratings.

**Where:** This change applies to Lightning Experience in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To create an app from the Customer Lifecycle Analytics template, you must have the Customer Lifecycle Analytics Plus add-on license.

**Why:** Use the Response Analysis dashboard to analyze the survey responses across different surveys, and improve the effectiveness of your surveys.



**How:** Go to Analytics Studio, click **Create**, and select **App**. Select the **Customer Lifecycle Analytics** template and follow the instructions in the wizard to create your app.

## Analyze Responses from Participants Within Your Company

Use the Customer Lifecycle Analytics app dashboards to analyze feedback from users within your Salesforce org.

**Where:** This change applies to Lightning Experience in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To create an app from the Customer Lifecycle Analytics template, you must have the Customer Lifecycle Analytics Plus add-on license.

**How:** Go to Analytics Studio, click **All Items**, select the **Apps** tab, and click your app. Click the **Dashboards** tab and open the dashboard you want to use. To analyze internal survey feedback from users, filter data by participant type **User**.

## Use the Improved Configuration Wizard to Automatically Create Datasets

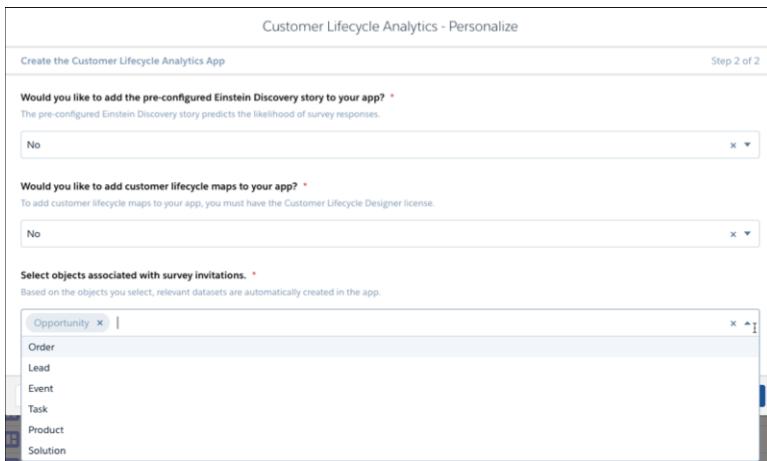
When you create an app from the Customer Lifecycle Analytics template, you can associate objects with your dataflow to automatically add data to your app.

**Where:** This change applies to Lightning Experience in Performance, Partner Developer, Enterprise, Developer, and Unlimited editions where Salesforce Surveys is enabled.

**Who:** To create an app from the Customer Lifecycle Analytics template, you must have the Customer Lifecycle Analytics Plus add-on license.

**Why:** The enhanced configuration wizard makes it easier to add data to your dashboards. In the wizard, choose the objects you want to add to your app, and Analytics adds the relevant datasets to the app.

**How:** On the **Customer Lifecycle Analytics - Personalize** screen of the wizard, select the objects whose records are associated with survey invitations and the relevant datasets are created.



## Lightning Scheduler: Automatic Resource Assignment, Anonymous Scheduling, Enhanced Scheduling Experience for Global Users, and More

Let your users breeze through appointment scheduling with automatic resource assignment. Anonymize appointments to protect your resources' privacy and to have the flexibility to reassign different resources if initially assigned resources become unavailable. To better serve global users, Lightning Scheduler now supports kilometers in addition to miles, and users now see appropriate date and time formats on flow screens based on their locale.

### IN THIS SECTION:

#### [Streamline Appointment Scheduling with Automatic Service Resource Assignment](#)

Enable automatic service resource assignment to let your users quickly schedule appointments without having to choose a service resource. You can also give users the option to manually select a service resource or have one assigned automatically.

#### [Hide Service Resource Names with Anonymous Scheduling](#)

Anonymous scheduling ensures that your service resources' names aren't exposed to external users in scheduled appointments. With anonymous scheduling, users don't get to choose service resources during the scheduling process, and assigned resources' names aren't shown on the appointment summary page.

#### [Streamline Your Flows with the Review Inbound or Outbound Service Appointment Component](#)

Users can now review inbound or outbound service appointments with a new flow screen component. If an "Access to entity 'Lead' denied" error appears when scheduling an appointment, you can replace the old Review Service Appointment component with the new component.

#### [Get Appointment Slots of Service Resources with the Available Territory Slots API](#)

Use the new Available Territory Slots Connect API to get available appointment slots for all service resources in a list of service territories.

#### [Other Changes to Lightning Scheduler](#)

Learn about other small but important improvements to Lightning Scheduler.

## Streamline Appointment Scheduling with Automatic Service Resource Assignment

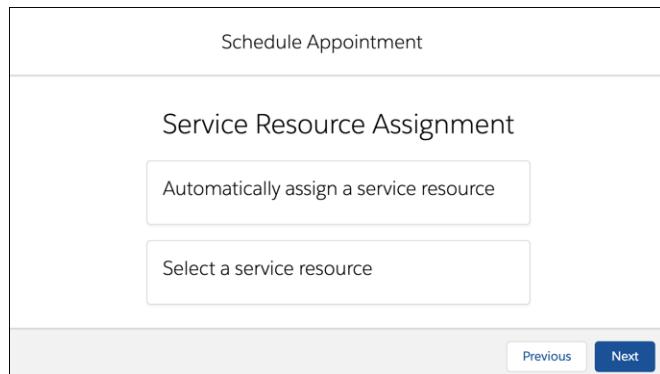
Enable automatic service resource assignment to let your users quickly schedule appointments without having to choose a service resource. You can also give users the option to manually select a service resource or have one assigned automatically.

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

**Why:** Customers or guest users don't always know the names of service resources or they don't really care about which resource is assigned to them. With automatic resource assignment, they can schedule appointments without selecting a service resource. Based on the selected time slot, an appropriate service resource is automatically assigned to the appointment.

**How:** Use the new Anonymous Booking and Service Resource Booking attributes on your flow screen component. The affected flow screen components include Select Service Resource, Service Resource Availability, and Select Service Resource and Service Appointment Time. By default, Anonymous Booking is set to False and Service Resource Booking to True, and there's no change in your flow's behavior.

- To skip the resource selection page and automatically assign service resources, set Anonymous Booking to *True* and Service Resource Booking to *False*.
- To give users the option to choose between automatic resource assignment and manual resource selection, set both Anonymous Booking and Service Resource Booking to *True*.



SEE ALSO:

[Salesforce Help: Enable Automatic Service Resource Assignment \(can be outdated or unavailable during release preview\)](#)

## Hide Service Resource Names with Anonymous Scheduling

Anonymous scheduling ensures that your service resources' names aren't exposed to external users in scheduled appointments. With anonymous scheduling, users don't get to choose service resources during the scheduling process, and assigned resources' names aren't shown on the appointment summary page.

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

**Why:** Organizations typically hide their scheduled service resources' names from users to protect their privacy. Anonymous scheduling also gives you the flexibility to assign different resources to appointments if the initially assigned resources become unavailable.

**How:** To enable anonymous scheduling, first enable automatic service resource assignment by setting the new Anonymous Booking attribute to `True` and Service Resource Booking attribute to `False` on your flow screen component. And then, hide assigned resources' names by setting the new Show Service Resource attribute on the Review Service Appointment flow screen component to `False`.

#### SEE ALSO:

[Salesforce Help: Enable Anonymous Resource Scheduling](#) (can be outdated or unavailable during release preview)

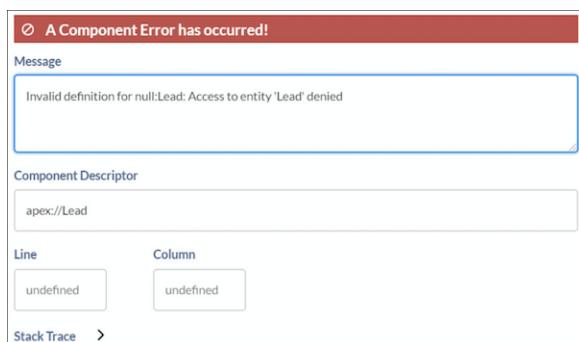
## Streamline Your Flows with the Review Inbound or Outbound Service Appointment Component

Users can now review inbound or outbound service appointments with a new flow screen component. If an “Access to entity ‘Lead’ denied” error appears when scheduling an appointment, you can replace the old Review Service Appointment component with the new component.

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

**When:** This component was released on April 15, 2020.

**Why:** The Review Service Appointment flow screen component causes an error when authenticated community users try to schedule an appointment. Most commonly, users with the Customer Community Plus license get this error.



**How:** Edit your Lightning Scheduler flow that experiences this problem, and replace the Review Service Appointment component with the Review Inbound or Outbound Service Appointment component.

## Get Appointment Slots of Service Resources with the Available Territory Slots API

Use the new Available Territory Slots Connect API to get available appointment slots for all service resources in a list of service territories.

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

#### SEE ALSO:

[New and Changed Connect REST API Resources](#)

## Other Changes to Lightning Scheduler

Learn about other small but important improvements to Lightning Scheduler.

**Where:** These changes apply to Lightning Experience in Enterprise, Performance, and Unlimited editions with Lightning Scheduler enabled.

**Why:** We enhanced the appointment scheduling experience for global users.

#### Show distances in miles (mi) or kilometers (km) on the service territory selection page

Set the new Distance Unit attribute on the Select Service Territory flow screen component to *mi* or *km*. If you enter any other value, it's shown in miles.

#### Display date-time format according to the user's locale

The date-time format on flow screens automatically changes based on the user's locale. No admin setup is required.

## Search: Find Information Faster and Get the Most Relevant Results

Amp up your productivity using Search. You can find the records you want more easily and take action right from the search results page.

#### IN THIS SECTION:

### [Einstein Search: Available with Professional Edition, Clearer Setup Process, Natural Language Search Examples, and Better Recommended Results on the Salesforce Mobile App \(Beta\)](#)

You can turn on Einstein Search, now available with Professional edition, at no additional cost and benefit from all it has to offer. Complete all the steps outlined by a clearer setup process. Learn how to use natural language search by following examples. See improved recommended results on the mobile app.

#### [Get Search Results for More Objects](#)

More objects are now searchable in Financial Services Cloud and Health Cloud.

## Einstein Search: Available with Professional Edition, Clearer Setup Process, Natural Language Search Examples, and Better Recommended Results on the Salesforce Mobile App (Beta)

You can turn on Einstein Search, now available with Professional edition, at no additional cost and benefit from all it has to offer. Complete all the steps outlined by a clearer setup process. Learn how to use natural language search by following examples. See improved recommended results on the mobile app.

 **Note:** As a beta feature, Einstein Search is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only based on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions by emailing us at <mailto:TryEinsteinSearch@salesforce.com>.

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#### IN THIS SECTION:

### [Step Up Productivity with Einstein Search in Professional Edition \(Beta\)](#)

Einstein Search is now available with Professional Edition. Get search results that are personal, natural, and actionable. You can turn on personalization, natural language searches, actionable instant results, and recommended results.

### [Get Everything Einstein Search Has to Offer \(Beta\)](#)

Einstein Search is personal, natural, and actionable. To give your users the full Einstein Search experience, enable all Einstein Search features. Begin in Setup, where the option is now labeled Enable Einstein Search. This page lists the steps to turn on personalization, natural language search, and enhanced instant results.

### [Search with Everyday Words Using Einstein Natural Language Search \(Beta\)](#)

Natural language search lets users enter common words and phrases in the search box to find the records that they want. Natural language search is supported for accounts, cases, contacts, leads, and opportunities.

### [Say Goodbye to the Shield Encryption Limitation for Einstein Search Personalization \(Beta\)](#)

You can now turn on Einstein Search personalization with Shield Platform Encryption enabled for your Salesforce org. Shield Platform Encryption is no longer a restriction.

### [Benefit from Simpler Einstein Search Permission Names \(Beta\)](#)

Less is more! Einstein Search permission names are shorter but they still turn on the same powerful features as before.

### [Get Better Recommended Results on the Salesforce Mobile App \(Beta\)](#)

Find records faster and act more quickly with the improved quality of Einstein Search recommended results on the Salesforce mobile app. Recommended results make the right record stand out instead of picking the record from a list.

### [Find User-Owned Objects: Use "My" in a Natural Language Search \(Beta\)](#)

To find objects owned by a user and not the user's team, use the word "my" in a Natural Language search. Einstein Search returns results only for the user-owned object, not for the object that the user's team owns. For example, if a user types "my opportunities," Einstein Search retrieves all the opportunities that the user owns.

#### SEE ALSO:

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## **Step Up Productivity with Einstein Search in Professional Edition (Beta)**

Einstein Search is now available with Professional Edition. Get search results that are personal, natural, and actionable. You can turn on personalization, natural language searches, actionable instant results, and recommended results.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app in Professional edition. The Salesforce mobile app supports only personalization and recommended results. The mobile app does not support actionable instant results or natural language search.

**Who:** To use personalization, enable the org preference in the Einstein Search settings. To use the natural and actionable features, create an Einstein Search permission set license.

#### SEE ALSO:

[Enable Einstein Search Features \(Beta\)](#)

### **Get Everything Einstein Search Has to Offer (Beta)**

Einstein Search is personal, natural, and actionable. To give your users the full Einstein Search experience, enable all Einstein Search features. Begin in Setup, where the option is now labeled Enable Einstein Search. This page lists the steps to turn on personalization, natural language search, and enhanced instant results.

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

**How:** To enable Einstein Search, from Setup enter *Enable Einstein Search* in the Quick Find box, then select **Enable Einstein Search**.

SEE ALSO:

[Salesforce Help: Enable Einstein Search Features \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Search with Everyday Words Using Einstein Natural Language Search (Beta)

Natural language search lets users enter common words and phrases in the search box to find the records that they want. Natural language search is supported for accounts, cases, contacts, leads, and opportunities.

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

**Who:** Natural language search requires the Einstein Search permission set license.

**Why:** Everyday words together with certain objects and relative time conditions let Einstein Search apply these words as filters to your Salesforce org's records.

For example, if your sales rep enters *my closed cases last year*, Einstein Search interprets those words as a person does. The results show every closed case owned by that sales rep in the last year. Examples of natural language search are available in the Help documentation.

The screenshot shows a search results page for the query "my closed cases last year". The top banner says "Showing results for 'my closed cases last year'. Not what you're looking for? Try exact word matches for 'my closed cases last year'." Below the banner, the search term "my closed cases last year" is displayed in bold. A sub-header indicates the results are for "Owner Admin User · Closed True · Object Case · Last Modified Date Last Year | Sorted by Last Modified Date". The main table has two columns: "Case Number" and "Priority". The data is as follows:

Case Number	Priority
00001320	Medium
00001307	Low
00001306	Medium
00001305	High
00001228	High
00001298	Medium
00001294	High

SEE ALSO:

[Salesforce Help: Natural Language Search Examples \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Say Goodbye to the Shield Encryption Limitation for Einstein Search Personalization (Beta)

You can now turn on Einstein Search personalization with Shield Platform Encryption enabled for your Salesforce org. Shield Platform Encryption is no longer a restriction.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app in Professional, Enterprise, Performance, and Unlimited editions.

**Who:** Orgs with Shield Platform Encryption enabled can turn on personalization.

To turn on personalization, your org must meet these requirements:

- Enterprise, Performance, or Unlimited edition

- Lightning Experience is enabled

**How:** To enable personalization:

- From Setup, enter *Einstein Search* in the Quick Find box, then select **Enable Einstein Search**.
- Select **Turn on Personalization (Beta)**.
- Click **Save**.

SEE ALSO:

[Salesforce Help: Turn On Einstein Search Personalization \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Benefit from Simpler Einstein Search Permission Names (Beta)

Less is more! Einstein Search permission names are shorter but they still turn on the same powerful features as before.

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

**How:** To create the permission set:

- From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
- Click **New**.
- Enter your permission set label and API name (example: *Einstein\_Search*).
- For the License, select **Einstein Search** under Permission Set Licenses then click Save.
- On the Permission Sets page, select **System Permissions**.
- Select **Edit**, then for each permission you want in the permission set, select **Enable**.
- Click **Save**.

SEE ALSO:

[Salesforce Help: Turn On Natural Language Search and Enhanced Instant Results \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Get Better Recommended Results on the Salesforce Mobile App (Beta)

Find records faster and act more quickly with the improved quality of Einstein Search recommended results on the Salesforce mobile app. Recommended results make the right record stand out instead of picking the record from a list.

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

**Who:** Recommended results require the Einstein Search permission set license. Record previews require the Einstein Search Record Previews permission set license.

**Why:** At the top of your search results page, you see a preview of the recommended record. That way you know instantly whether it's the one you want.

SEE ALSO:

[Salesforce Help: Recommended Results with Record Previews \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Find User-Owned Objects: Use "My" in a Natural Language Search (Beta)

To find objects owned by a user and not the user's team, use the word "my" in a Natural Language search. Einstein Search returns results only for the user-owned object, not for the object that the user's team owns. For example, if a user types "my opportunities," Einstein Search retrieves all the opportunities that the user owns.

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

**Who:** Natural language search requires the Einstein Search permission set license.

**Why:** You asked and we listened. Einstein Search now interprets the word "my" as the owner of an object.

SEE ALSO:

[Salesforce Help: Natural Language Search Examples \(Beta\) \(can be outdated or unavailable during release preview\)](#)

## Get Search Results for More Objects

More objects are now searchable in Financial Services Cloud and Health Cloud.

**Where:** These changes apply to Lightning Experience and Salesforce Classic.

Object	Where
Care Metric Target	Health Cloud, Enterprise and Unlimited editions in Lightning Experience and Salesforce Classic
Care Pgm Prov Healthcare Provider	Health Cloud, Enterprise and unlimited editions in Lightning Experience and Salesforce Classic
Care Registered Device	Health Cloud, Enterprise and unlimited editions in Lightning Experience and Salesforce Classic
Code Set	Health Cloud, Enterprise and unlimited editions in Lightning Experience and Salesforce Classic
Expense	Financial Services Cloud, Enterprise, Performance, Unlimited, and Developer editions with Field Service in Lightning Experience and Salesforce Classic
Provider Search Sync Log	Health Cloud, Enterprise and Unlimited editions in Lightning Experience
Unit of Measure	Health Cloud, Enterprise and Unlimited editions in Lightning Experience and Salesforce Classic

SEE ALSO:

[Salesforce Help: Searchable Fields by Object in Lightning Experience \(can be outdated or unavailable during release preview\)](#)

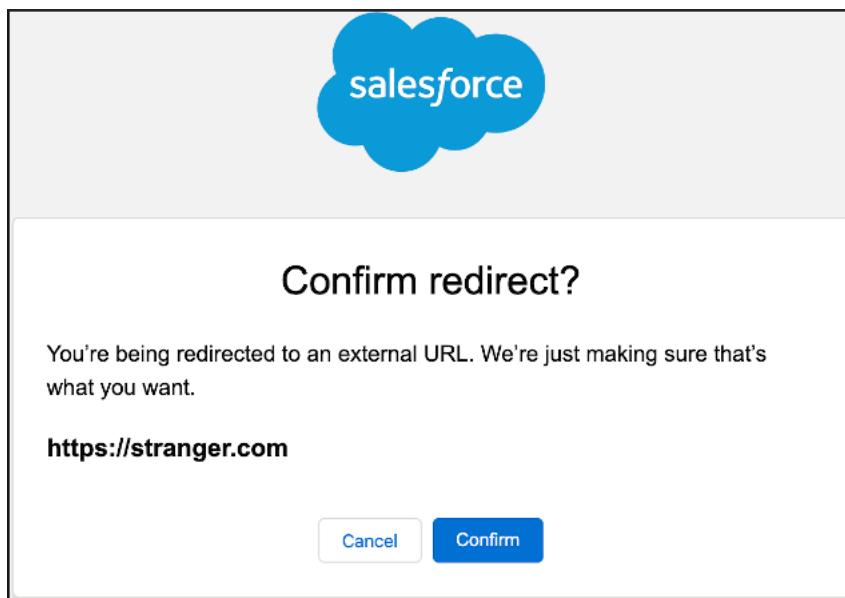
[Salesforce Help: Searchable Fields by Object in Salesforce Classic \(can be outdated or unavailable during release preview\)](#)

## Redirect Notices for External URLs

To provide greater security, we now process and redirect links to external URLs, or any location outside Salesforce.

**Where:** This change affects links in Lightning Experience that point to external URLs.

**How:** Click a link. For link targets outside Salesforce, if the URL is allowed, there is no change in behavior—the page opens normally. If the target URL is not in the allowlist, a page opens and asks you to confirm the redirection to the external URL. Click **Confirm** to open the page immediately, or click **Cancel** to prevent the redirection.



## Get the Trailblazer.me Experience on Salesforce Help

Salesforce Help now uses Trailblazer.me for sign-up, login, and profile and settings management. When users open a link from the Help Menu directing them to Salesforce Help, they log into their Trailblazer.me account first.

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

**When:** This change starts on May 22, 2020.

**How:** Log into Salesforce Help by clicking Log In in the top-right corner. Once logged in, to view or edit your Trailblazer.me profile or settings you click your profile pic and select **Profile** or **Settings**.

If you are prompted to log in to Trailblazer.me after selecting a Salesforce Help Menu link, you're directed to the page after login. Currently, Single Sign On (SSO) from the Salesforce application to Salesforce Help isn't available. But Trailblazer.me sessions are long-lasting. If you logged into Trailhead, Salesforce Help, the Trailblazer Community, or another Salesforce site recently, your session continues onto Salesforce Help. You're logged in as the same user.

### SEE ALSO:

[Salesforce Help: Get Started with Trailblazer.me \(can be outdated or unavailable during release preview\)](#)

## Einstein Voice Assistant Is Being Retired (Beta)

Einstein Voice Assistant is scheduled to be retired on July 10, 2020.

**Where:** This change applies to the Salesforce mobile app for iOS and Android in Professional, Enterprise, Unlimited, and Developer editions. It also applies to Setup for this feature in Lightning Experience.

## Lightning Extension's Dark Mode Feature is Temporarily Disabled

Dark mode is disabled while we resolve some performance issues. We're working to make it available again.

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

SEE ALSO:

[Salesforce Help: Try New Features with the Lightning Extension for Chrome](#) (can be outdated or unavailable during release preview)

[Knowledge Article: Dark Mode is Disabled](#)

## Require Secure HTTPS Connections (Update, Enforced)

Require Secure HTTPS Connections was an update in Spring '20 and was enforced in production orgs on May 1, 2020. As part of updates related to Google Chrome's SameSite cookie changes, HTTPS connections are required to access Salesforce. HTTP connections are no longer permitted. This update enabled the Require secure connections (HTTPS) setting on the Session Settings Setup page and prevented it from being disabled. The Require secure connections (HTTPS) for all third-party domains setting isn't affected by this update.

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

**When:** This update was activated automatically on May 1, 2020 in production orgs.

To view this update, from Setup, in the Quick Find box, enter *Critical Updates*, then select **Critical Updates**. For Require Secure HTTPS Connections, click **Review**.

 **Note:** If you don't see this update, the Require secure connections (HTTPS) setting was already enabled in your org and no action is required.

SEE ALSO:

[Spring '20 Release Notes: Require Secure HTTPS Connections \(Update\)](#)

[Release Updates \(Beta\)](#)

## Open Hyperlinks in Formula Fields Correctly (Update, Enforced)

If you have formula fields that contain a `HYPERNLINK` function, Lightning Experience ignores the target value when attempting to open the link. This update ensures that the target value for hyperlinks is honored, whether it's explicitly configured or set by default. This update was first made available in Winter '19 and is enforced in Summer '20.

**Where:** This change applies to Lightning Experience and the Salesforce app in all editions.

**When:** This update is enforced when a sandbox or production org is upgraded to Summer '20. Enforcement starts on June 15, 2020 and takes effect when your instance is upgraded to Summer '20. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**How:** From Setup, enter *Critical Updates* in the Quick Find box. Then select **Critical Updates**. For Lightning Experience Honors Target Values for Hyperlinks in Formula Fields, click **Acknowledge**.

SEE ALSO:

[Salesforce Help: Tips for Working with Hyperlink Formula Fields](#) (can be outdated or unavailable during release preview)

## Keep Working with Tab-Focused Dialogs (Previously Released Update)

In Lightning console apps, dialogs no longer stop you from interacting with the rest of the UI. This release update limits the focus of dialogs triggered by a workspace tab or subtab to only the tab that triggered it. This release update was first made available in Winter '20.

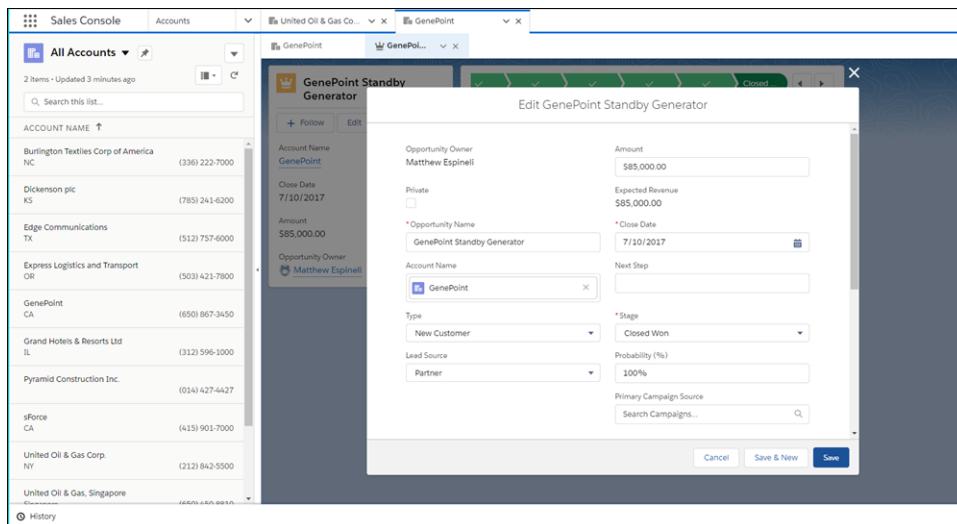
**Where:** This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing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

**When:** You can activate this update now. Otherwise, we enforce it in the Winter '22 release.

**Why:** Before the Winter '20 release, all dialogs triggered by a workspace tab or subtab in a Lightning console app took the focus of the entire app. This update makes dialogs require the focus of only the tab that triggered them, allowing users to interact with the rest of the app.

**How:** To activate this release update before the Winter '22 release, from Setup, enter *Release Updates* in the Quick Find box, then select **Release Updates**. For Keep Working with Tab-Focused Dialogs, click **Activate**.

After the update, when you trigger a dialog, it's limited to the tab that created it.



### SEE ALSO:

[Release Updates \(Beta\)](#)

## Create More Records from Global Profiles

Save time and reduce errors by cutting down on manual data entry when creating records from global profile data with C360 Global Profiles search. Create records on lead and contact standard objects along with the previously supported account object in your org.

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

**Who:** Users with a Customer 360 Data Manager add-on subscription.

**How:** From C360 Global Profiles search, find your customer with a phone number or email address. Choose which object you want to create based on the global profile. You can create multiple records of different types for each supported object from the global profile.

Each object must be mapped from Customer 360 Data Manager with the Cloud Information Model.

#### SEE ALSO:

- [Add the C360 Global Profiles Component to More Page Layouts](#)
- [Salesforce Help: Create Records Using Customer 360 Data Manager Data](#)
- [Salesforce Help: Data Mapping](#)

## Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms

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Einstein Search is natural. Users can enter common words and phrases in the search box and find the records that they're looking for. Use Einstein OCR (optical character recognition) to turn images such as business cards into alphanumeric text. Get the best Einstein Discovery predictions from three modeling algorithms.

Read up on the latest ways to get Einstein working for you.

## Salesforce Overall

### [Einstein Voice Assistant Is Being Retired \(Beta\)](#)

Einstein Voice Assistant is scheduled to be retired on July 10, 2020.

## Salesforce Overall

### [Einstein Search: Available with Professional Edition, Clearer Setup Process, Natural Language Search Examples, and Better Recommended Results on the Salesforce Mobile App \(Beta\)](#)

You can turn on Einstein Search, now available with Professional edition, at no additional cost and benefit from all it has to offer. Complete all the steps outlined by a clearer setup process. Learn how to use natural language search by following examples. See improved recommended results on the mobile app.

## Sales

### [Sales Cloud Einstein: Opportunity Scoring Includes Consistent Labels and Field-Level Security, Improved Scoring Model for Leads and Opportunities, and New Account Insight](#)

Opportunity Score is the field name everywhere scores appear. Field-level security controls which scoring factors sales reps see. Einstein Opportunity Scoring models now include products, quotes, and price books. Einstein Lead Scoring models now include leads' activity data. And Einstein Account Insights lets reps know when companies are cutting costs.

## Service

### [Einstein for Service: Reply Recommendations, Multi-Language Article Recommendations, Enhanced Bot Event Logs, and Facebook Messenger for Bots](#)

Recommend chat replies based on similar closed chats to busy support agents, and receive knowledge article recommendations in five new languages. Help support agents wrap up cases faster with field value recommendations that are based on chat data and closed

case fields. Troubleshoot faster with Enhanced Bot event logs, and integrate skills-based routing so your bot can help your customers more quickly. Reach more customers on bots with nine new languages and Facebook Messenger support. Receive Einstein Case Classification predictions on lookup fields as well as checkboxes and picklists, and identify cases whose field predictions didn't meet the auto-update confidence threshold.

## Industries

### **Einstein Object Detection: Data Safety, Improved Detection, and Some Key Updates**

Delete the Object Detection data stored in your inactive Salesforce orgs. Objects are detected by models with the highest accuracy. Admins have more information about their models and datasets. Use all records list and related lists to view Einstein Object Detection records easily.

## Analytics

### **Einstein Discovery: Tree-Based Modeling Types, Random Forest Models (Pilot), and Deployed Model Replacement**

Get the best predictions from three modeling algorithms. Create accurate models using random forest algorithms (pilot). Replace deployed models easily.

## Customization

### **Einstein Prediction Builder: Define Your Prediction Set, Run Reports, and Enable Predictions from the Scorecard**

Make your prediction results more relevant by choosing which records you want Einstein to score. Run reports so you can explore the data being used in your prediction. Save time when you enable or disable predictions directly from the prediction scorecard. Use Data Checker for even more field and record types.

## Development

### **Einstein Platform Services: Image Recognition and Natural Language Processing**

Not a data scientist or machine-learning expert, but still want to integrate AI into your apps? Use the Einstein Platform Services APIs to easily AI-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train custom classifiers to solve a vast array of image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind the text. Make your apps smarter and look like a genius at the same time.

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## **Sales: Einstein Call Coaching and Engagement Details for High Velocity Sales, Custom Opportunity Splits, Quick Actions for Task Queues, and Pardot B2B Marketing Features**

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Use Einstein Call Coaching to analyze conversational data, and review engagement details to see when prospects engage over email. Create more custom opportunity split types. Set up quick actions to assign tasks to queues. Pardot adds Einstein Attribution and the Marketing Campaign Intelligence app. Get more control over opportunity access via territories. Path features come to Kanban. And email integration helps you boost productivity more than ever.

## IN THIS SECTION:

### [High Velocity Sales: Einstein Call Coaching, Engagement Details, and More Sales Cadence Customization](#)

Sales managers can analyze sales calls with Einstein Call Coaching. Sales reps can see when prospects engage over email, such as when a sales cadence email is opened or a link is clicked. There are also many new features for sales cadences, like removing prospects automatically from sales cadences when specified exit criteria are met.

### [Salesforce Maps: COVID-19 Hotspot Monitoring, Territory Planning Scenarios, and Advanced Setup Improvements](#)

Plan for sales and service responses when you visualize active COVID-19 cases. Show the impact of expanding or contracting territories. And enjoy a simplified, more intuitive setup experience for Salesforce Maps Advanced.

### [Sales Cloud Einstein: Opportunity Scoring Includes Consistent Labels and Field-Level Security, Improved Scoring Model for Leads and Opportunities, and New Account Insight](#)

Opportunity Score is the field name everywhere scores appear. Field-level security controls which scoring factors sales reps see. Einstein Opportunity Scoring models now include products, quotes, and price books. Einstein Lead Scoring models now include leads' activity data. And Einstein Account Insights lets reps know when companies are cutting costs.

### [Core Sales Features: Enhancements to Opportunities, Orders, and Enterprise Territory Management](#)

Create more custom split types. With a B2B Commerce license, use orders in Salesforce while managing products and price books in an external platform. And get more control over opportunity access via territories.

### [Productivity Features: Email Threading, Tasks to Queues, New Email Insight, and Improved Kanban Views](#)

Sales reps can enjoy more efficiency when selling. High Velocity Sales users can use threaded emails to see an entire conversation. Quick actions make it easier to assign tasks to queues. The Not Interested email insight lets reps know when a customer isn't interested in their sales pitch. And add company-specific tips and expertise to Kanban views.

### [Integration with Google: Track Email Setup Changes, Text Shortcut Improvements, and Lightning Sync Setup Available to More Admins](#)

You can turn the email tracking feature on and off from a single setting for all Gmail integration and Inbox users. Plus, we added a keyboard shortcut to make adding text shortcuts to an email easier than ever. Starting in Winter '21, Lightning Sync availability is changing. And in Spring '20, Lightning Sync admins can delegate setup to admins with more restrictive permissions.

### [Integration with Microsoft®: Track Email Setup Changes, Text Shortcut Improvements, Changes for Lightning Sync and Retirement for Salesforce for Outlook](#)

You can turn the email tracking feature on and off from a single setting for all Outlook integration and Inbox users. Plus, we added a keyboard shortcut to make adding text shortcuts to an email easier than ever. In Winter '21 Lightning Sync availability is changing. And Salesforce for Outlook will no longer function starting in December 2020. Keep reading to learn more about the retirement and moving to the next-generation features.

### [Salesforce CPQ and Billing: Change Quote Line Editor Column Width, Bypass the Preserve Bundle Structure Requirement on Amendments, and Improved Error Management for Finance Periods](#)

Change column widths in the quote line editor. Create amendments without using the original contract's product bundle structure. And quickly review and correct errors encountered when opening or closing finance periods.

### [Pardot](#)

Pardot launches new B2B Marketing features, such as Einstein Attribution and a Marketing Campaign Intelligence app, as well as a number of enhancements to security, syncing, content reuse, and feature setup. Some features become available in June, and others with the Salesforce Summer '20 release.

### [Other Changes in the Sales Cloud](#)

Learn about other changes we've made to improve usability and permission changes for duplicate management, email, and Enterprise Territory Management.

## High Velocity Sales: Einstein Call Coaching, Engagement Details, and More Sales Cadence Customization

Sales managers can analyze sales calls with Einstein Call Coaching. Sales reps can see when prospects engage over email, such as when a sales cadence email is opened or a link is clicked. There are also many new features for sales cadences, like removing prospects automatically from sales cadences when specified exit criteria are met.

High Velocity Sales and its features are available for an extra cost. For pricing details, contact your Salesforce account executive. Lightning Dialer is also available for an extra cost as an add-on license.

### IN THIS SECTION:

#### [Get Insights Into Sales Calls with Einstein Call Coaching](#)

Give sales managers insights about their teams' sales calls and surface coachable moments. Managers can play recordings of conversations to gain visibility into mentions of competitors, products, custom keywords, pricing discussions, and next steps.

#### [See Real-Time Details of Prospects' Email Engagement](#)

Know immediately when sales cadence targets open an email, reply, click an email link, and more. My Feed Alerts show engagements directly in the Work Queue. Engagement data appears on target records and email messages.

#### [Sales Cadences: Branch on Email Reply, Remove Prospects Automatically, and Thread Emails](#)

Sales managers can branch sales cadences based on email replies and remove prospects automatically based on specific criteria. And they can group emails from a sales cadence to a prospect into a thread.

#### [See Sales Cadence and Rep Performance at a Glance \(Generally Available\)](#)

Sales managers can use Einstein Analytics performance dashboards to quickly see customer engagement and how sales reps are doing. For example, managers can view how many sales cadences are in progress, with detailed call and email response statistics. And they can see how effectively sales reps work through their sales cadences.

#### [Advance the Sales Cadence Without Waiting](#)

Sales reps can skip a waiting period and move to the next step in the sales cadence. Previously, sales reps waited the full duration of the wait step. Now reps can accelerate the sales cadence and save time.

#### [Choose Whether to Track Emails in High Velocity Sales](#)

Gathering information about interactions with sales reps' emails isn't always in compliance with your customers' privacy policies. Now email tracking is optional to give you more flexibility when you set up High Velocity Sales.

#### [Get a Cleaner View of Sales Cadence Tasks in the Activity Timeline](#)

Now orgs that enable High Velocity Sales in Summer '20 or later show each sales cadence task only once in the Activity Timeline. In Salesforce orgs that turned on High Velocity Sales before Summer '20, the Activity Timeline on prospect records shows each sales cadence task twice. One showed the scheduled task, and the other showed the completed task. To see this cleaner timeline if you turned on High Velocity Sales before Summer '20, contact Salesforce.

## Get Insights Into Sales Calls with Einstein Call Coaching

Give sales managers insights about their teams' sales calls and surface coachable moments. Managers can play recordings of conversations to gain visibility into mentions of competitors, products, custom keywords, pricing discussions, and next steps.

**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

**Who:** This feature is available to sales managers with the Call Coaching User permission set, and is available only in English.

Call Coaching does not record your calls. Rather, you connect it with your recording system such as Lightning Dialer or other supported partners. It is a customer's responsibility to manage consent and comply with local privacy requirements in the way calls are recorded.

**Why:** Einstein Call Coaching is a new feature available for sales managers that offers the ability to see insights and trends surfaced from sales calls. Recorded calls are analyzed for mentions of specific keywords and phrases.

From voice call records, managers can play call recordings and see call details, including the talk-to-listen ratio. The different colors show the participants on the call. Jump to different mentions in the call from the player (1). Click different mentions (2) to highlight and jump to specific areas of the call.

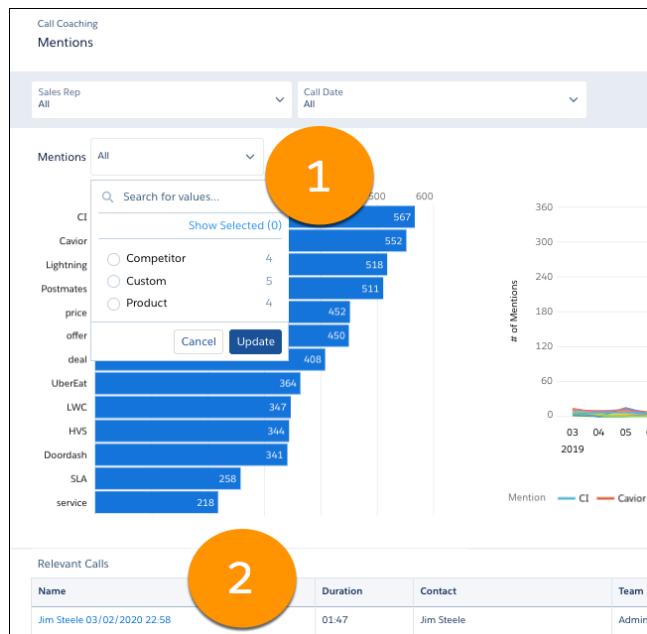
Sales managers can also add feedback (3) to help us surface the most relevant calls in the daily highlights email. This feedback goes to our system, not the sales rep on the call.

Managers can also see reports and dashboards about different insights.

From the Overview page, managers can filter by sales rep and call date (1), and review reports of top mentions based on role hierarchy (2).

The Overview page also features links to recordings in the Recent Calls table (3). These recordings are the calls most recently made by your team.

Managers can see more details on the Mentions page.



Filter by the type of mention and see relevant reports (1). This page also features a list of Relevant Calls (2) based on your filter criteria.

Call Coaching users also receive daily emails with a list of highlighted calls if there were at least 3 calls with insights in the previous day.

**How:** Salesforce admins can enable Call Coaching from Setup. For more details, see the Salesforce Help.

## See Real-Time Details of Prospects' Email Engagement

Know immediately when sales cadence targets open an email, reply, click an email link, and more. My Feed Alerts show engagements directly in the Work Queue. Engagement data appears on target records and email messages.

**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

**When:** This feature is scheduled to be generally available 30 days after the Summer '20 release.

**Why:** In the new My Feed tab of the Work Queue, sales reps receive alerts when prospects engage with tracked emails, so they can follow up immediately. They can also see an alert when a record is assigned to them. The types of alerts reps see depends on whether your Salesforce org uses High Velocity Sales (HVS), Inbox, Einstein Activity Capture (EAC), or a combination.

Alert Types	HVS + Inbox + EAC	HVS + Inbox	Inbox only
Opens	✓	✓	✓
Replies	✓		
Link clicks	✓	✓	✓
Bounces	✓		

Alert Types	HVS + Inbox + EAC	HVS + Inbox	Inbox only
Record assignments	✓	✓	

The My Feed tab shows the last 30 days of engagements. Sales reps can sort and filter the list as needed. To view an email and its engagement details, sales reps can click the email subject.

The My Feed tab shows the last 30 days of engagements. Sales reps can sort and filter the list as needed. To view an email and its engagement details, sales reps can click the email subject.

If your Salesforce org uses Einstein Activity Capture, hovering over the **Last Opened Date** of an email displays the Engagement related list. If your Salesforce org doesn't use Einstein Activity Capture, click the email subject and then the **Engagement** tab to display the list. The Engagement list shows all engagements for the last 90 days. Sales reps can see dates and times that recipients opened emails or clicked links, and how many times they interacted, in a chronological list. Sales reps can use the engagement details to identify their most interested prospects for prompt follow-up.

If your Salesforce org uses Einstein Activity Capture, hovering over the **Last Opened Date** of an email displays the Engagement related list. If your Salesforce org doesn't use Einstein Activity Capture, click the email subject and then the **Engagement** tab to display the list. The Engagement list shows all engagements for the last 90 days. Sales reps can see dates and times that recipients opened emails or clicked links, and how many times they interacted, in a chronological list. Sales reps can use the engagement details to identify their most interested prospects for prompt follow-up.

On lead, contact, and person account records, when the Activity Timeline shows email activity, sales reps can access the engagement details for each email. To view the engagements, click View full email and then hover over the **Last Opened Date** or click the email subject.

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Sales Cadence Steps (4)			
Step Title	Total Calls	All Emails Sent	All Emails Opened
Manual email send	0	4	13
Manual email send	0	3	9
Manual email send	0	2	1
Manual email send	0		
<a href="#">View All</a>			

On sales cadence records, the Sales Cadence Steps related list shows sales managers and reps how many times emails were opened for each email step.

## Sales Cadences: Branch on Email Reply, Remove Prospects Automatically, and Thread Emails

Sales managers can branch sales cadences based on email replies and remove prospects automatically based on specific criteria. And they can group emails from a sales cadence to a prospect into a thread.

### IN THIS SECTION:

#### [Branch Sales Cadences Based on Email Replies](#)

Sales managers can create sales cadences that lead prospects through different outreach steps depending on whether the prospect replies to an email. Sales reps can follow one path if the prospect replies, and another if they don't.

#### [Remove Prospects from Sales Cadences Automatically Based on Criteria You Select](#)

Use sales cadence rules to remove prospects if an email bounces, the prospect replies to an email, or a sales call has a specific outcome.

#### [Organize Sales Cadence Emails as a Thread](#)

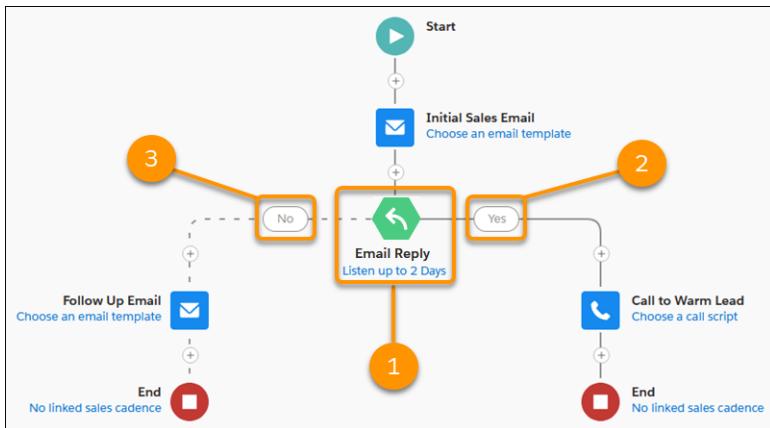
See sales cadence and prospect emails organized as a thread so sales reps can see more of their interactions with each prospect. Sales managers can group some or all emails from a sales cadence into a thread so reps can see all email activity in one place.

### Branch Sales Cadences Based on Email Replies

Sales managers can create sales cadences that lead prospects through different outreach steps depending on whether the prospect replies to an email. Sales reps can follow one path if the prospect replies, and another if they don't.

**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

**Why:** Listener branch steps let sales managers listen for an email reply, and how long to wait for a prospect to engage (1). Then they can choose what outreach reps to perform when a prospect engages (2) or doesn't (3). Listener branch steps ignore out-of-office and bounce replies.



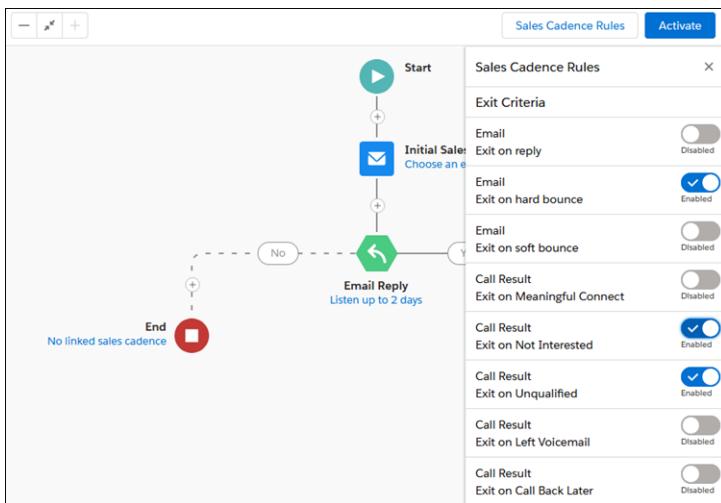
## Remove Prospects from Sales Cadences Automatically Based on Criteria You Select

Use sales cadence rules to remove prospects if an email bounces, the prospect replies to an email, or a sales call has a specific outcome.

**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

**Why:** Save sales reps time by automatically removing prospects from sales cadences based on the results of sales steps.

**How:** Sales Cadence Rules let sales managers specify exit criteria that apply to the entire sales cadence.



## Organize Sales Cadence Emails as a Thread

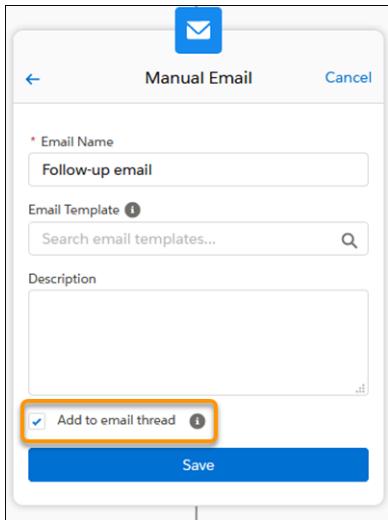
See sales cadence and prospect emails organized as a thread so sales reps can see more of their interactions with each prospect. Sales managers can group some or all emails from a sales cadence into a thread so reps can see all email activity in one place.

**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

**Why:** When sales managers create a sales cadence, they can set manual email steps to thread with emails from previous email steps. If the subsequent emails use a different template with a different email subject, the subject changes to match the previous email, preceded by "RE:".

Sales reps can complete threaded email steps from Lightning Experience, Outlook, or Gmail.

**How:** After the manual email step in a sales cadence, each subsequent manual email is set to thread with the previous email steps.



To start a new thread in the sales cadence, deselect **Add to email thread**. Each automated email step also starts a new thread.

 **Note:** When a sales cadence step specifies a threaded email, a Salesforce email address is added in the **BCC** field, except when emails are sent using Send Through Salesforce.

Sales reps can see the BCC address in their email application's Sent Items folder.

#### SEE ALSO:

[View Threaded Emails in a Single Page](#)

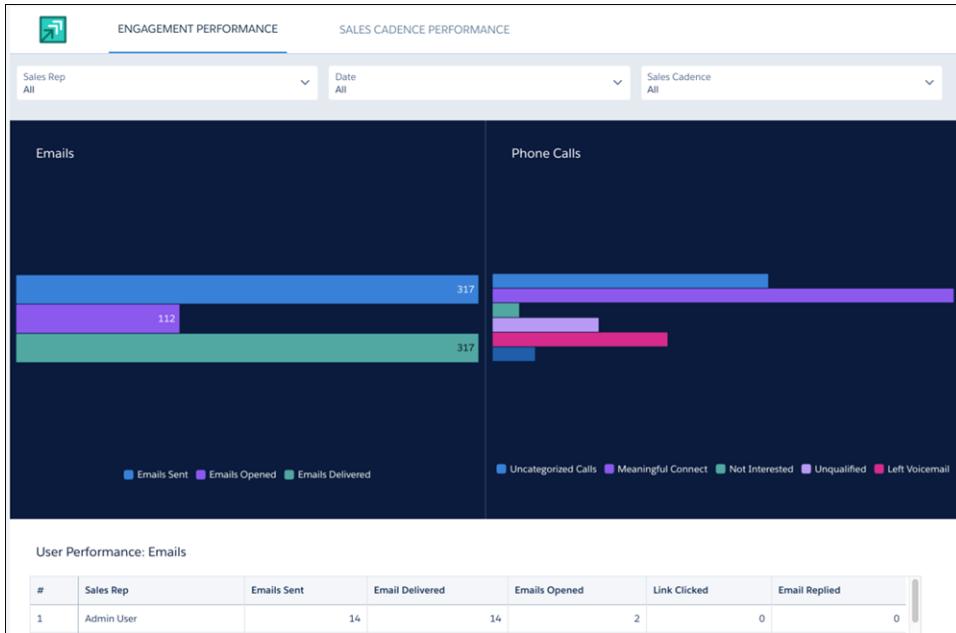
## See Sales Cadence and Rep Performance at a Glance (Generally Available)

Sales managers can use Einstein Analytics performance dashboards to quickly see customer engagement and how sales reps are doing. For example, managers can view how many sales cadences are in progress, with detailed call and email response statistics. And they can see how effectively sales reps work through their sales cadences.

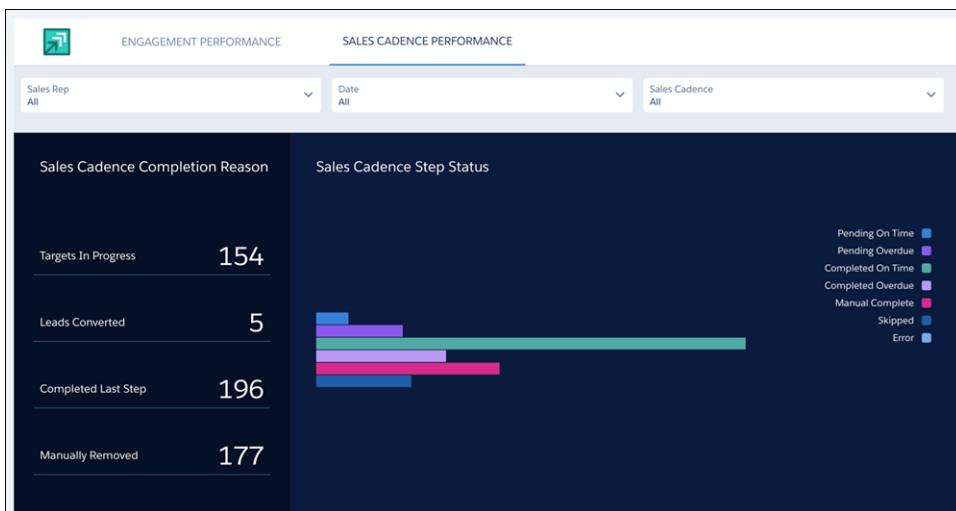
**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

**Who:** To view High Velocity Sales performance dashboards, you need the High Velocity Sales User or High Velocity Sales Cadence Creator permission.

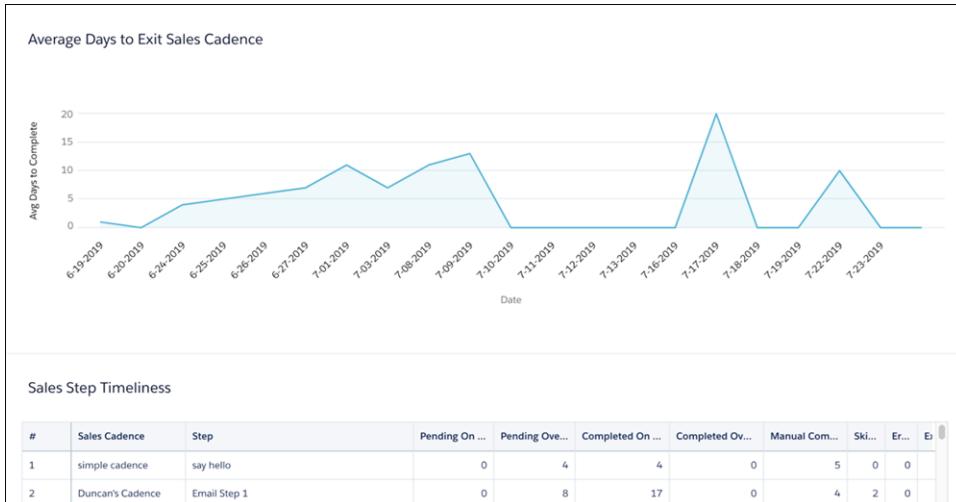
**Why:** With the Engagement Performance dashboard, managers see prospect engagement statistics for emails and phone calls, sorted by sales cadence, date range, sales rep, or a combination.



With the Sales Cadence Performance dashboard, managers see sales cadence effectiveness. Details include statistics on targets in progress, lead conversion, and sales cadence completions.

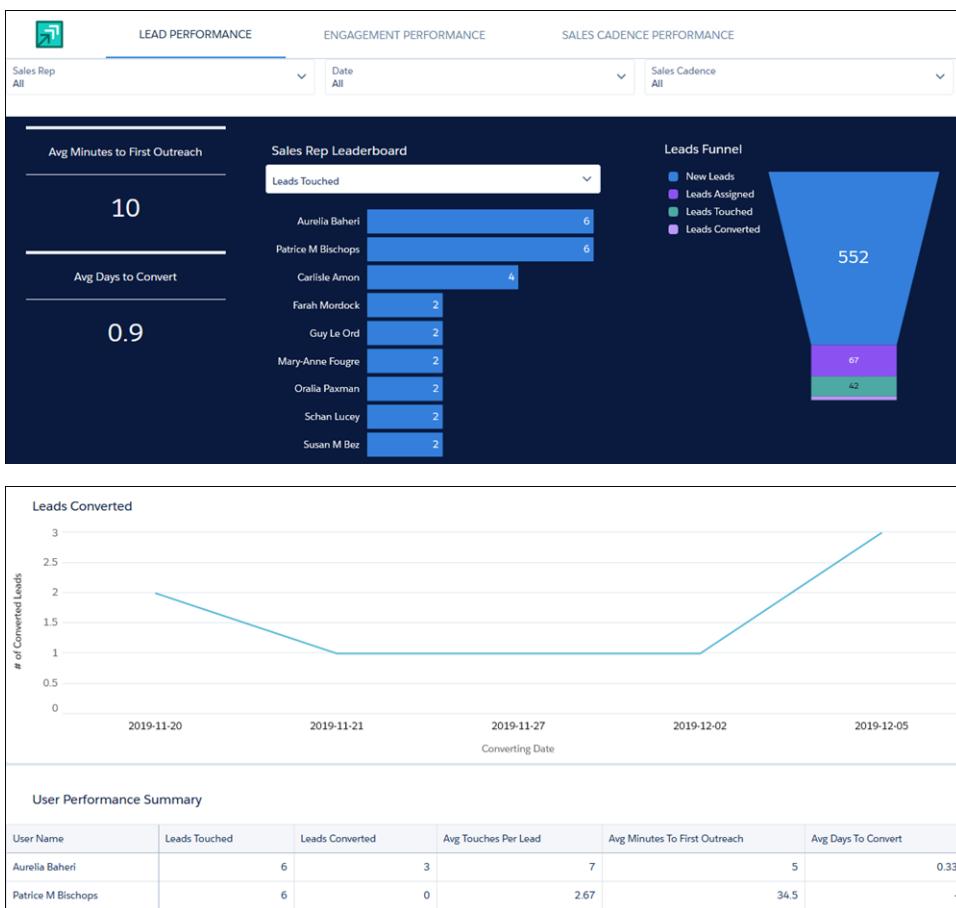


Managers can also see how long prospects take to move through sales cadences and whether reps are completing outreach steps on time.



The Lead Performance dashboard shows your sales managers how well their team is converting leads. They can see how fast sales reps act on new leads and the number of leads in each stage of the sales funnel. The dashboard also shows the average number of days to convert, the number of touches per lead, and the number of conversions. With this data, sales managers can see which reps need more coaching and which sales cadences need tuning.

Sales managers can filter lead statistics by sales rep, sales cadence, and date range.



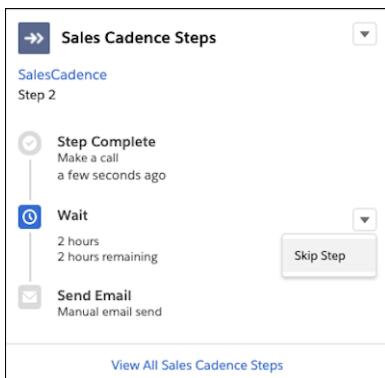
**How:** To enable the dashboards, map your Call Outcome values and turn on the High Velocity Sales Performance Analytics Application in High Velocity Sales Setup. To view the dashboards, sales managers choose High Velocity Sales Performance from the navigation menu in the High Velocity Sales app.

## Advance the Sales Cadence Without Waiting

Sales reps can skip a waiting period and move to the next step in the sales cadence. Previously, sales reps waited the full duration of the wait step. Now reps can accelerate the sales cadence and save time.

**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

**Why:** Sometimes reps want to move to the next step in a sales cadence without the wait. Skipping the waiting period allows reps to keep leads, contacts, and person accounts moving through the sales process without unnecessary delays.

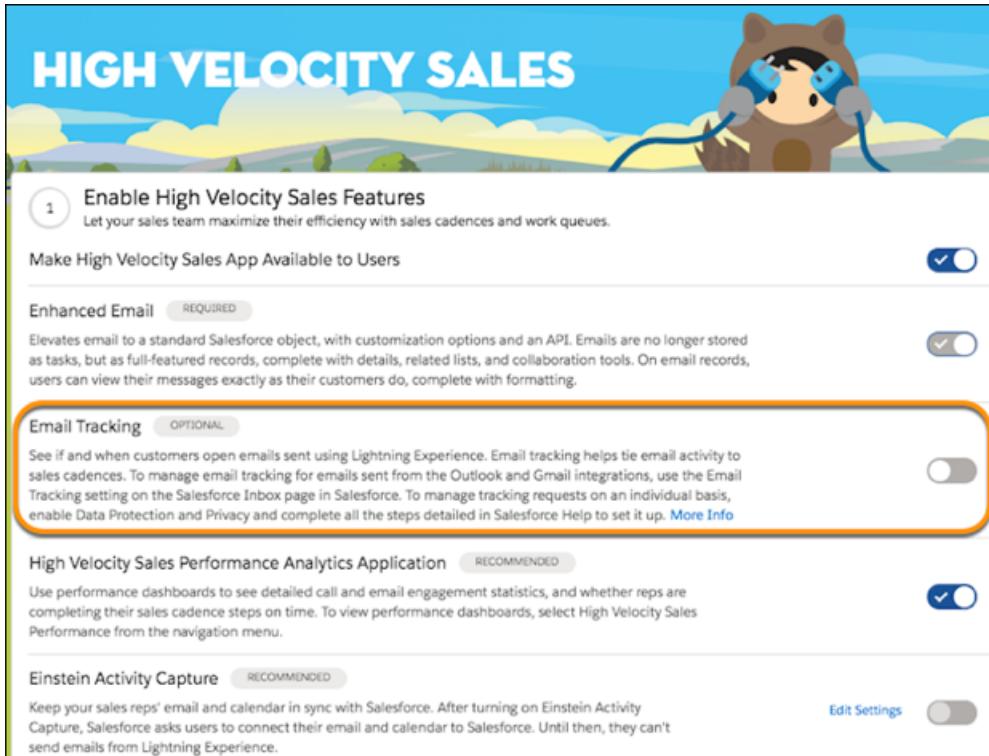


## Choose Whether to Track Emails in High Velocity Sales

Gathering information about interactions with sales reps' emails isn't always in compliance with your customers' privacy policies. Now email tracking is optional to give you more flexibility when you set up High Velocity Sales.

**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** From Setup, in the Quick Find box, enter *High Velocity Sales*, and then select **High Velocity Sales**. Use the Email Tracking option to turn email tracking on or off.



Turning email tracking off for High Velocity Sales also turns email tracking off for all emails sent from Lightning Experience. If your reps use the Outlook or Gmail integrations with Inbox, use the Email Tracking option in the Salesforce Inbox setup page to turn email tracking off in the integrations.

#### SEE ALSO:

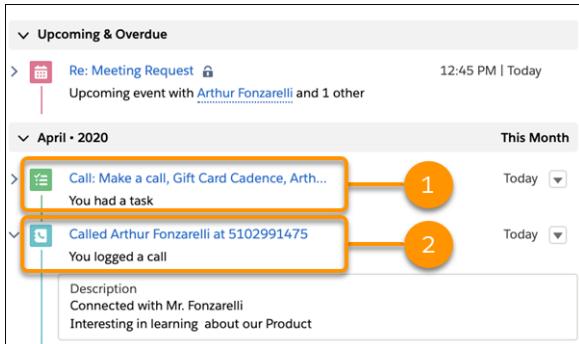
- [Turn Off Email Tracking in the Gmail Integration with One Salesforce Setting](#)
- [Turn Off Email Tracking in the Outlook Integration with One Salesforce Setting](#)
- [Salesforce Help: Set Up High Velocity Sales \(can be outdated or unavailable during release preview\)](#)

## Get a Cleaner View of Sales Cadence Tasks in the Activity Timeline

Now orgs that enable High Velocity Sales in Summer '20 or later show each sales cadence task only once in the Activity Timeline. In Salesforce orgs that turned on High Velocity Sales before Summer '20, the Activity Timeline on prospect records shows each sales cadence task twice. One showed the scheduled task, and the other showed the completed task. To see this cleaner timeline if you turned on High Velocity Sales before Summer '20, contact Salesforce.

**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

**Why:** This cleaner look makes it easier for sales reps to see what's coming up and what's completed.



The scheduled task (1) no longer appears once the completed task (2) appears.

## Salesforce Maps: COVID-19 Hotspot Monitoring, Territory Planning Scenarios, and Advanced Setup Improvements

Plan for sales and service responses when you visualize active COVID-19 cases. Show the impact of expanding or contracting territories. And enjoy a simplified, more intuitive setup experience for Salesforce Maps Advanced.

### IN THIS SECTION:

#### [Salesforce Maps: COVID-19 Hotspot Monitoring and Esri™ ArcGIS Living Atlas of the World](#)

Plan for business responses using an Esri ArcGIS Online layer for tracking active COVID-19 hotspots. Gain deeper insight on the geographical landscape and plan schedules that improve sales and service. And take advantage of expanded controls and options for permissions.

#### [Territory Planning: Scenario Comparisons, Collaboration, and Sharing and Permissions](#)

Consider the impact of expanding or contracting territory models. Collaborate with teammates on territory plans. And share and control access to data sets and alignments—all in Salesforce Maps.

#### [Advanced: Redesigned Setup Experience](#)

Enjoy a simplified and more intuitive setup experience with Salesforce Maps Advanced. A streamlined process and new prepopulated sample values help you deliver important functionality to your teams in less time.

## Salesforce Maps: COVID-19 Hotspot Monitoring and Esri™ ArcGIS Living Atlas of the World

Plan for business responses using an Esri ArcGIS Online layer for tracking active COVID-19 hotspots. Gain deeper insight on the geographical landscape and plan schedules that improve sales and service. And take advantage of expanded controls and options for permissions.

### IN THIS SECTION:

#### [Monitor COVID-19 Hotspots with an Esri™ ArcGIS Online Layer](#)

Plan for sales and service responses when you visualize active COVID-19 cases in Salesforce Maps.

#### [Plot Content from Esri™ ArcGIS Living Atlas of the World](#)

Give your reps desktop access to the foremost collection of publicly available geographic content from around the world—directly in Salesforce Maps.

### [Get a Better Handle on Permissions and Your Reps' Settings](#)

Reduce the burden for your reps' setup requirements and manage more of their Salesforce Maps settings for them in permission groups. A reorganized Permission Groups page and newly added permissions give you better control, so that your teams can focus on their jobs. You determine whether your teams can override the settings that you implement.

### [See Layers Instead of Folders on Mobile Devices](#)

Plotting layers from mobile devices is more efficient now than ever with two new views. Your reps can see layers that they have access to and plot them with fewer clicks.

### [Map New Shape Layers](#)

Discover the new shape layers available after Spring '20 in Salesforce Maps.

## Monitor COVID-19 Hotspots with an Esri™ ArcGIS Online Layer

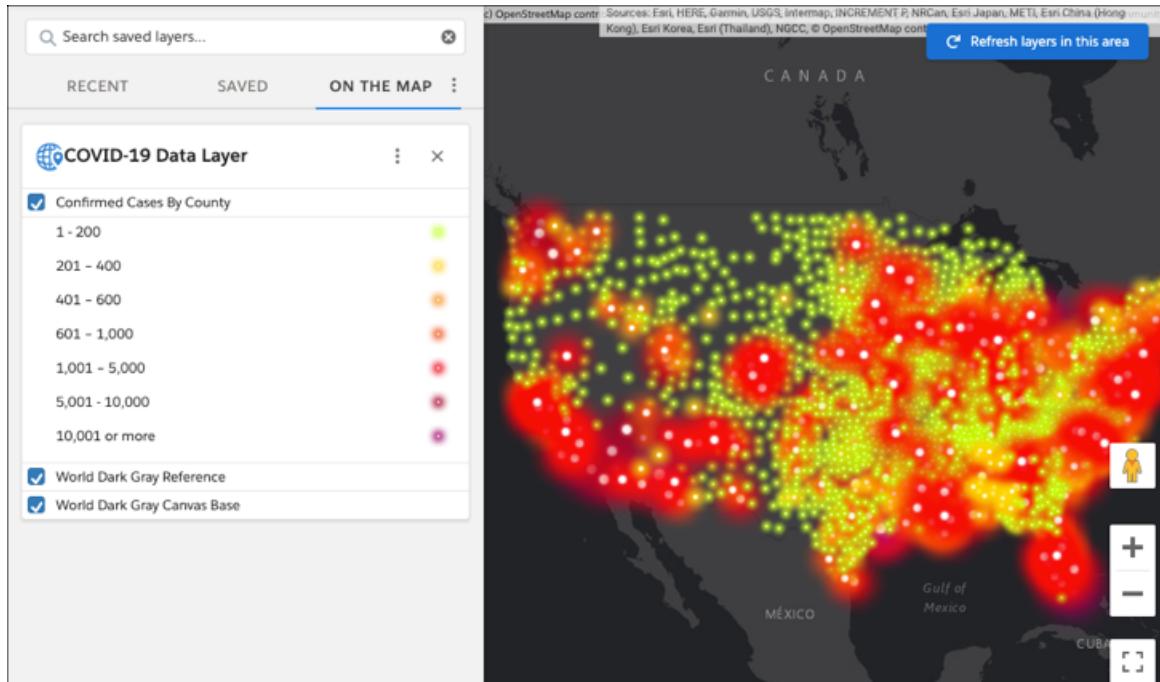
Plan for sales and service responses when you visualize active COVID-19 cases in Salesforce Maps.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Admins set up an ArcGIS Online layer, which lets field reps plot on their maps to make informed decisions about schedule planning.

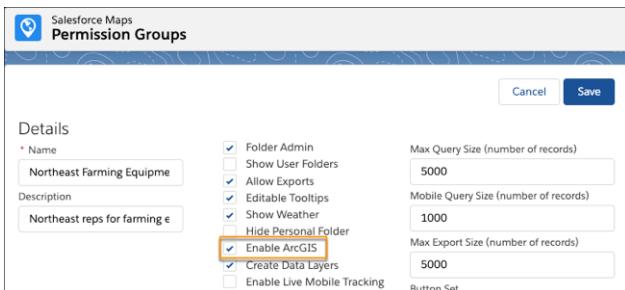
**Why:** To plan schedules thoughtfully with safety and empathy top-of-mind, admins can set up a data layer that helps their teams:

- Identify areas with slowing outbreak trends to better determine safe zones for field re-entry.
- Determine the ideal headcount based on the overall health of the market.
- Rebalance territories using current headcount.
- Find new or previously undiscovered opportunities in their territories while in field-recovery mode.



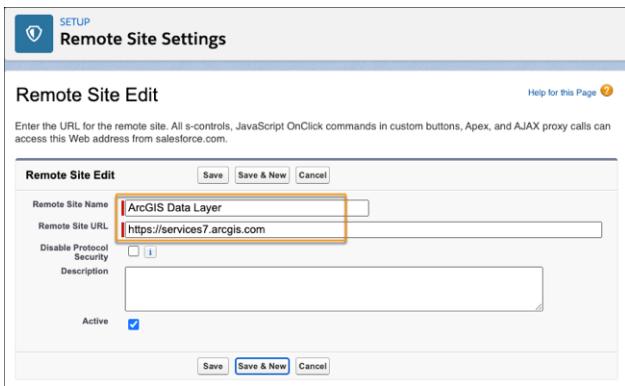
**How:** Set up Salesforce Maps for ArcGIS and two remote sites before your reps can plot the ArcGIS Online layer.

1. For each permission group that you want to add the layer, select **Enable ArcGIS**.

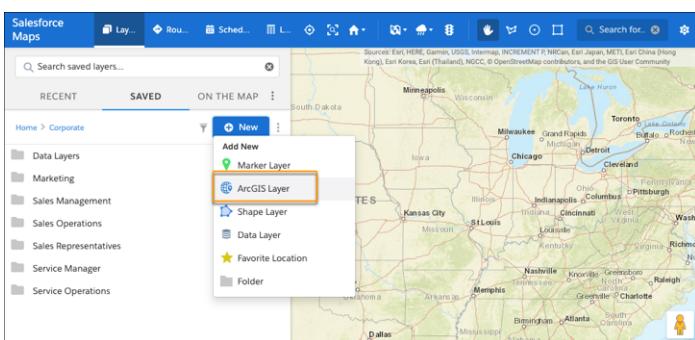


2. In Salesforce Setup, enter *Remote Site Settings* in the Quick Find box, then select **Remote Site Settings**. Click **New Remote Site**.
3. Give the remote site a name of your choice. Enter the following URL, then click **Save & New**.

<https://services7.arcgis.com>

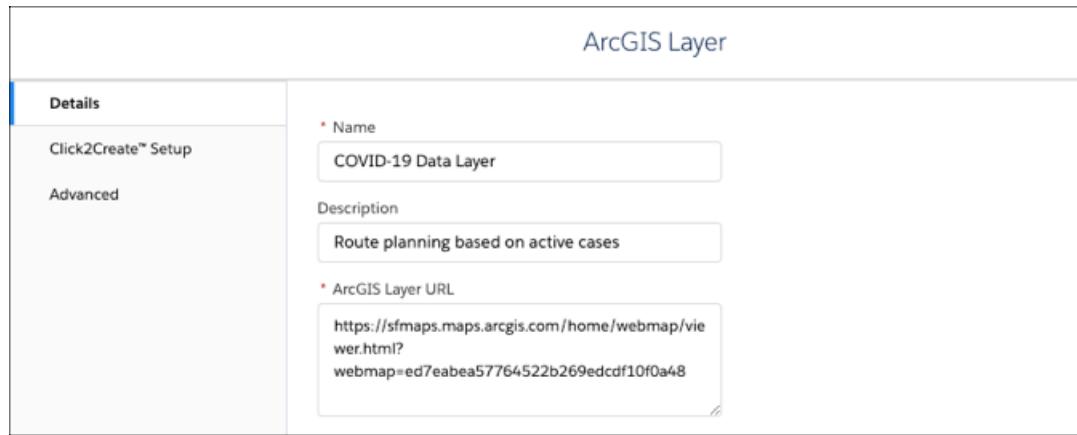


4. Give the remote site a name of your choice. Enter the following URL, then save your changes.
- <https://services.arcgisonline.com>
5. To create the ArcGIS Online layer in Salesforce Maps, select **Layers > Saved**. Then select the folder where you want to store the data layer.
  6. Click **New > ArcGIS Layer**.



7. Give the ArcGIS Online layer a name, then enter this URL.

<https://sfmaps.maps.arcgis.com/home/webmap/viewer.html?webmap=ed7eabea57764522b269edcdf10f0a48>



Now your reps can plot the layer onto the map.

## Plot Content from Esri™ ArcGIS Living Atlas of the World

Give your reps desktop access to the foremost collection of publicly available geographic content from around the world—directly in Salesforce Maps.

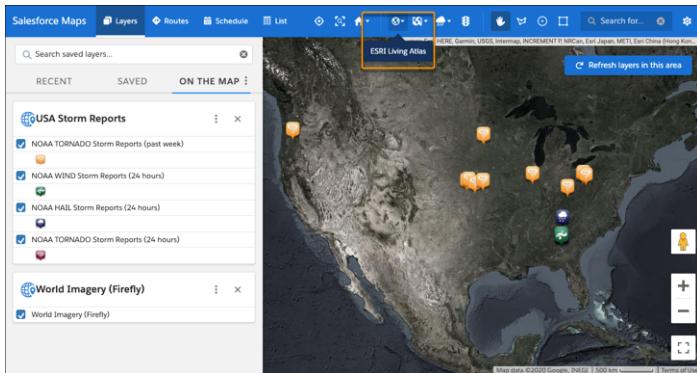
**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Reps can plot publicly available content from ArcGIS Living Atlas of the World, regardless of whether they ever subscribed to Esri products and services.

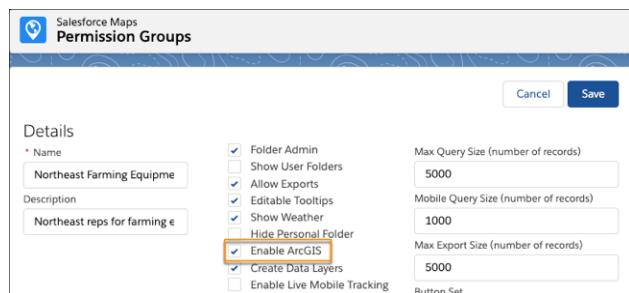
**Why:** To gain deeper insight on the geographical landscape and plan schedules that improve sales and service, reps can now plot these layers on their maps.

Layer	It's great, because it...
World Imagery (Clarity)	Presents Esri's most recent, high-quality imagery available. And it helps reps analyze geographical locations using high-quality images.
World Imagery (Firefly)	Includes a neutral-imagery basemap with desaturated colors, which helps when your reps overlay it with other brightly styled layers. Ultimately, this layer helps them better visualize map content.
USA Storm Reports	Contains continuously updated US tornado, wind storm, and hail storm reports. It helps your reps visualize potential weather hazards near their routes and schedules.
World Time Zones	Provides time zones for countries and the cities within them. It doesn't show daylight savings time.

After you enable ArcGIS in your permission groups, your teammates can plot any of the layers when they click **Esri Living Atlas** on the map.



**How:** Set up Salesforce Maps to include content from ArcGIS Living Atlas of the World. For each permission group that you want to expose content from ArcGIS Living Atlas of the World, select **Enable ArcGIS**.



## Get a Better Handle on Permissions and Your Reps' Settings

Reduce the burden for your reps' setup requirements and manage more of their Salesforce Maps settings for them in permission groups. A reorganized Permission Groups page and newly added permissions give you better control, so that your teams can focus on their jobs. You determine whether your teams can override the settings that you implement.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Admins control more settings can determine which permissions to lock. Teams get more options to tailor their experiences.

**Why:** When you control which settings your teams can change, you prevent inadvertent changes to permissions.

### New Settings in Permission Groups

- Simplify tab views for reps when you hide unused functions for routes or schedules.

Routes & Schedule		
Setting	Value	Allow User Override
Show Routes Tab	✓	
Show Schedule Tab	✓	
Default Transportation Mode	Driving	✓

- Set a geolocation zoom level for mobile devices.

Mobile		
Setting	Value	Allow User Override
Show Routes Tab	✓	
Show Schedule Tab	✓	
Maximum Records to Plot	1000	✓
Plot in Visible Area	✓	
Enable Live Mobile Tracking	○	
My Location Zoom Level	10	

- Plot default layers that load when your reps open the map.

Layers		
Setting	Value	Allow User Override
Maximum Records to Plot	5000	✓
Folder Administrator	○	✓
Show User Folders	○	✓
Show Personal Folders	○	✓
Enable ArcGIS Layers	✓	✓
Manage Data Layers	○	✓
Manage Territory Layers	○	✓
Plot on Load Layers	My Accounts	✓

- Determine the appearance of layers and folders for mobile devices when you select a hierarchical or flat folder structure.
- For data residency requirements, control where Salesforce Maps processes your data: North America or European Union.

Desktop and Mobile		
General		
Setting	Value	Allow User Override
Default Units	Miles	✓
Default Basemap	ESRI Street	✓
Off-Platform Processing Location	North America	

Before you update this setting, confirm that all remote sites including sfmapsapi in the URL are set to Active. To confirm, from Setup, enter *Remote Site Settings* in the Quick Find box, and then select **Remote Site Settings**.

### User Settings Now Available in Permission Groups

In this section...	We added...
General	Default Units
Layers	<ul style="list-style-type: none"> <li>Default Proximity Type</li> <li>Default Proximity Radius Distance</li> <li>Invert Proximity</li> </ul>
Routes & Schedules	<ul style="list-style-type: none"> <li>Default Transportation Mode</li> <li>Optimization Method</li> <li>Allow Duplicate Stops/Events</li> <li>Default Event Duration</li> <li>Default Route Type</li> <li>Default Start Location</li> </ul>

In this section...	We added...
	<ul style="list-style-type: none"> <li>Default End Location</li> <li>Shift Times</li> <li>Include Shift Break</li> <li>Break Time</li> </ul>
List	<ul style="list-style-type: none"> <li>Maximum Records on Page</li> <li>Default Column Visibility and Order</li> </ul>
Mobile	<ul style="list-style-type: none"> <li>Maximum Records to Plot</li> <li>Plot in Visible Area</li> </ul> <p>Previously named <i>Visible Area Enabled on Mobile by Default</i> in General Settings.</p> <ul style="list-style-type: none"> <li>Enable Live Mobile Tracking</li> <li>Show Last Session's Layers, Routes, and Schedules</li> <li>Schedule Based on Current Time and Location</li> <li>Map It Proximity</li> </ul>

### Easier-to-Understand Field Names in Permission Groups

In this section...	We changed the field name...	To...
General	Map Types	Default Basemap
Layers	Max Query Size	Maximum Records to Plot
	Radius + Units	Default Proximity Radius Distance
Routes & Schedules	Routing and Schedule Optimization	Optimization Method
Info Windows	Editable Tooltips	Edit Details Tab Fields
List	Default Page Size	Maximum Records on Pages
Mobile	Mobile State Remembrance	Show Last Session's Layers, Routes, and Schedules
	Mobile Query Size	Maximum Records to Plot
	Visible Area Enabled on Mobile by Default	Plot in Visible Area

### See Layers Instead of Folders on Mobile Devices

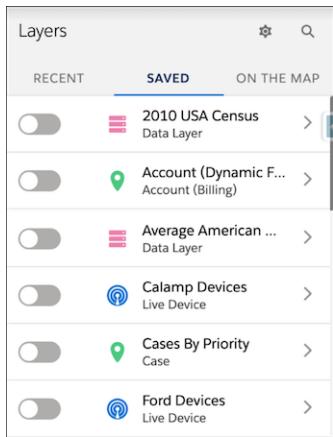
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**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

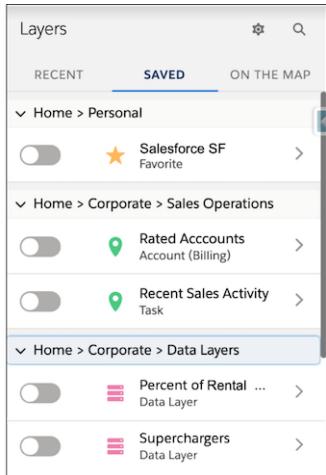
**Who:** Salesforce Maps Mobile is available to users with a Salesforce Maps license. Admins select a mobile folder display for users in permission groups.

**How:** From **Permission Groups > Mobile Folder Display**, admins can select from three views for how they want users to interact with layers and folders on their mobile devices.

- Flat alphabetically



- Flat organized by folder alphabetically



- Folder hierarchy (default)

## Map New Shape Layers

Discover the new shape layers available after Spring '20 in Salesforce Maps.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Reps can map specific areas using new geographic boundaries.

Shape Layer	Type of Boundary
Vietnam	Quan
Philippines	Postal Codes
Singapore	Postal Codes
Japan	Postal Codes
Indonesia	Postal Codes and Kota
India	Postal Codes
Malaysia	Districts, Postal Codes, and States

## Territory Planning: Scenario Comparisons, Collaboration, and Sharing and Permissions

Consider the impact of expanding or contracting territory models. Collaborate with teammates on territory plans. And share and control access to data sets and alignments—all in Salesforce Maps.

### IN THIS SECTION:

#### [Compare Territory Model Changes and Create Alignments with Scenario Planning](#)

Quickly visualize scenarios that show the impact of expanding or contracting the size of territory models or changing attribute targets. Compare each scenario to the current alignment and create an optimized alignment from the scenario you select.

#### [Collaborate in Territory Plans and Alignments](#)

When you work with your team on territory plans and alignments, now you can add comments and mention coworkers directly on the map. And you can place comments on specific areas to ask questions or give feedback.

#### [Control Sharing and Permissions](#)

Invite stakeholders to collaborate on data sets and alignments before publishing them to Salesforce Maps or Enterprise Territory Management. Apply the principle of least privilege when you restrict access to data sets and alignments among teams and teammates who don't require access to them.

#### [Require Approval for Updates to Alignments](#)

Grant authority to specific users so that they can approve changes to alignments in Salesforce Maps. Receive notifications when teammates attempt to publish updated alignments, and prevent unapproved changes from appearing in Salesforce.

#### [Create Data Sets with Less Hassle](#)

Forget about dealing with custom report types when you create data sets in Salesforce Maps. Instead, create data sets from standard Salesforce reports.

#### [Create Big Data Sets with Fewer Limits](#)

Import more records at one time. Instead of importing 50,000 records at a time using Salesforce reports, you can now import as many as 250,000 records at a time using SOQL queries. SOQL queries and standard reports can be used in a single data set, and now you can see the number of records being imported.

#### [Import Attributes to Data Sets and Supplement Alignments at Any Time](#)

Import unit attribute data into data sets from outside of Salesforce using a comma-separated values (CSV) file. You can import attributes when creating a data set or by editing a data set or alignment.

### [Use Expanded Publishing Options](#)

Publish alignments to Enterprise Territory Management or to Salesforce Maps with more control over important options. For example, instead of publishing a whole alignment, you can now select what you publish, such as your current focus. Save on storage and duplication by overwriting layers and rules. Assign multiple Salesforce users to territories so you can see who's responsible for selected territories.

### [Publish the Map and Its Legend to PDF \(Generally Available\)](#)

Create PDF files for specified layers of an alignment, individual territories, or your current focus.

## Compare Territory Model Changes and Create Alignments with Scenario Planning

Quickly visualize scenarios that show the impact of expanding or contracting the size of territory models or changing attribute targets. Compare each scenario to the current alignment and create an optimized alignment from the scenario you select.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

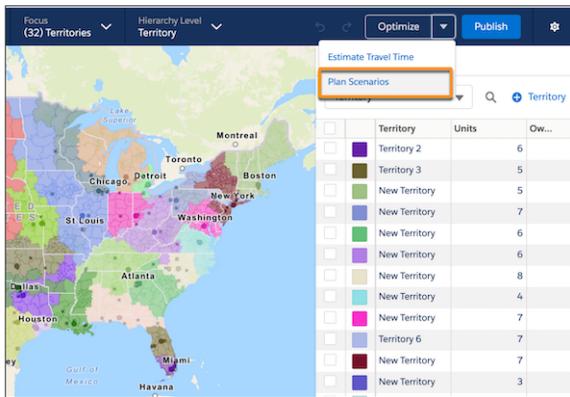
**Who:** Territory Planning is available to users with Salesforce Maps and Territory Planning licenses, and either the Salesforce Maps Admin or Salesforce Maps Territory Planning permission set.

**Why:** Users want to make informed decisions when changing their territories. Scenario Planning lets users forecast alignments to determine, for example:

- Whether new territories are achievable based on a percentage increase or decrease in field team size.
- How many territories are necessary to achieve a specific amount of managed revenue per territory.
- Growth and field strategies that meet business needs.

### How:

1. In Territory Planning, click **Optimize** and select **Plan Scenarios**.



2. Add scenarios, select the attributes you want to adjust, and enter values. Scenario Planning calculates values of other attributes. You then determine whether to create an alignment based on a specific scenario. Select a scenario and click **Next Step**.

The screenshot shows a table comparing four scenarios based on territory count and revenue. The columns are: Attribute, Current # of Territories (8), Scenario 1 # of Territories (6), Scenario 2 # of Territories (10), and % Change (75% and 125%). The table includes summary rows for average accounts, revenue, quota percentage, and annual revenue.

Attribute	Current # of Territories	Scenario 1 # of Territories	Scenario 2 # of Territories	
Avg. Accounts	522	695	417	+174
Avg. Revenue	\$78,601,956	\$104,802,607 +26,200,652	\$62,881,564	15,720,391 -104
Avg. Quota %	105	140	84	+35 -21
Avg. Annual Revenue	\$78,601,956	\$104,802,607 +26,200,652	\$62,881,564	15,720,391

**Add Scenarios**  
Add a new scenario to compare to your current Alignment. Then create it!

**Next Step**

- Let Scenario Planning distribute territories equally for you, or adjust them yourself.

The screenshot shows a table mapping territory names to their old and new counts under two scenarios. The 'Equitable' tab is selected. The target territory count is set to 10.

Territory Name	Old Territory Count	New Territory Count	
District 1	2	3	+1
District 2	2	3	+1
District 3	2	2	+0
District 4	2	2	+0
<b>Target Territory Count: 10</b>	<b>8</b>	<b>10 ✓</b>	

**Previous** **Create New Alignment**

- Create your alignment.

## Collaborate in Territory Plans and Alignments

When you work with your team on territory plans and alignments, now you can add comments and mention coworkers directly on the map. And you can place comments on specific areas to ask questions or give feedback.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Territory Planning is available to users with Salesforce Maps and Territory Planning licenses, and either the Salesforce Maps Admin or Salesforce Maps Territory Planning permission set.

**Why:** When reps collaborate in Territory Planning, they can:

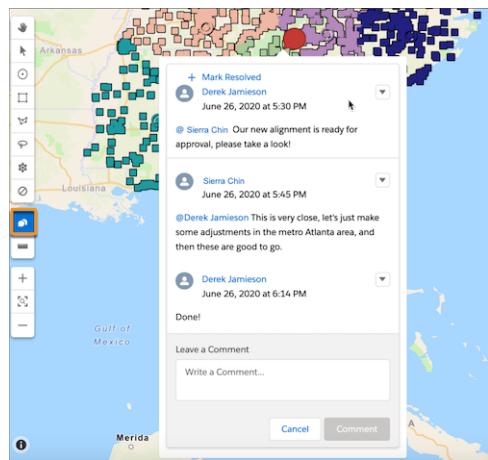
- Have conversations with multiple contributors about a plan or alignment without leaving Territory Planning.
- Control when to see and hide comments on the map.
- Provide feedback, even as a view-only user.
- Interact with comments on the map, on the Comments tab, or in their Chatter feed.
- Reply directly to comments from other users, mark comment threads as resolved, or hide them when done.

**How:**

- From Setup, enter *Feed Tracking* in the Quick Find box, and then select **Feed Tracking**. Enable feed tracking for:

- **Territory Planning Alignment**
- **Territory Planning Data Set**

2. From Territory Planning, add comments on the map by clicking .



#### SEE ALSO:

[Customize Chatter Feed Tracking](#)

## Control Sharing and Permissions

Invite stakeholders to collaborate on data sets and alignments before publishing them to Salesforce Maps or Enterprise Territory Management. Apply the principle of least privilege when you restrict access to data sets and alignments among teams and teammates who don't require access to them.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Territory Planning is available to users with Salesforce Maps and Territory Planning licenses, and either the Salesforce Maps Admin or Salesforce Maps Territory Planning permission set.

**Why:** To share and control who can view and modify data sets and alignments, their creators can now:

- Invite others to gather feedback before publishing.
- Hide data sets and alignments altogether.
- Restrict others' access. The access that creators apply to data sets also applies to their alignments.
- Transfer ownership. Keep in mind that new owners can restrict the creators' access.

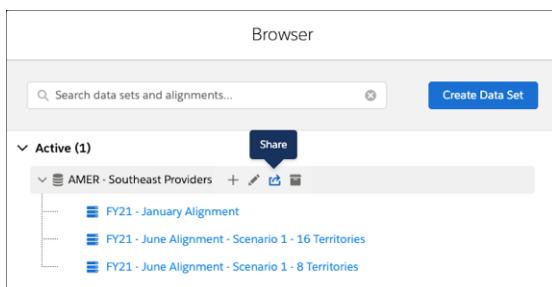
Depending on whether you already established data sets and alignments, learn what's necessary to grant or restrict the access you intend.

<b>For data sets and alignments established...</b>	<b>It's good for you to know that other Territory Planning users...</b>
Before Summer '20	Can access and edit them. So if you want to restrict access to your data sets and alignments, disable the sharable link. For anyone whom you want to grant access, add those people to your permission controls.

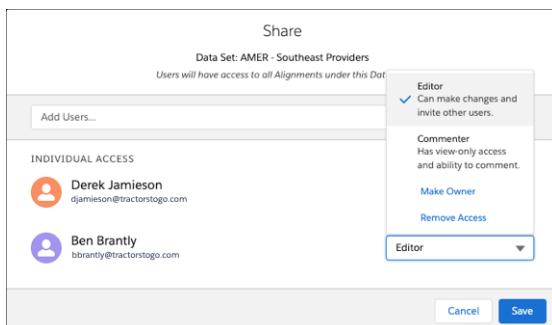
<b>For data sets and alignments established...</b>	<b>It's good for you to know that other Territory Planning users...</b>
During or after Summer '20	Can't access them. So if you want to grant access to your data sets and alignments, add those people to your permission controls.

**How:** It's easy to invite others for gathering feedback and restricting access.

1. From Setup, enter *Feed Tracking* in the Quick Find box, and then select **Feed Tracking**. Enable feed tracking for:
  - **Territory Planning Alignment**
  - **Territory Planning Data Set**
2. In Territory Planning, scroll to your data set or alignment, and then hover over and click **Share**.



3. Add or select users, then select the access that you want to grant.



#### SEE ALSO:

[Customize Chatter Feed Tracking](#)

## Require Approval for Updates to Alignments

Grant authority to specific users so that they can approve changes to alignments in Salesforce Maps. Receive notifications when teammates attempt to publish updated alignments, and prevent unapproved changes from appearing in Salesforce.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

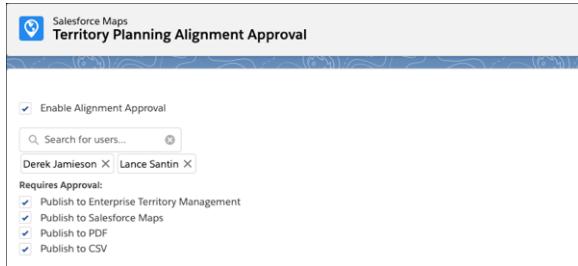
**Who:** Territory Planning is available to users with Salesforce Maps and Territory Planning licenses, and either the Salesforce Maps Admin or Salesforce Maps Territory Planning permission set.

**Why:** To prevent accidental loss of alignment details, admins can now:

- Assign specific teammates to approve changes to alignments.
- Require others to request approval before they can publish an alignment.
- Let users add comments to alignments that are pending approval, but make no other changes to them.
- Set up the process to tell teammates who can approve changes about any pending approval requests.
- Give users who can approve changes the authority to provide feedback about, grant, and deny requests.
- Receive advance notice when someone attempts to publish alignments. You can then prevent updates from appearing in Salesforce and save snapshots of those alignments.

**How:** It's easy to require approval and gather feedback for updated alignments.

1. From Setup, enter *Feed Tracking* in the Quick Find box, and then select **Feed Tracking**. Enable feed tracking for:
  - **Territory Planning Alignment**
  - **Territory Planning Data Set**
2. From Setup, enter *Installed Packages* in the Quick Find box, and then select **Installed Packages**.
3. Click **Configure** next to the Salesforce Maps package.
4. Under Territory Planning, click **Alignment Approval**, and then click **Enable Alignment Approval**.
5. To add a user who you want to grant the authority to approve changes to alignments, enter the name, and then select it. Repeat this step for other users of your choice.



6. Select options that require approval from the users you added in the previous step.

#### SEE ALSO:

[Customize Chatter Feed Tracking](#)

## Create Data Sets with Less Hassle

Forget about dealing with custom report types when you create data sets in Salesforce Maps. Instead, create data sets from standard Salesforce reports.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Territory Planning is available to users with Salesforce Maps and Territory Planning licenses, and either the Salesforce Maps Admin or Salesforce Maps Territory Planning permission set.

**Why:** To simplify the process for creating data sets, you can now import standard Salesforce reports:

- Regardless of the placement of the record ID column in the reports.
- That include either user IDs or usernames, or even other fields.
- That include either standard addresses, or latitudes and longitudes.

**How:** The process for creating data sets using standard reports is similar to the process using custom report types, but with these minor differences.

1. In Territory Planning, create a data set. Then select a standard Salesforce report.

The screenshot shows the 'Create Data Set' interface. At the top, there's a note: 'Select the reports that will make up your data set. For example, for sales reps responsible for accounts, select an account-based report that includes fields that will help you determine territory assignment.' Below this is a search bar ('Search reports') and a link to 'Create Custom Query'. A table lists reports: 'AMER - Southeast Providers' is checked and highlighted with a red box; 'AMER - Southeast Providers - Original' and 'All Accounts' are also listed. The table columns are Report Name, Description, Folder, and Owner.

Report Name	Description	Folder	Owner
AMER - Southeast Providers		Public Reports	Maps
+ AMER - Southeast Providers - Original		Public Reports	Maps
+ All Accounts		Public Reports	Maps

2. Turn on **Import Object Fields**, and then select a unit assignment field, such as Account ID.

The screenshot shows the 'Create Data Set' interface at the configuration step for 'AMER - Southeast Providers'. It asks to specify attributes for territory assignment. There are two main sections: 'Unit Name (Ex. Top Accounts)' containing 'AMER - Southeast Providers' and 'Unit ID Field (Ex. Account ID)' containing 'Account ID'. Below these, under 'Unit Assignment Field (Ex. Territory Name, Territory ID, Owner Name, etc.)', 'Account ID' is selected and highlighted with a red box. The 'Import Object Fields' checkbox is also checked and highlighted with a red box. Further down, there are sections for 'Latitude Field' (containing 'Account.BillingLatitude') and 'Longitude Field' (containing 'Account.BillingLongitude').

## Create Big Data Sets with Fewer Limits

Import more records at one time. Instead of importing 50,000 records at a time using Salesforce reports, you can now import as many as 250,000 records at a time using SOQL queries. SOQL queries and standard reports can be used in a single data set, and now you can see the number of records being imported.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Territory Planning is available to users with Salesforce Maps and Territory Planning licenses, and either the Salesforce Maps Admin or Salesforce Maps Territory Planning permission set.

**Why:** Adding SOQL queries helps you plan and create data sets more easily because:

- Visible record count limitations help you choose the method that best fits your company's size and complexity.
- Importing more records at a time helps you plan for the larger segments of your company.
- Entering SOQL queries directly or by using a wizard makes the SOQL option available to users with different experience levels.

**How:** Enter a SOQL query while creating a data set.

1. In Territory Planning, click **Data Set > Create Data Set**, then click **Create Custom Query**.

The screenshot shows the 'Create Data Set' page. At the top, there's a note: 'Select the reports that will make up your data set. For example, for sales reps responsible for accounts, select an account-based report that includes fields that will help you determine territory assignment.' Below this is a search bar labeled 'Search reports' and a button labeled 'Create Custom Query' which is highlighted with a red box. At the bottom, it says '0 Report(s), 0 Queries Selected - 0 of 2500000 records'.

- Select the fields you want to add or modify, or enter the query directly.

The screenshot shows the 'SOQL Query Builder' interface. It has sections for 'Query Name' (set to 'Northwest Rentals'), 'Object' (set to 'Account'), and 'Fields' (listing Account ID, Account Name, Account Number, and Account Phone). There are also filter settings for 'Type' (Employees), 'Operator' (less than), and 'Value' (10000). A query editor at the bottom contains the SOQL query: 'SELECT Id, Name, AccountNumber, Industry, maps\_\_AssignmentRule\_\_c FROM Account'. Buttons for 'Test Query' and 'Save' are at the bottom.

- Test and save your query.

## Import Attributes to Data Sets and Supplement Alignments at Any Time

Import unit attribute data into data sets from outside of Salesforce using a comma-separated values (CSV) file. You can import attributes when creating a data set or by editing a data set or alignment.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Territory Planning is available to users with Salesforce Maps and Territory Planning licenses, and either the Salesforce Maps Admin or Salesforce Maps Territory Planning permission set.

**Why:** Bringing in data from other systems, such as enterprise resource planning (ERP) and point of sale (POS) systems, during and after data set creation helps you:

- Supplement your Salesforce records within Territory Planning.
- Conserve storage because you store the related data outside of Salesforce.
- Keep certain data private.

**How:** Import attributes from CSV files by either of these methods:

- While creating or editing a data set, click **Import from CSV**.

The screenshot shows the 'Create Data Set' page. At the top, 'Latitude Field' is set to 'Billing Latitude' and 'Longitude Field' is set to 'Billing Longitude'. Below this, the 'Attribute Fields' section lists various fields under 'Available': Account ID, Case Safe Id, Account Name, Account Owner: Full Name, Annual Revenue, Billing City, and Billing Latitude. Under 'Selected', there are no fields listed. A button labeled 'Import from CSV' is visible. At the bottom, there are 'Previous' and 'Finish' buttons.

- To update an alignment, go to **Settings > Attributes**, then click **Update from CSV** or **Add from CSV**.

The screenshot shows the 'Setup' interface with the 'Unit Attributes' tab selected. It includes sections for 'Areas', 'United States POSTAL CODE', and 'SMTP Accounts', each with an 'Update from CSV' or 'Add from CSV' button. The left sidebar has tabs for 'Legend' and 'Attributes', with 'Attributes' currently selected. At the bottom, there are 'Cancel' and 'Save' buttons.

## Use Expanded Publishing Options

Publish alignments to Enterprise Territory Management or to Salesforce Maps with more control over important options. For example, instead of publishing a whole alignment, you can now select what you publish, such as your current focus. Save on storage and duplication by overwriting layers and rules. Assign multiple Salesforce users to territories so you can see who's responsible for selected territories.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Territory Planning is available to users with Salesforce Maps and Territory Planning licenses, and either the Salesforce Maps Admin or Salesforce Maps Territory Planning permission set.

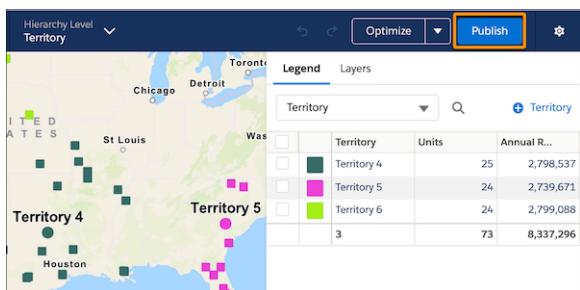
**Why:**

Publish To	Option	Why It Helps
Enterprise Territory Management	<ul style="list-style-type: none"> <li>Publish to and overwrite branches and child branches within Enterprise Territory Management.</li> <li>Select assignment rule fields and operators.</li> </ul>	<p>Enterprise Territory Management lets teams:</p> <ul style="list-style-type: none"> <li>Update specific parts of a territory model, for example, individual territories or individual users, so you can respond to changing market needs.</li> </ul>

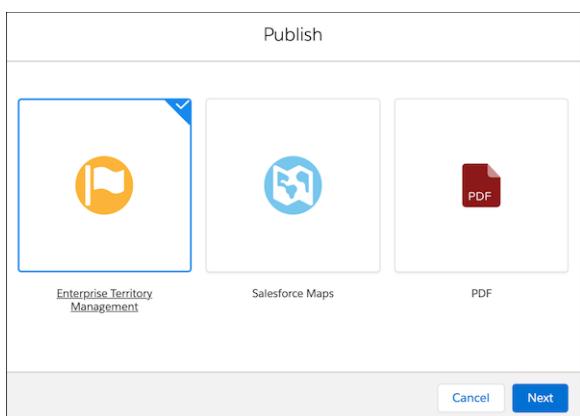
Publish To	Option	Why It Helps
	<ul style="list-style-type: none"> <li>• Publish multiple users to a single territory.</li> </ul>	<ul style="list-style-type: none"> <li>• Use assignment rules for new and updated accounts when they publish large territories.</li> <li>• Base assignment rules on fields and operators in Salesforce.</li> </ul>
Salesforce Maps	<ul style="list-style-type: none"> <li>• Publish to and overwrite folders and shape layers within Salesforce Maps.</li> </ul>	<p>Salesforce Maps lets teams:</p> <ul style="list-style-type: none"> <li>• Update specific parts of a territory model, for example, individual territories or individual users, to respond to changing market needs.</li> <li>• Find shape layers quickly and easily.</li> <li>• Use auto-assignment for new and updated accounts when they publish large territories.</li> <li>• Publish shape layers within each sales reps' folder in Salesforce Maps so that they can manage their territories independently.</li> </ul>

**How:** It's easy to have more control over publishing. Select the options during the publish process.

1. To access publishing options from the map, click **Publish**.



2. Select where to publish and click **Next**.



3. Select publish options and click **Publish**.

## Publish the Map and Its Legend to PDF (Generally Available)

Create PDF files for specified layers of an alignment, individual territories, or your current focus.

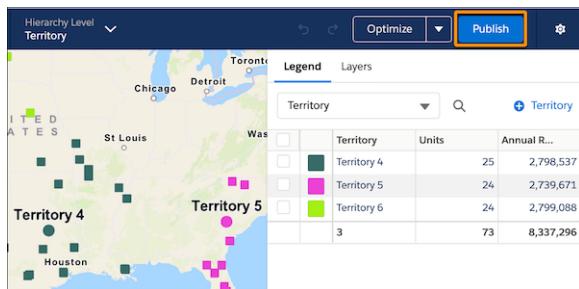
**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Territory Planning is available to users with Salesforce Maps and Territory Planning licenses, and either the Salesforce Maps Admin or Salesforce Maps Territory Planning permission set.

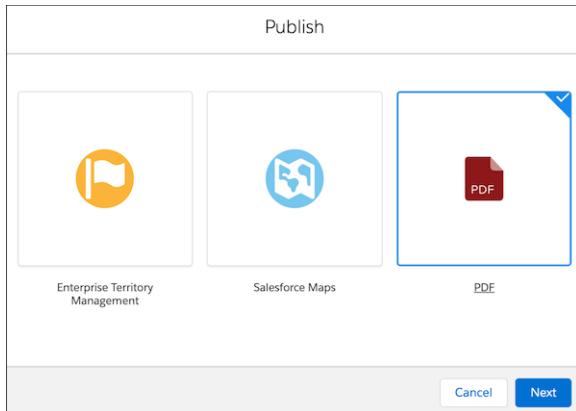
**Why:** It's easier to communicate territory assignments and get stakeholder feedback.

**How:**

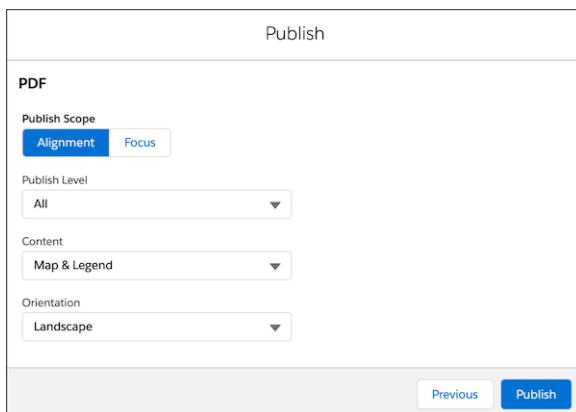
1. From the map, click **Publish**.



2. Select **PDF**.



- To create and download the PDF, select publish options and then click **Publish**.



## Advanced: Redesigned Setup Experience

Enjoy a simplified and more intuitive setup experience with Salesforce Maps Advanced. A streamlined process and new prepopulated sample values help you deliver important functionality to your teams in less time.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions where the Salesforce Maps Unified Package is installed.

**Who:** Salesforce Maps Advanced admins get access to the redesigned setup experience.

**Why:** The redesigned interface for Salesforce Maps Advanced helps you:

- Easily migrate from the legacy setup experience.
- Define locations and required visits within new data sets.
- Specify what constitutes completed visits, set windows for visit times, and get appointments to appear on your reps' calendars.
- Prioritize data sets using drag functionality.
- Efficiently manage visit plans and assign profiles and users to them.
- Better manage configurations for multiple teams.

## Sales Cloud Einstein: Opportunity Scoring Includes Consistent Labels and Field-Level Security, Improved Scoring Model for Leads and Opportunities, and New Account Insight

Opportunity Score is the field name everywhere scores appear. Field-level security controls which scoring factors sales reps see. Einstein Opportunity Scoring models now include products, quotes, and price books. Einstein Lead Scoring models now include leads' activity data. And Einstein Account Insights lets reps know when companies are cutting costs.

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### IN THIS SECTION:

#### [Enjoy Consistent Field Labels for Opportunity Scores](#)

The score field is now called Opportunity Score in all places. Previously, the field was called Score in some places and Opportunity Score in others.

#### [See Only the Scoring Factors That You Have Access To](#)

The contributing factors that sales reps see alongside opportunity scores are now dependent on the reps' field access. For example, reps who don't have access to the Amount field no longer see factors that are based on amount.

#### [Get Opportunity Scores Based on Products, Quotes, and Price Books](#)

When building the opportunity scoring model, Einstein now looks at the product, quote, and price book objects. For example, see how an open or expired quote, or a particular product or price book influence scores. With a more robust model, you get more accurate scores with more detailed factors.

#### [See Activity Data Reflected in Lead Scores](#)

Einstein Lead Scoring now includes activity data for leads when building a scoring model and calculating lead scores. More data means better scores.

#### [Know When Companies Are Cutting Costs](#)

To help your team stay aware of key business developments regarding customers, Einstein Account Insights now lets reps know when companies are cutting costs. As with other account insights, cost-cutting insights appear with articles from reputable, English-language news sources.

### SEE ALSO:

#### [Get AI-Enhanced Attribution Data on Your Campaign Records](#)

## Enjoy Consistent Field Labels for Opportunity Scores

The score field is now called Opportunity Score in all places. Previously, the field was called Score in some places and Opportunity Score in others.

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

**Who:** Einstein Opportunity Scoring is available to users with and without a Sales Cloud Einstein license. If you have questions about the requirements for Einstein Opportunity Scoring without a Sales Cloud Einstein license, talk to your Salesforce account executive.

**Why:** No matter where you see opportunity scores, such as opportunity list views (1) and opportunity records (2), the field is always labeled `Opportunity Score`.

The screenshot shows two parts of the Salesforce interface. The top part is a list of opportunities titled 'All Opportunities' with a sorting dropdown labeled 'Opportunity Score'. The bottom part is a detailed view of an opportunity for 'Acme - 1,200 Widgets' with a breakdown of factors like Value Prop..., Id. Decisio..., Perception ..., and Proposal/P... along with their respective scores.

Opportunity Name	Account Name	Opportunity Score
1 Acme - 1,200 Widgets	Acme	93
2 Media - 400 Widgets	Greendot Media	85
3 5,000 Astro Dolls	salesforce.com	74

## SEE ALSO:

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## See Only the Scoring Factors That You Have Access To

The contributing factors that sales reps see alongside opportunity scores are now dependent on the reps' field access. For example, reps who don't have access to the Amount field no longer see factors that are based on amount.

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

**Who:** Einstein Opportunity Scoring is available to users with and without a Sales Cloud Einstein license. If you have questions about the requirements for Einstein Opportunity Scoring without a Sales Cloud Einstein license, talk to your Salesforce account executive.

**Why:** When you set field-level security to limit users' access to fields, it's important that scores respect those field-level security settings. Keep in mind that scoring factors never show field values, so no one was ever at risk of seeing field values that they don't have access to.

## SEE ALSO:

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## Get Opportunity Scores Based on Products, Quotes, and Price Books

When building the opportunity scoring model, Einstein now looks at the product, quote, and price book objects. For example, see how an open or expired quote, or a particular product or price book influence scores. With a more robust model, you get more accurate scores with more detailed factors.

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

**When:** The key factors, which appear in the score component, are available starting June 1, 2020. The model factors used to build scoring models, which are used in reports and through API, are available with the Summer '20 release.

**Who:** Einstein Opportunity Scoring is available to users with and without a Sales Cloud Einstein license. If you have questions about the requirements for Einstein Opportunity Scoring without a Sales Cloud Einstein license, talk to your Salesforce account executive.

SEE ALSO:

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## See Activity Data Reflected in Lead Scores

Einstein Lead Scoring now includes activity data for leads when building a scoring model and calculating lead scores. More data means better scores.

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

SEE ALSO:

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## Know When Companies Are Cutting Costs

To help your team stay aware of key business developments regarding customers, Einstein Account Insights now lets reps know when companies are cutting costs. As with other account insights, cost-cutting insights appear with articles from reputable, English-language news sources.

**Where:** This change applies to Sales Cloud Einstein in Lightning Experience. Sales Cloud Einstein is available for an extra cost in Enterprise, Performance, and Unlimited editions.

**When:** This enhancement is available starting on June 1, 2020.

SEE ALSO:

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## Core Sales Features: Enhancements to Opportunities, Orders, and Enterprise Territory Management

Create more custom split types. With a B2B Commerce license, use orders in Salesforce while managing products and price books in an external platform. And get more control over opportunity access via territories.

IN THIS SECTION:

[Opportunities: More Splits, Alerts Setup, and Updated Labels](#)

Create more custom split types, and use Lightning Experience to set up automatic email notifications for opportunities. Opportunity scoring is now more clearly labeled in the UI.

[Orders: Enabling Orders Without Price Books and New Order Item Validations](#)

Enable orders that don't require price books, and review new validations for creating order items.

### [Enterprise Territory Management: More Options for Record Access and Object Labels](#)

Choose the access level that users get to the opportunities assigned to their territories' child territories. And customize the way Territory object labels appear in the user interface.

### [Other Changes in Core Sales Features](#)

Track products and pricing in one report. We improved territory-related labels on Account and Activities reports. We also improved some labels on the Setup page for Big Deal Alerts. Customizable Forecasting was retired. And the original territory management feature is scheduled for retirement in Summer '21.

## Opportunities: More Splits, Alerts Setup, and Updated Labels

Create more custom split types, and use Lightning Experience to set up automatic email notifications for opportunities. Opportunity scoring is now more clearly labeled in the UI.

### IN THIS SECTION:

#### [Use a Higher Split Limit to Make Opportunity Splits More Effective](#)

Create more granular splits to reflect reps' quotas. You can now use up to six custom opportunity splits, plus the default revenue and overlay splits. Previously, the limit was three custom splits.

#### [Set Up Alerts for Big Deals in Lightning Experience](#)

You can now use Lightning Experience to set up automatic email notifications for opportunities that reach a threshold of amount and probability. Previously, setting up Big Deal Alerts required you to switch to Salesforce Classic.

#### [Enjoy Consistent Field Labels for Opportunity Scores](#)

It's easier to review scores now that the name of the score field is consistently called Opportunity Score. Previously, the field was called Score in some places and Opportunity Score in others.

## Use a Higher Split Limit to Make Opportunity Splits More Effective

Create more granular splits to reflect reps' quotas. You can now use up to six custom opportunity splits, plus the default revenue and overlay splits. Previously, the limit was three custom splits.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Performance and Developer Editions and in Enterprise and Unlimited Editions with the Sales Cloud.

### SEE ALSO:

[IdeaExchange: Expand the Number of Opty Splits Available](#)

[Salesforce Help: Customize Opportunity Split Types \(can be outdated or unavailable during release preview\)](#)

## Set Up Alerts for Big Deals in Lightning Experience

You can now use Lightning Experience to set up automatic email notifications for opportunities that reach a threshold of amount and probability. Previously, setting up Big Deal Alerts required you to switch to Salesforce Classic.

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

**How:** In Setup, use the Quick Find box to find **Big Deal Alerts**. In the Sender Email field, enter your own Salesforce email address or a verified org-wide email. You must have the View All Data permission to set up alerts.

SEE ALSO:

[Salesforce Help: Set Up Big Deal Alerts for Opportunities](#) (can be outdated or unavailable during release preview)

## Enjoy Consistent Field Labels for Opportunity Scores

It's easier to review scores now that the name of the score field is consistently called Opportunity Score. Previously, the field was called Score in some places and Opportunity Score in others.

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

**Who:** Einstein Opportunity Scoring is available to users with and without a Sales Cloud Einstein license. If you have questions about the requirements for Einstein Opportunity Scoring without a Sales Cloud Einstein license, talk to your Salesforce account executive.

SEE ALSO:

[Sales Cloud Einstein: Opportunity Scoring Includes Consistent Labels and Field-Level Security, Improved Scoring Model for Leads and Opportunities, and New Account Insight](#)

## Orders: Enabling Orders Without Price Books and New Order Item Validations

Enable orders that don't require price books, and review new validations for creating order items.

IN THIS SECTION:

[New Validations for Creating Order Items](#)

We introduced some new validations for creating order items. Previously, if the user or process configured certain pairs of fields incorrectly, Salesforce identified the error without showing a message, then updated the values to match. Now, when you enter an incorrect configuration, Salesforce shows you the validation message, then allows you to enter the correct field values on your own.

[Enable Orders Without Price Books](#)

Salesforce now offers support for organizations that use orders in Salesforce while managing products and price books in an external platform. When you enable orders without price books, developers can create orders that don't require a value for the Price Book field, and orders that don't require a value for their Price Book Entry fields.

### New Validations for Creating Order Items

We introduced some new validations for creating order items. Previously, if the user or process configured certain pairs of fields incorrectly, Salesforce identified the error without showing a message, then updated the values to match. Now, when you enter an incorrect configuration, Salesforce shows you the validation message, then allows you to enter the correct field values on your own.

**Where:** This change applies to Salesforce Lightning Experience and Salesforce Classic.

**Why:**

**How:** When a user or process creates an order item, Salesforce requires the following configurations.

- The order item's price book entry and the order must have the same price books.
- The order item's price book entry and the order must have the same CurrencyIsoCode.
- The order item and its product must have the same price book entry.

- When the Optional Price book feature is active, the order item's list price must match the price book entry's list price. If the order item's list price is null, Salesforce populates it with the list price of the order item's price book entry.

For example, you have Product A with Price Book Entry A, and Product B with Price Book Entry B. You then order Product A, but accidentally assign Price Book Entry B to your new order item and attempt to save. Previously, Salesforce would change your order item to use Price Book Entry A without notifying you. Now, Salesforce shows a validation error message informing you that an order item and its product must use the same price book entry. You can then update your order item and try saving again.

## Enable Orders Without Price Books

Salesforce now offers support for organizations that use orders in Salesforce while managing products and price books in an external platform. When you enable orders without price books, developers can create orders that don't require a value for the Price Book field, and orders that don't require a value for their Price Book Entry fields.

**Where:** This change applies to Lightning Experience.

**Who:** This change is available for users with one of the following B2B licenses.

- B2B Commerce
- B2B Commerce Starter
- B2B Commerce Growth
- B2B Commerce Plus

**Why:** Previously, a validation required sales reps to define a price book when they first added order products to their order. This validation prevented organizations from using Salesforce order features if they managed products and price books in an external platform.

**How:** From Setup, in the Quick Find Box, enter *Order Settings*, and then select **Order Settings**. Select the Optional Price book setting and then save your changes.

## Enterprise Territory Management: More Options for Record Access and Object Labels

Choose the access level that users get to the opportunities assigned to their territories' child territories. And customize the way Territory object labels appear in the user interface.

### IN THIS SECTION:

#### [Get More Control Over Who Sees What](#)

Now you can choose the access level that users get to the opportunities assigned to their territories' child territories. For example, let's say you set the access level to view and edit. Now users can edit the opportunities assigned to their territories' child territories. Previously, view access was granted.

#### [Customize the Territory Object Labels](#)

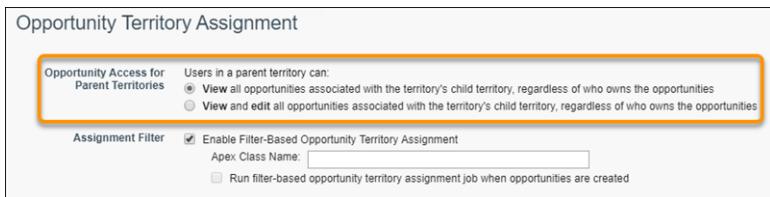
To reflect your company's naming conventions, you can now show custom Territory object labels to your users. For example, if your company calls sales territories "districts," change the Territories label to Districts. The custom labels replace instances of Territory and Territories on end-user pages. For example, the Assigned Territories related list on accounts becomes Assigned Districts.

### Get More Control Over Who Sees What

Now you can choose the access level that users get to the opportunities assigned to their territories' child territories. For example, let's say you set the access level to view and edit. Now users can edit the opportunities assigned to their territories' child territories. Previously, view access was granted.

**Where:** These changes apply to Lightning Experience and Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**How:** Set the opportunity access level for parent territories on the Territory Settings page in Setup, under Opportunity Territory Assignment.



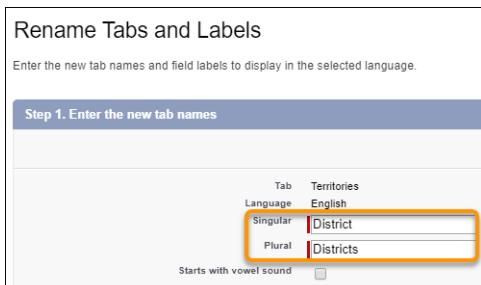
With API access, you can also set the opportunity access level by using the `t2ForecastAccessLevel` field in the `Territory2Settings` [Metadata API](#) type.

## Customize the Territory Object Labels

To reflect your company's naming conventions, you can now show custom Territory object labels to your users. For example, if your company calls sales territories "districts," change the Territories label to Districts. The custom labels replace instances of Territory and Territories on end-user pages. For example, the Assigned Territories related list on accounts becomes Assigned Districts.

**Where:** These changes apply to Lightning Experience and Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**How:** On the Rename Tabs and Labels page in Setup, enter a new name for the Territories tab.



SEE ALSO:

[Salesforce Help: Customize Enterprise Territory Management Labels](#) (can be outdated or unavailable during release preview)

[Labels Improved for Enterprise Territory Management Details](#)

## Other Changes in Core Sales Features

Track products and pricing in one report. We improved territory-related labels on Account and Activities reports. We also improved some labels on the Setup page for Big Deal Alerts. Customizable Forecasting was retired. And the original territory management feature is scheduled for retirement in Summer '21.

### IN THIS SECTION:

[Streamline Pricing Management with Product and Pricing Custom Report Types](#)

Create custom report types based on price book entries. Managing and updating pricing is easier and more efficient now because users can build reports based on products and pricing. When creating custom report types, you can use price book entries as a primary object. For custom report types that have product as the primary object, we added price book entries as a secondary object.

[Labels Improved for Enterprise Territory Management Details](#)

New labels make standard Account and Activities reports easier to use when you include information about territories. The new labels also appear in the object management field settings for territories and on the territory detail page in Setup.

### [Labels Improved on Big Deal Alerts Setup Page](#)

Some labels on the Setup page for Big Deal Alerts were updated to improve usability.

### [Customizable Forecasting Was Retired](#)

Customizable Forecasting was retired. Users can't access the Customizable Forecasting feature and its underlying data via the user interface or API. We encourage you to migrate to Collaborative Forecasts.

### [Original Territory Management Is Being Retired](#)

The original territory management feature is scheduled for retirement as of Summer '21. After the feature is retired, users can't access the original territory management feature and its underlying data. We encourage you to migrate to Enterprise Territory Management.

## Streamline Pricing Management with Product and Pricing Custom Report Types

Create custom report types based on price book entries. Managing and updating pricing is easier and more efficient now because users can build reports based on products and pricing. When creating custom report types, you can use price book entries as a primary object. For custom report types that have product as the primary object, we added price book entries as a secondary object.

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

**Why:** Not only can you get better product and pricing reports, but you also track and report on custom fields you added to price book entries.

## New Custom Report Type

[Help for this](#)

**Step 1. Define the Custom Report Type**

**Report Type Focus**

Specify what type of records (rows) will be the focus of reports generated by this report type.

Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object	--Select--
Identification	Opportunities Order Products Orders Party Consents Performance Cycles <b>Price Book Entries</b>
Report Type Label	Price Books
Report Type Name	Process Instance
Description	Product Items
Store in Category	Product Request Line Items
Deployment	Product Requests
A report type with deployment administrators and their deployment status	Products
Deployment Status	

**Step 2. Define the Report Type Fields**

**Report Type Fields**

Define the fields that will be used to filter and group the data in your report.

**Fields**

Primary Object: Price Book Entries

Report Type Label: Price Books

Report Type Name: Process Instance

Description: Product Items

Store in Category: Product Request Line Items

Deployment: Product Requests

Deployment Status: Products

**Next**

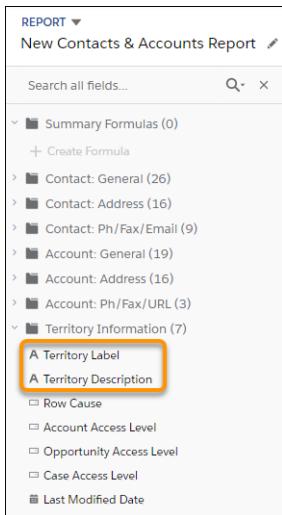
### Labels Improved for Enterprise Territory Management Details

New labels make standard Account and Activities reports easier to use when you include information about territories. The new labels also appear in the object management field settings for territories and on the territory detail page in Setup.

**Where:** These changes apply to Lightning Experience and Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**Why:** For standard Account and Activities reports, the report builder and output now show:

- Territory Label instead of Label.
- Territory Description instead of Description.



**How:** On the Rename Tabs and Labels page in Setup, you can replace Territory Label with a text of your choice. Your custom label appears in the report builder and output and in the Object Manager field settings for territories.

Tab	Territories
Language	English
Other Labels	
Territory Label	Singular District Label

#### SEE ALSO:

- [Salesforce Help: Customize Enterprise Territory Management Labels \(can be outdated or unavailable during release preview\)](#)
- [Customize the Territory Object Labels](#)

## Labels Improved on Big Deal Alerts Setup Page

Some labels on the Setup page for Big Deal Alerts were updated to improve usability.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

**How:** The following labels were updated to make it easier to create and update alerts.

- The field label Name is now Alert Name.
- The field label From Email Name is now Sender Name.
- The field label From Email Address is now Sender Email.
- The field label Use Page Layout and Language From is now User.
- The section heading Alert Settings is now Sender.

- The section headings are no longer numbered.

**SEE ALSO:**

[Salesforce Help: Set Up Big Deal Alerts for Opportunities](#) (can be outdated or unavailable during release preview)

## Customizable Forecasting Was Retired

Customizable Forecasting was retired. Users can't access the Customizable Forecasting feature and its underlying data via the user interface or API. We encourage you to migrate to Collaborative Forecasts.

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

**How:** Review our documentation and follow the instructions to set up Collaborative Forecasts.

If you use the original territory management feature, we encourage you to migrate to Enterprise Territory Management. The original territory management feature is scheduled for retirement in Summer '21 and isn't available for Collaborative Forecasts.

**SEE ALSO:**

[Knowledge article: Customizable Forecasting Will Be Retired in the Summer '20 Release](#)

[Original Territory Management Is Being Retired](#)

## Original Territory Management Is Being Retired

The original territory management feature is scheduled for retirement as of Summer '21. After the feature is retired, users can't access the original territory management feature and its underlying data. We encourage you to migrate to Enterprise Territory Management.

**Where:** This change applies to Salesforce Classic in Performance and Developer editions and in Enterprise and Unlimited editions with the Sales Cloud.

**How:** Review our documentation and follow the instructions for setting up Enterprise Territory Management. We also strongly recommend that you keep a comprehensive backup of all your territory data while you're still using the original territory management feature.

 **Note:** Customizable Forecasting was retired. Original territory management users can't access the Customizable Forecasting feature and its underlying data, but forecast managers retain access granted to opportunities and territories. If you were using Customizable Forecasting, we encourage you to migrate to Collaborative Forecasts.

**SEE ALSO:**

[Knowledge article: The Original Territory Management Module Will Be Retired in the Summer '21 Release](#)

[Customizable Forecasting Was Retired](#)

## Productivity Features: Email Threading, Tasks to Queues, New Email Insight, and Improved Kanban Views

Sales reps can enjoy more efficiency when selling. High Velocity Sales users can use threaded emails to see an entire conversation. Quick actions make it easier to assign tasks to queues. The Not Interested email insight lets reps know when a customer isn't interested in their sales pitch. And add company-specific tips and expertise to Kanban views.

**IN THIS SECTION:**[Email Experience: Email Threading, Email Tracking Updates, EAI, and Improved DKIM Keys](#)

Sales reps can use email threading on cadence step cards in High Velocity Sales. You can use High Velocity Sales while other emails in your org aren't tracked. Your sales reps can easily send and receive emails all over the world with EAI (Email Address Internationalization). We've improved email security with changes to DomainKeys Identified Mail (DKIM) keys.

[Email Templates: Update Visualforce Email Templates for Guest Users](#)

Protect access to your company's data when you send Visualforce Classic email templates to guest users. Review and update these templates so that they can still be used.

[Activities: Quick Actions for Task Queues and Mobile Reminders](#)

Your sales reps can set up quick actions to assign tasks to queues. They'll stay informed receiving their activity reminders as push and in-app notifications in the Salesforce mobile app.

[Einstein Activity Capture: New Email Insight, API Access, and Improved View for Threaded Emails](#)

Know when a customer isn't interested in your sales pitch with the Not Interested email insight. Add users to an Einstein Activity Capture configuration using SOAP API. See threaded emails along with the latest engagement information in a single page.

[Lightning Dialer: Customize the Consent Reminder for Recorded Calls](#)

Before recording a phone call, sales reps can see a prompt that reminds them to ask for consent to record the call. Salesforce admins can now customize the text that appears.

[Kanban: Key Fields and Guidance, and Confetti Celebrations](#)

Kanban has adopted two Path features that make life better for your reps. When you specify key fields and success guidance for a process in a path, kanban views also show the fields and guidance. And when you set up a confetti toss in a path, the kanban view for that object now tosses confetti, too.

[Salesforce Inbox Mobile: Smarter Selling from Your Inbox](#)

Salesforce Inbox integrates your email and calendar with Salesforce, so sales reps can manage their work sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at their desk.

## Email Experience: Email Threading, Email Tracking Updates, EAI, and Improved DKIM Keys

Sales reps can use email threading on cadence step cards in High Velocity Sales. You can use High Velocity Sales while other emails in your org aren't tracked. Your sales reps can easily send and receive emails all over the world with EAI (Email Address Internationalization). We've improved email security with changes to DomainKeys Identified Mail (DKIM) keys.

**IN THIS SECTION:**[Use Email Threading in Sales Cadence Emails](#)

Keep emails between sales reps and prospects organized with email threading. When sales managers group some or all sales cadence emails into a thread, reps can see all email activity in one place.

[Track Emails for Lightning Experience No Longer Disables High Velocity Sales](#)

When you turn off the Email Tracking option in Activity Settings, it now disables email tracking in Lightning Experience and only the email tracking feature in High Velocity Sales. Previously, turning off the setting also disabled all of High Velocity Sales.

[Connect Globally with Email Address Internationalization](#)

Connect with users across the globe with Email Address Internationalization (EAI). EAI allows non-Latin-based characters in email addresses when sending emails to and from Salesforce. We've supported these characters in the domain name (the part to the right of the @) for years. EAI now supports them in the local parts of email addresses (the part before the @).

### [Improve Email Security with Redesigned DKIM Keys \(Update, Enforced\)](#)

To address potential security vulnerabilities with DomainKeys Identified Mail (DKIM) keys, we improved the way they're created. You no longer have to work with public and private keys. And, because sharing keys can introduce security vulnerabilities, we removed the ability to import DKIM keys. Improve Email Security with Redesigned DKIM Keys was an update in Winter '19 and is enforced in Summer '20.

## Use Email Threading in Sales Cadence Emails

Keep emails between sales reps and prospects organized with email threading. When sales managers group some or all sales cadence emails into a thread, reps can see all email activity in one place.

**Where:** This change applies to High Velocity Sales in Lightning Experience. High Velocity Sales is available as an add-on in Enterprise, Performance, and Unlimited editions.

**Who:** Users with the Use Inbox user permission, available with a High Velocity Sales, Sales Cloud Einstein, or Inbox license.



**Note:** When a sales cadence step specifies a threaded email, a Salesforce email address is added in the **BCC** field, except when emails are sent using Send Through Salesforce.

Sales reps can see the BCC address in their email application's Sent Items folder.

### SEE ALSO:

[Organize Sales Cadence Emails as a Thread](#)

## Track Emails for Lightning Experience No Longer Disables High Velocity Sales

When you turn off the Email Tracking option in Activity Settings, it now disables email tracking in Lightning Experience and only the email tracking feature in High Velocity Sales. Previously, turning off the setting also disabled all of High Velocity Sales.

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

### SEE ALSO:

[Choose Whether to Track Emails in High Velocity Sales](#)

## Connect Globally with Email Address Internationalization

Connect with users across the globe with Email Address Internationalization (EAI). EAI allows non-Latin-based characters in email addresses when sending emails to and from Salesforce. We've supported these characters in the domain name (the part to the right of the @) for years. EAI now supports them in the local parts of email addresses (the part before the @).

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in all editions. EAI isn't supported in Pardot, Marketing Cloud, Einstein Activity Capture, or Salesforce Inbox.

**When:** This feature is available for activation in existing orgs in Summer '20. Orgs created in Summer '20 or later have EAI enabled by default.

**How:** Before enabling Email Address Internationalization, prepare your Salesforce org.

- Review the considerations, preparation steps, and how to enable EAI in Salesforce Help
- Ensure that UTF-8 support exists throughout the email's path
- Update your integrations to support Unicode characters
- Adopt the latest API version

- Ensure that all fields storing email addresses use the email data type

## SEE ALSO:

[Knowledge Article: Prepare for Salesforce Email Address Internationalization \(EAI\) Support](#)

[Salesforce Help: Email Address Internationalization \(EAI\) \(can be outdated or unavailable during release preview\)](#)

## Improve Email Security with Redesigned DKIM Keys (Update, Enforced)

To address potential security vulnerabilities with DomainKeys Identified Mail (DKIM) keys, we improved the way they're created. You no longer have to work with public and private keys. And, because sharing keys can introduce security vulnerabilities, we removed the ability to import DKIM keys. Improve Email Security with Redesigned DKIM Keys was an update in Winter '19 and is enforced in Summer '20.

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

 **Note:** Sound familiar? This update was first enforced in the Winter '20 release, but some Salesforce orgs didn't get the change. In Summer '20, we apply this update to those orgs.

**How:** Salesforce now publishes the TXT record containing your public key to DNS. We also added automatic key rotation to reduce the risk of your keys becoming compromised by a third party. Keys generated using the old method continue to work, but in Summer '20, when you generate new keys, you must use the more secure method.

## SEE ALSO:

[Winter '19 Release Notes: Improve Email Security with Redesigned DKIM Keys](#)

[Salesforce Help: Set Up Secure DKIM Keys \(can be outdated or unavailable during release preview\)](#)

[Release Updates \(Beta\)](#)

## Email Templates: Update Visualforce Email Templates for Guest Users

Protect access to your company's data when you send Visualforce Classic email templates to guest users. Review and update these templates so that they can still be used.

**Where:** This change applies to Salesforce orgs with active public communities, sites, and portals in Enterprise, Performance, Unlimited, and Developer editions.

**When:** This security policy was released in Spring '20 and was immediately enforced.

**Who:** This change applies to Visualforce email templates that target guest users in communities.

**How:** Add the `renderUsingSystemContextWithoutSharing="True"` attribute to every Visualforce email template.

 **Important:** Assess the impact of the guest security policy and, if necessary, update Visualforce email templates sent to guest users.

## SEE ALSO:

[Ensure Guest User Access to Emails Created with Visualforce Email Templates](#)

[Salesforce Help: Create Visualforce Email Templates in Salesforce Classic \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guest User Security Policies and Timelines \(can be outdated or unavailable during release preview\)](#)

## Activities: Quick Actions for Task Queues and Mobile Reminders

Your sales reps can set up quick actions to assign tasks to queues. They'll stay informed receiving their activity reminders as push and in-app notifications in the Salesforce mobile app.

### IN THIS SECTION:

#### [Use Quick Actions to Assign Tasks to Queues](#)

Your sales reps can save time when they collaborate on sales tasks. Now you can set up quick actions on record pages or as global actions so reps can assign tasks to queues more quickly.

#### [Send Mobile Activity Reminders \(Pilot\)](#)

Event and task reminders are now available as push and in-app notifications for the Salesforce mobile app. Previously, event and task reminders were only available on desktop.

## Use Quick Actions to Assign Tasks to Queues

Your sales reps can save time when they collaborate on sales tasks. Now you can set up quick actions on record pages or as global actions so reps can assign tasks to queues more quickly.

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

### SEE ALSO:

[Salesforce Help: Create Global Quick Actions](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create Object-Specific Quick Actions](#) (can be outdated or unavailable during release preview)

## Send Mobile Activity Reminders (Pilot)

Event and task reminders are now available as push and in-app notifications for the Salesforce mobile app. Previously, event and task reminders were only available on desktop.

**Where:** This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in all editions, except Database.com.



**Note:** We provide Mobile Activity Reminders to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Mobile Activity Reminders isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Mobile Activity Reminders in the [Lightning on Mobile Trailblazer Community](#).

### SEE ALSO:

[Keep Your Reps on Time and on Task with Mobile Activity Reminders \(Pilot\)](#)

## Einstein Activity Capture: New Email Insight, API Access, and Improved View for Threaded Emails

Know when a customer isn't interested in your sales pitch with the Not Interested email insight. Add users to an Einstein Activity Capture configuration using SOAP API. See threaded emails along with the latest engagement information in a single page.

## IN THIS SECTION:

### [Know When Customers Are Not Interested with New Email Insight](#)

The new Not Interested email insight lets you know without even opening the email when a customer prefers not to continue a sales conversation. Know which conversations to focus on to close deals. Einstein Email Insights shows the relevant sales context for emails associated with Salesforce records.

### [Add Users to an Einstein Activity Capture Configuration with SOAP API](#)

The new UserEmailCalendarSync object lets developers add users to an Einstein Activity Capture configuration. Configurations allow users' contacts and events to sync between Salesforce and their connected account. The API makes it easier to add many users to a configuration.

### [View Threaded Emails in a Single Page](#)

To stay connected to the conversation, sales reps want to see emails grouped in a single thread. Now reps see threaded emails plus the latest engagement information in a single page. Previously, reps viewed threaded emails from the activity timeline.

## Know When Customers Are Not Interested with New Email Insight

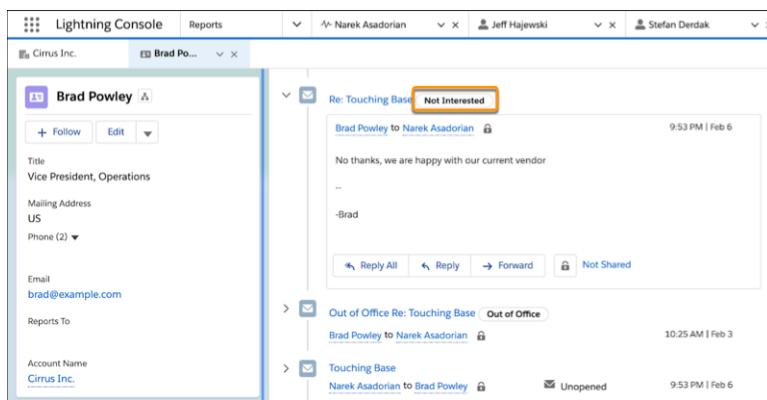
The new Not Interested email insight lets you know without even opening the email when a customer prefers not to continue a sales conversation. Know which conversations to focus on to close deals. Einstein Email Insights shows the relevant sales context for emails associated with Salesforce records.

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

**Who:** This feature is available to all Einstein Activity Capture users including users with an Inbox license.

### How:

Email Insights are available when you turn on Einstein Activity Capture. If you use Einstein Activity Capture through a Sales Cloud Einstein or Inbox license, Email Insights are on by default. View this insight in the email details, on the activity timeline, and in Salesforce Inbox mobile apps.



### SEE ALSO:

[Salesforce Help: Turn on Email Insights \(can be outdated or unavailable during release preview\)](#)

## Add Users to an Einstein Activity Capture Configuration with SOAP API

The new UserEmailCalendarSync object lets developers add users to an Einstein Activity Capture configuration. Configurations allow users' contacts and events to sync between Salesforce and their connected account. The API makes it easier to add many users to a configuration.

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

#### SEE ALSO:

[New and Changed Objects](#)

## View Threaded Emails in a Single Page

To stay connected to the conversation, sales reps want to see emails grouped in a single thread. Now reps see threaded emails plus the latest engagement information in a single page. Previously, reps viewed threaded emails from the activity timeline.

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

**Who:** All Einstein Activity users can see email threads in a single page. To see engagement details, reps must use High Velocity Sales or Inbox.

**Why:** By seeing email conversations in a single page, sales reps are better equipped to move sales forward. Email threads include emails captured by Einstein Activity Capture. Manually logged emails aren't included.

#### How:

From the activity timeline, click **View full email** (1). If you use High Velocity Sales or Inbox, you can also click an email-based alert from the My Feed tab (2).

High Velocity Sales and Inbox users can hover over the **Last opened date** (3) of an email to see full engagement details. The engagement details are for emails captured by Einstein Activity Capture. Engagement details for manually logged emails appear on a separate tab.

#### SEE ALSO:

- [See Real-Time Details of Prospects' Email Engagement](#)
- [Track Email Engagements Across Applications in the Outlook Integration](#)
- [Track Email Engagements Across Applications in the Gmail Integration](#)

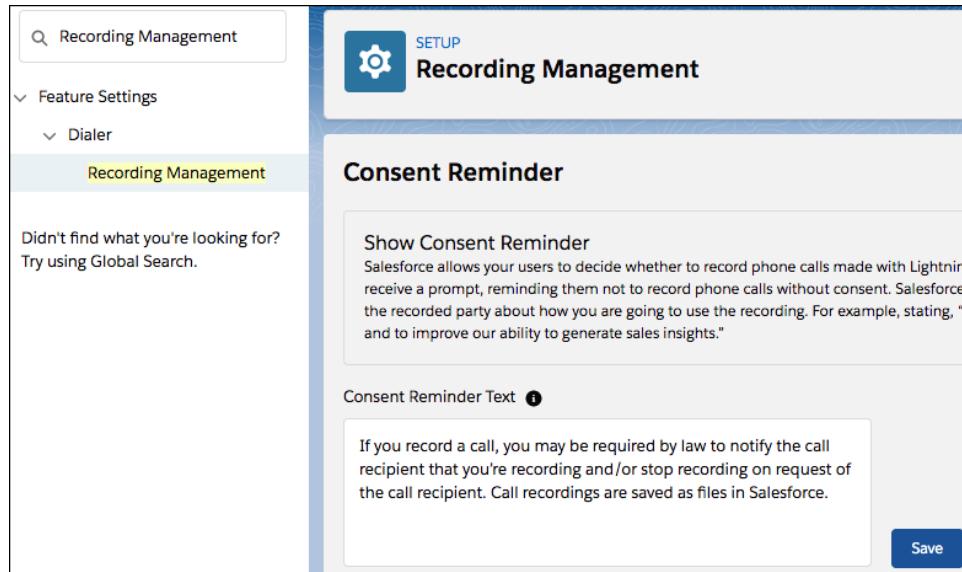
## Lightning Dialer: Customize the Consent Reminder for Recorded Calls

Before recording a phone call, sales reps can see a prompt that reminds them to ask for consent to record the call. Salesforce admins can now customize the text that appears.

 **Note:** For now, we support outgoing calls only to the United States and Canada.

**Where:** This change applies to Lightning Dialer in Lightning Experience. Lightning Dialer is available for an additional cost in Essentials, Professional, Enterprise, Performance, and Unlimited editions.

**Why:** Update the consent reminder to state what's important for your sales teams.



You can turn off the consent reminder if you like. We recommend that you update the text to match the recording laws applicable to your sales reps and prospects.

**How:** To use this feature, select **Recording Management** under the Dialer settings in Setup.

## Kanban: Key Fields and Guidance, and Confetti Celebrations

Kanban has adopted two Path features that make life better for your reps. When you specify key fields and success guidance for a process in a path, kanban views also show the fields and guidance. And when you set up a confetti toss in a path, the kanban view for that object now tosses confetti, too.

## IN THIS SECTION:

[Get Guidance on Your Company's Processes in Kanban Views](#)

Your users can now benefit from the same tips and expertise whether they use paths or a kanban view to work deals. When you use a path to specify key fields and guidance for a sales process or a project, corresponding kanban views now surface that information, too.

[Celebrate Milestones with Confetti in Kanban Views](#)

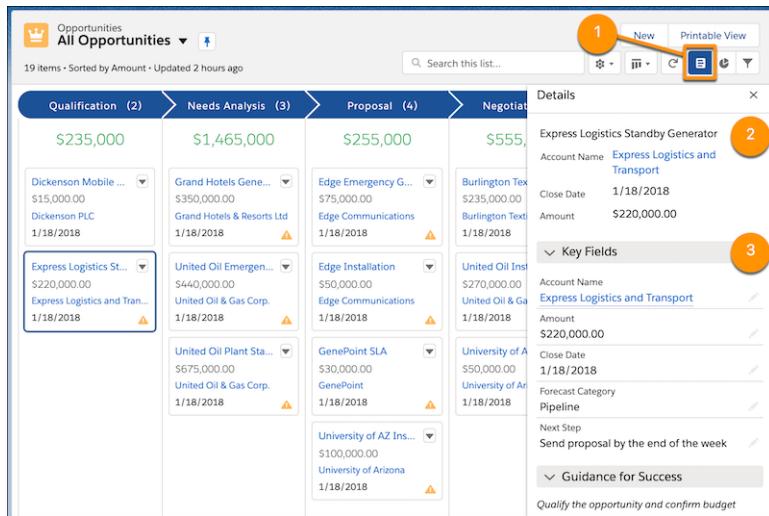
Reward your teams for their successes—such as winning an opportunity—no matter which feature they use to manage deals and projects. When you set up a confetti toss for users who reach a designated step in a path, corresponding kanban views now toss confetti, too. Celebrations don't work on the status Converted on leads.

## Get Guidance on Your Company's Processes in Kanban Views

Your users can now benefit from the same tips and expertise whether they use paths or a kanban view to work deals. When you use a path to specify key fields and guidance for a sales process or a project, corresponding kanban views now surface that information, too.

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

**Why:** Reps stay aligned with your company's sales processes while they track and update data on their deals. They can open and close the details panel by clicking  (1). When a rep selects a card, the panel shows the first four compact layout fields (2) plus available key fields and guidance (3). The panel shows key fields and guidance when they're configured for a path for the same object, record type, and picklist as the kanban view. Reps can edit a record's key fields inline, without leaving the kanban view.



**How:** In Setup, use the Quick Find box to find **Path Settings**. Enable Path and create a path, or edit one. In step 2 of creating a path, for each step in your sales process, select key fields and provide success guidance for your sales processes.

## SEE ALSO:

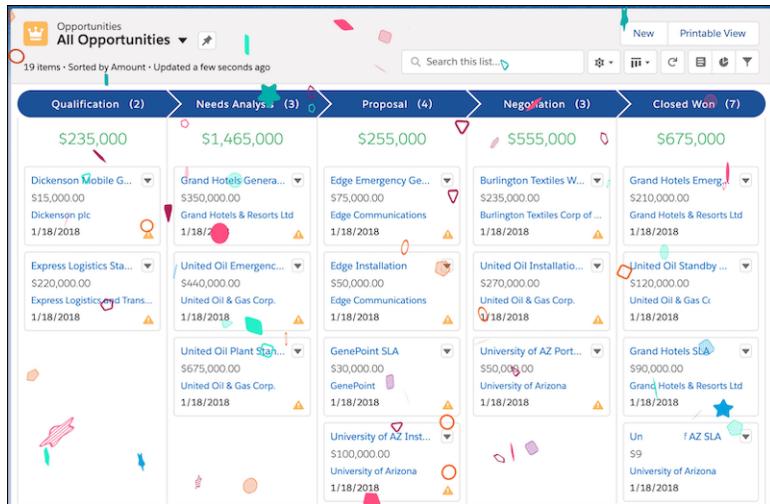
[Salesforce Help: Create a Path \(can be outdated or unavailable during release preview\)](#)

## Celebrate Milestones with Confetti in Kanban Views

Reward your teams for their successes—such as winning an opportunity—no matter which feature they use to manage deals and projects. When you set up a confetti toss for users who reach a designated step in a path, corresponding kanban views now toss confetti, too. Celebrations don't work on the status Converted on leads.

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

**Why:** A confetti celebration creates a little fun and boosts morale when sales reps reach a milestone.



**How:** In Setup, use the Quick Find box to find **Path Settings**. Enable Path and create a path, or edit one. In step 3, select settings for celebrations. Celebrations are triggered in a kanban view when they're configured for a path for the same object, record type, and picklist.

### SEE ALSO:

[Salesforce Help: Configure the Last Path Step \(can be outdated or unavailable during release preview\)](#)

## Salesforce Inbox Mobile: Smarter Selling from Your Inbox

Salesforce Inbox integrates your email and calendar with Salesforce, so sales reps can manage their work sales more efficiently. Inbox increases reps' productivity on every email message, whether they're on the go or at their desk.

Learn about the latest features and enhancements to Inbox mobile in [Salesforce Help](#).

- [Inbox Mobile for iOS](#)
- [Inbox Mobile for Android](#)

To learn about the latest features and enhancements in Inbox desktop, see the [Outlook Integration](#), [Gmail Integration](#), and [Email Experience](#) sections of the Salesforce release notes.

### SEE ALSO:

[Outlook® Integration: Updates to Email Tracking, Improved Text Shortcuts, and Logged Email Status Changes](#)

[Gmail™ Integration: Updates to Email Tracking, Improved Text Shortcuts, and Logged Email Status Changes](#)

[Email Experience: Email Threading, Email Tracking Updates, EAI, and Improved DKIM Keys](#)

## Integration with Google: Track Email Setup Changes, Text Shortcut Improvements, and Lightning Sync Setup Available to More Admins

You can turn the email tracking feature on and off from a single setting for all Gmail integration and Inbox users. Plus, we added a keyboard shortcut to make adding text shortcuts to an email easier than ever. Starting in Winter '21, Lightning Sync availability is changing. And in Spring '20, Lightning Sync admins can delegate setup to admins with more restrictive permissions.

### IN THIS SECTION:

#### [Gmail™ Integration: Updates to Email Tracking, Improved Text Shortcuts, and Logged Email Status Changes](#)

The Gmail integration now respects a Salesforce setting to turn the feature on and off, making setup easier than ever before. Sales reps can access engagement and alert information through the Feed tab. Sales reps can insert a text shortcut using a keyboard shortcut and can use Lightning Experience quick text in the integration. And we updated the status of logged outgoing emails to properly show the emails as sent, not read.

#### [Lightning Sync for Google: Pending Availability Changes and Setup Available to More Admins](#)

Starting in Winter '21, Lightning Sync won't be available to new Salesforce customers. In Summer '20, you can delegate admins at your company with more restrictive permissions to help you set up and manage Lightning Sync.

## Gmail™ Integration: Updates to Email Tracking, Improved Text Shortcuts, and Logged Email Status Changes

The Gmail integration now respects a Salesforce setting to turn the feature on and off, making setup easier than ever before. Sales reps can access engagement and alert information through the Feed tab. Sales reps can insert a text shortcut using a keyboard shortcut and can use Lightning Experience quick text in the integration. And we updated the status of logged outgoing emails to properly show the emails as sent, not read.

### IN THIS SECTION:

#### [Turn Off Email Tracking in the Gmail Integration with One Salesforce Setting](#)

The Gmail integration now respects the Email Tracking setting on the Salesforce Inbox Setup Assistant page in Salesforce setup. One setting means a single place to turn email tracking on or off across desktop and mobile Inbox applications. When the setting is off, the email tracking components no longer appear in the Gmail integration. The components aren't available to add to an email application pane using the Lightning App Builder.

#### [Track Email Engagements Across Applications in the Gmail Integration](#)

The Feed tab replaces the Tracking tab and provides information about engagements with the emails your reps send from the Gmail integration, Lightning Experience, or from the High Velocity Sales Work Queue. Sales reps can filter and sort the feed to identify and follow up with their hottest leads. The alert summaries include the customer or prospect name, email subject, engagement type, and previous engagement history.

#### [Enable Quick Text to Access Text Shortcuts in the Gmail Integration](#)

Now text shortcuts are stored so that reps can access text shortcuts and individual quick text wherever they compose email. This change requires the Quick Text feature to be on to access text shortcuts in the Gmail integration. With this change, individual quick text phrases saved to the Email Channel in Salesforce are available as a text shortcut in the Gmail integration. Text shortcuts created starting in Summer '20 are available as individual quick text in Salesforce.

#### [Add Text Shortcuts to Emails with Keystrokes Instead of Clicks in the Gmail Integration](#)

Insert text shortcuts with keystrokes instead of clicks. Sales reps can assign a shortcode to a text shortcut to insert the phrase in an email. When reps type the code to insert a text shortcut phrase instead of using the mouse to select a phrase, they can stay focused on their email content.

### [Disabled Inbox Features in the Gmail Integration for Some Salesforce Editions](#)

The Make Inbox Available to Users setting on the Salesforce Inbox Setup Assistant page in setup is now off for all Developer editions and editions that are no longer sold. If you develop features or integrations, or you rely on Inbox features in these editions, turn the setting back on.

### [Status Change for Sent Emails Logged from the Gmail Integration](#)

Emails that sales reps send from Gmail are now logged in Salesforce with a status of Sent instead of Read. Sent email includes emails logged from the Sent folder in Gmail, using the Log on Send option, or from the Log Reminder page. Incoming emails that reps log to Salesforce are logged with a status of Read. The status of emails logged before Summer '20 doesn't change.

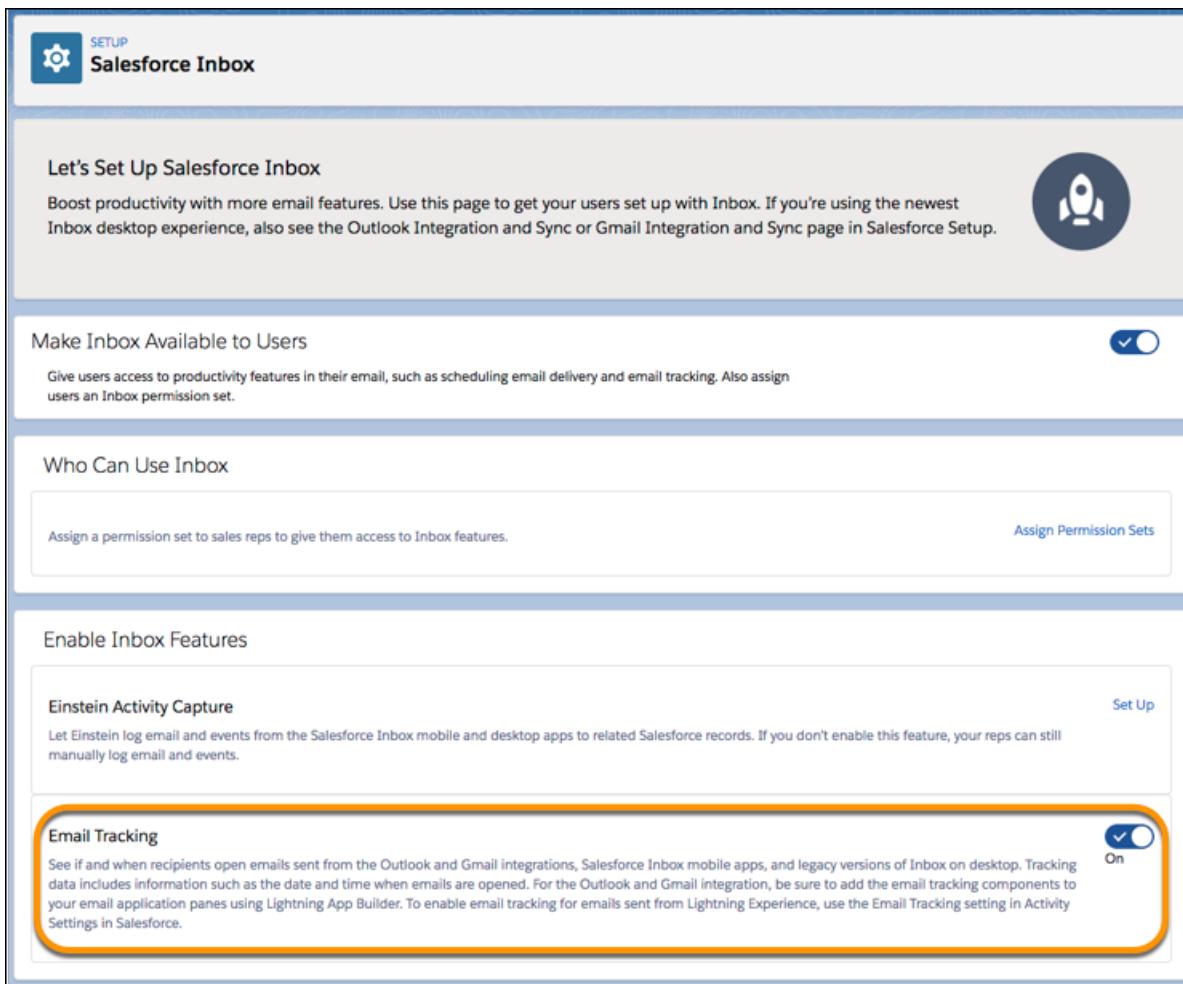
## Turn Off Email Tracking in the Gmail Integration with One Salesforce Setting

The Gmail integration now respects the Email Tracking setting on the Salesforce Inbox Setup Assistant page in Salesforce setup. One setting means a single place to turn email tracking on or off across desktop and mobile Inbox applications. When the setting is off, the email tracking components no longer appear in the Gmail integration. The components aren't available to add to an email application pane using the Lightning App Builder.

**Where:** This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

**Why:** A single setting helps ensure that you turned email tracking off for all Inbox users at once. Previously, to turn off email tracking for Gmail integration you removed email tracking components from the email integration panes.

**How:** From Salesforce Setup, in the Quick Find box, enter *Inbox*, and then select **Setup Assistant**. Use the Email Tracking setting to turn the feature on or off.



The screenshot shows the 'Let's Set Up Salesforce Inbox' page. It includes sections for 'Make Inbox Available to Users' (with a toggle switch), 'Who Can Use Inbox' (with a 'Assign Permission Sets' button), and 'Enable Inbox Features'. The 'Email Tracking' section is highlighted with an orange border and has its own 'Set Up' button and a 'On' toggle switch.

## SEE ALSO:

[Salesforce Help: Email Tracking Considerations for Tracking Emails from the Gmail Integration](#) (can be outdated or unavailable during release preview)

## Track Email Engagements Across Applications in the Gmail Integration

The Feed tab replaces the Tracking tab and provides information about engagements with the emails your reps send from the Gmail integration, Lightning Experience, or from the High Velocity Sales Work Queue. Sales reps can filter and sort the feed to identify and follow up with their hottest leads. The alert summaries include the customer or prospect name, email subject, engagement type, and previous engagement history.

**Where:** This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

**When:** Users with an Inbox license get the Feed tab showing email engagements 30 days after Summer '20 is released. This time allows for data to collect to populate the feed.

**How:** In Developer, Personal, Chatter, and Database.com editions, Inbox features are turned off by default in the Summer '20 release. For reps to see the Feed, re-enable Inbox in the Salesforce Inbox Setup Assistant page in setup.

After it's enabled, the content of the Email Tracking - List component automatically updates with the alerts and engagement information after the initial data collection period passes.

The screenshot shows the 'My Feed' tab in the Work Queue. It displays four recent interactions:

- Elizabeth Smith** (1m ago): Chat next week? (Replied, 6 opens, 3 clicks)
- Rebecca Wats** (1m ago): Follow up with you (Replied, 4 opens)
- john.g@gmail.com** (3m ago): Chief Marketing Officer • Pac ... (Missed call, 1 call, 1 voicemail)
- Unknown contact** (7m ago): Demo prep (1 of 2) (Email opened, 1 reply, 1 click)

**Tip:** Sales reps who use the High Velocity Sales Work Queue see the same engagement information, plus extra engagements specific to High Velocity Sales, in the My Feed tab in the Work Queue. If you use High Velocity Sales, you can configure the email integration pane in the Lightning App Builder to only show the feed in one location.

#### SEE ALSO:

[Salesforce Help: Add the Work Queue Component to Email Integration Panes for Outlook and Gmail](#) (can be outdated or unavailable during release preview)

[See Real-Time Details of Prospects' Email Engagement](#)

[Salesforce Help: Engagements and Alerts in the Outlook and Gmail Integrations](#) (can be outdated or unavailable during release preview)

## Enable Quick Text to Access Text Shortcuts in the Gmail Integration

Now text shortcuts are stored so that reps can access text shortcuts and individual quick text wherever they compose email. This change requires the Quick Text feature to be on to access text shortcuts in the Gmail integration. With this change, individual quick text phrases saved to the Email Channel in Salesforce are available as a text shortcut in the Gmail integration. Text shortcuts created starting in Summer '20 are available as individual quick text in Salesforce.

**Where:** This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

**How:** The Quick Text feature is on by default in Lightning Experience, and on by default in Salesforce Classic when Chat is enabled. To enable it, from Setup, in the Quick Find box, enter **Quick Text Settings**, then select **Quick Text Settings**. Click **Enable Quick Text**. No other quick text settings are required.

 **Note:** Shared quick texts are only available when composing emails from within Salesforce.

## SEE ALSO:

[Add Text Shortcuts to Emails with Keystrokes Instead of Clicks in the Gmail Integration](#)

[Salesforce Help: Create Quick Text Messages \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Quick Text Considerations \(can be outdated or unavailable during release preview\)](#)

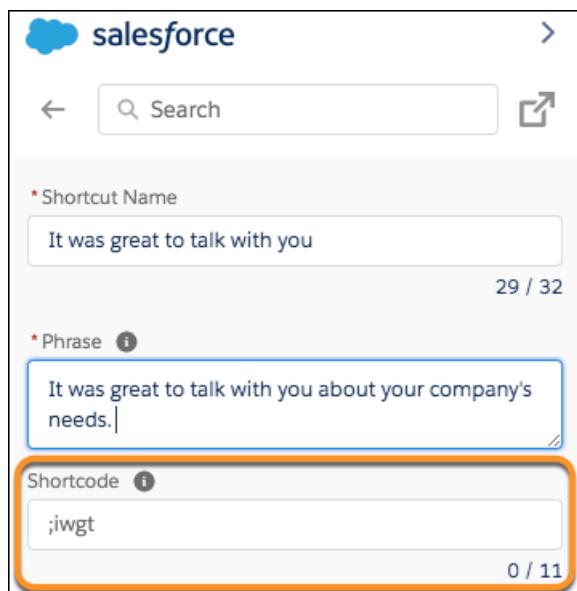
[Salesforce Help: Do More While Composing Emails in Outlook and Gmail \(can be outdated or unavailable during release preview\)](#)

## Add Text Shortcuts to Emails with Keystrokes Instead of Clicks in the Gmail Integration

Insert text shortcuts with keystrokes instead of clicks. Sales reps can assign a shortcode to a text shortcut to insert the phrase in an email. When reps type the code to insert a text shortcut phrase instead of using the mouse to select a phrase, they can stay focused on their email content.

**Where:** This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

**How:** The Shortcode field is available for text shortcuts created starting in Summer '20. To add a code to text shortcuts created before Summer '20, recreate the shortcut.



## SEE ALSO:

[Enable Quick Text to Access Text Shortcuts in the Gmail Integration](#)

[Salesforce Help: Do More While Composing Emails in Outlook and Gmail \(can be outdated or unavailable during release preview\)](#)

## Disabled Inbox Features in the Gmail Integration for Some Salesforce Editions

The Make Inbox Available to Users setting on the Salesforce Inbox Setup Assistant page in setup is now off for all Developer editions and editions that are no longer sold. If you develop features or integrations, or you rely on Inbox features in these editions, turn the setting back on.

**Where:** This change applies to Salesforce Inbox in Personal, Developer, Chatter, and Database.com editions.

**Why:** Salesforce enabled data generation for the engagements and alerts feature in production and sandbox orgs that have an Inbox license. That feature helps power data shown in the Feed tab in Inbox. We chose to not gather engagement data by default for Personal, Developer, Chatter, and Database.com editions, so we disabled Inbox. But you can choose to turn on the Make Inbox Available to Users setting, which also starts engagement data generation.

## Status Change for Sent Emails Logged from the Gmail Integration

Emails that sales reps send from Gmail are now logged in Salesforce with a status of Sent instead of Read. Sent email includes emails logged from the Sent folder in Gmail, using the Log on Send option, or from the Log Reminder page. Incoming emails that reps log to Salesforce are logged with a status of Read. The status of emails logged before Summer '20 doesn't change.

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

## Lightning Sync for Google: Pending Availability Changes and Setup Available to More Admins

Starting in Winter '21, Lightning Sync won't be available to new Salesforce customers. In Summer '20, you can delegate admins at your company with more restrictive permissions to help you set up and manage Lightning Sync.

### IN THIS SECTION:

#### [Lightning Sync for Google Not Available for New Customers](#)

Starting in Winter '21, Lightning Sync won't be available to new Salesforce customers. To start syncing your sales reps' contacts and events between Google and Salesforce, we encourage customers to explore Einstein Activity Capture. With Einstein Activity Capture, you get contact and event sync, plus easy admin setup and even more productivity-boosting features for sales reps.

#### [Delegate Set up to Admins with More Restrictive Permissions](#)

Get through your to-do list faster when you delegate other Salesforce admins at your company to help you set up and manage Lightning Sync for Google. Now admins need the Manage Users and Manage Lightning Sync permissions only. Previously, the more restrictive admin permission, Customize Application, was also required.

## Lightning Sync for Google Not Available for New Customers

Starting in Winter '21, Lightning Sync won't be available to new Salesforce customers. To start syncing your sales reps' contacts and events between Google and Salesforce, we encourage customers to explore Einstein Activity Capture. With Einstein Activity Capture, you get contact and event sync, plus easy admin setup and even more productivity-boosting features for sales reps.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Who:** Customers who purchase Salesforce in Winter '21 can't enable Lightning Sync. Lightning Sync users, current Salesforce customers, and customers who purchase Salesforce before Winter '21 can enable Lightning Sync and continue using it after Winter '21. See [Lightning Sync User License Support](#) for license types that qualify for Lightning Sync.

**Why:** We heard your requests for more flexible connection options and optimized features. To give you the best in Google integration, we are combining our resources to focus on delivering one sync product: Einstein Activity Capture. With Einstein Activity Capture, you get the same basic features as Lightning Sync, and more.

- With Einstein Activity Capture sync, sales reps get up-to-date contacts and events in the application where they need it most.
- When reps send and receive emails, Einstein Activity Capture adds them to the activity timeline of related account, contact, contract, lead, opportunity, and quote records. Subsequent activity is automatically added to the activity timeline, too. Sharing settings let you decide who else sees the related emails and events, so that teams work together better.

- Einstein Email Insights give reps intelligent data that helps them send the perfect response at the perfect time. For example, reps can follow up immediately when an email from a customer mentions a competitor.

To read about all the benefits offered by Einstein Activity Capture, see [What Does Einstein Activity Capture Do?](#)

Each release, we introduce improvements to Einstein Activity Capture. Stay up to date on improvements with the Salesforce release notes.

**SEE ALSO:**

[Knowledge Article: Lightning Sync: Not Available for New Salesforce Customers Starting in Winter '21](#)

[Salesforce Help: Compare Einstein Activity Capture and Lightning Sync \(can be outdated or unavailable during release preview\)](#)

## Delegate Set up to Admins with More Restrictive Permissions

Get through your to-do list faster when you delegate other Salesforce admins at your company to help you set up and manage Lightning Sync for Google. Now admins need the Manage Users and Manage Lightning Sync permissions only. Previously, the more restrictive admin permission, Customize Application, was also required.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** With the Manage Users and Manage Lightning Sync permissions only, admins with more restrictive permissions can complete Lightning Sync-related administrative tasks from Setup.

- Turn on the Let users sync contacts, events, or both between Google and Salesforce setting.
- Create and edit sync configurations.
- Check sync statuses using the Lightning Sync connection test.

When setting up for the first time, Salesforce admins still require support from an experienced Google admin to start syncing contacts and events. Google admins complete more setup steps from your Google GSuite Google API Console and Google Admin Console.

**How:** From Setup, enter *Sync* in the Quick Find box, then select **Gmail integration and Sync**.

**SEE ALSO:**

[Salesforce Help: Prepare Salesforce for Lightning Sync for Google \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Define Lightning Sync for Google Settings for Reps \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Run the Lightning Sync Connection Test for Google Users \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: See the Big Picture for Setting Up Lightning Sync for Google \(can be outdated or unavailable during release preview\)](#)

## Integration with Microsoft®: Track Email Setup Changes, Text Shortcut Improvements, Changes for Lightning Sync and Retirement for Salesforce for Outlook

You can turn the email tracking feature on and off from a single setting for all Outlook integration and Inbox users. Plus, we added a keyboard shortcut to make adding text shortcuts to an email easier than ever. In Winter '21 Lightning Sync availability is changing. And Salesforce for Outlook will no longer function starting in December 2020. Keep reading to learn more about the retirement and moving to the next-generation features.

**IN THIS SECTION:**[Outlook® Integration: Updates to Email Tracking, Improved Text Shortcuts, and Logged Email Status Changes](#)

The Outlook integration now respects a Salesforce setting to turn the feature on and off, making setup easier than ever. Sales reps see all alert information through the Feed tab. Sales reps can access engagement and alert information through the Feed tab. And the updated status of logged outgoing emails correctly shows the emails as sent, not read.

[Lightning Sync for Microsoft® Exchange: Pending Availability Changes and Setup Available to More Admins](#)

Starting in Winter '21, Lightning Sync won't be available to new Salesforce customers. In Summer '20, you can delegate admins at your company with more restrictive permissions to help you set up and manage Lightning Sync. And to continue syncing, Microsoft Office 365® customers must review their settings and prepare for the Microsoft retirement of Basic Authentication.

[Salesforce for Outlook: Pending Retirement and Restoring Access Temporarily](#)

Salesforce for Outlook relies on Microsoft® Internet Explorer 11, for which Salesforce support is ending in December 2020. Learn about our next-generation Microsoft products and how to start planning your move. And for customers already impacted by the browser support changes, learn how to reconnect until December.

## Outlook® Integration: Updates to Email Tracking, Improved Text Shortcuts, and Logged Email Status Changes

The Outlook integration now respects a Salesforce setting to turn the feature on and off, making setup easier than ever. Sales reps see all alert information through the Feed tab. Sales reps can access engagement and alert information through the Feed tab. And the updated status of logged outgoing emails correctly shows the emails as sent, not read.

**IN THIS SECTION:**[Integration No Longer Supported with Older Versions of Outlook and Windows](#)

The extended Salesforce support for Microsoft Internet Explorer 11 ends in December 2020. After support ends, the Outlook integration won't function for Windows users on older versions of Microsoft Outlook. To continue using the integration features in Outlook, upgrade Windows and Outlook to the latest versions that don't require Internet Explorer 11.

[Turn Off Email Tracking in the Outlook Integration with One Salesforce Setting](#)

The Outlook integration now respects the Email Tracking setting on the Salesforce Inbox Setup Assistant page in Salesforce setup. One setting means a single place to turn email tracking on or off across desktop and mobile Inbox applications. When the setting is off, the email tracking components no longer appear in the Outlook integration. The components aren't available to add to an email application pane using the Lightning App Builder.

[Track Email Engagements Across Applications in the Outlook Integration](#)

The Feed tab replaces the Tracking tab and provides information about engagements with the emails your reps send from the Outlook integration, Lightning Experience, or from the High Velocity Sales Work Queue. Sales reps can filter and sort the feed to identify and follow up with their hottest leads. The alert summaries include the customer or prospect name, email subject, engagement type, and previous engagement history.

[Enable Quick Text to Access Text Shortcuts in the Outlook Integration](#)

Now text shortcuts are stored so that reps can access text shortcuts and individual quick text wherever they compose email. This change requires the Quick Text feature to be on to access text shortcuts in the Outlook integration. With this change, individual quick text phrases saved to the Email Channel in Salesforce are available as a text shortcut in the Outlook integration. Text shortcuts created starting in Summer '20 are available as individual quick text in Salesforce.

[Disabled Inbox Features in the Outlook Integration for Some Salesforce Editions](#)

The Make Inbox Available to Users setting on the Salesforce Inbox Setup Assistant page in setup is now off for all Developer editions and editions that are no longer sold. If you develop features or integrations, or you rely on Inbox features in these editions, turn the setting back on.

### [Status Change for Sent Emails Logged from the Outlook Integration](#)

Emails that sales reps send from Outlook are now logged in Salesforce with a status of Sent instead of Read. Sent email includes emails logged from the Sent Items folder in Outlook, using the Log on Send option, or from the Log Reminder page. Incoming emails that reps log to Salesforce are logged with a status of Read. The status of emails logged before Summer '20 remain the same.

## Integration No Longer Supported with Older Versions of Outlook and Windows

The extended Salesforce support for Microsoft Internet Explorer 11 ends in December 2020. After support ends, the Outlook integration won't function for Windows users on older versions of Microsoft Outlook. To continue using the integration features in Outlook, upgrade Windows and Outlook to the latest versions that don't require Internet Explorer 11.

**Where:** This change applies to the Outlook integration, formerly known as Lightning for Outlook, in all editions.

**Who:** Any Outlook integration user with environments older than the following loses access to the integration in December 2020:

- Office version 16.0.11629.x or later (released in May 2019)
- Windows 10 version 1903 or later (released in May 2019)

**Why:** The Outlook integration is built on the Microsoft Add-in Framework. Original versions of that framework required Internet Explorer 11 to launch the Salesforce add-in from desktop versions of Outlook. That requirement was true for all add-ins built on that framework, not just the Salesforce add-in. The latest versions of the framework now use Microsoft Edge as the default browser to launch the add-in. The latest versions of Windows and Outlook include Microsoft Edge by default. When Internet Explorer 11 support ends, users who don't have the Edge browser lose access to the Outlook integration.

To ensure continued use of the Outlook integration, work with your IT department to upgrade to these versions of Windows 10 and Office, which include Microsoft Edge by default:

- Office version 16.0.11629.x or later
- Windows 10 version 1903 or later

Alternatively, users can access the integration using Outlook on the web, which doesn't require updates to Outlook or Windows.

### SEE ALSO:

[Knowledge Article: Outlook Integration Does Not Connect Error](#)(can be outdated or unavailable during release preview)

[Salesforce Help: Outlook Integration System Requirements](#) (can be outdated or unavailable during release preview)

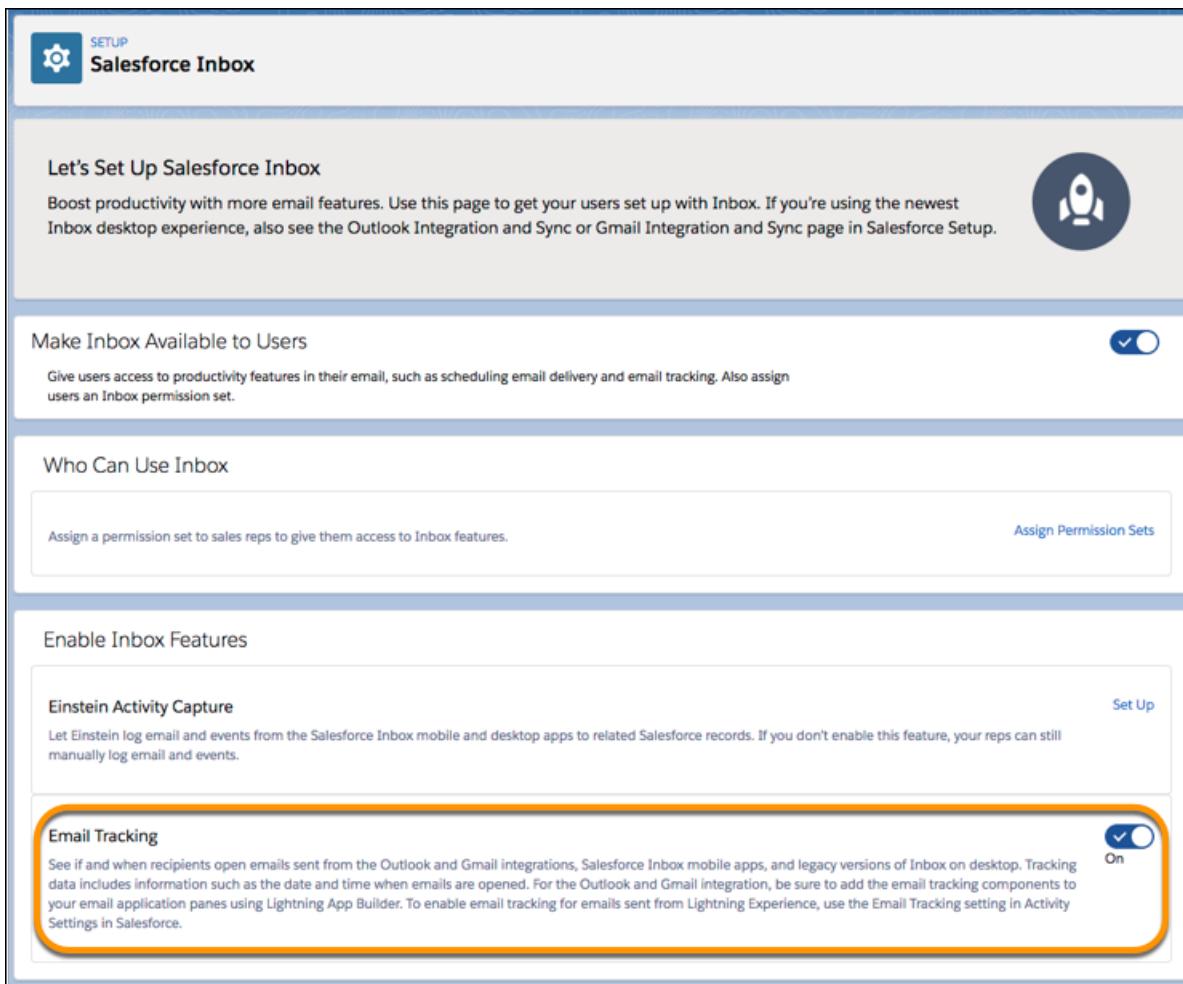
## Turn Off Email Tracking in the Outlook Integration with One Salesforce Setting

The Outlook integration now respects the Email Tracking setting on the Salesforce Inbox Setup Assistant page in Salesforce setup. One setting means a single place to turn email tracking on or off across desktop and mobile Inbox applications. When the setting is off, the email tracking components no longer appear in the Outlook integration. The components aren't available to add to an email application pane using the Lightning App Builder.

**Where:** This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

**Why:** A single setting helps ensure that you turned email tracking off for all Inbox users at once. Previously, to turn off email tracking for the Outlook integration you removed email tracking components from the email integration panes.

**How:** From Salesforce Setup, in the Quick Find box, enter *Inbox*, and then select **Setup Assistant**. Use the Email Tracking setting to turn the feature on or off.



The screenshot shows the 'Let's Set Up Salesforce Inbox' section. It includes a 'Make Inbox Available to Users' toggle switch, a 'Who Can Use Inbox' section with a 'Assign Permission Sets' button, and an 'Enable Inbox Features' section. Under 'Email Tracking', there is a description and a toggle switch labeled 'On'. The 'On' switch is highlighted with an orange border.

## SEE ALSO:

[Salesforce Help: Email Tracking Considerations for Tracking Emails from the Outlook Integration](#) (can be outdated or unavailable during release preview)

## Track Email Engagements Across Applications in the Outlook Integration

The Feed tab replaces the Tracking tab and provides information about engagements with the emails your reps send from the Outlook integration, Lightning Experience, or from the High Velocity Sales Work Queue. Sales reps can filter and sort the feed to identify and follow up with their hottest leads. The alert summaries include the customer or prospect name, email subject, engagement type, and previous engagement history.

**Where:** This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

**When:** Users with an Inbox license get the Feed tab showing email engagements 30 days after Summer '20 is released. This time allows for data to collect to populate the feed.

**How:** In Developer, Personal, Chatter, and Database.com editions, Inbox features are turned off by default in the Summer '20 release. For reps to see the Feed, re-enable Inbox in the Salesforce Inbox Setup Assistant page in setup.

After it's enabled, the content of the Email Tracking - List component automatically updates with the alerts and engagement information after the initial data collection period passes.

The screenshot shows the 'My Feed' tab in the Work Queue. It displays four recent interactions:

- Elizabeth Smith** (1m ago): Chat next week? (Replied, 6 opens, 3 clicks)
- Rebecca Wats** (1m ago): Follow up with you (Replied, 4 opens)
- john.g@gmail.com** (3m ago): Chief Marketing Officer • Pac ... (Missed call, 1 call, 1 voicemail)
- Unknown contact** (7m ago): Demo prep (1 of 2) (Email opened, 1 reply, 1 click)

**Tip:** Sales reps who use the High Velocity Sales Work Queue see the same engagement information, plus extra engagements specific to High Velocity Sales, in the My Feed tab in the Work Queue. If you use High Velocity Sales, you can configure the email integration pane in the Lightning App Builder to only show the feed in one location.

#### SEE ALSO:

[Salesforce Help: Add the Work Queue Component to Email Integration Panes for Outlook and Gmail](#) (can be outdated or unavailable during release preview)

[See Real-Time Details of Prospects' Email Engagement](#)

[Salesforce Help: Engagements and Alerts in the Outlook and Gmail Integrations](#) (can be outdated or unavailable during release preview)

## Enable Quick Text to Access Text Shortcuts in the Outlook Integration

Now text shortcuts are stored so that reps can access text shortcuts and individual quick text wherever they compose email. This change requires the Quick Text feature to be on to access text shortcuts in the Outlook integration. With this change, individual quick text phrases saved to the Email Channel in Salesforce are available as a text shortcut in the Outlook integration. Text shortcuts created starting in Summer '20 are available as individual quick text in Salesforce.

**Where:** This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

**How:** The Quick Text feature is on by default in Lightning Experience, and on by default in Salesforce Classic when Chat is enabled. To enable it, from Setup, in the Quick Find box, enter *Quick Text Settings*, then select **Quick Text Settings**. Click **Enable Quick Text**. No other quick text settings are required.

**Note:** Shared quick texts are only available when composing emails from within Salesforce.

#### SEE ALSO:

[Salesforce Help: Create Quick Text Messages](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Quick Text Considerations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Do More While Composing Emails in Outlook and Gmail](#) (can be outdated or unavailable during release preview)

## Disabled Inbox Features in the Outlook Integration for Some Salesforce Editions

The Make Inbox Available to Users setting on the Salesforce Inbox Setup Assistant page in setup is now off for all Developer editions and editions that are no longer sold. If you develop features or integrations, or you rely on Inbox features in these editions, turn the setting back on.

**Where:** This change applies to Salesforce Inbox in Personal, Developer, Chatter, and Database.com editions.

**Why:** Salesforce enabled data generation for the engagements and alerts feature in production and sandbox orgs that have an Inbox license. That feature helps power data shown in the Feed tab in Inbox. We chose to not gather engagement data by default for Personal, Developer, Chatter, and Database.com editions, so we disabled Inbox. But you can choose to turn on the Make Inbox Available to Users setting, which also starts engagement data generation.

## Status Change for Sent Emails Logged from the Outlook Integration

Emails that sales reps send from Outlook are now logged in Salesforce with a status of Sent instead of Read. Sent email includes emails logged from the Sent Items folder in Outlook, using the Log on Send option, or from the Log Reminder page. Incoming emails that reps log to Salesforce are logged with a status of Read. The status of emails logged before Summer '20 remain the same.

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

## Lightning Sync for Microsoft® Exchange: Pending Availability Changes and Setup Available to More Admins

Starting in Winter '21, Lightning Sync won't be available to new Salesforce customers. In Summer '20, you can delegate admins at your company with more restrictive permissions to help you set up and manage Lightning Sync. And to continue syncing, Microsoft Office 365® customers must review their settings and prepare for the Microsoft retirement of Basic Authentication.

### IN THIS SECTION:

#### [Lightning Sync for Microsoft Exchange Not Available for New Customers](#)

Starting in Winter '21, Lightning Sync won't be available to new Salesforce customers. To start syncing your sales reps' contacts and events between Microsoft applications and Salesforce, we encourage customers to explore Einstein Activity Capture. With Einstein Activity Capture, you get contact and event sync, plus easy admin setup and even more productivity-boosting features for sales reps.

#### [Delegate Set up to Admins with More Restrictive Permissions](#)

Get through your to-do list faster when you delegate other Salesforce admins at your company to help you set up and manage Lightning Sync for Microsoft Exchange. Now admins need the Manage Users and Manage Lightning Sync permissions only. Previously, the more restrictive admin permission, Customize Application, was also required.

#### [Required Changes for Some Microsoft Office 365 Customers](#)

Microsoft® has moved their Basic Authentication retirement for Microsoft Office 365® and Exchange Online to the second half of 2021. If you're an Office 365® customer using a service account as your connection method, contacts and events will stop syncing at that time. To avoid a sync interruption, work with your Microsoft admin or IT professional to update your Lightning Sync connection method. Or consider moving to Einstein Activity Capture.

## Lightning Sync for Microsoft Exchange Not Available for New Customers

Starting in Winter '21, Lightning Sync won't be available to new Salesforce customers. To start syncing your sales reps' contacts and events between Microsoft applications and Salesforce, we encourage customers to explore Einstein Activity Capture. With Einstein Activity Capture, you get contact and event sync, plus easy admin setup and even more productivity-boosting features for sales reps.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Who:** Customers who purchase Salesforce in Winter '21 can't enable Lightning Sync. Lightning Sync users, current Salesforce customers, and customers who purchase Salesforce before Winter '21 can enable Lightning Sync and continue using it after Winter '21. See [Lightning Sync User License Support](#) for license types that qualify for Lightning Sync.

**Why:** We heard your requests for more flexible connection options and optimized features. To give you the best in Microsoft integration, we are combining our resources to focus on delivering one sync product: Einstein Activity Capture. With Einstein Activity Capture, you get the same basic features as Lightning Sync, and more.

- With Einstein Activity Capture sync, sales reps get up-to-date contacts and events in the application where they need it most.
- When reps send and receive emails, Einstein Activity Capture adds them to the activity timeline of related account, contact, contract, lead, opportunity, and quote records. Subsequent activity is automatically added to the activity timeline, too. Sharing settings let you decide who else sees the related emails and events, so that teams work together better.
- Einstein Email Insights give reps intelligent data that helps them send the perfect response at the perfect time. For example, reps can follow up immediately when an email from a customer mentions a competitor.

To read about all the benefits offered by Einstein Activity Capture, see [What Does Einstein Activity Capture Do?](#)

Each release, we introduce improvements to Einstein Activity Capture. Stay up to date on improvements with the Salesforce release notes.

#### SEE ALSO:

[Knowledge Article: Lightning Sync: Not Available for New Salesforce Customers Starting in Winter '21](#)

[Salesforce Help: Compare Einstein Activity Capture and Lightning Sync](#)(can be outdated or unavailable during release preview)

## Delegate Set up to Admins with More Restrictive Permissions

Get through your to-do list faster when you delegate other Salesforce admins at your company to help you set up and manage Lightning Sync for Microsoft Exchange. Now admins need the Manage Users and Manage Lightning Sync permissions only. Previously, the more restrictive admin permission, Customize Application, was also required.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** With the Manage Users and Manage Lightning Sync permissions only, admins with more restrictive permissions can complete Lightning Sync-related administrative tasks from Setup.

- Turn on the Let users sync contacts, events, or both between Exchange and Salesforce setting.
- Create and edit sync configurations.
- Check sync statuses using the Lightning Sync connection test.

When setting up for the first time, Salesforce admins sometimes require support from an experienced Microsoft admin to start syncing contacts and events. Depending on the connection settings you choose, Microsoft admins might need to complete more setup steps from your Exchange server, or provide server administrator login credentials.

**How:** From Setup, enter *Sync* in the Quick Find box, then select **Outlook integration and Sync**.

#### SEE ALSO:

[Salesforce Help: Set Up Salesforce to Communicate with Microsoft® Exchange Using a Service Account](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Define Lightning Sync for Microsoft® Exchange Settings for Reps](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Run the Lightning Sync Connection Test for Microsoft® Exchange Users](#) (can be outdated or unavailable during release preview)

[Salesforce Help: See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange](#) (can be outdated or unavailable during release preview)

## Required Changes for Some Microsoft Office 365 Customers

Microsoft® has moved their Basic Authentication retirement for Microsoft Office 365® and Exchange Online to the second half of 2021. If you're an Office 365® customer using a service account as your connection method, contacts and events will stop syncing at that time. To avoid a sync interruption, work with your Microsoft admin or IT professional to update your Lightning Sync connection method. Or consider moving to Einstein Activity Capture.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Who:** This retirement affects only Office 365 with Exchange Online customers who use a service account to connect to Salesforce.

These customers aren't impacted:

- Customers on Exchange 2016® or Exchange 2013® on-premise servers who connect to Salesforce using the service account connection method. Microsoft hasn't announced retirement for basic authentication for those servers.
- Customers on Office 365 who connect to Salesforce using the OAuth 2.0 connection method.

**Why:** The Lightning Sync service account connection method uses basic authentication to connect Microsoft servers to Salesforce.

**How:** To avoid a sync interruption, work with the Microsoft admin or IT professional at your company to verify whether the retirement impacts you. Then, review the available solutions and select the one that works best for you. See [Adjust Your Sync Setup before Basic Authentication Retirement](#).

#### SEE ALSO:

[External Link: Basic Authentication and Exchange Online – April 2020 Update](#)

[Salesforce Help: OAuth 2.0 Connection for Microsoft Users](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Lightning Sync System Requirements](#) (can be outdated or unavailable during release preview)

## Salesforce for Outlook: Pending Retirement and Restoring Access Temporarily

Salesforce for Outlook relies on Microsoft® Internet Explorer 11, for which Salesforce support is ending in December 2020. Learn about our next-generation Microsoft products and how to start planning your move. And for customers already impacted by the browser support changes, learn how to reconnect until December.

## IN THIS SECTION:

### [Salesforce for Outlook Is Being Retired in December 2020](#)

Salesforce for Outlook will no longer function when extended support for Microsoft® Internet Explorer 11 ends in December 2020. But check out the advancements made in our next-generation products, the Outlook Integration and Einstein Activity Capture, and learn about making the move.

### [Restore Access If Service Is Interrupted Before December 2020](#)

Changes for Microsoft® Internet Explorer® 11 support can interrupt service for Salesforce for Outlook users who can't access Salesforce Classic. We provide details on how to see if your users are affected, and how to restore access.

### [Find Version-Specific Salesforce for Outlook Release Notes](#)

Wondering about the updates available in each Salesforce for Outlook version? Find those version-specific release notes in the Outlook/Gmail integrations, and Inbox Trailblazer Community.

## Salesforce for Outlook Is Being Retired in December 2020

Salesforce for Outlook will no longer function when extended support for Microsoft® Internet Explorer 11 ends in December 2020. But check out the advancements made in our next-generation products, the Outlook Integration and Einstein Activity Capture, and learn about making the move.

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

**When:** Salesforce for Outlook will be retired in December 2020.

**Why:** Along with the end of extended support for IE11, Salesforce for Outlook will no longer be able to sync contacts, events, or tasks. Likewise, the Salesforce for Outlook Side Panel won't connect to Salesforce, so sales reps can't work with their Salesforce records from Microsoft Outlook®.

To continue integrating Outlook and Salesforce, we encourage customers to explore our suggested next-generation product options.

**How:** To learn more about the retirement and to compare replacement products, see [Salesforce for Outlook Retirement](#).

And for support during your transition to the latest products, check out the migration guide, [Move from Salesforce for Outlook to the Next-Generation Products](#).

## SEE ALSO:

[Supported Browsers for Lightning Experience](#)

[Knowledge Article: Extended Support for Accessing Lightning Experience Using Microsoft Internet Explorer 11](#)

[Salesforce Help: Outlook and Gmail Integration on Desktop \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Einstein Activity Capture \(can be outdated or unavailable during release preview\)](#)

## Restore Access If Service Is Interrupted Before December 2020

Changes for Microsoft® Internet Explorer® 11 support can interrupt service for Salesforce for Outlook users who can't access Salesforce Classic. We provide details on how to see if your users are affected, and how to restore access.

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

**Who:** Salesforce for Outlook users experience a service interruption when they meet either of these scenarios.

- Your Salesforce org or the user doesn't have access to Salesforce Classic.
- Your company has opted not to [extend Microsoft Internet Explorer 11 support until December 31, 2020](#).

**Why:** In 2016, Salesforce stopped supporting Lightning Experience on IE11. Because Salesforce for Outlook relies on IE11 to display Salesforce from Microsoft Outlook®, the IE11 access block also affects Salesforce for Outlook users.

**How:** To restore Salesforce for Outlook access for users, take one of these suggested workarounds until the product is retired in December 2020.

- Opt in to extended support for IE11.
- For customers whose Salesforce subscriptions offer access to Salesforce Classic, admins can also restore Salesforce for Outlook by providing users access to Salesforce Classic.

Or, consider moving to our next-generation products, Outlook Integration and Einstein Activity Capture.

For steps on restoring access and details on our next generation products, see [Salesforce for Outlook No Longer Connects for Some Customers working from Lightning Experience](#).

#### SEE ALSO:

[Supported Browsers for Lightning Experience](#)

[Salesforce Help: Outlook and Gmail Integration on Desktop](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Einstein Activity Capture](#) (can be outdated or unavailable during release preview)

## Find Version-Specific Salesforce for Outlook Release Notes

Wondering about the updates available in each Salesforce for Outlook version? Find those version-specific release notes in the Outlook/Gmail integrations, and Inbox Trailblazer Community.

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

#### SEE ALSO:

[Salesforce Trailblazer Community: Salesforce for Outlook Release Notes](#)

## Salesforce CPQ and Billing: Change Quote Line Editor Column Width, Bypass the Preserve Bundle Structure Requirement on Amendments, and Improved Error Management for Finance Periods

Change column widths in the quote line editor. Create amendments without using the original contract's product bundle structure. And quickly review and correct errors encountered when opening or closing finance periods.

#### IN THIS SECTION:

[Salesforce CPQ: Optimize Column Sizes on the Quote Line Editor, Bypass the Preserve Bundle Structure Requirement on Amendments, and Prepare for Permission Set Licenses](#)

Change column widths in the quote line editor. Create amendments without using the original contract's product bundle structure. And prepare for the transition from managed package licenses to permission set licenses.

[Salesforce Billing: Better Finance Period Error Handling, Options for Bypassing Guest User Security Policies for Payment Site Finance Periods Hosted Payment Platforms](#)

Use error logs to quickly find and correct issues preventing you from opening or closing a finance period. Opt out of a Salesforce Summer '20 security policy change that prevents guest user access to payment sites and hosted payment platforms. View due dates on your invoice lines and view invoice line balances on your assets.

## SEE ALSO:

[Knowledge Article: New Objects, Fields, and Permissions for Salesforce CPQ and Billing Summer '20](#) (can be outdated or unavailable during release preview)

## Salesforce CPQ: Optimize Column Sizes on the Quote Line Editor, Bypass the Preserve Bundle Structure Requirement on Amendments, and Prepare for Permission Set Licenses

Change column widths in the quote line editor. Create amendments without using the original contract's product bundle structure. And prepare for the transition from managed package licenses to permission set licenses.



**Note:** Salesforce CPQ is offered for an extra cost. For pricing, contact your Salesforce account executive.

## IN THIS SECTION:

[Optimize Column Sizes on Quote Line Editor](#)

Now your sales reps can optimize the Quote Line Editor layout to their preferences. They can resize column widths to minimize horizontal scrolling and reduce white space so they can work more efficiently. And the Quote Line Editor now has minimum column widths, auto-saving functionality, and the ability to reset to the default.

[Choose When to Bypass the Preserve Bundle Structure Requirement on Amendments](#)

Now your sales reps can create amendments without using the original contract's product bundle structure. The new Bypass Preserve Bundle Structure setting removes the requirement to keep the original bundle structure. Your bundle products become individual quote lines on the amendment quote.

[Transition CPQ to Permission Set Licenses \(Update\)](#)

Salesforce CPQ is replacing Managed Package Licenses with Permission Set Licenses. You must assign the new license to all users before installing or upgrading to the Winter '21 version.

### Optimize Column Sizes on Quote Line Editor

Now your sales reps can optimize the Quote Line Editor layout to their preferences. They can resize column widths to minimize horizontal scrolling and reduce white space so they can work more efficiently. And the Quote Line Editor now has minimum column widths, auto-saving functionality, and the ability to reset to the default.

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

**How:** On a desktop, select **Enable Column Resizing** in the Line Editor settings. Make sure that each user profile has the correct permissions for the column metadata and field metadata objects.

## Choose When to Bypass the Preserve Bundle Structure Requirement on Amendments

Now your sales reps can create amendments without using the original contract's product bundle structure. The new Bypass Preserve Bundle Structure setting removes the requirement to keep the original bundle structure. Your bundle products become individual quote lines on the amendment quote.

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

**Why:** This setting offers greater flexibility when you create amendments. But we recommend that you continue to use the Preserve Bundle Structure setting whenever possible. Bypassing the preserve bundle structure requirement can introduce unexpected price changes or unforeseen product and price rule behavior changes.

Before you introduce the bypass setting, make sure to thoroughly test your product rules, price rules, and transactions.

**How:** In Salesforce CPQ Subscriptions and Renewals settings, select **Bypass Preserve Bundle Structure**.

### SEE ALSO:

[Salesforce Help: Subscription and Renewal Package Settings](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Salesforce CPQ Amendment Field Guidelines](#) (can be outdated or unavailable during release preview)

## Transition CPQ to Permission Set Licenses (Update)

Salesforce CPQ is replacing Managed Package Licenses with Permission Set Licenses. You must assign the new license to all users before installing or upgrading to the Winter '21 version.

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

**When:** This update is automatically enforced in Winter '21. Before upgrading installing or upgrading to Salesforce CPQ Winter '21, you must assign the new CPQ Permission Set License to the following users.

- Users who have a managed package license
- Users who have access to CPQ objects or fields through profiles or permission sets

**Why:** Salesforce can automatically provision license quantity changes immediately when an order is processed. This change makes the process as fast and precise as possible.

**How:** In Salesforce CPQ Spring '20, we added a readiness tool in CPQ package settings. The tool shows whether your org can safely transition to permission set licenses or whether you must resolve license errors first. In Salesforce CPQ Summer '20, we introduced a warning message that appears in the quote line editor if the errors returned after running the readiness tool aren't resolved. We also added an **Assign Licenses** button that you can use to quickly assign permission set licenses to all your package users.

Sales reps can still access the quote line editor in Salesforce CPQ Summer '20 after closing the warning. However, we recommend using the readiness tool, correcting any license errors, and upgrading before Salesforce CPQ Winter '21. Users without a CPQ permission set license or CPQ profile can't access Salesforce CPQ in Winter '21, even if they have access to CPQ objects or fields through profiles or permission sets.

### SEE ALSO:

[Knowledge Article: Salesforce CPQ Error 'As of Winter '21, Salesforce CPQ requires permission set licenses instead of managed package licenses. Contact your Salesforce CPQ admin about upgrading.'](#)

[Knowledge Article: Best Practices for CPQ Winter '21 Profiles and Permission Sets](#)

## Salesforce Billing: Better Finance Period Error Handling, Options for Bypassing Guest Periods User Security Policies for Payment Sites and Hosted Payment Platforms

Use error logs to quickly find and correct issues preventing you from opening or closing a finance period. Opt out of a Salesforce Summer '20 security policy change that prevents guest user access to payment sites and hosted payment platforms. View due dates on your invoice lines and view invoice line balances on your assets.

### IN THIS SECTION:

#### [Better Error Handling for Finance Periods](#)

Now it's easier to review finance period errors and make the appropriate corrections. When Salesforce Billing can't open or close a finance period due to an error on the period or its revenue transactions, it changes the finance period's Period Status field to the new Error value. Then, it creates error log records for the finance period and for any revenue transaction that prevented the finance period from opening or closing. The error log records contain detailed information on why the action failed so you can make corrections and retry your action on the finance period.

#### [Opt Out of Guest User Security Policies for Payment Sites and Hosted Payment Platforms](#)

Salesforce Summer '20 introduces a guest user security policy that prevents guest users from accessing a payment site or hosted payment platform in Salesforce Billing. If your organization uses either of those features, you can opt out of the policy and assess the effects of the change in your Salesforce org.

#### [Close Finance Periods with More Transactions](#)

Now it's easier for users to close finance periods that contain a large number of transactions. Salesforce Billing is less likely to encounter errors when closing finance periods with many transactions.

#### [Manage Invoice Line Due Dates](#)

Invoice lines now inherit the Days Past Due and Due Date fields from their parent invoices.

#### [View Invoice Line Balances on Assets](#)

Now it's easier to review the total balances of posted invoice lines related to an asset. Assets have the Invoice Line Balance field, which shows the total balances of all posted invoice lines related to the asset. The asset's invoice line balance continues to update following actions made against related invoice lines, such as allocations and payments.

## Better Error Handling for Finance Periods

Now it's easier to review finance period errors and make the appropriate corrections. When Salesforce Billing can't open or close a finance period due to an error on the period or its revenue transactions, it changes the finance period's Period Status field to the new Error value. Then, it creates error log records for the finance period and for any revenue transaction that prevented the finance period from opening or closing. The error log records contain detailed information on why the action failed so you can make corrections and retry your action on the finance period.

**Where:** This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

**Why:** When a user or process changes a finance period's status from Open to Closed, or Closed to Open, Salesforce Billing runs validations on the finance period and its revenue transactions. Previously, if any of the validations returned an error, Salesforce Billing reverted the finance period's status and didn't provide error messages for why the action failed. Users had to spend unnecessary time manually reviewing the entire finance period to discover the issues. Now, error logs on the finance period and revenue transaction let you quickly identify why the opening or closing failed.

We also added new Pending Open and Pending Closed statuses to the finance period. When you change the finance period's status from Open to Closed, Salesforce Billing sets the status to Pending Closed while it runs validations. If the validations are successful, it updates to Closed, otherwise, it updates to Error. When you change a finance period's status from Closed to Open, Salesforce Billing sets the status to Pending Open while it runs validations. If the validations are successful, it updates to Open, otherwise, it updates to Error.

**How:** If you upgraded from an earlier version of Salesforce Billing, add the following values to your finance period's Period Status field.

- Error
- Pending Closed
- Pending Opened

When your finance period's status changes to Error, go to the period's Error Logs related list and review the new error logs. We also recommend adding the Status field to the fields that show on the Revenue Transactions related list on your finance period page layout. That way, you can quickly see which revenue transactions didn't open or close and review their error logs as well.

#### SEE ALSO:

[Salesforce Help: Managing Finance Period Errors \(can be outdated or unavailable during release preview\)](#)

## Opt Out of Guest User Security Policies for Payment Sites and Hosted Payment Platforms

Salesforce Summer '20 introduces a guest user security policy that prevents guest users from accessing a payment site or hosted payment platform in Salesforce Billing. If your organization uses either of those features, you can opt out of the policy and assess the effects of the change in your Salesforce org.

**Where:** This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

**Why:** The Salesforce Summer '20 release adds a security policy restricting guest users to a maximum level of read or create access on all standard or custom objects. Previously, you could grant guest users update, delete, View All Data, or Modify All Data on specific objects. Salesforce is only enforcing this new security policy on new orgs and on compliant existing orgs. Compliant orgs don't have update, delete, View All Data, or Modify All Data permissions for guest users on any object.

The Salesforce Billing payment site and hosted payment platform features require guest users to input data that changes fields on payments and invoices. These objects look up to the account object and have the sharing setting "Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records." While the sharing setting is active, guest users can change Salesforce Billing objects that have a master-detail relationship to the account, such as payments, payment methods, and invoices. However, the Summer '20 security policy enables three settings that override the profile-level access settings and prevent guest users from making payments in payment sites.

- Secure guest user record access
- Assign new records created by guest users to the default owner
- Assign new records created by Salesforce Sites guest users to a default owner

**How:** You can enable an update to prevent the security policy from enabling the three settings in Salesforce Summer '20. If the settings are enabled, activating the update doesn't disable them. To access the settings and check their status:

- From setup, enter *Sharing Settings* in the Quick Find box, and then select **Sharing Settings**. You can see the **Secure guest user record access** checkbox on the page.
- From Setup, enter *Communities Settings* in the Quick Find box, and then select **Communities Settings**. You can see the **Assign new records created by guest users to the default owner** checkbox on the page.
- From Setup, enter *Sites* in the Quick Find box, and then select **Sites**. You can see the **Assign new records created by Salesforce Sites guest users** checkbox on the page.

To enable the update, go to Critical Updates in Setup and select **Opt Out of Guest User Security Policies Before Summer '20**. After Summer '20, you can't enable the update, but you can still select or deselect the three settings on your own. If you opt out of these

settings for the Summer '20 release, you must comply with our new guest security policies before Winter '21, when they are [Finance Periods](#) on all orgs. We're actively investigating ways to address this issue. For more information, review our [Known Issue](#).

#### SEE ALSO:

[Opt Out of Guest User Security Policies Before Summer '20 \(Previously Released Update\)](#)

[Salesforce Help: Lightning Platform Payment Sites for Salesforce Billing](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Salesforce Billing Hosted Card Payments in Community and Lightning Pages](#) (can be outdated or unavailable during release preview)

[Known Issue: Salesforce Billing Hosted Payment Site does not work with Secure guest user record access enabled](#)

## Close Finance Periods with More Transactions

Now it's easier for users to close finance periods that contain a large number of transactions. Salesforce Billing is less likely to encounter errors when closing finance periods with many transactions.

**Where:** This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

## Manage Invoice Line Due Dates

Invoice lines now inherit the Days Past Due and Due Date fields from their parent invoices.

**Where:** This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

**How:** The Days Past Due and Due Date fields appear on the invoice line by default for new Salesforce Billing users. If you're upgrading from an earlier version of Salesforce Billing, add them to your invoice line's page layout.

## View Invoice Line Balances on Assets

Now it's easier to review the total balances of posted invoice lines related to an asset. Assets have the Invoice Line Balance field, which shows the total balances of all posted invoice lines related to the asset. The asset's invoice line balance continues to update following actions made against related invoice lines, such as allocations and payments.

**Where:** This change applies to Salesforce Lightning Experience and Salesforce Classic in Salesforce Billing.

**How:** Order products now have the Asset (CALM) lookup field, which has the API name `b1ng__asset__c`. When you enter an asset in the field and invoice your order product, the invoice line's new Asset field inherits the value of Asset (CALM). As you continue to invoice your order product, your asset will have relationships with multiple invoice lines. You can view your asset's invoice lines in the asset's new Invoice Lines related list. The asset's Invoice Line Balance field shows the sum of Balance fields on posted invoice lines related to the asset.

Users can update Asset (CALM) on their own or through processes or workflow rules. Your Asset (CALM) value doesn't have to be the same as the order product's Asset field (`sbqq__asset__c`). Salesforce CPQ uses the Asset field for CPQ features, while Salesforce Billing uses the Asset (CALM) field for Billing features.

The Asset (CALM) field, Invoice Line Balance field, and the invoice line's Asset field don't appear on their page layouts by default. If you want your users to view them, add each field to its page layout.



**Note:** Customer Asset Lifecycle Management (CALM) is a Salesforce Billing feature that's under development. We plan to provide more information about CALM when it's ready.

## Pardot

Pardot launches new B2B Marketing features, such as Einstein Attribution and a Marketing Campaign Intelligence app, as well as a number of enhancements to security, syncing, content reuse, and feature setup. Some features become available in June, and others with the Salesforce Summer '20 release.

### IN THIS SECTION:

#### [Pardot Changes Coming In June](#)

We made browsing your Pardot assets more secure for your prospects, and you can turn on Person Account Syncing without contacting Support. We also enabled Handlebars Merge Language for new Pardot accounts to simplify workflows for marketers. And data for advanced email analytics in List Email reports is no longer available for emails older than 14 months. These features are scheduled for release between June 15 and June 26, 2020.

#### [Pardot Changes Coming In Summer '20](#)

We're bringing more Salesforce and Pardot data and tasks together so that you can align your marketing and sales teams more than ever. Explore correlations in the Marketing Campaign Intelligence app, let Einstein Attribution calculate campaign influence percentages, and add customers from Salesforce to Pardot lists and engagement programs easily. Plus, we made enhancements to User Sync and B2B Marketing Analytics setup, and Pardot Sandboxes are now generally available.

## Pardot Changes Coming In June

We made browsing your Pardot assets more secure for your prospects, and you can turn on Person Account Syncing without contacting Support. We also enabled Handlebars Merge Language for new Pardot accounts to simplify workflows for marketers. And data for advanced email analytics in List Email reports is no longer available for emails older than 14 months. These features are scheduled for release between June 15 and June 26, 2020.

### IN THIS SECTION:

#### [Make Pardot Assets More Secure for Prospects](#)

To create a secure browsing experience for your prospects across your marketing assets, we added an account setting to force all SSL-enabled Pardot assets to load over HTTPS. When a browser requests an SSL-enabled Pardot asset over HTTP, Pardot will force redirect the request to HTTPS.

#### [Enable Person Account Syncing Without Contacting Support](#)

Now a Pardot admin can turn on Person Account Syncing without contacting Salesforce Support. Before, to sync prospects with Salesforce person accounts, you contacted Support to enable the functionality.

#### [View Timely Advanced Email Analytics for List Email Reports](#)

Data for emails older than 14 months is no longer recorded for advanced email metrics on the Interaction and Email Clients tab for the List Email report. The change is due to Pardot advanced email integration. You can view all other email engagement metrics regardless of the send date.

#### [Create New Pardot Accounts with Handlebars Merge Language Enabled By Default](#)

Simplify workflows for marketing users. Handlebars Merge Language (HML) enabled for new Pardot accounts brings the latest merge language to users and provides easier integration with Sales Cloud. For existing Pardot accounts, admins can manually upgrade to HML.

## Make Pardot Assets More Secure for Prospects

To create a secure browsing experience for your prospects across your marketing assets, we added an account setting to force all SSL-enabled Pardot assets to load over HTTPS. When a browser requests an SSL-enabled Pardot asset over HTTP, Pardot will force redirect the request to HTTPS.

**Where:** This change applies to all Pardot editions.

**When:** This feature is scheduled for release between June 15 and June 26.

**How:** Enable this feature from the Pardot Account Settings page.

SEE ALSO:

[Salesforce Help: Force Pardot Assets to Load Over HTTPS \(can be outdated or unavailable during release preview\)](#)

[IdeaExchange: Securely redirect http to https](#)

## Enable Person Account Syncing Without Contacting Support

Now a Pardot admin can turn on Person Account Syncing without contacting Salesforce Support. Before, to sync prospects with Salesforce person accounts, you contacted Support to enable the functionality.

**Where:** This change applies to all Pardot editions.

**When:** This feature is scheduled for release between June 15 and June 26, 2020.

**How:** Person Account Syncing is enabled from your Salesforce-Pardot connectors settings page.

SEE ALSO:

[Person Account Syncing with Salesforce](#)

## View Timely Advanced Email Analytics for List Email Reports

Data for emails older than 14 months is no longer recorded for advanced email metrics on the Interaction and Email Clients tab for the List Email report. The change is due to Pardot advanced email integration. You can view all other email engagement metrics regardless of the send date.

**Where:** This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions. It also applies to Pardot Growth with Advanced Email Analytics enabled.

**When:** This feature is scheduled for release between June 15 and June 26, 2020.

SEE ALSO:

[Salesforce Help: Advanced Email Analytics Reports \(can be outdated or unavailable during release preview\)](#)

## Create New Pardot Accounts with Handlebars Merge Language Enabled By Default

Simplify workflows for marketing users. Handlebars Merge Language (HML) enabled for new Pardot accounts brings the latest merge language to users and provides easier integration with Sales Cloud. For existing Pardot accounts, admins can manually upgrade to HML.

**Where:** This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

**When:** This feature is scheduled for release between June 15 and June 26, 2020.

## Pardot Changes Coming In Summer '20

We're bringing more Salesforce and Pardot data and tasks together so that you can align your marketing and sales teams more than ever. Explore correlations in the Marketing Campaign Intelligence app, let Einstein Attribution calculate campaign influence percentages, and add customers from Salesforce to Pardot lists and engagement programs easily. Plus, we made enhancements to User Sync and B2B Marketing Analytics setup, and Pardot Sandboxes are now generally available.

### IN THIS SECTION:

#### [Manage Pardot Users with Salesforce](#)

We added enhancements to Salesforce User Sync that make it easier than ever to manage your users. Now you can assign users to Pardot and manage them directly from Salesforce Setup.

#### [Retiring B2B Marketing Analytics Legacy Apps](#)

Beginning with the Summer '20 release, datasets in legacy B2B Marketing Analytics apps will no longer be updated. Legacy apps include any custom apps you made without selecting the B2B Marketing Analytics app template during setup.

#### [Upgrade to Salesforce-Pardot Connector v2](#)

Upgrade to v2 of the Salesforce-Pardot connector to take advantage of improvements such as instant metadata sync, Business Unit Switcher, and the Pardot integration user.

#### [Test Configuration Changes with Developer Sandboxes for Pardot \(Generally Available\)](#)

Plan and test configuration changes before you implement them in your Pardot production account with the new Developer Sandbox for Pardot. This sandbox is a Pardot Business Unit that is provisioned from any Salesforce sandbox.

#### [First-Party Tracking \(Beta\)](#)

Pardot added first-party tracking to keep you from losing prospect activity data, give you more flexibility with campaign attribution, and block traffic that doesn't come from your domains. To protect consumers' privacy, web browsers are moving away from supporting third-party cookies over the next few years. The marketing industry uses third-party cookies to track prospect engagement across marketing assets and domains. Opt in to this beta to stay on the leading edge of visitor tracking.

#### [Reuse Snippet API Names](#)

Save time thinking of elaborate descriptions for your API names, and use what makes the most sense. Now you can use the same API Name for your snippets when you assign each snippet to a different campaign or business unit. Previously, every snippet's API Name had to be unique. With the right assignment, an API Name like event\_name, copyright, or another commonly used value is now sufficient.

#### [Pardot API: New and Changed Items](#)

Use the Pardot API more effectively with these new features and changes.

#### [Prospect List View Changing for Some Users](#)

Pardot is removing an experimental user interface (UI). As a result, some Pardot Lightning app users will see minor changes to the Prospects table.

#### [Follow the Path to Easier B2B Marketing Analytics Setup](#)

Now you can follow clear steps in Salesforce Setup to get started with B2B Marketing Analytics, instead of comparing help articles to figure out what comes next. When you open the Setup page, we check your configuration and show you the right steps to enable B2B Marketing Analytics.

#### [Explore New Apps Tailored for B2B Marketers](#)

B2B Marketing Analytics Plus is generally available. The growing feature set now includes an Account-Based Marketing app and the new Marketing Campaign Intelligence app, which brings two easy-to-read dashboards together in one place. The Campaign Engagement dashboard shows prospect engagement data from Pardot, and the Campaign Performance dashboard shows relevant campaign data from Salesforce. Sales and marketing users can explore these dashboards or create an Einstein Discovery Story to predict methods that can optimize their plans for maximum engagement.

### [Access and Customize Pardot Dataflows](#)

Now you can see exactly which fields flow into your datasets when you use B2B Marketing Analytics Plus products with Pardot data. Further customize your dashboards when you use the easy interface to create datasets. Select the fields you want, and deselect the ones you don't.

### [See Engagement Data on Opportunity Records](#)

Give your users access to interactive widgets that show tailored engagement data for their frequently viewed records. We added support for Opportunity records to the suite of embeddable dashboards. Users can see activity counts, details about the activities' associated campaigns, and a list of recent activity by related contacts.

### [Get AI-Enhanced Attribution Data on Your Campaign Records](#)

Use a customized model created by Einstein learning to more accurately identify the most effective campaigns in your customer journeys. Einstein Attribution leaves rules-based influence models in the rearview mirror. It uses artificial intelligence to develop a data-driven model that attributes revenue share based on your actual customers, their engagement, and your successes.

### [Add to Prospect Lists and Engagement Studio Programs from Records and List Views](#)

Add to Pardot Lists and Add to Engagement Studio Lists are now available as standard buttons to add to record and list view pages in Salesforce. The buttons allow reps to add prospects to Pardot lists without leaving their CRM. Adding prospects to an Engagement Studio list also adds them to related engagement programs, if applicable.

### [Test Emails Removed from Engagement Datasets](#)

To address user concerns, we removed test email data from the Pardot Email and Pardot Engagement History datasets. The two datasets now contain data associated only with list email sends, ignoring data from emails that are sent from the Testing tab. These datasets are used with B2B Marketing Analytics apps and embedded Engagement History dashboards.

## Manage Pardot Users with Salesforce

We added enhancements to Salesforce User Sync that make it easier than ever to manage your users. Now you can assign users to Pardot and manage them directly from Salesforce Setup.

**Where:** This change applies to all Pardot Editions.

**How:** How you take advantage of these changes depends on when your account or business unit was created, and whether Salesforce User Sync is already enabled.

In accounts that enabled Salesforce User Sync before the Summer '20 release: First assign users from Salesforce Setup, and then transfer user management control to Salesforce from Salesforce User Sync settings in Pardot.

In accounts that were created before the Summer '20 release that don't have Salesforce User Sync enabled: First assign users from Salesforce Setup, then enable Salesforce User Sync in Pardot.

In accounts and business units created after the Summer '20 release: Assign users from Salesforce Setup.

### SEE ALSO:

[Salesforce Help: Manage Users with Salesforce](#) (can be outdated or unavailable during release preview)

## Retiring B2B Marketing Analytics Legacy Apps

Beginning with the Summer '20 release, datasets in legacy B2B Marketing Analytics apps will no longer be updated. Legacy apps include any custom apps you made without selecting the B2B Marketing Analytics app template during setup.

**Where:** This change applies to Pardot Pro and Ultimate editions with the B2B Marketing Analytics add-on.

**How:** We recommend that you migrate your apps to B2B Marketing Analytics 2.0. Here's a high-level look at the steps involved. For details, check out [Migration for Legacy Users](#).

1. Review the prerequisite settings.
2. Create and assign new permission sets.
3. Save custom lenses, datasets, or dashboards to the My Shared Apps or My Private Apps folder.
4. Create an app with the B2B Marketing Analytics app template.
5. Delete the old managed package, if applicable.

SEE ALSO:

[Salesforce Help: B2B Marketing Analytics](#) (can be outdated or unavailable during release preview)

## Upgrade to Salesforce-Pardot Connector v2

Upgrade to v2 of the Salesforce-Pardot connector to take advantage of improvements such as instant metadata sync, Business Unit Switcher, and the Pardot integration user.

**Where:** This change applies to all Pardot editions.

**How:** To start the upgrade, navigate to the Connectors page in Pardot. From there, click **Get Started**. Follow the on-screen instructions to complete the upgrade.

SEE ALSO:

[Salesforce Help: Upgrading to v2 of the Salesforce-Pardot Connector](#) (can be outdated or unavailable during release preview)

## Test Configuration Changes with Developer Sandboxes for Pardot (Generally Available)

Plan and test configuration changes before you implement them in your Pardot production account with the new Developer Sandbox for Pardot. This sandbox is a Pardot Business Unit that is provisioned from any Salesforce sandbox.

**Where:** This change applies to Lightning Experience in accounts with Pardot Advanced and Pardot Premium edition that are connected to a Salesforce account with sandboxes.

**How:** To create a Developer Sandbox for Pardot, provision a new business unit from Pardot Account Setup within a Salesforce sandbox.

SEE ALSO:

[Salesforce Help: Create a Pardot Sandbox](#) (can be outdated or unavailable during release preview)

[IdeaExchange: Create true Pardot Sandbox environments](#)

## First-Party Tracking (Beta)

Pardot added first-party tracking to keep you from losing prospect activity data, give you more flexibility with campaign attribution, and block traffic that doesn't come from your domains. To protect consumers' privacy, web browsers are moving away from supporting third-party cookies over the next few years. The marketing industry uses third-party cookies to track prospect engagement across marketing assets and domains. Opt in to this beta to stay on the leading edge of visitor tracking.

**Where:** This change applies to all Pardot editions.

 **Note:** As a beta feature, first-party tracking is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce

reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for first-party tracking [in this Google Form](#).

**How:** Enable first-party cookie tracking from Pardot Settings, then update your tracker domains in Domain Management.

#### SEE ALSO:

[Salesforce Help: Pardot First-Party Tracking \(Beta\)](#) (can be outdated or unavailable during release preview)

## Reuse Snippet API Names

Save time thinking of elaborate descriptions for your API names, and use what makes the most sense. Now you can use the same API Name for your snippets when you assign each snippet to a different campaign or business unit. Previously, every snippet's API Name had to be unique. With the right assignment, an API Name like event\_name, copyright, or another commonly used value is now sufficient.

**Where:** This change applies to all Pardot editions with the Pardot Lightning app.

**How:** Although the Handlebars Merge Language relies on a unique identifier to render values in an asset, it can now differentiate between snippet assignments. If you plan to use duplicate API names, make sure to assign those snippets to different campaigns or business units.

The screenshot shows a Pardot interface for managing snippets. At the top, there's a header with the snippet name 'Copyright Date'. Below the header, there are buttons for Follow, Edit, Clone, and Delete. Underneath the header, there are sections for Type (Date) and Last Modified By (Admin User, 6/19/2020, 7:33 AM). A 'Related' tab is selected, showing a list of 'Assignments (3)'. Each assignment row contains a Name (United States, Annual Customer Conference, Europe) and an Assignment Scope dropdown. The 'Assignment Scope' dropdown for the third assignment (Europe) is highlighted with a red box. There are also 'Business' and 'Campaign' options in the dropdown menu.

## Pardot API: New and Changed Items

Use the Pardot API more effectively with these new features and changes.

### Export API

All objects: Added support for all export data objects to filter returned fields.

Prospect object: Added support for the prospect object. Export up to a year of prospect records at once.

Visitor Activity object:

- Added the ability to filter visitor activity to return only records with a prospect ID.
- Added the ability to filter visitor activity to return only records with a specific type.
- Added a procedure to retrieve visitor activity based on updated\_at date.

List Membership object: Added support for the list membership object. Export up to a year of list membership records at once.

### Visitor Activity

Now you can query visitor activity based on the updated\_at date.

## Pardot API Authentication

Now you can authenticate using Salesforce Connected Apps. This change removes the need for a Pardot-only user to authenticate.

SEE ALSO:

[Developer Docs: Pardot API Documentation](#)

## Prospect List View Changing for Some Users

Pardot is removing an experimental user interface (UI). As a result, some Pardot Lightning app users will see minor changes to the Prospects table.

**Where:** The experimental Prospect List View UI was only available in the Pardot Lightning app to some users.

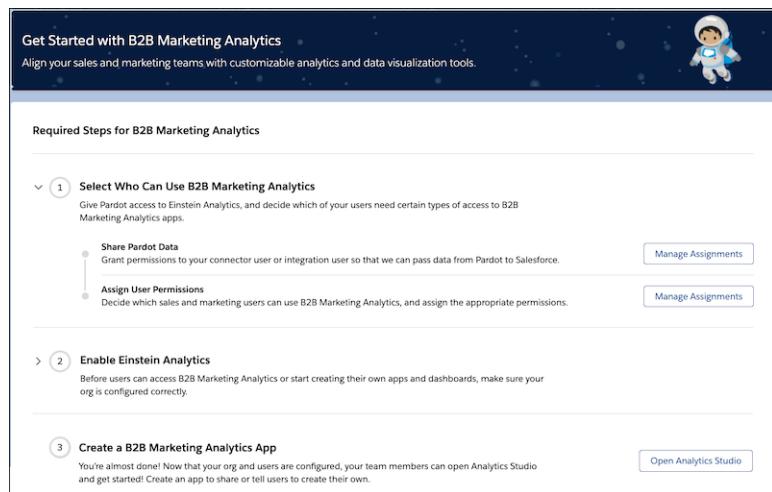
**Why:** The experimental version doesn't support the **Select All** option on the prospect table, but the standard UI does. All other differences between the experimental version and standard version are cosmetic.

## Follow the Path to Easier B2B Marketing Analytics Setup

Now you can follow clear steps in Salesforce Setup to get started with B2B Marketing Analytics, instead of comparing help articles to figure out what comes next. When you open the Setup page, we check your configuration and show you the right steps to enable B2B Marketing Analytics.

**Where:** This change applies to Lightning Experience and Salesforce Classic and is included with Pardot Plus and Advanced. The change also affects Pardot Pro and Ultimate editions with the B2B Marketing Analytics add-on.

**How:** Open Salesforce Setup, and search for B2B Marketing Analytics. On the Getting Started page, follow the steps provided. To enable optional dashboards and datasets, review the steps on the Optional Features page.



Text links are available on certain steps that open Salesforce Help for more information. Buttons take you to the correct in-app locations to accomplish each task.

SEE ALSO:

[Salesforce Help: B2B Marketing Analytics \(can be outdated or unavailable during release preview\)](#)

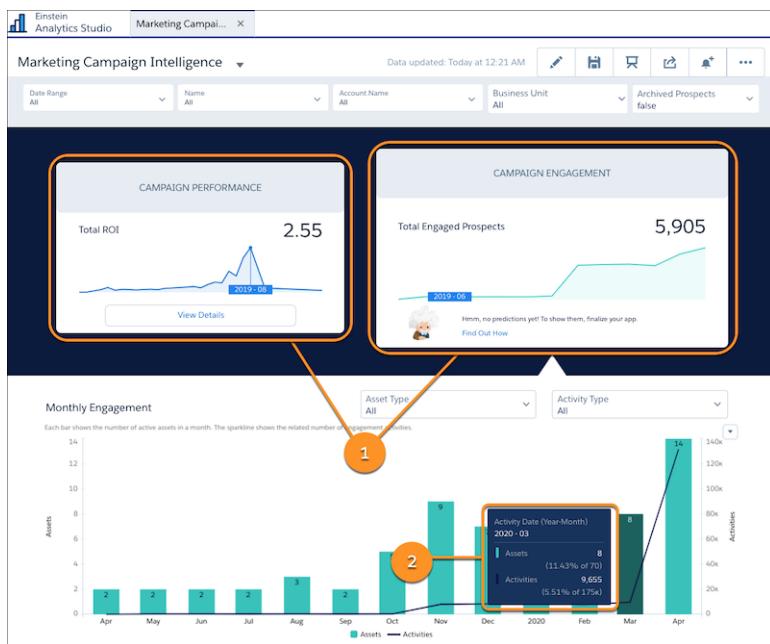
## Explore New Apps Tailored for B2B Marketers

B2B Marketing Analytics Plus is generally available. The growing feature set now includes an Account-Based Marketing app and the new Marketing Campaign Intelligence app, which brings two easy-to-read dashboards together in one place. The Campaign Engagement dashboard shows prospect engagement data from Pardot, and the Campaign Performance dashboard shows relevant campaign data from Salesforce. Sales and marketing users can explore these dashboards or create an Einstein Discovery Story to predict methods that can optimize their plans for maximum engagement.

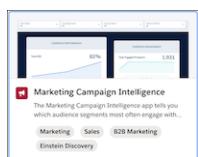
**Where:** This change applies to Lightning Experience and Salesforce Classic. This feature is available in Salesforce Enterprise, Unlimited, and Developer editions with Pardot Premium or the B2B Marketing Analytics Plus add-on.

**Why:** Customers asked for simpler ways to find out which audience segments most often engage with their marketing campaigns. Users want preset reports and dashboards that give them a better view of specific relationships that are hidden inside their dataflows. They also want help to identify the best next step for future campaigns. The Marketing Campaign Intelligence app and Einstein Discovery Story do all these things, making it easier to achieve the results your business wants.

The new app offers side-by-side dashboards (1) for an aggregate view and handy details (2) you expect from our B2B Marketing Analytics products.



**How:** If you already use Analytics Studio apps, such as B2B Marketing Analytics or Account-Based Marketing, you can create an app and choose the Marketing Campaign Intelligence app template.



If it's your first analytics app, enable Analytics and Data Sync first. Verify and assign permissions, and head over to Analytics Studio to create your first app.

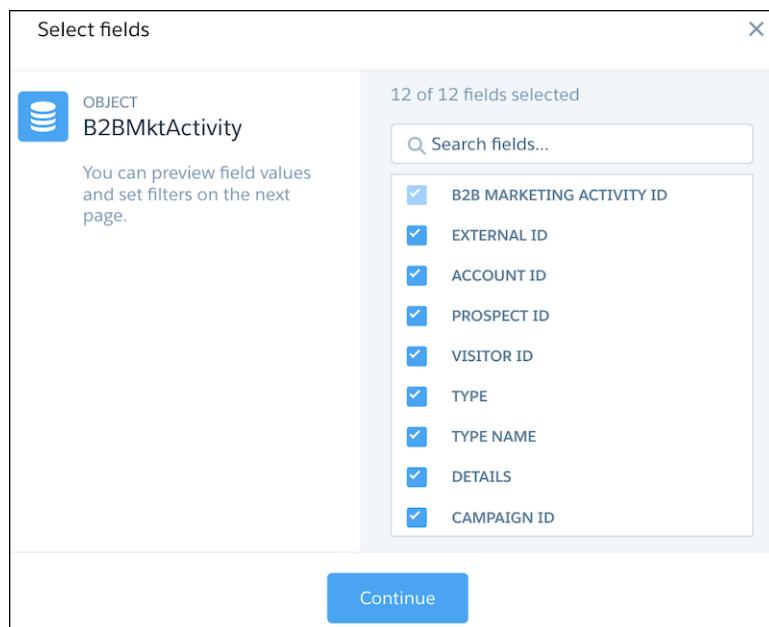
## Access and Customize Pardot Dataflows

Now you can see exactly which fields flow into your datasets when you use B2B Marketing Analytics Plus products with Pardot data. Further customize your dashboards when you use the easy interface to create datasets. Select the fields you want, and deselect the ones you don't.

**Where:** This change applies to Lightning Experience and Salesforce Classic. This feature is available in Salesforce Enterprise, Unlimited, and Developer editions with Pardot Premium edition or the B2B Marketing Analytics Plus add-on.

**Why:** This change improves performance with Pardot datasets in Analytics templated apps. Now that the data is visible in the Data Manager, you can also use the Connect interface to create custom datasets. For example, tie together Pardot data, Salesforce data, and other third-party data that's syncing into Analytics in a single dataset. Or, if you use multiple business units, create custom datasets that are specific to each.

**How:** The datasets are available in the SFDC Local Connector automatically. To create a custom dataset, head over to Analytics Studio and open the Data Manager. On the Connect tab, create a new data connection with SFDC Local. From there, select the B2BMktActivity or B2BMktProspect dataset, and select the fields you want to include in your new dataset.



### SEE ALSO:

[Salesforce Help: Design a Simple Dataset with Dataset Builder](#) (can be outdated or unavailable during release preview)

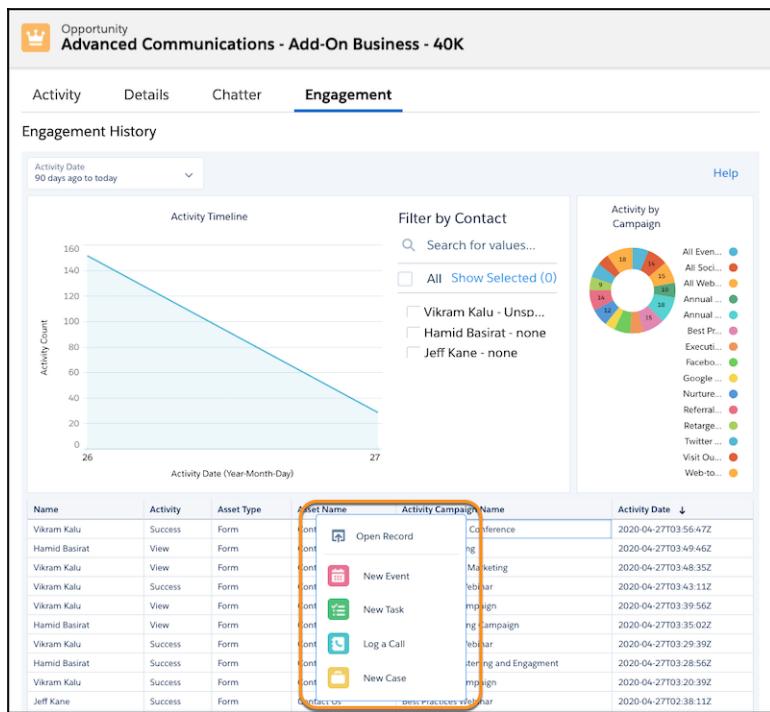
## See Engagement Data on Opportunity Records

Give your users access to interactive widgets that show tailored engagement data for their frequently viewed records. We added support for Opportunity records to the suite of embeddable dashboards. Users can see activity counts, details about the activities' associated campaigns, and a list of recent activity by related contacts.

**Where:** This change applies to Salesforce Professional (with API access), Enterprise, Performance, and Unlimited editions with Pardot Growth, Plus, Advanced, or Premier edition.

**How:** Enable Engagement History in Salesforce Setup. Then, use the Lightning App Builder to drag an Engagement History Dashboard Lightning component onto a tab on your Opportunity records.

Users can click into widgets to explore this data.



#### SEE ALSO:

[Salesforce Help: Turn On Engagement History Dashboards](#) (can be outdated or unavailable during release preview)

## Get AI-Enhanced Attribution Data on Your Campaign Records

Use a customized model created by Einstein learning to more accurately identify the most effective campaigns in your customer journeys. Einstein Attribution leaves rules-based influence models in the rearview mirror. It uses artificial intelligence to develop a data-driven model that attributes revenue share based on your actual customers, their engagement, and your successes.

**Where:** This change applies to Pardot Advanced and Pardot Premium editions with Salesforce Enterprise, Performance, and Unlimited editions.

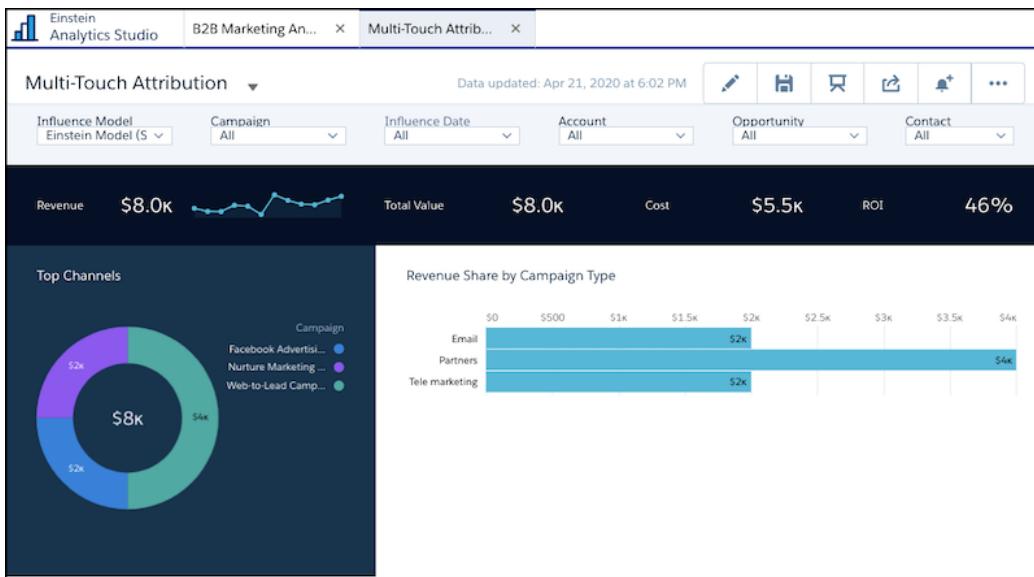
**Who:** To view Einstein Attribution insights, users need the CRM User, Sales User, or Service User permission set.

**Why:** Other attribution models leave the heavy lifting to users. A user must create a rule based on estimated weights, or enter individual attribution percentages for each campaign. Typically, it comes down to guesswork and manual entry.

With Einstein Attribution, artificial intelligence builds a model that's specific to your customer base, and it changes as new information is analyzed. It's able to assign influence to a number of campaigns throughout the customer's journey without any manual record creation.

**How:** Use the Einstein Attribution Setup Assistant to get started. To reveal insights on campaign and opportunity pages, make sure that Campaign Influence related lists are in place. Then, set the Data-Driven Model as your default Campaign Influence model and share the news with your sales and marketing teams.

For further exploration, open the Data-Driven Model in the B2B Marketing Analytics Multi-Touch Attribution dashboard.



#### SEE ALSO:

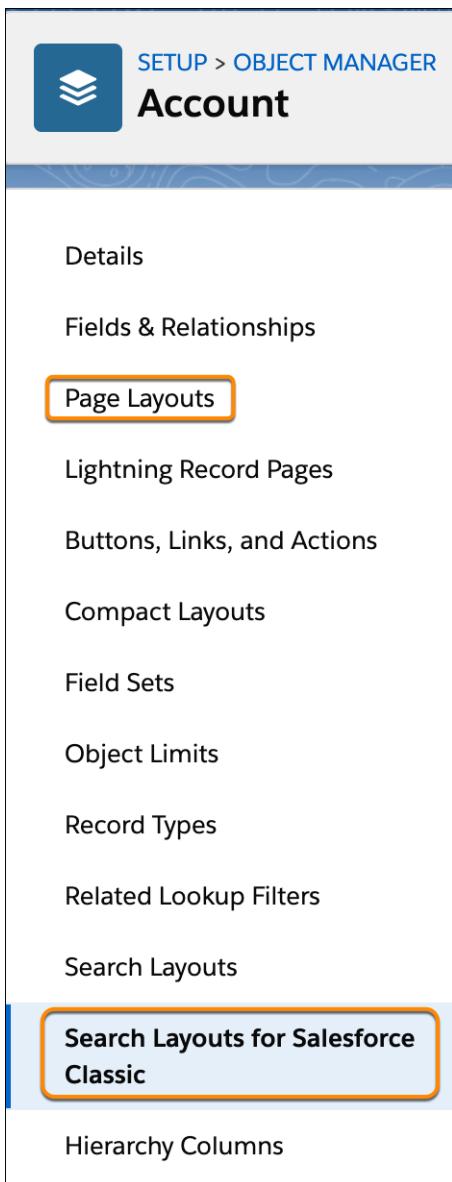
[Salesforce Help: Einstein Attribution](#) (can be outdated or unavailable during release preview)

### Add to Prospect Lists and Engagement Studio Programs from Records and List Views

Add to Pardot Lists and Add to Engagement Studio Lists are now available as standard buttons to add to record and list view pages in Salesforce. The buttons allow reps to add prospects to Pardot lists without leaving their CRM. Adding prospects to an Engagement Studio list also adds them to related engagement programs, if applicable.

**Where:** This change applies to all Pardot editions with Salesforce Professional, Enterprise, and Unlimited editions.

**How:** Add the Add to Pardot Lists and Add to Engagement Studio Lists buttons as standard actions to leads or contacts. Add to record pages in Page Layouts of the Object Manager and add to list views in Search Layouts for Salesforce Classic.



#### SEE ALSO:

[Salesforce Help: Create the Add to Pardot List Button](#) (can be outdated or unavailable during release preview)

[IdeaExchange: 'Add to Nurture List' action should show related Engagement Programs](#)

[IdeaExchange: Bulk add leads to nurtures in Salesforce Engage](#)

[IdeaExchange: Add Pardot "Add to Nurture" Button on List Views in Salesforce](#)

## Test Emails Removed from Engagement Datasets

To address user concerns, we removed test email data from the Pardot Email and Pardot Engagement History datasets. The two datasets now contain data associated only with list email sends, ignoring data from emails that are sent from the Testing tab. These datasets are used with B2B Marketing Analytics apps and embedded Engagement History dashboards.

**Where:** This change applies to Lightning Experience and Salesforce Classic in B2B Marketing Analytics and Engagement History embedded dashboards. B2B Marketing Analytics is included with Pardot Plus and Advanced or with Pardot Pro and Ultimate editions using the B2B Marketing Analytics add-on. Engagement History embedded dashboards are available in Salesforce Professional (with API access), Enterprise, Performance, and Unlimited editions with Pardot Growth, Plus, Advanced, or Premier edition.

**When:** Test email data was removed from the Pardot Email dataset on July 10, 2020, and from the Pardot Engagement History dataset on July 15, 2020.

**Why:** The Email dataset changes are retroactive, so users are likely to encounter new values where these datasets are in use. The Engagement History dataset change applies only on data gathered from July 15, 2020 and after. Significant value changes are less likely with this dataset, but consider the change when evaluating previous benchmarks. In addition, some email activity metrics in the Prospect and Activity dataset originate from the Engagement History dataset. If you're using custom queries on any of these datasets, it's possible that values can differ.

## Other Changes in the Sales Cloud

Learn about other changes we've made to improve usability and permission changes for duplicate management, email, and Enterprise Territory Management.

### IN THIS SECTION:

#### [Data.com Prospector and Data.com Clean Have Been Retired](#)

Data.com Prospector and Data.com Clean licenses can no longer be renewed. When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields will be removed from your org.

#### [Removed Users and Licenses Page for Inbox from Salesforce Setup](#)

We removed the User and Licenses page under Inbox in Salesforce Setup because of unexpected results on the page. Instead, use the Company Information page in Salesforce Setup to view the total purchased and assigned licenses. Use the Permission Sets page to determine which users are assigned to Inbox.

#### [Permission Changes for Sales Cloud Features](#)

Review access changes to Sales Cloud features that take effect with the Summer '20 release.

## Data.com Prospector and Data.com Clean Have Been Retired

Data.com Prospector and Data.com Clean licenses can no longer be renewed. When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields will be removed from your org.

**Where:** This change applies to Lightning Experience and Salesforce Classic. Data.com Prospector licenses are available in **Contact Manager** (no Lead object), **Group, Professional, Enterprise, Performance**, and **Unlimited** editions. Data.com Clean licenses are available in **Professional, Enterprise, Performance**, and **Unlimited** editions.

### SEE ALSO:

[Knowledge Article: Data.com Clean and Prospector Retirement](#)

## Removed Users and Licenses Page for Inbox from Salesforce Setup

We removed the User and Licenses page under Inbox in Salesforce Setup because of unexpected results on the page. Instead, use the Company Information page in Salesforce Setup to view the total purchased and assigned licenses. Use the Permission Sets page to determine which users are assigned to Inbox.

**Where:** This change applies to Salesforce Inbox, available for an extra cost in Group, Professional, Enterprise, Performance, Unlimited, and Developer editions, and at no cost in Essentials editions.

SEE ALSO:

[Salesforce Help: View Your Salesforce Org's Permission Set Licenses](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Assign a Feature Permission Set License and Permission Set](#) (can be outdated or unavailable during release preview)

## Permission Changes for Sales Cloud Features

Review access changes to Sales Cloud features that take effect with the Summer '20 release.

### Duplicate Management

Access to duplicate rules, duplicate jobs, matching rules, and matching criteria through the API is limited to authenticated users with the View Setup and Configuration permission.

### Email

Access to email domain filters in the API is limited to authenticated users with the Email Administration, Customize Application, and View Setup and Configuration permissions. Access to organization-wide email addresses for user profiles is limited to authenticated users.

### Enterprise Territory Management

Access to territories and their assignments, associations, categories, and models is limited to standard and partner users.

SEE ALSO:

[Knowledge Article: User Profile Permission Descriptions](#)

## Service: Service Cloud Voice, Einstein Reply Recommendations, Multi-Language Einstein Bots, Field Service Lightning Shift Improvements, and More

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Talk with your customers via Service Cloud Voice, a new product that integrates the power of Salesforce with the telephony services of Amazon Connect. Recommend chat replies based on similar closed chats to support agents in the Lightning Service Console. Use Einstein Bots in nine languages. Manage Field Service Lightning shifts (beta) more easily with improvements to schedule views.

IN THIS SECTION:

[Einstein for Service: Reply Recommendations, Multi-Language Article Recommendations, Enhanced Bot Event Logs, and Facebook Messenger for Bots](#)

Recommend chat replies based on similar closed chats to busy support agents, and receive knowledge article recommendations in five new languages. Help support agents wrap up cases faster with field value recommendations that are based on chat data and closed case fields. Troubleshoot faster with Enhanced Bot event logs, and integrate skills-based routing so your bot can help your customers more quickly. Reach more customers on bots with nine new languages and Facebook Messenger support. Receive Einstein Case Classification predictions on lookup fields as well as checkboxes and picklists, and identify cases whose field predictions didn't meet the auto-update confidence threshold.

[Field Service: Enhanced Shift Management, Optimization Insights, Asset Availability, and Confetti](#)

Manage shifts more easily with improvements to schedule views. See how an optimization impacts KPIs, especially as you refine the scheduling policy. Monitor planned and unplanned asset downtimes so you can proactively improve service levels. Celebrate with a confetti toss as users progress through product requests.

[Channels: Voice for Service, Embedded Channel Menu Preview, Chat Header Redesign, and Canadian Short Codes](#)

Talk with your customers using Service Cloud Voice, a new product that integrates the power of Salesforce with the telephony services of Amazon Connect. See your Embedded Channel Menu branding and label choices with a live preview. Enhance your standard header for Embedded Chat. Reach more customers quickly with Short Codes for Messaging in Canada.

[Knowledge: Sharing and Article Ownership](#)

Lightning Knowledge introduces sharing (Beta) so you can leverage the power of the platform. Set default sharing and tailor criteria-based rules to your content and your readers. The Change Owner action, available for all Salesforce orgs with Lightning Knowledge, helps you get specific about owner-based access if you make the switch to sharing.

[Routing: Status-Based Capacity and Prioritized Additional Skills](#)

The Status-Based capacity model is Generally Available. Measure agent capacity more accurately using the status of accepted work. Drop additional skills iteratively instead of all at once.

[Other Changes in Service Cloud](#)

Learn about other changes we've made in the Service Cloud.

## Einstein for Service: Reply Recommendations, Multi-Language Article Recommendations, Enhanced Bot Event Logs, and Facebook Messenger for Bots

Recommend chat replies based on similar closed chats to busy support agents, and receive knowledge article recommendations in five new languages. Help support agents wrap up cases faster with field value recommendations that are based on chat data and closed case fields. Troubleshoot faster with Enhanced Bot event logs, and integrate skills-based routing so your bot can help your customers more quickly. Reach more customers on bots with nine new languages and Facebook Messenger support. Receive Einstein Case Classification predictions on lookup fields as well as checkboxes and picklists, and identify cases whose field predictions didn't meet the auto-update confidence threshold.

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### IN THIS SECTION:

[Help Chat Agents Respond Faster with Einstein Reply Recommendations \(Generally Available\)](#)

Einstein Reply Recommendations analyzes data from chat transcripts to generate replies that address your customers' inquiries. As agents chat with customers, they can select the most relevant reply from a list of recommended replies in the Lightning Service Console. Einstein only recommends replies that you reviewed and published.

[Deliver Einstein Article Recommendations in Five New Languages \(Pilot\)](#)

Einstein Article Recommendations uses data from past cases to identify knowledge articles that are most likely to help your agents address customer inquiries. Article recommendations are now available in French, German, Spanish, Portuguese, and Italian in addition to English.

[Close Cases Faster with Einstein Case Wrap-Up \(Pilot\)](#)

Chats with customers often include valuable interactions that result in a case field update. Help support agents wrap up cases faster with on-demand recommendations that are based on chat data and closed case field values.

[Einstein Bots: Facebook Messenger, Enhanced Event Logs, Skills-Based Routing, and More](#)

Build smarter chatbots in less time with our brand new bot enhancements. We created great new integrations with Service Cloud favorites such as Skills-Based Routing and Facebook Messenger. Help your developers troubleshoot faster with enhanced event logs, and train your chatbot with new cutting-edge Natural Language Processing models. Create a multi-language experience with Einstein Bots in nine newly supported languages.

[Einstein Case Classification: Lookup Field Support and a New Lightning Component](#)

Einstein Case Classification now predicts lookup field values in addition to checkboxes and picklists. It's now possible to identify cases whose field predictions didn't meet the confidence threshold. Field recommendations have moved to a new Lightning Service Console component.

## SEE ALSO:

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## Help Chat Agents Respond Faster with Einstein Reply Recommendations (Generally Available)

Einstein Reply Recommendations analyzes data from chat transcripts to generate replies that address your customers' inquiries. As agents chat with customers, they can select the most relevant reply from a list of recommended replies in the Lightning Service Console. Einstein only recommends replies that you reviewed and published.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Einstein Reply Recommendations is available only in English.

**Who:** Einstein Reply Recommendations is included in the Service Cloud Einstein add-on license. To publish and manage replies, you need:

- Permission to create quick text
- Manage Replies for Einstein Reply Recommendations user permission

To use replies in the console, agents need the Einstein Reply Recommendations User permission set, which comes with the add-on license.

**How:** Turn on this feature on the Einstein Reply Recommendations page in Setup. Then, build your predictive model so Einstein can generate replies based on past closed chats. Identify the replies that you want to make available to your support team, edit them if needed—for example, to add a merge field such as the customer's name—and publish them to quick text. Agents see recommended published replies in a Lightning Service Console component, and can select one and insert it into a chat.

The screenshot shows two main sections. On the left is a 'Conversation' window with a message from a 'Visitor' asking for an extension due to a coronavirus lockdown. An admin reply follows, promising an extension. On the right is a 'Einstein Replies' interface titled 'BEST'. It displays three recommended responses about return policies. The top recommendation states: 'Items must be returned in their original condition, unopened, to qualify for a full refund. The refund amount will be deposited back to the original form of payment.' This text is highlighted with a red box. Below it are two more recommendations: one about partial refunds for items with signs of wear, and another about generating return shipping labels.

Manage your published replies just like you manage quick text, and pause recommendations at any time. For example, if you update a business policy, you can pause recommendations to remove or update replies that reflect your old policy.

**Important:** In the Spring '20 Einstein Reply Recommendations pilot, agents needed the View and Act On Einstein Reply Recommendations user permission to use reply recommendations. If you participated in the pilot, assign agents the new Einstein Reply Recommendations User permission set and remove the pilot user permission to ensure continued access.

#### SEE ALSO:

[Salesforce Help: Einstein Reply Recommendations](#) (can be outdated or unavailable during release preview)

## Deliver Einstein Article Recommendations in Five New Languages (Pilot)

Einstein Article Recommendations uses data from past cases to identify knowledge articles that are most likely to help your agents address customer inquiries. Article recommendations are now available in French, German, Spanish, Portuguese, and Italian in addition to English.

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

**Why:** Article recommendations in these newly supported languages work much like they do in English. A single, predictive model controls Einstein's recommendations for all supported languages in your Salesforce org, and agents see recommendations in the Knowledge component of the Lightning Service Console. Einstein uses natural language processing (NLP) to detect each case's language, and checks the knowledge article version's Language field for the article's language.

Here's how multi-language recommendations work:

- If the case language is supported\*, Einstein recommends any relevant articles in that language.
- If the case language isn't supported\*, Einstein recommends any relevant articles in the org's Knowledge master language.
- If both the case and Knowledge master languages aren't supported\*, Einstein recommends any relevant English articles.

This means that the case and its recommended articles may use two different languages.

\*Here, a "supported" language is:

- One of the languages supporting Einstein Article Recommendations: English, French, German, Spanish, Portuguese, or Italian
- Set to Active in your Knowledge settings

The screenshot shows two panels. On the left is a 'Case Wrap-Up' sidebar with sections for 'Einstein Recommendations Applied' (CWUAccount, Priority, Status, Subject, Description), 'Feed' (Post, Log a Call, Share an update...), and 'Details' (Most Recent Activity, All Updates, Call Logs, Text Posts, Status Changes). On the right is a 'Case' detail page for 'Qué es Astorga (Estorga, 4 en el leonés de la Maragatería)' with a 'Knowledge' section displaying three recommended articles: 'Astorga (Estorga, 4 en el leonés de la Ma...)', 'Edición princip... (000001002)', and 'Tesoro de la lengua castellana o español... (000001001)'. An orange box highlights the 'Knowledge' section.

**How:** To sign up for this pilot, contact your Salesforce Account Executive. Make sure that you have the following data in at least one of the six supported languages:

- 100 knowledge articles
- 500 instances of an article attached to a case, also called an “attach”

## Close Cases Faster with Einstein Case Wrap-Up (Pilot)

Chats with customers often include valuable interactions that result in a case field update. Help support agents wrap up cases faster with on-demand recommendations that are based on chat data and closed case field values.

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

**Why:** Like Einstein Case Classification, Einstein Case Wrap-Up suggests values on case fields based on activity on past cases. However, Einstein Case Wrap-Up learns from both closed cases and closed chat transcripts to unlock key customer service data.

Recommendations appear in the new Einstein Field Recommendations Lightning component, which you can add to the Lightning Service Console case and Chat layouts or to a Lightning app of your choice. Agents click **Get Einstein Recommendations** to view predictions, and can then review and save the recommended updates. Fields with predictions are signified by a green dot.

The screenshot shows two panels. On the left is a 'Case Wrap-Up' sidebar with sections for 'Einstein Recommendations Applied' (CWUAccount, Priority, Status, Subject, Description), 'Feed' (Post, Log a Call, Share an update...), and 'Details' (Most Recent Activity, All Updates, Call Logs, Text Posts, Status Changes). On the right is a 'Case' detail page for 'Inquiry on Nike women running shoes model number A1234 101' with a 'Knowledge' section displaying three recommended articles: 'Astorga (Estorga, 4 en el leonés de la Ma...)', 'Edición princip... (000001002)', and 'Tesoro de la lengua castellana o español... (000001001)'. An orange box highlights the 'Knowledge' section.

**How:** To sign up for this pilot, contact your Salesforce Account Executive. You'll select case fields to include in your Einstein Case Wrap-Up predictive model.

## Einstein Bots: Facebook Messenger, Enhanced Event Logs, Skills-Based Routing, and More

Build smarter chatbots in less time with our brand new bot enhancements. We created great new integrations with Service Cloud favorites such as Skills-Based Routing and Facebook Messenger. Help your developers troubleshoot faster with enhanced event logs, and train your chatbot with new cutting-edge Natural Language Processing models. Create a multi-language experience with Einstein Bots in nine newly supported languages.

### IN THIS SECTION:

#### [Get Deeper Insights with Enhanced Event Logs](#)

Expanded event log enhancements deliver two new levels of bot event logs. You can now troubleshoot highly complex bots on one page, including messages sent to and from the customer. You can also use event logs to report on key performance indicators such as average conversation time and channel origin. You can export bot session data and event logs through the API or from the Data Loader to share with your team. Create standard reports to share with your team using the Conversation Definition Session object.

#### [Increase Customer Satisfaction with Skills-Based Routing for Bots](#)

Use skills-based routing with a bot to match your customers with an agent that has the skills required to complete the task. Skills let you define attributes that are important to your business, such as language ability, certifications, or product knowledge. The bot can now attribute multiple skills to a conversation and transfer to agents that match.

#### [Expand Your Audience with Facebook Messenger \(Generally Available\)](#)

Instantly connect your bot to the most popular messaging app in the US. With 40 million monthly active businesses and over a billion monthly active users, Facebook Messenger is now generally available as a channel for Einstein Bots. You can take a chatbot from idea to live in minutes with our integrated setup tools.

#### [Gain Understanding with Bot Model Enhancements \(Generally Available\)](#)

Your bot just got smarter with new Natural Language Processing models that use deep learning to generate better insights and intent matching. Now you can retrain your bot with just one click.

#### [Say "Bonjour" to Multi-Language Bots](#)

Train your bot to speak to your customers with our multi-language enhancements. Einstein Bots now supports the following languages: English, Spanish, French, German, Italian, Portuguese. The following languages are in beta: Chinese Simplified, Chinese Traditional, Japanese.

#### [Maintain Your Bot with Bot Builder Upgrades](#)

Focus more on the task at hand with collapsible bot dialog steps in the Map and Detail views. Train your bot faster with new bulk actions in Bot Training. Intent Extensions are now renamed Intent Sets to make it easier to navigate models. As you grow your bot, these tools help keep your bot organized and encourage consistent training.

#### [Use Chat Data to Strengthen Intent Models \(Pilot\)](#)

Let Einstein help you use past chat logs to identify new utterances. When you enter a phrase related to your intent, Einstein searches your chat logs for similar phrases that can be directly added to your model.

#### [Get Foundational Docs on Intent Management and Bot Event Data](#)

Become a bot expert by learning about the best ways to build an intent model, migrate bot data between orgs, and report on bot conversations. Build bots based on tested best practices now included in Salesforce Help on handling the two types of Einstein Bot data: Intent Management and Bot Event Data.

### [Einstein Bots: Increased Limits](#)

Learn about changes to active bot limits to Einstein Bots.

### [Create Dynamic Queue Routing for Einstein Bots](#)

Einstein Bots now uses the Chat button queue, so conversations can wait for the next available agent based on a transferred queue or skill.

## Get Deeper Insights with Enhanced Event Logs

Expanded event log enhancements deliver two new levels of bot event logs. You can now troubleshoot highly complex bots on one page, including messages sent to and from the customer. You can also use event logs to report on key performance indicators such as average conversation time and channel origin. You can export bot session data and event logs through the API or from the Data Loader to share with your team. Create standard reports to share with your team using the Conversation Definition Session object.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**Who:** Einstein Bots is available to Salesforce orgs with both Service Cloud and Chat user licenses, or to orgs with Digital Engagement user licenses. Each applicable org is provided with 25 Einstein Bots conversations per month for each Chat or Digital Engagement user with an active subscription.

**How:** You can access the Event Logs on the Performance tab within the Bot Builder. The following permissions are required to view the Bot Event Logs: API Enabled, View All Data, Customize Application. To create a standard report, you must create a report type with the Conversation Definition Session object before creating the report. To export bot sessions or event logs, use the Conversation Definition Session, Conversation Event Log, or Conversation Definition Session Engagement objects using API version 49.0 or higher.

Event Date	Dialog Name	Event Type	Event	Log Level	Error
4/15/2020, 05:01:40 PM		Start Session	Starting a new session	Info	
4/15/2020, 05:01:40 PM	Welcome	Message	Message sent: Hi! I'm the Ein...	Info	
4/15/2020, 05:01:40 PM	Welcome	Redirect	Redirect to dialog: Main_Me...	Info	
4/15/2020, 05:01:40 PM	Welcome	Start Dialog	Start dialog: Main_Menu	Info	
4/15/2020, 05:01:40 PM	Main Menu	Message	Message sent: Here are som...	Info	
4/15/2020, 05:01:40 PM	Main Menu	Question	Prompt sent: [0] Make Appoi...	Info	
4/15/2020, 05:01:53 PM	Main Menu	Input Message	User response: 'I want to sch...	Info	
4/15/2020, 05:01:54 PM	Main Menu	Intent Prediction	Intent detected successfully...	Info	
4/15/2020, 05:01:55 PM	Main Menu	Redirect	Redirect to dialog: Make_Ap...	Info	
4/15/2020, 05:01:55 PM	Main Menu	Start Dialog	Start dialog: Make_Appoint...	Info	
4/15/2020, 05:01:55 PM	Make Appointment	Message	Message sent: Sure, I can hel...	Info	
4/15/2020, 05:01:55 PM	Make Appointment	Question	Prompt sent: What type of a...	Info	

## Increase Customer Satisfaction with Skills-Based Routing for Bots

Use skills-based routing with a bot to match your customers with an agent that has the skills required to complete the task. Skills let you define attributes that are important to your business, such as language ability, certifications, or product knowledge. The bot can now attribute multiple skills to a conversation and transfer to agents that match.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

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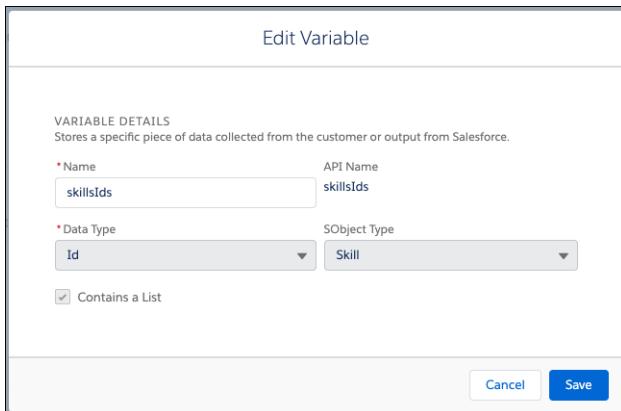
**How:** Prerequisites:

- Chat enabled
- Omni-Channel setup with Skill-Based Routing enabled (if you're new to Skill Based Routing, complete [steps 1–5 in the setup instructions](#))
- Skills created, with a list of the 18-digit skill IDs
- Einstein Bots enabled

 **Note:** Limitations with Skills-Based Routing and Einstein Bots:

- Einstein Bots do not support attribute setup with Skills-Based Routing.
- If a transfer occurs and no agents are available, the bot routes to a system "no agent available" dialog.

**1.** In your bot, create a list variable with the data type of ID. Set the SObject Type to Skill.



**2.** Create an Apex class which adds a set of skill IDs to a list. We recommend adding the list of Skill IDs as a comment for reference.

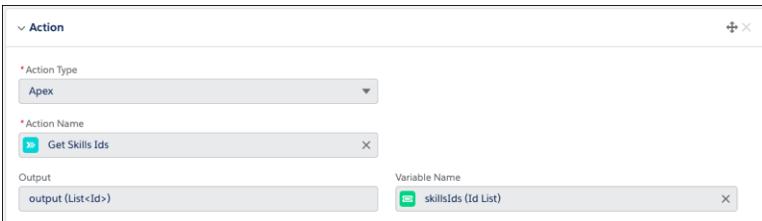
```
global with sharing class GetSkillsIdsAction {
    @InvocableMethod(label='Get Skills Ids' description='Return Ids of Skills')
    global static List<List<Id>> getSkillsIds() {
        List<Id> skillsIds = new List<Id> ();

        /*
         * 18 char Skills Ids in the org:
         *
         * Dutch - 0C5RM000000028I0AQ
         * French - 0C5RM000000028D0AQ
         * Spanish - 0C5RM000000026R0AQ
         */

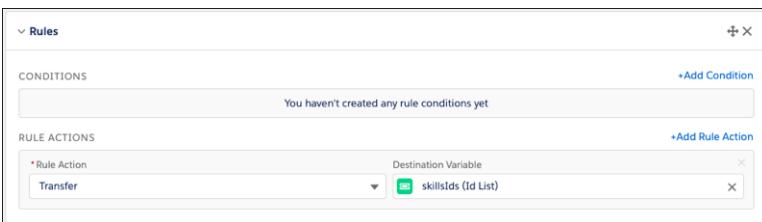
        skillsIds.add('0C5RM000000028I0AQ');
        skillsIds.add('0C5RM000000026R0AQ');

        return new List<List<Id>> {skillsIds};
    }
}
```

3. In the Einstein Bot Builder, add an Action Dialog Step to call the Apex class and set the skills IDs in the bot variable.



4. Add a Rule Dialog Step without conditions. In the Rule Action, select to Transfer to the bot variable.



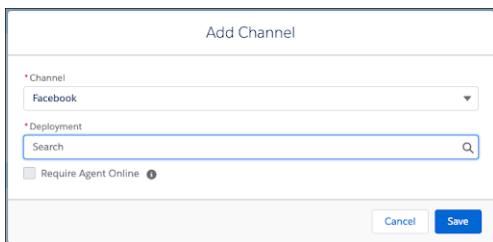
## Expand Your Audience with Facebook Messenger (Generally Available)

Instantly connect your bot to the most popular messaging app in the US. With 40 million monthly active businesses and over a billion monthly active users, Facebook Messenger is now generally available as a channel for Einstein Bots. You can take a chatbot from idea to live in minutes with our integrated setup tools.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

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**How:** Set up Facebook pages in Messaging before you can add them to any bot. After you add the page, navigate to the Overview Page in the Bot Builder. Click Add in the Channel menu, and then select Facebook as the Channel and the Channel Name in the Deployment field.



## Gain Understanding with Bot Model Enhancements (Generally Available)

Your bot just got smarter with new Natural Language Processing models that use deep learning to generate better insights and intent matching. Now you can retrain your bot with just one click.

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**How:** You can retrain your bot on the new intent model by clicking Build Model in the Model Management section of the Bot Builder.

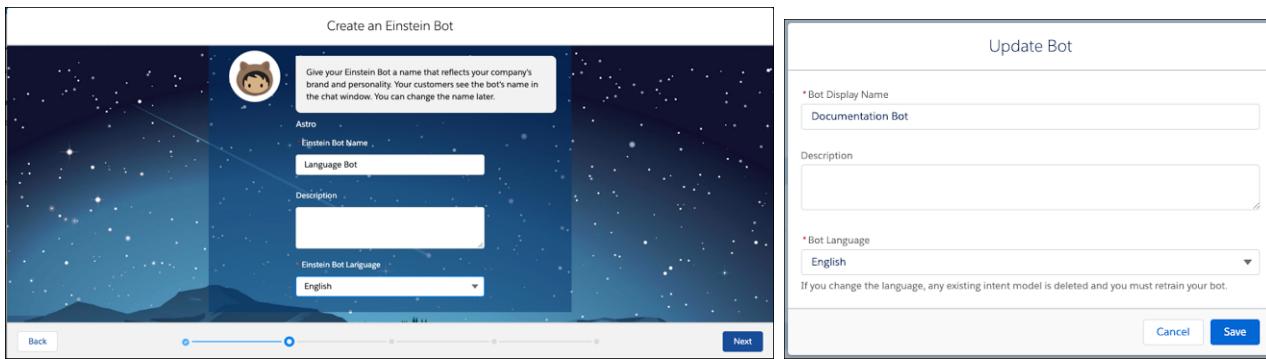
## Say “Bonjour” to Multi-Language Bots

Train your bot to speak to your customers with our multi-language enhancements. Einstein Bots now supports the following languages: English, Spanish, French, German, Italian, Portuguese. The following languages are in beta: Chinese Simplified, Chinese Traditional, Japanese.

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**How:** Setting a language for the bot is now required. You can select a language for a new bot during the New Bot Setup Flow. You can assign a language to previously created bots by editing the Bot Information section of the Bot Overview page.



## Maintain Your Bot with Bot Builder Upgrades

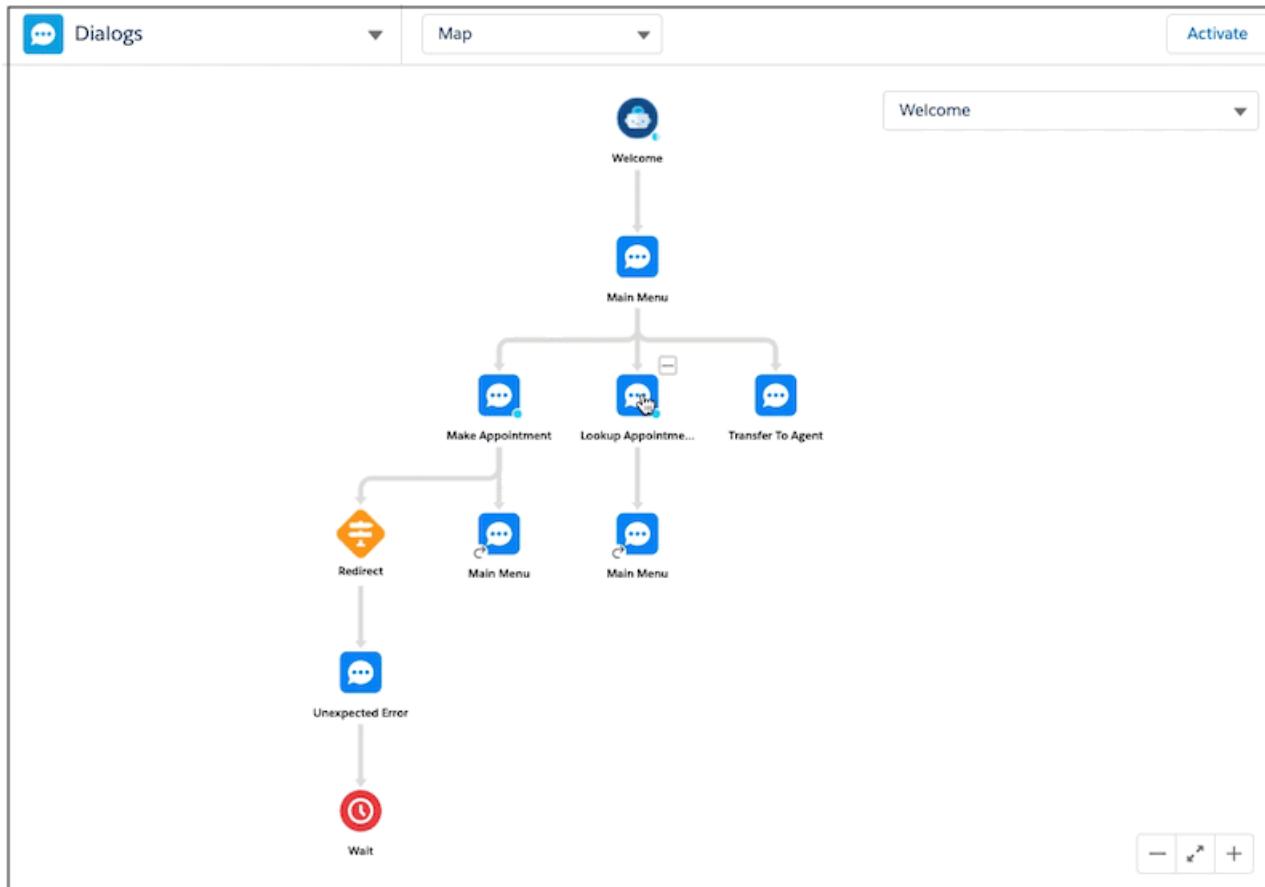
Focus more on the task at hand with collapsible bot dialog steps in the Map and Detail views. Train your bot faster with new bulk actions in Bot Training. Intent Extensions are now renamed Intent Sets to make it easier to navigate models. As you grow your bot, these tools help keep your bot organized and encourage consistent training.

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**How:** You can access the map view through the Dialog menu in the Einstein Bot Builder, and you can access the Bot Training page through the Model Management menu. Changes to the Map View include:

- Pan Mode was removed, but you can click and drag throughout the model, or use arrow buttons and tabs for greater accessibility.
- A green circle over the corner of the icon identifies those dialogs with intent enabled.
- Collapsing at the parent shows the number of direct child dialogs attached to that parent dialog.
- Hovering over a rule dialog step shows the criteria included in the rule.



## Use Chat Data to Strengthen Intent Models (Pilot)

Let Einstein help you use past chat logs to identify new utterances. When you enter a phrase related to your intent, Einstein searches your chat logs for similar phrases that can be directly added to your model.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**Who:** Einstein Bots is available to Salesforce orgs with both Service Cloud and Chat user licenses, or to orgs with Digital Engagement user licenses. Each applicable org is provided with 25 Einstein Bots conversations per month for each Chat or Digital Engagement user with an active subscription.

**How:** To learn more about the pilot, contact your account executive.

## Get Foundational Docs on Intent Management and Bot Event Data

Become a bot expert by learning about the best ways to build an intent model, migrate bot data between orgs, and report on bot conversations. Build bots based on tested best practices now included in Salesforce Help on handling the two types of Einstein Bot data: Intent Management and Bot Event Data.

**Why:** We added two new help sections to explain the two main types of bot data:

- Einstein Bots and Your Data: A comprehensive overview of bot data. This guide describes best practices around reading event log data, the differences between bot data and bot version data, and a comprehensive listing of each object in the bot data model.

- Intent Management: Intent Data, or the data used to create an intent model, is separate from bot event data. This guide walks you through how and when to introduce an intent model to your bot, best practices on maintaining an intent model, and how to migrate intent data between orgs.

## Einstein Bots: Increased Limits

Learn about changes to active bot limits to Einstein Bots.

- We increased the number of active bots in an org from 10 to 20. If your org needs more than 20 active bots at one time, contact Salesforce Support.

## Create Dynamic Queue Routing for Einstein Bots

Einstein Bots now uses the Chat button queue, so conversations can wait for the next available agent based on a transferred queue or skill.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions. Setup for Einstein Bots is available only in Lightning Experience.

**Who:** Einstein Bots is available to Salesforce orgs with both Service Cloud and Chat user licenses, or to orgs with Digital Engagement user licenses. Each applicable org is provided with 25 Einstein Bots conversations per month for each Chat or Digital Engagement user with an active subscription.

**How:** To transfer calls to the Chat Button queue, you must select **Enable Queue** on the Chat Button record.

## Einstein Case Classification: Lookup Field Support and a New Lightning Component

Einstein Case Classification now predicts lookup field values in addition to checkboxes and picklists. It's now possible to identify cases whose field predictions didn't meet the confidence threshold. Field recommendations have moved to a new Lightning Service Console component.

### IN THIS SECTION:

#### [Recommend and Automate Values for Lookup Fields](#)

Give your agents recommendations for lookup fields. Einstein Case Classification already recommends and automates values for picklist and checkbox fields. Now, lookup fields are also supported.

#### [Identify Cases With Low-Confidence Predictions](#)

Find cases whose field predictions failed to meet the required confidence level for automatic updates by Einstein. Use this information to add these cases to a queue for review or rerun case routing logic.

#### [Update Your Page Layouts](#)

Same great recommendations, slightly different location. Update your Lightning Service Console layout to display Einstein Case Classification recommendations in the new Einstein Field Recommendations component.

## Recommend and Automate Values for Lookup Fields

Give your agents recommendations for lookup fields. Einstein Case Classification already recommends and automates values for picklist and checkbox fields. Now, lookup fields are also supported.

**Where:** This change applies to Salesforce Classic and Lightning Experience. Setup for Einstein Case Classification is available only in Lightning Experience.

**How:** When you create or edit a Case Classification model, you can add lookup fields to your model on the “Add fields to predict” page.

SEE ALSO:

[Salesforce Help: Configure Your Predictive Model](#) (can be outdated or unavailable during release preview)

## Identify Cases With Low-Confidence Predictions

Find cases whose field predictions failed to meet the required confidence level for automatic updates by Einstein. Use this information to add these cases to a queue for review or rerun case routing logic.

**Where:** This change applies to Salesforce Classic and Lightning Experience. Setup for Einstein Case Classification is available only in Lightning Experience.

**Why:** When you choose to let Einstein auto-update certain case fields, you set a minimum confidence level for Einstein’s predictions. Previously, it wasn’t possible to identify cases whose Einstein predictions didn’t meet the required confidence level. Now, the AIUpdateRecordEvent object has two new fields that make it easier for you to build in additional logic after Einstein predicts field values.

Fields	Description
IsUpdated	(Boolean) Indicates whether a case was automatically updated by Einstein Case Classification (true) or not (false).
UpdatedFields	(List) List of the fields that were updated, if any.

**How:** Use [platform events](#) to subscribe to AIUpdateRecordEvent to be notified any time Einstein tries to predict the value of a case field that has the [Automate Value](#) setting turned on. The field must be included in an active Case Classification model.

SEE ALSO:

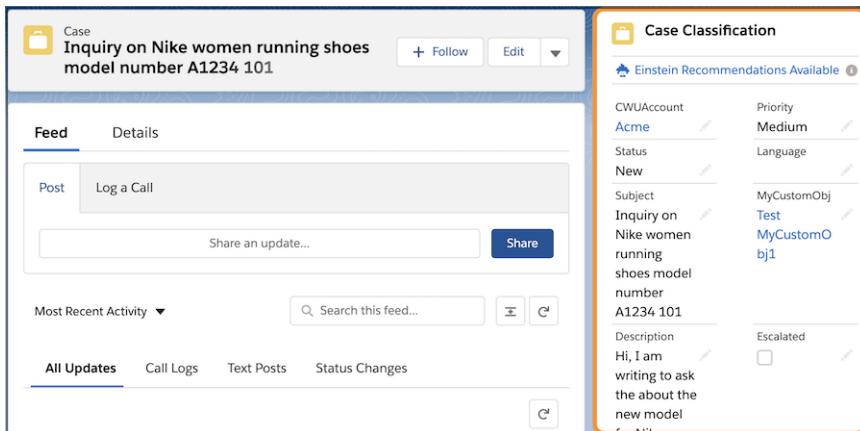
[Salesforce Help: AIUpdateRecordEvent](#) (can be outdated or unavailable during release preview)

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Same great recommendations, slightly different location. Update your Lightning Service Console layout to display Einstein Case Classification recommendations in the new Einstein Field Recommendations component.

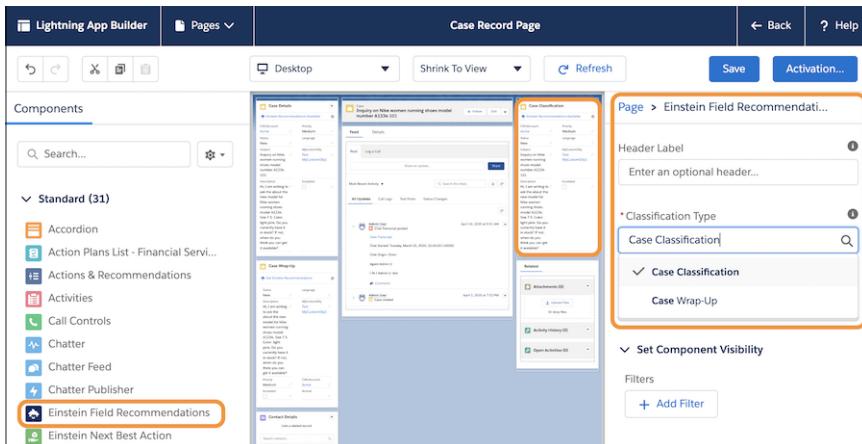
**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

**Why:** Einstein Case Classification recommendations are currently shown in the Case Details related record component in the Lightning Service Console. Though this component is still available, it will stop showing these recommendations in the Winter ’21 release. To give yourself some wiggle room, we recommend that you switch to the new Einstein Field Recommendations component.



The Salesforce Classic console experience isn't affected. Recommendations still show in the Einstein Case Classification Recommendations sidebar.

**How:** Drag the Einstein Field Recommendations component onto your Lightning Service Console layout, and select **Case Classification** as the type.



## Field Service: Enhanced Shift Management, Optimization Insights, Asset Availability, and Confetti

Manage shifts more easily with improvements to schedule views. See how an optimization impacts KPIs, especially as you refine the scheduling policy. Monitor planned and unplanned asset downtimes so you can proactively improve service levels. Celebrate with a confetti toss as users progress through product requests.

### IN THIS SECTION:

#### [Bring Results into Focus with Optimization Insights \(Beta\)](#)

Learn at a glance how global optimization affects your KPIs. When you tweak a scheduling policy and optimize the schedule, you can see if the change lowers travel times or improves utilization. A results snapshot shows metrics before and after the optimization.

#### [Manage Loads for Your Trucks and Workers](#)

To limit assignments, daily work hours, and how much workers can transport, add Count work rules to a scheduling policy. You can assign light workloads to new-hires, or track item quantities that fit in each worker's vehicle.

### [Take Scheduling Challenges in Stride](#)

Enhanced optimization makes it painless to respond to last-minute changes and build schedules that align with KPI goals. Previously, to access in-day optimization, predictive travel, and scheduling recipes, you activated enhanced optimization. We're now phasing in this flavor of optimization as the default method.

### [Save Clicks in the Dispatcher Console](#)

Work smarter and faster in the appointment list in the dispatcher console. Select appointments from different views and open the selected list with a single click. Hover over appointments and view details, or add icons that communicate information visually.

### [Get Improved Shift Management \(Generally Available\)](#)

This feature, now generally available, includes some changes since the last release. Managing shifts in the schedule view is easier than ever. Shifts that span multiple days have a new look, so it's easier to identify availability. Quickly search for shifts, then hover over one to make updates using the available actions. And, your team can change what they see by choosing fields and ordering them in the list view.

### [Customize the Gantt in More Ways](#)

Fine-tune control over what users can see and do in the dispatcher console with optional custom permissions. For example, you can create a read-only view of the Gantt for service managers. Or, configure which users can drag appointments from the list or map to the Gantt.

### [Give Users More Confetti](#)

Celebrate progress with a virtual confetti toss as your user reaches a designated Path stage on a product request or product request line item.

### [Share Maintenance Plans and Service Contracts as Needed](#)

Apply sharing rules to maintenance plans and extend access to users in public groups, roles, or territories. Share maintenance plans based on the owner or other criteria. Also, share Service Contract records based on criteria other than the service contract owner.

### [Track Asset Availability and Reliability](#)

Capture details of an asset's expected availability, and planned and unplanned maintenance. Then define a reporting period to view information on cumulative downtime, cumulative unplanned downtime, availability, and reliability to keep things running smoothly.

### [Track Your Team's Expenses](#)

Create expenses linked to work orders. From duct tape to travel costs, your team can keep track of expenses.

### [Use Criteria-Based Sharing Rules for Time Sheets](#)

Add criteria-based rules for time sheets to provide access to the right people. For example, you can create a rule that shares submitted time sheets with the accounting department or a partner manager group.

### [Link Directly to Actions and Flows in the Mobile App](#)

Save time and taps for your field service workers with URIs that launch flows and quick actions in the mobile app. For example, use a deep link to run a custom flow. You can also pass data in the URI, for example to pre-fill some fields.

### [Push Notification Limits Have Increased](#)

You can send up to 20,000 iOS and 10,000 Android push notifications per hour per org.

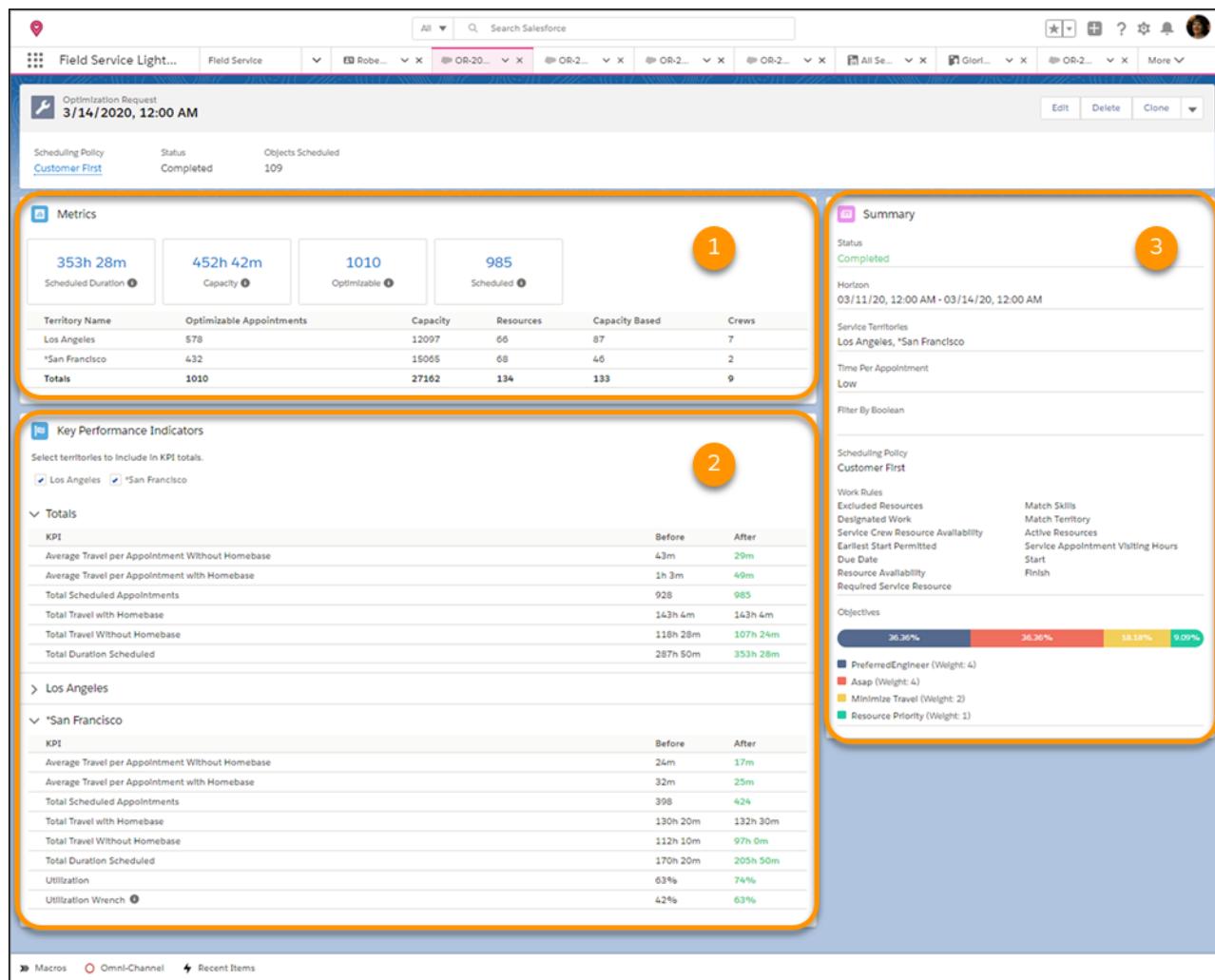
## **Bring Results into Focus with Optimization Insights (Beta)**

Learn at a glance how global optimization affects your KPIs. When you tweak a scheduling policy and optimize the schedule, you can see if the change lowers travel times or improves utilization. A results snapshot shows metrics before and after the optimization.

**Where:** This feature applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning managed package installed.

 **Note:** As a beta feature, Optimization Insights is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Optimization Insights in the [Field Service Lightning group in the Trailblazer Community](#).

**How:** In **Field Service Settings > Optimization**, enable **Optimization Insights**. Using Lightning App Builder, edit an optimization request page and add the three custom Lightning components. After a global optimization completes, the components provide metrics (1), KPIs by territory (2), and a summary that includes optimization and scheduling policy details (3).



The screenshot shows the Field Service Lightning app interface with three main components highlighted by orange circles:

- Metrics** (1): Displays key performance metrics such as Scheduled Duration (353h 28m), Capacity (452h 42m), Optimizable (1010), and Scheduled (985). It also provides a detailed breakdown by territory (Los Angeles, San Francisco) and totals.
- Key Performance Indicators** (2): Shows KPIs for Los Angeles and San Francisco, comparing 'Before' and 'After' values for various metrics like Average Travel per Appointment Without Homebase and Total Duration Scheduled.
- Summary** (3): Provides a summary of the optimization process, including the Scheduling Policy (Customer First), Work Rules, Excluded Resources, Designated Work, Service Crew Resource Availability, Earliest Start Permitted, Due Date, Resource Availability, Required Service Resource, and Objectives (PreferredEngineer, Asap, Minimize Travel, Resource Priority).

#### SEE ALSO:

[Salesforce Help: Gain Insight into Optimization](#) (can be outdated or unavailable during release preview)

## Manage Loads for Your Trucks and Workers

To limit assignments, daily work hours, and how much workers can transport, add Count work rules to a scheduling policy. You can assign light workloads to new-hires, or track item quantities that fit in each worker's vehicle.

**Where:** This feature applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning managed package installed.

**Why:** If you create Count work rules using relevance groups, you can refine how the limits apply. For example, you can create shorter daily schedules for less experienced workers.

**How:** Define Count work rules manually, or use the Lightning custom component from the managed package. You can add multiple Count work rules to a scheduling policy, including up to four rules that count custom fields.

 **Tip:** When you create a new work rule, if the Count work rule type isn't listed, update the FSL custom permission sets.

### SEE ALSO:

[Salesforce Help: Work Rule Type: Count Rule](#) (can be outdated or unavailable during release preview)

[Salesforce Help: How Are Field Service Permission Sets Updated?](#) (can be outdated or unavailable during release preview)

## Take Scheduling Challenges in Stride

Enhanced optimization makes it painless to respond to last-minute changes and build schedules that align with KPI goals. Previously, to access in-day optimization, predictive travel, and scheduling recipes, you activated enhanced optimization. We're now phasing in this flavor of optimization as the default method.

**Where:** This feature applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning managed package installed.

**How:** In new orgs and non-production orgs such as sandboxes, enhanced optimization is activated for you. In production orgs, we're activating it over time. To check if it's active in your org, go to **Field Service Settings > Optimization**. If you see the **Activate** toggle and it's off, enhanced optimization is inactive, and you can turn it on. If there's no **Activate** toggle, then it's already active.

### SEE ALSO:

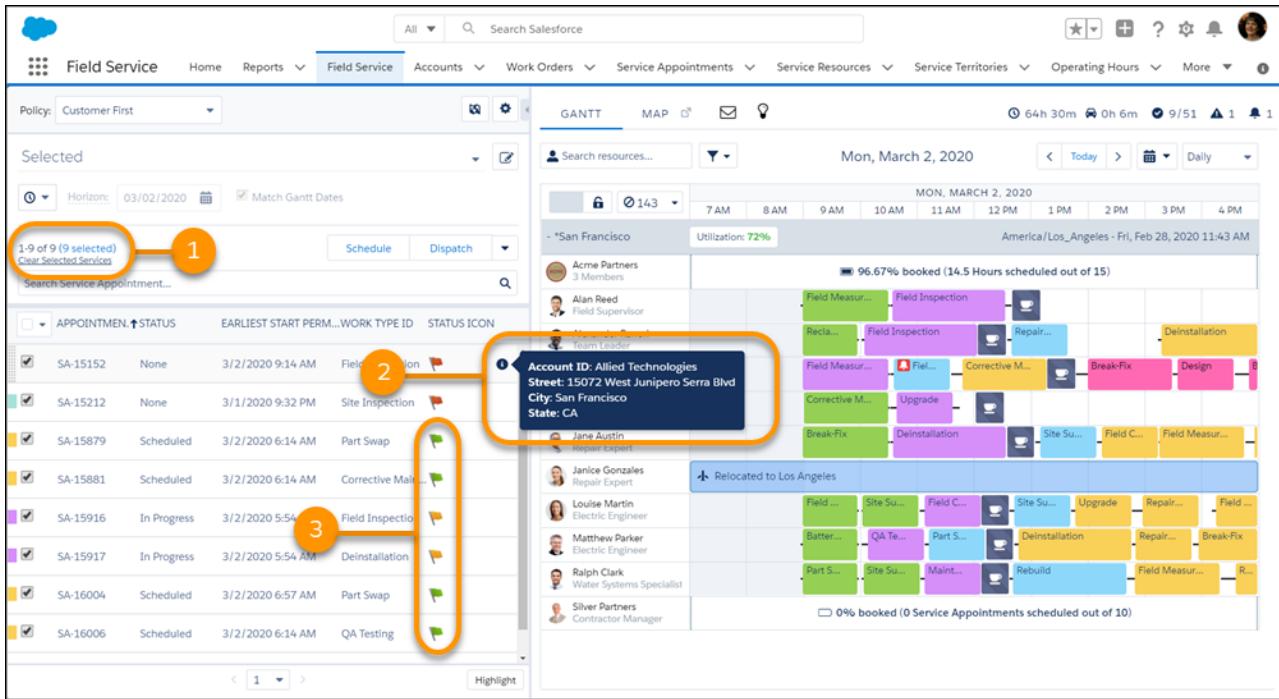
[Salesforce Help: Activate Enhanced Optimization](#) (can be outdated or unavailable during release preview)

## Save Clicks in the Dispatcher Console

Work smarter and faster in the appointment list in the dispatcher console. Select appointments from different views and open the selected list with a single click. Hover over appointments and view details, or add icons that communicate information visually.

**Where:** This feature applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning managed package installed.

**Why:** Select appointments with different filters, and click a link to see what's selected. You can also undo what's selected with a single click (1). When you hover on an appointment's information icon, you can see additional details, such as an address (2). And you can display Gantt icons or icons from a custom formula field in the appointment list (3).



**How:** To show extra appointment details, add fields to the Service Appointment List Preview field set. To display icons, add the Gantt icon field or a custom formula field to the Service Appointment List Columns field set.

#### SEE ALSO:

[Salesforce Help: Create Custom Appointment Icons](#) (can be outdated or unavailable during release preview)

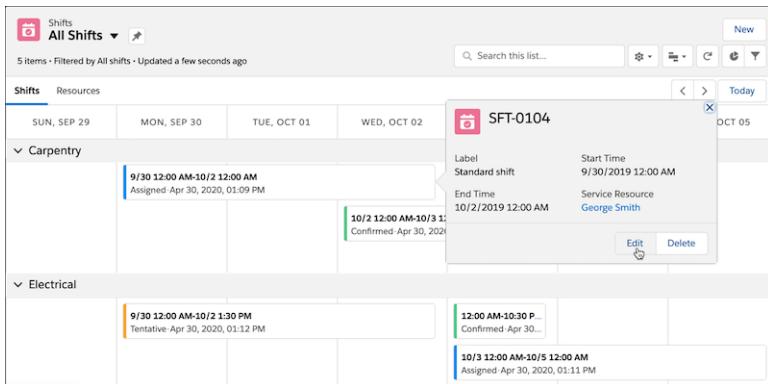
[Salesforce Help: Customize the Dispatcher Console with Field Sets](#) (can be outdated or unavailable during release preview)

## Get Improved Shift Management (Generally Available)

This feature, now generally available, includes some changes since the last release. Managing shifts in the schedule view is easier than ever. Shifts that span multiple days have a new look, so it's easier to identify availability. Quickly search for shifts, then hover over one to make updates using the available actions. And, your team can change what they see by choosing fields and ordering them in the list view.

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

**How:** Use the app launcher to open Shifts. Then, choose the schedule from the view dropdown.



## Customize the Gantt in More Ways

Fine-tune control over what users can see and do in the dispatcher console with optional custom permissions. For example, you can create a read-only view of the Gantt for service managers. Or, configure which users can drag appointments from the list or map to the Gantt.

**Where:** This feature applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions with the Field Service Lightning managed package installed.

**How:** To use the new permissions in existing orgs, first assign them to users. For example, add them to these custom FSL permission sets: FSL Admin, FSL Dispatcher, and FSL Community Dispatcher.

**Important:** If you activate these optional permissions without adding them to users, you make the Gantt read-only. Activate extended permissions after you add them to users and the FSL permission sets.

After you assign extended permissions to users, you can activate them in **Field Service Settings > Dispatcher Console UI > Extended Custom Permissions**. Activation is required only once and is irreversible.

Remove permissions from users as needed to restrict access. For example, to make the Gantt read-only for certain users, assign the permissions to the custom permission sets and activate them. Then disable the Enable Gantt Locker permission for those users that should have a read-only view of the Gantt.

### SEE ALSO:

[Salesforce Help: Set Custom Permissions for Field Service \(can be outdated or unavailable during release preview\)](#)

## Give Users More Confetti

Celebrate progress with a virtual confetti toss as your user reaches a designated Path stage on a product request or product request line item.

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

## Share Maintenance Plans and Service Contracts as Needed

Apply sharing rules to maintenance plans and extend access to users in public groups, roles, or territories. Share maintenance plans based on the owner or other criteria. Also, share Service Contract records based on criteria other than the service contract owner.

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

SEE ALSO:

[Sharing Rules](#)

## Track Asset Availability and Reliability

Capture details of an asset's expected availability, and planned and unplanned maintenance. Then define a reporting period to view information on cumulative downtime, cumulative unplanned downtime, availability, and reliability to keep things running smoothly.

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

**Why:** Understanding assets availability and reliability is key to keeping things running smoothly. When availability and reliability drop it could be time to refurbish or replace an asset.

To track an asset, enter the expected average daily uptime and the date that you want to start availability and reliability calculations. Then capture details of planned and unplanned downtime that occur during the asset's normal operating hours.

The system accumulates the values of planned and unplanned downtime. It then calculates availability, which accounts for all downtime, and reliability, which accounts for unplanned downtime.

**How:** Give access to Assets and the new downtime, availability, and reliability fields. Then add these fields to the Asset page layout to provide access to this feature to a user profile. Give access to Assets and the availability and reliability fields to provide community access to a community user profile.

SEE ALSO:

[Salesforce Help: Set Up Asset Availability and Reliability Reporting](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Provide Access to Asset Availability and Reliability Information](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Track Asset Availability and Reliability](#) (can be outdated or unavailable during release preview)

## Track Your Team's Expenses

Create expenses linked to work orders. From duct tape to travel costs, your team can keep track of expenses.

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

**How:** In the mobile app, your team can create expenses from a work order. For desktop, edit the work order page layout to add the Expense related list.

## Use Criteria-Based Sharing Rules for Time Sheets

Add criteria-based rules for time sheets to provide access to the right people. For example, you can create a rule that shares submitted time sheets with the accounting department or a partner manager group.

**Where:** This feature applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions with Field Service.

## Link Directly to Actions and Flows in the Mobile App

Save time and taps for your field service workers with URLs that launch flows and quick actions in the mobile app. For example, use a deep link to run a custom flow. You can also pass data in the URL, for example to pre-fill some fields.

**Where:** This feature applies to all editions with Field Service in the Field Service Mobile app.

**How:** You can link to quick actions that create a record, update a record, or run a Field Service Mobile Extension. Use the following format:

```
com.salesforce.fieldservice://v1/sObject/recordId/quickaction/quick_action_api_name
```

You can link to flows using a mobile app extension that calls the flow. Use the following format, with the app extension name URL-encoded:

```
com.salesforce.fieldservice://v1/sObject/recordId/flow/app_extension_api_name
```

## Push Notification Limits Have Increased

You can send up to 20,000 iOS and 10,000 Android push notifications per hour per org.

**Where:** This change applies to the Field Service mobile app in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Send More Push Notifications with Increased Limits](#)

## Channels: Voice for Service, Embedded Channel Menu Preview, Chat Header Redesign, and Canadian Short Codes

Talk with your customers using Service Cloud Voice, a new product that integrates the power of Salesforce with the telephony services of Amazon Connect. See your Embedded Channel Menu branding and label choices with a live preview. Enhance your standard header for Embedded Chat. Reach more customers quickly with Short Codes for Messaging in Canada.

IN THIS SECTION:

[Voice: Intelligent Telephony Inside the Service Console](#)

Service Cloud Voice is a brand new product that natively integrates intelligent telephony into Salesforce for a seamless agent experience. Agents can talk with your customers using an intuitive softphone that combines the power of Amazon Connect, including real-time call transcription. Bring voice calls and your digital channels together so your support agents can help customers at the right time using the channel that customers prefer.

### [Messaging: Canadian Short Codes, New User Permissions, and Bots for Facebook](#)

Reach more customers more quickly with short codes in Canada. Use the new "End Messaging Session" user permission to close out conversations. Deploy Einstein Bots on your Facebook Messenger channel.

### [Channel-Object Linking: Records for Voice \(Beta\)](#)

Save your agents time by creating rules to link Voice calls to records such as contacts. When an agent accepts a call and opens it in their workspace, you can prompt them to choose from recommended records, search for a record, or create a new one.

### [Embedded Service for Mobile Apps: Zapped Some Bugs](#)

In the latest release of the Embedded Service SDK, we focused on accessibility improvements and bug fixes.

### [Embedded Service for Web: Channel Menu Preview, Channel Menu Dynamic Items, Chat Header Redesign, and Lightning Web Component](#)

Visualize your Channel Menu branding choices during setup with a live preview. Personalize your customer's website visits with a dynamic Channel Menu using an API. Streamline your standard header for Embedded Chat or customize the header using a Lightning Web Component.

## Voice: Intelligent Telephony Inside the Service Console

Service Cloud Voice is a brand new product that natively integrates intelligent telephony into Salesforce for a seamless agent experience. Agents can talk with your customers using an intuitive softphone that combines the power of Amazon Connect, including real-time call transcription. Bring voice calls and your digital channels together so your support agents can help customers at the right time using the channel that customers prefer.

**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license.

**When:** You can turn on Service Cloud Voice in new and existing orgs after July 21, 2020.

**Who:** Users with the "Customize Application" permission can enable Service Cloud Voice. Users with the Contact Center Admin permission set can create and manage the contact center. Users with the Contact Center Agent permission set can access the contact center and make and receive calls.

**Why:** Sometimes it's just easier to talk to someone on the phone. Despite the variety of channels, customers prefer to talk directly to a knowledgeable service agent who can quickly solve their problem. Voice makes it easier for agents to answer and make calls, track customer information, and resolve customer issues—all within the Service Console.

Service Cloud Voice lets you quickly spin up a contact center so your agents can get to work helping customers. When you create your contact center, Salesforce builds an Amazon Connect instance for you from scratch. Take advantage of Amazon Connect telephony features such as call transcription and interactive voice response (IVR) natively integrated into Salesforce.

**How:** Make sure your Salesforce org satisfies the prerequisites for Voice.

Then turn on Voice. From Setup, enter `Voice Setup` in the Quick Find box, then select **Voice Setup**. Turn on Service Cloud Voice and specify an email address to use for your Amazon Web Services root user account. To complete the process to turn on Voice, follow the instructions to confirm your company's tax registration number.

Next, create your contact center in Voice. Add users to the contact center, then follow the instructions to configure your Salesforce org, Omni-Channel, and your Amazon Connect to work with Voice.

### IN THIS SECTION:

#### [Talk with Customers with the Power of Customer 360 at Your Fingertips](#)

Your customers want to be heard and to get help as quickly as possible. Your support agents want to resolve customer calls easily and with the full power of Service Cloud at their fingertips. Voice lets agents talk with your customers while accessing the wealth of information in Salesforce.

### [Put the Right Agents on the Call with Transfer, Merge, and Speed Dial](#)

Agents can put customers in touch with the best person to solve their issue at the touch of a button.

### [View Contact Center Analytics at a Glance](#)

Help your support supervisors track key performance indicators (KPIs) with the Service Cloud Voice Analytics app. Supervisors can see graphs that show data such as call volume, average handle time, average speed to answer, and more, so they can manage agent workloads. Supervisors can filter the data by date, geography, and agent.

### [Extend Voice with the Capabilities of Amazon Connect](#)

Take advantage of the Amazon Connect platform to customize what happens when customers call your contact center. Create an interactive voice response (IVR) using Contact Flows and Lambda functions. Assign routing profiles to determine how calls are routed to agents. Set up Quick Connects so agents can quickly transfer calls to frequently used phone numbers. Turn on call recording and call transcription.

### [Boost Agent Productivity with Real-Time Call Transcription](#)

Let agents view a live transcript of a call as it is progressing, so they can focus on resolving the issue instead of taking notes. When a call is transferred to another agent, the receiving agent can quickly review the transcript to get up to speed, so the customer doesn't get frustrated by repeating the same information.

#### SEE ALSO:

[Salesforce Help: Set Up Voice](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Set Up Voice](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Voice Limitations](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Voice Prerequisites](#) (can be outdated or unavailable during release preview)

## Talk with Customers with the Power of Customer 360 at Your Fingertips

Your customers want to be heard and to get help as quickly as possible. Your support agents want to resolve customer calls easily and with the full power of Service Cloud at their fingertips. Voice lets agents talk with your customers while accessing the wealth of information in Salesforce.

**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license.

**When:** You can turn on Service Cloud Voice in new and existing orgs after July 21, 2020.

**Who:** Users with the Contact Center Agent permission set can answer and make calls in the Service Cloud Voice contact center.

**Why:** When a customer calls, agents can accept the call in the Omni-Channel widget, just like they do for cases and messaging channels. Intuitive call controls let agents transfer, mute, hold, and end calls—all without leaving the Service Console.

When an agent accepts a call, Salesforce matches the phone number to a contact record, so the agent has the customer's information at their fingertips. If no match is found, agents are prompted to create a contact, so the customer's information is captured in Salesforce for future reference.

The call controls component gives agents an intuitive way to transfer, mute, hold, and end calls in the console. The component appears when an agent is on a call, and is hidden when the call ends, so it's not in the way.

**How:** Open the Omni-Channel widget in the Service Cloud console, and set your availability so you can accept and make calls.

#### SEE ALSO:

[Salesforce Help: Help Customers on the Phone](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Extend Your Contact Center with Amazon Connect](#) (can be outdated or unavailable during release preview)

## Put the Right Agents on the Call with Transfer, Merge, and Speed Dial

Agents can put customers in touch with the best person to solve their issue at the touch of a button.

**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license.

**When:** You can turn on Service Cloud Voice in new and existing orgs after July 21, 2020.

**Who:** Users with the Contact Center Agent permission set can answer and make calls in the Service Cloud Voice contact center.

**How:** Agents can transfer the call to another agent or queue, and they can merge two calls into a single call. Agents can click Speed Dial to use Amazon Connect's Quick Connect phone numbers.

### SEE ALSO:

[Salesforce Help: Help Customers on the Phone \(can be outdated or unavailable during release preview\)](#)

[Extend Voice with the Capabilities of Amazon Connect](#)

## View Contact Center Analytics at a Glance

Help your support supervisors track key performance indicators (KPIs) with the Service Cloud Voice Analytics app. Supervisors can see graphs that show data such as call volume, average handle time, average speed to answer, and more, so they can manage agent workloads. Supervisors can filter the data by date, geography, and agent.

**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions. Service Cloud Voice is available for an additional cost as an add-on license.

**When:** You can turn on Service Cloud Voice in new and existing orgs after July 21, 2020.

**Who:** To set up the Contact Center Reporting Dashboard, you need the Einstein Analytics Platform Admin and the Service Analytics Admin permission sets. To create and manage Analytics apps, you need the "Manage Analytics Templated Apps" and "Edit Analytics Dataflows" user permissions.

To view the Contact Center Reporting Dashboard, users need the Einstein Analytics Platform User and the Service Analytics User permission sets.

**How:** Customize the Contact Center Analytics app in the Analytics Studio, so the data shown is relevant to your company. Supervisors can open the Contact Center Analytics app from the App Launcher.

### SEE ALSO:

[Salesforce Help: Customize the Analytics App for Your Contact Center \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: View Voice Analytics \(can be outdated or unavailable during release preview\)](#)

## Extend Voice with the Capabilities of Amazon Connect

Take advantage of the Amazon Connect platform to customize what happens when customers call your contact center. Create an interactive voice response (IVR) using Contact Flows and Lambda functions. Assign routing profiles to determine how calls are routed to agents. Set up Quick Connects so agents can quickly transfer calls to frequently used phone numbers. Turn on call recording and call transcription.

**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions in orgs where Service Cloud Voice is enabled. Service Cloud Voice is available for an additional cost as an add-on license.

**When:** You can turn on Service Cloud Voice in new and existing orgs after July 21, 2020.

**Who:** The Amazon Connect administrator can customize the Amazon Connect instance.

**How:** Use your Amazon Web Service root email address to log in to your Amazon Connect instance and customize your settings. See the [Amazon Connect Administrator Guide](#).

SEE ALSO:

[Salesforce Help: Set Up Voice](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Extend Your Contact Center with Amazon Connect](#) (can be outdated or unavailable during release preview)

[External Site: Amazon Connect Administrator Guide](#)

## Boost Agent Productivity with Real-Time Call Transcription

Let agents view a live transcript of a call as it is progressing, so they can focus on resolving the issue instead of taking notes. When a call is transferred to another agent, the receiving agent can quickly review the transcript to get up to speed, so the customer doesn't get frustrated by repeating the same information.

**Where:** This change applies to Lightning Experience in the Enterprise, Performance, and Unlimited editions in orgs where Service Cloud Voice is enabled. Service Cloud Voice is available for an additional cost as an add-on license.

**When:** You can turn on Service Cloud Voice in new and existing orgs after July 21, 2020.

**Who:** The Amazon Web Services administrator can customize the Amazon Connect instance. Salesforce users with the "Customize Application" permission can modify the page layouts. Users with the Contact Center Agent permission set can view call transcripts.

**Why:** The conversation body component shows the call transcript. The transcript gives agents and supervisors clear visibility into the customer interaction, which can be useful for building customer relationships and for training purposes.

**How:** Use your Amazon Web Service root email address to log in to your Amazon Connect instance and configure call transcription. In the Lightning App Builder in Salesforce, add the Conversation Body component to the Voice page.

SEE ALSO:

[External Site: Amazon Connect Administrator Guide](#)

[Salesforce Help: Set Up Voice](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Extend Your Contact Center with Amazon Connect](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Standard Lightning Page Components](#) (can be outdated or unavailable during release preview)

## Messaging: Canadian Short Codes, New User Permissions, and Bots for Facebook

Reach more customers more quickly with short codes in Canada. Use the new "End Messaging Session" user permission to close out conversations. Deploy Einstein Bots on your Facebook Messenger channel.

IN THIS SECTION:

### [Expand Your Reach with Short Code Messages in Canada](#)

Use short code phone numbers to send recurring messages and one-time alerts to your Canadian customers. When customers respond, they can have two-way conversations with support agents, just like they do on your other channels. Short codes have high throughput, which allows you to send one-to-many messages and high volumes of one-to-one messages. Our new consent management settings for Canada keep you compliant with national regulations.

### [Add the "End Messaging Session" User Permission](#)

Before Summer '20, users could end ongoing Messaging sessions with the "Configure Messaging" user permission. Starting in Summer '20, this permission can't be used to end Messaging sessions. To allow agents and supervisors to end sessions, update your user permission sets to include the "End Messaging Session" permission.

### [Reduce Your Agents' Workload with Einstein Bots for Facebook](#)

Deploy bots to your Facebook Messenger channel. Let bots take care of your customers' routine requests—like password resets and order tracking—while agents spend their time handling more complex issues.

### [Manage Customer Consent for Multiple Languages](#)

Stay compliant by writing unique consent keywords and automated responses for each language you support. Use custom responses to account for country-specific regulations.

### [Use Conversation Toolkit Events for Messaging](#)

Create or update records based on the content of messages. Now when certain event types occur in the console, such as when an agent sends a message to a customer, your JavaScript code can be executed. Use the `lightning:conversationNewMessage` and `lightning:conversationAgentSend` events for Messaging.

### [Reach Out to Customers with Agent Initiated Conversations on Facebook and WhatsApp \(Open Beta\)](#)

When an issue requires more research, Agent Initiated Conversations allow agents to end a conversation, find the solution, and then restart the conversation. This feature is generally available for SMS channels and is now available as an open beta for Facebook Messenger and WhatsApp.

### [Dependency Changes to Messaging](#)

Starting in Summer '20, High Velocity Sales (HVS) is no longer required to view the Start Conversation button on Person Account records.

## Expand Your Reach with Short Code Messages in Canada

Use short code phone numbers to send recurring messages and one-time alerts to your Canadian customers. When customers respond, they can have two-way conversations with support agents, just like they do on your other channels. Short codes have high throughput, which allows you to send one-to-many messages and high volumes of one-to-one messages. Our new consent management settings for Canada keep you compliant with national regulations.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. This feature is available in Salesforce orgs with access to Messaging through a Digital Engagement add-on and the Short Codes add-on SKU.

**Why:** Short codes are typically used for transactional messages or promotional content. Get the benefits of short codes while delivering the instant, personalized support your customers know and love. Previously, short code channels were only available in the United States.

**How:** To request the Short Codes add-on SKU, contact your Salesforce Account Executive or Sales Representative.

### SEE ALSO:

[Salesforce Help: Set Up Short Code Channels in Messaging \(can be outdated or unavailable during release preview\)](#)

## Add the "End Messaging Session" User Permission

Before Summer '20, users could end ongoing Messaging sessions with the "Configure Messaging" user permission. Starting in Summer '20, this permission can't be used to end Messaging sessions. To allow agents and supervisors to end sessions, update your user permission sets to include the "End Messaging Session" permission.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. This feature is available in Salesforce orgs with access to Messaging through a Digital Engagement add-on.

**How:** Update your Messaging permission set. Edit the App Permissions for your users, and select **End Messaging Session**. Make sure to save your updates.

SEE ALSO:

[Salesforce Help: Create a Messaging Permission Set \(can be outdated or unavailable during release preview\)](#)

## Reduce Your Agents' Workload with Einstein Bots for Facebook

Deploy bots to your Facebook Messenger channel. Let bots take care of your customers' routine requests—like password resets and order tracking—while agents spend their time handling more complex issues.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. This feature is available in orgs with access to Messaging through a Digital Engagement add-on.

SEE ALSO:

[Expand Your Audience with Facebook Messenger \(Generally Available\)](#)

## Manage Customer Consent for Multiple Languages

Stay compliant by writing unique consent keywords and automated responses for each language you support. Use custom responses to account for country-specific regulations.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. This feature is available in Salesforce orgs with access to Messaging through a Digital Engagement add-on.

**Why:** Communicate with your customers in the languages they speak. When you use short codes, your business is required to follow carrier compliance requirements, industry standards, and applicable laws.

**How:** When you create or edit a Messaging channel, select the languages you want to support under International Consent Settings. Enter keywords that your channel automatically responds to. Then write customized responses for those keywords.

International Consent Settings

Add Language

- English (US)
- French

\* Language: French

Delete Language

Opt-In Keywords: OUI

Double Opt-In Keywords: Enter response...

Opt-In Confirmation: Merci d'avoir choisi les alertes Salesforce. Texter ARRET pour 123456 pour annuler.

Opt-Out Keywords: ARRET

Opt-Out Confirmation: (未显示)

Buttons: Cancel, Save

## SEE ALSO:

[Salesforce Help: Create Automated Responses for Messaging Channels](#) (can be outdated or unavailable during release preview)

## Use Conversation Toolkit Events for Messaging

Create or update records based on the content of messages. Now when certain event types occur in the console, such as when an agent sends a message to a customer, your JavaScript code can be executed. Use the `lightning:conversationNewMessage` and `lightning:conversationAgentSend` events for Messaging.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. This feature is available in Salesforce orgs with access to Messaging through a Digital Engagement add-on.

**How:** Use `aura:handler` to listen for the Lightning event.

## Reach Out to Customers with Agent Initiated Conversations on Facebook and WhatsApp (Open Beta)

When an issue requires more research, Agent Initiated Conversations allow agents to end a conversation, find the solution, and then restart the conversation. This feature is generally available for SMS channels and is now available as an open beta for Facebook Messenger and WhatsApp.

**Where:** This change applies to orgs with access to Messaging through a Digital Engagement add-on. Messaging in Lightning Experience is available in Enterprise, Performance, Unlimited, and Developer editions with Service Cloud or Sales Cloud.

 **Note:** As a beta feature, Agent Initiated Conversations for Facebook and WhatsApp is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

**How:** After agents find a potential solution, they navigate to the customer's record home and click Start Conversation. A new tab opens with the most recent session and a message that a new session has started. Agents continue the conversation where they left off. They can send multiple messages.

 **Note:** For agent initiated messages, we use the most current customer opt-out information at the time the message is sent. If end users change their opt-out status after an initial outbound message is sent, agents can send additional messages until the official opt-out status is updated.

If the customer isn't available to respond, agents can close the conversation tab. They are notified when the customer responds. An outbound message in a waiting state doesn't take up agent capacity.

If the original agent goes offline before the customer responds, the conversation is routed to an available agent or waits for someone to be available.

 **Note:** Both Facebook and WhatsApp have specific rules of engagement for sending outbound messages to users. For agent initiated messages, there are times when an agent believes they have sent a message, but Facebook or WhatsApp has blocked the message due to their specific rules. During the beta, agents may not always be aware of blocked messages.

## Dependency Changes to Messaging

Starting in Summer '20, High Velocity Sales (HVS) is no longer required to view the Start Conversation button on Person Account records.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions. This feature is available in Salesforce orgs with access to Messaging through a Digital Engagement add-on.

SEE ALSO:

[Salesforce Help: Send Agent-Initiated Outbound Messages \(can be outdated or unavailable during release preview\)](#)

## Channel-Object Linking: Records for Voice (Beta)

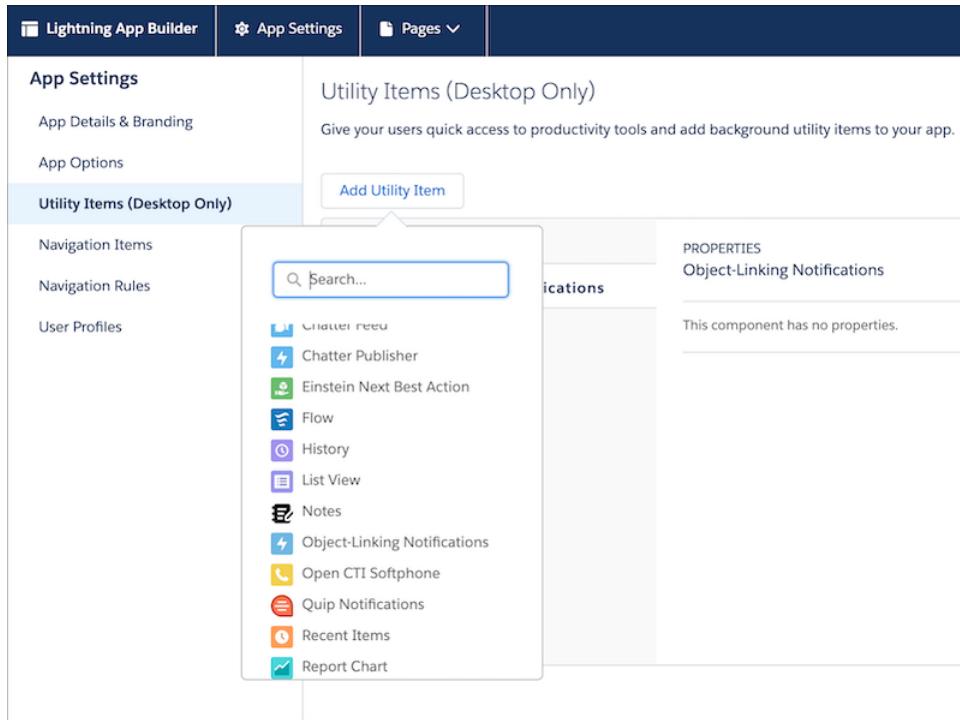
Save your agents time by creating rules to link Voice calls to records such as contacts. When an agent accepts a call and opens it in their workspace, you can prompt them to choose from recommended records, search for a record, or create a new one.

**Where:** This change applies to Lightning Experience in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions. Agent notifications are supported only in the Lightning console.

 **Note:** As a beta feature, Channel-Object Linking for Voice is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

**Who:** This feature is for Voice users. Stay tuned as it becomes available for other types of channels.

**How:** Enter Channel-Object in the Quick Find box in Service Setup and select Channel-Object Linking. Then click New Linking Rule to start the guided flow for the Voice channel. Add the Object-Linking Notifications background utility in App Builder to generate messages to the agent.



#### SEE ALSO:

[Salesforce Help: Channel-Object Linking for Voice](#) (can be outdated or unavailable during release preview)

## Embedded Service for Mobile Apps: Zapped Some Bugs

In the latest release of the Embedded Service SDK, we focused on accessibility improvements and bug fixes.

**Where:** This change applies to the Service SDK for Mobile Apps for iOS (version 224.0.0) and Android (version 224.0.0).

**How:** For details about new features, see the release notes for [iOS](#) and [Android](#). Visit the [Embedded Service SDK Developer Center](#) for other resources.

## Embedded Service for Web: Channel Menu Preview, Channel Menu Dynamic Items, Chat Header Redesign, and Lightning Web Component

Visualize your Channel Menu branding choices during setup with a live preview. Personalize your customer's website visits with a dynamic Channel Menu using an API. Streamline your standard header for Embedded Chat or customize the header using a Lightning Web Component.

## IN THIS SECTION:

### [See a Live Channel Menu Preview](#)

Quickly preview your Channel Menu branding choices during setup. See how your colors, icons, fonts, and text look in a live view before deployment to your website or Salesforce community.

### [Respond with a Dynamic Channel Menu](#)

Show, hide, or reorder channel selections as customers browse your website for a more dynamic experience. Change the channel options offered based on your criteria with our Reordering API.

### [Enhance Conversations with an Improved Chat Header](#)

Provide a modern experience for your customers with a streamlined Embedded Chat header. The narrower design keeps the critical content in the main window for more focused interaction.

### [Customize the Chat Header with a Lightning Web Component](#)

Create a custom Chat header using a Lightning web component (LWC). LWCs are feature-rich and use newer versions of ECMAScript than Aura components. You deploy them in the same way as Aura, and both types can work side by side on your website.

### [Provide Animations for Channel Menu and Chat with Accessibility](#)

Awesome animations help users know their experience is working. For Channel Menu and Chat provide this reassurance and simultaneously allow customers with vestibular impairments or slow network speeds to turn the animations off in their OS settings.

### [Transform Chat Sessions from Start to End](#)

Reimagine your customer's chat experience using the Embedded Service API to dynamically update your button settings. Replace the default start button and move it to another location on your web page. Create an end chat or clear the session data based on a user's action for a responsive experience.

### [Add Post-Chat Surveys for Five-Star Service](#)

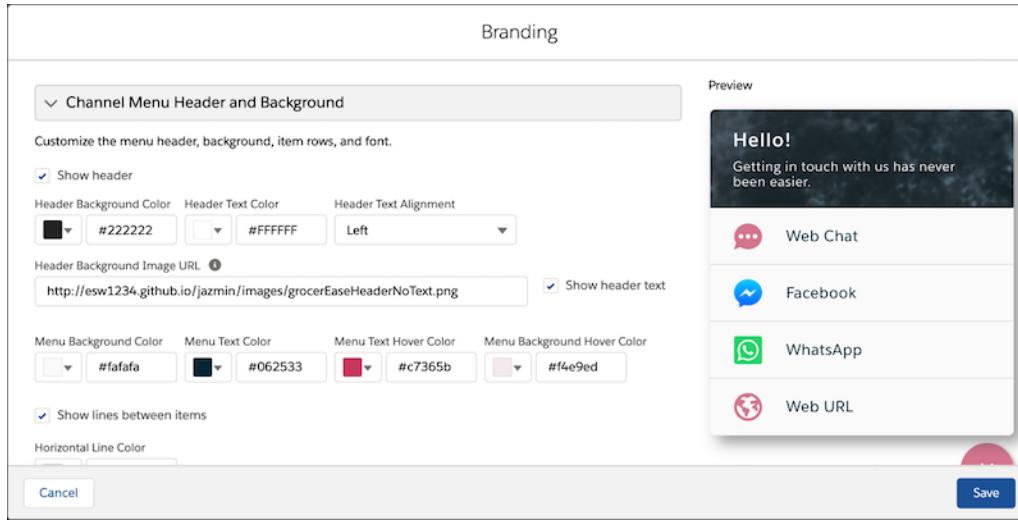
Create post-chat customer surveys to rate your agents' service or ask a question. Salesforce Surveys are easy to set up and provide valuable engagement feedback.

## **See a Live Channel Menu Preview**

Quickly preview your Channel Menu branding choices during setup. See how your colors, icons, fonts, and text look in a live view before deployment to your website or Salesforce community.

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

**Why:** The live preview of your selections displays in the Branding modal. And you can preview your text updates in Labels setup. Changes can take up to 10 minutes to appear for the first time on your website due to cacheing.



## SEE ALSO:

[Salesforce Help: Set Up the Channel Menu](#) (can be outdated or unavailable during release preview)

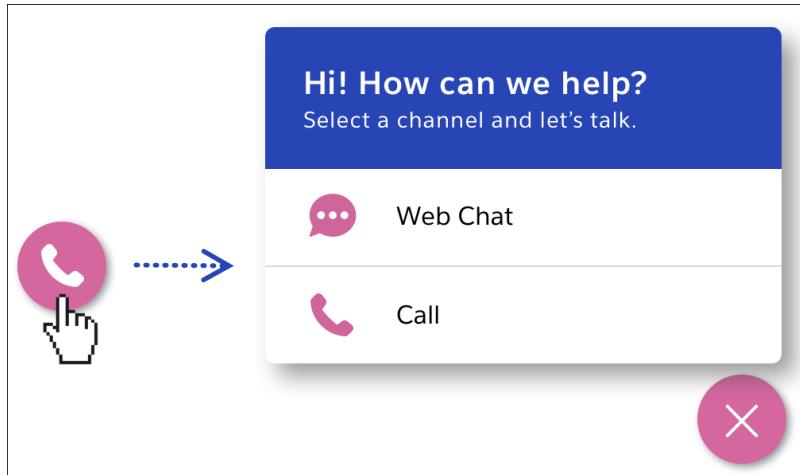
[Salesforce Help: Set Branding for the Channel Menu](#) (can be outdated or unavailable during release preview)

## Respond with a Dynamic Channel Menu

Show, hide, or reorder channel selections as customers browse your website for a more dynamic experience. Change the channel options offered based on your criteria with our Reordering API.

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

**Why:** A dynamic Channel Menu lets you respond to customer actions on your website. Surface a Sales chat deployment or a Call button when they scroll a new product page. Offer white-glove assistance via a chat deployment or web URL if they add items to a shopping cart. Set up specific deployments for all your runtime local changes to the Channel Menu.



**How:** The API updates which channel options are displayed and changes the action button as customers interact with your website.

#### SEE ALSO:

[Salesforce Help: Channel Menu Reordering](#) (can be outdated or unavailable during release preview)

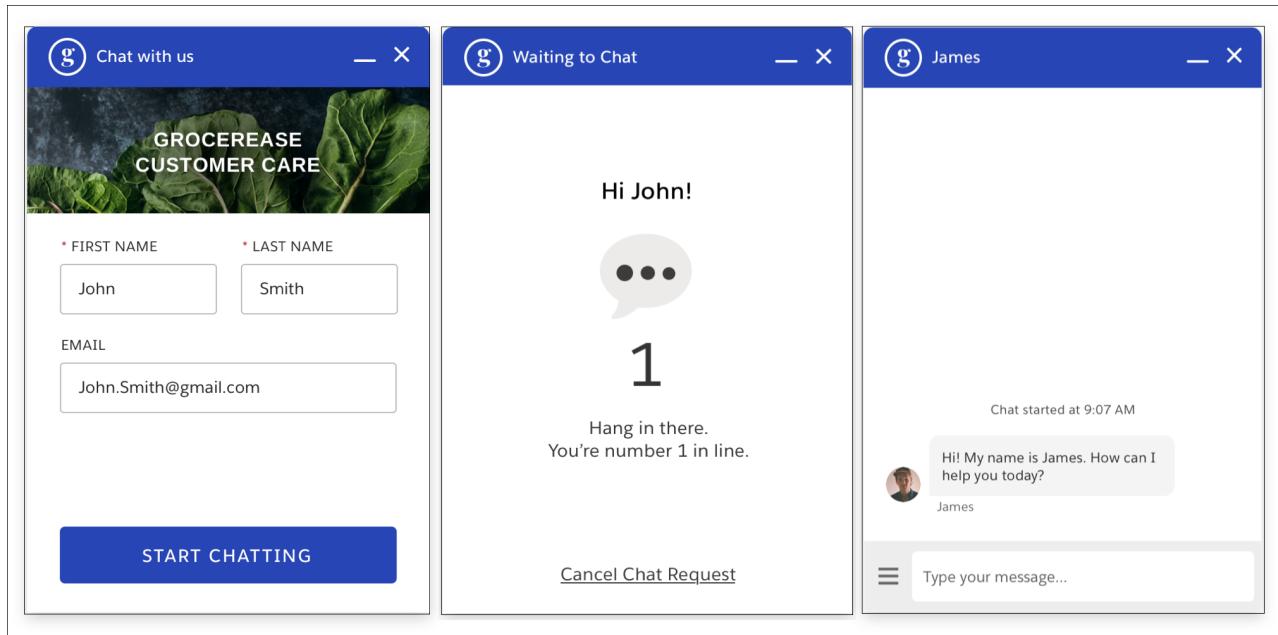
[Salesforce Help: Set Up the Channel Menu](#) (can be outdated or unavailable during release preview)

## Enhance Conversations with an Improved Chat Header

Provide a modern experience for your customers with a streamlined Embedded Chat header. The narrower design keeps the critical content in the main window for more focused interaction.

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

**Why:** Here's the new chat header with three default states. Add your brand logo, color, and text for a personalized interaction that enhances your conversation in the main window.



**How:** The new chat header is standard, and your existing branding is applied, including a logo to the header. Check your color selections in the Branding modal for these fields: Header, Header Text, and Header Alternate. Any custom background header that you applied previously is automatically removed. The Save Transcript for Visitors feature is now located in the footer menu.

**!** **Important:** We support using only the branding options in setup and in the customizable parameters in the code snippet. If you have added custom CSS in your embedded component, test your chat window before each release to ensure that it functions properly.

#### SEE ALSO:

[Salesforce Help: Set Up Embedded Chat](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Set Up General Branding](#) (can be outdated or unavailable during release preview)

## Customize the Chat Header with a Lightning Web Component

Create a custom Chat header using a Lightning web component (LWC). LWCs are feature-rich and use newer versions of ECMAScript than Aura components. You deploy them in the same way as Aura, and both types can work side by side on your website.

**Where:** This change applies to Lightning Experience in Professional, Performance, and Unlimited editions that use the embedded code snippet.

**How:** Create your component and deploy to your org. In Embedded Service Setup, choose your deployment, edit Chat Settings, and use the Customize with Lightning Components table to choose your Chat Header component. Changes are for Embedded Chat only and can't be applied to Field Service or Appointment Booking.

### SEE ALSO:

[Embedded Service for Web Developer Guide](#)

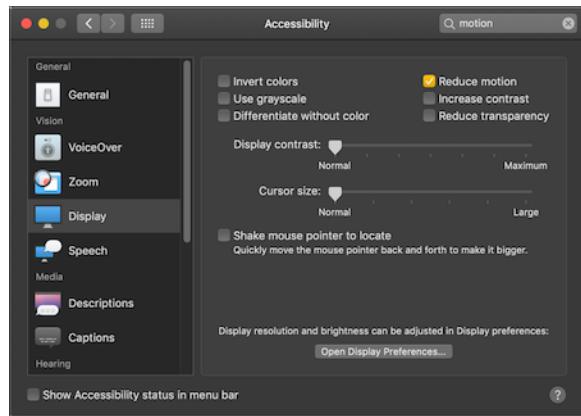
[Lightning Web Components for Embedded Service](#)

## Provide Animations for Channel Menu and Chat with Accessibility

Awesome animations help users know their experience is working. For Channel Menu and Chat provide this reassurance and simultaneously allow customers with vestibular impairments or slow network speeds to turn the animations off in their OS settings.

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

**Why:** Animations added for Channel Menu include: close poof, action-button poof, and menu-item hover. For Chat: a fade-in and fade-out when minimizing and maximizing the chat window. Users have the option to turn them off with a reduce-motion setting in their device's OS.



## Transform Chat Sessions from Start to End

Reimagine your customer's chat experience using the Embedded Service API to dynamically update your button settings. Replace the default start button and move it to another location on your web page. Create an end chat or clear the session data based on a user's action for a responsive experience.

**Where:** This change applies to Lightning Experience in Professional, Performance, and Unlimited editions. This feature is available with the embedded code snippet via Lightning Out and is not available for Communities.

SEE ALSO:

[Embedded Service for Web Developer Guide](#)

[Start and End Chat](#)

## Add Post-Chat Surveys for Five-Star Service

Create post-chat customer surveys to rate your agents' service or ask a question. Salesforce Surveys are easy to set up and provide valuable engagement feedback.

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

SEE ALSO:

[\*Salesforce Help: Customize Post-Chat with Surveys \(can be outdated or unavailable during release preview\)\*](#)

## Knowledge: Sharing and Article Ownership

Lightning Knowledge introduces sharing (Beta) so you can leverage the power of the platform. Set default sharing and tailor criteria-based rules to your content and your readers. The Change Owner action, available for all Salesforce orgs with Lightning Knowledge, helps you get specific about owner-based access if you make the switch to sharing.

IN THIS SECTION:

[Use Salesforce Sharing with Lightning Knowledge \(Beta\)](#)

Take advantage of the sharing features you already know, such as organization-wide defaults, access by owner role hierarchies, and criteria-based rules. The standard Salesforce sharing model contrasts with the default for Knowledge, which uses data categories to control access beyond object permissions. When you use standard sharing, data categories still classify articles but they no longer control record access.

[Change Record Owners in Lightning Knowledge](#)

Choose which person or queue is responsible for an article draft or add the ownership fields to reports. The Change Owner action supports orgs making the switch to standard Salesforce sharing with Knowledge. Keep in mind that the owner only controls record access if you turn on sharing for Knowledge.

[Track More Article Usage with Linked Articles](#)

When an article is used in a Chat, Messaging, or Social conversation, it's attached in the Linked Article list. An article shared in a social post within a case is still attached to the case in the Case Article object, while an article shared in stand-alone social conversations is attached in the Linked Article object. Previously, the Linked Article object was only associated with work orders, work types, and work order line items.

[Filter Knowledge Reports by Data Category](#)

Filter knowledge reports by category to return information about entire categories and subcategories of knowledge articles.

## Use Salesforce Sharing with Lightning Knowledge (Beta)

Take advantage of the sharing features you already know, such as organization-wide defaults, access by owner role hierarchies, and criteria-based rules. The standard Salesforce sharing model contrasts with the default for Knowledge, which uses data categories to control access beyond object permissions. When you use standard sharing, data categories still classify articles but they no longer control record access.

**Where:** Sharing for Lightning Knowledge is available for Enterprise, Essentials, Performance, Developer, and Unlimited editions where Lightning Knowledge is enabled.

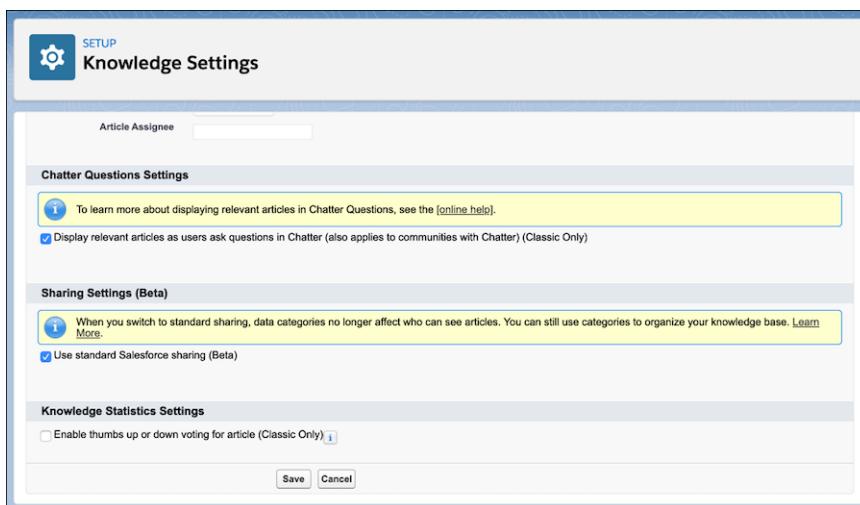
 **Note:** As a beta feature, Sharing for Lightning Knowledge is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Sharing for Lightning Knowledge in the [Knowledge group in the Trailblazer Community](#). For information on enabling this feature in your org, contact Salesforce.

**Who:** Contact Salesforce Support to enable this feature in your org. The beta version of Sharing isn't right for all orgs. Read the limitations and try sharing in a sandbox org if you're unsure. For example, you can't create rules that share articles with guest users or high volume users. We recommend that you don't use sharing in orgs where you want to share only some public articles with guest and high volume portal users.

**Why:** Simplify your article access strategy by using the same sharing model you use for other objects, with some exceptions. For example, you can create a rule that modifies access based on the Record Type field. When Sharing is enabled, you can still use data categories to classify articles and as filters for searches and queries.

**How:** To switch to the Salesforce sharing model for Knowledge, edit the Knowledge Settings page in Setup.

1. Under Sharing Settings, enable **Use standard Salesforce sharing (Beta)**.
2. Save your changes.



3. Then, you can view and change the sharing settings for Knowledge. From Setup, enter *sharing* in the quick find box and select **Sharing Settings**.

Edit the sharing settings and add rules as you like. By default, the knowledge object uses Public Read/Write for internal users and Private for external access.

#### SEE ALSO:

[Salesforce Help: Sharing for Lightning Knowledge](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Sharing Settings](#) (can be outdated or unavailable during release preview)

[IdeaExchange Idea: Allow Sharing Rule assignments to Knowledge Articles](#)

[IdeaExchange Idea: Sharing Settings for Knowledge\\_\\_kav object](#)

## Change Record Owners in Lightning Knowledge

Choose which person or queue is responsible for an article draft or add the ownership fields to reports. The Change Owner action supports orgs making the switch to standard Salesforce sharing with Knowledge. Keep in mind that the owner only controls record access if you turn on sharing for Knowledge.

**Where:** This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions of Knowledge with Lightning Knowledge enabled.

**Who:** To use the Change Owner action, users must have permission to transfer records, to manage articles, and have Knowledge object permission to create, read, and edit articles. To be an article owner, the user or queue must have permission to view draft articles. When you use data categories to control record access, the owner needs category-based access.

**Why:** If you switch to standard sharing for the Knowledge object, setting the article owner makes it possible to fine-tune who has access. Previously, you couldn't change the article owner. By default, the owner is the user who created the article, or the user who submits a translation. With the new ownership by queue feature, tasks like filtering reports and list views by owner, or writing validation rules, can apply to queues as well as users.

#### SEE ALSO:

[Salesforce Help: Change a Record's Owner](#) (can be outdated or unavailable during release preview)

[Use Salesforce Sharing with Lightning Knowledge \(Beta\)](#)

## Track More Article Usage with Linked Articles

When an article is used in a Chat, Messaging, or Social conversation, it's attached in the Linked Article list. An article shared in a social post within a case is still attached to the case in the Case Article object, while an article shared in stand-alone social conversations is attached in the Linked Article object. Previously, the Linked Article object was only associated with work orders, work types, and work order line items.

**Where:** This change applies to Enterprise, Essentials, Performance, Developer, and Unlimited editions in Lightning Experience with Lightning Knowledge enabled.

## Filter Knowledge Reports by Data Category

Filter knowledge reports by category to return information about entire categories and subcategories of knowledge articles.

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

#### SEE ALSO:

[Filter Knowledge Reports by Category](#)

## Routing: Status-Based Capacity and Prioritized Additional Skills

The Status-Based capacity model is Generally Available. Measure agent capacity more accurately using the status of accepted work. Drop additional skills iteratively instead of all at once.

### IN THIS SECTION:

#### [Determine Agent Capacity Based on Work Item Status \(Generally Available\)](#)

Measure agent capacity more accurately. Omni-Channel can now determine agent capacity based on the status of accepted work rather than the previous method of open tabs. If agents are unavailable, their work remains assigned, and reflected in their capacity, until the work is completed or reassigned.

#### [Prioritize Additional Routing Skills](#)

If you use skills-based routing with either the attribute setup method or Apex code, you can set some skills to additional. For additional skills, you can now specify the order in which skills are dropped if after the specified timeout no agent with that skill is available. Higher priority-value skills are dropped first. Lower priority-value skills, for example 0, are dropped last.

## Determine Agent Capacity Based on Work Item Status (Generally Available)

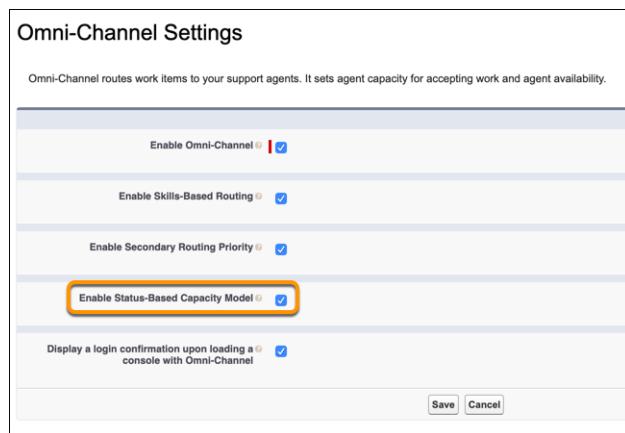
Measure agent capacity more accurately. Omni-Channel can now determine agent capacity based on the status of accepted work rather than the previous method of open tabs. If agents are unavailable, their work remains assigned, and reflected in their capacity, until the work is completed or reassigned.

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

**Why:** With the new status-based capacity model, work remains assigned and applied to an agent's capacity until the work is completed or reassigned to a different agent. In contrast, the current tab-based capacity model releases an agent's capacity when a work tab is closed in the service console.

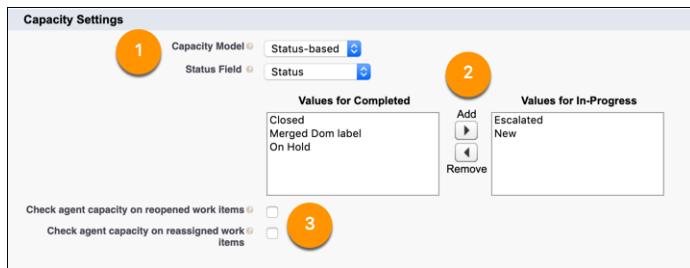
 **Note:** The status-based capacity model can be used only for cases, leads, and custom objects. It isn't supported for real-time work items such as chat and messaging. Also, the Omni-Channel Supervisor console doesn't support all data points related to this model.

**How:** In the Omni-Channel settings, click **Enable Status-Based Capacity Model**.



For each service channel, select the Status-Based capacity model. (1) Then, specify the picklist field that you use to track work status and the field values that you use for completed and in-progress work. (2)

For work that's assigned to a specific agent, you can choose to override the capacity check and keep the work assigned to the agent. (3)



**Note:** If you set up a channel to use the status-based capacity model, work remains assigned even if agents close tabs. The My Work tab in the Omni-Channel widget shows work assigned to the agent until it is completed or reassigned. Agents can open a tab for work from the My Work tab.

#### SEE ALSO:

[Salesforce Help: Create Service Channels](#) (can be outdated or unavailable during release preview)

## Prioritize Additional Routing Skills

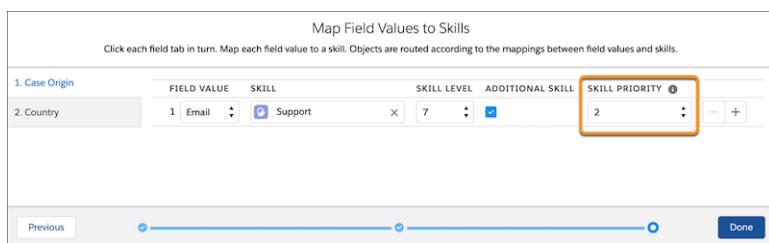
If you use skills-based routing with either the attribute setup method or Apex code, you can set some skills to additional. For additional skills, you can now specify the order in which skills are dropped if after the specified timeout no agent with that skill is available. Higher priority-value skills are dropped first. Lower priority-value skills, for example 0, are dropped last.

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

**Why:** Initially, Omni-Channel tries to route a work item to an agent with all the requested skills. If an agent with all the skills isn't available, Omni-Channel drops skills marked as additional based on their priority value. After the additional skills timeout period as specified in the routing configuration, Omni-Channel drops skills with the same priority value until an agent with the remaining skills is available. The work item is then routed to the best-matched agent, even if the agent doesn't have all the additional skills.

**Note:** Skills with the same priority value resulting from the attribute setup method or Apex code belong to the same group and are dropped together.

**How:** In the Attribute Setup for Skills-Based Routing setup flow, select **Additional Skill** and set the **Skill Priority**.



For example, you can set up the following required and additional skills:

- Language: English and French are required, not additional.
- Issue Type: Software and Hardware are additional skills of the highest priority, 0.

- Product: Speaker, Mouse, and Keyboard are additional skills of priority 1.
- Location: USA, England, Canada, and France are additional skills of priority 2.

In this example, Language skills aren't additional, so they are never dropped. Skills associated with the Issue Type field are the highest priority, so Omni-Channel drops them last. Skills associated with the Location field are dropped first.

The **Drop Additional Skills Time-Out**, set in the routing configuration, specifies the amount of time to wait before dropping each set of additional skills.

 **Note:** If you have existing attribute-mapping sets with additional skills, these skills are treated as if they were set to priority 0 and are dropped last. You can adjust them by editing the attribute-mapping set. Consider adjusting the **Drop Additional Skills Time-Out** to account for the time to drop additional skills in priority order. The time required to route the work item to an agent might be longer than when additional skills were dropped all at once.

#### SEE ALSO:

[Salesforce Help: Create Service Channels](#) (can be outdated or unavailable during release preview)

## Other Changes in Service Cloud

Learn about other changes we've made in the Service Cloud.

#### IN THIS SECTION:

[Show Extended Record and Polymorphic Relationships with the Related Record Component](#)

Now your agents can look up more information with fewer clicks. Agents can use the updated Related Record component to look up two levels of record relationships to get more context for their customers.

[Permission Changes for Service Cloud Features](#)

Review access changes to Service Cloud features that take effect with the Summer '20 release.

## Show Extended Record and Polymorphic Relationships with the Related Record Component

Now your agents can look up more information with fewer clicks. Agents can use the updated Related Record component to look up two levels of record relationships to get more context for their customers.

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

**Who:** To create and save Lightning pages in the Lightning App Builder, users need the "Customize Application" permission. To view Lightning pages in the Lightning App Builder, users need the "View Setup and Configuration" permission.

**Why:** Now agents can look up a field value on the related record that's associated with another record. For example, an agent can look up the account for a contact that's related to a case. Previously, the agent could look up only one level of a record relationship. So, they could look up the contact that's related to the case, but not the account that's associated with the contact that's on that case.

Now, agents can also look up polymorphic fields on the Related Record Component. For example, the Tasks Related To field can take a value of a Case, Account, or Opportunity, and so on. Then the agent can select the lookup field type "Case" and from there display the case. Previously, polymorphic fields weren't supported in the Related Record Component.

**How:** On the Lightning App Builder, select your record page and add the Related Record component to the page. Specify the first record lookup, and then specify the second-level lookup. You must specify a first-level lookup before you can add a second-level lookup. The second-level lookup must be a field that's accessible from the first record lookup.

To let users look up polymorphic fields, select a polymorphic lookup field type on the first-level lookup or on the second-level lookup.

**SEE ALSO:**

[Salesforce Help: Standard Lightning Page Components](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create and Configure Lightning Experience Record Pages](#) (can be outdated or unavailable during release preview)

## Permission Changes for Service Cloud Features

Review access changes to Service Cloud features that take effect with the Summer '20 release.

**Entitlements and Milestones**

Access to entitlement templates, entitlement processes, work order milestones, and milestone types is limited to Salesforce admins, users with access to the Case, Entitlement, or Work Order objects, and users with the View Setup and Configuration permission.

**Linked Articles**

Access to linked articles in the API is limited to users with access to the parent record linked to the knowledge article.

**SEE ALSO:**

[Knowledge Article: User Profile Permission Descriptions](#)

## Industries: Emergency Response Management, Plus Better Customer Focus with Action Plans, Search Enhancements, Store Visit Management, and More

Vertical solutions from Salesforce Industries are full of features designed to bring you closer to the people who depend on you. Salesforce Emergency Response Management helps you deliver contact tracing, monitoring, and other resources fast when crisis hits. Health Cloud has new emergency response features, plus more ways to support call center workers and connect with patients, along with increased convenience and usability. Financial Services Cloud brings greater usability to Action Plans and helps you leverage your customers' loan application data to create financial accounts. Consumer Goods Cloud helps your field reps focus on the most important data and manage their schedules more easily. Manufacturing Cloud helps keep your sales plans on track by enabling account managers to set account targets and forecast better.

**IN THIS SECTION:**

[Introducing Salesforce Emergency Response Management](#)

Salesforce Emergency Response Management helps you serve your constituents and communities when they need it most. Provide healthcare to symptomatic patients and trace and monitor potentially exposed individuals. Allocate emergency resources and services with more speed and efficiency than ever before.

[Health Cloud: Emergency Management, Provider Search Logging, Device Sales Support, and More](#)

Health Cloud brings you even more ways to connect with people who need your help. You can help stop the spread of infection and quickly provide care in a public health emergency. Care providers can monitor patients remotely to track health indicators. Medical device providers can register devices and track shipping requests to help get the right equipment to the right patient. Device companies and salespeople get support for effective site visits and inventory management, including a mobile app. You can use consent forms for more kinds of interactions. Call center operators get more usable results when they search for providers on behalf of patients. And if provider searches aren't working right, you can now view a log to help solve the problem.

### [Financial Services Cloud: More Ways to Share Data and Collaborate](#)

Financial Services Cloud offers new ways to display data, share data, and collaborate with partners. Keep policyholder record pages tidy with greater control over policy and claim details you want to show. Streamline partner workflows by enabling Action Plans for Partner Communities. Make it easy to refer mortgage accounts to other lines of business by creating financial accounts, person accounts, contacts, assets, and liabilities from loan application data. Use the Actionable Relationship Center to see account business relationships in a hierarchy view.

### [Consumer Goods Cloud: A Customized Mobile App, Salesforce Maps Embedded in Desktop App, and More](#)

Help your sales managers track and manage their territories and help out their reps in the field. You can customize the mobile app for maximum efficiency and embed Salesforce Maps in the desktop app, offering analysis at a glance.

### [Manufacturing Cloud: Shape Your Business Growth Plans, Focus on Specific Account Forecasts, and Improve Comparison Between Planned and Actual Metrics of Sales](#)

Shape your organization's growth plans by setting up measurable targets. Achieve growth plans by assigning targets to your team members. Concentrate on key business areas by strategically distributing targets among specific products and accounts, and by time period. Enhance your focus and user productivity by identifying key accounts and products in your organization. Recalculate all eligible account forecasts with a single click. Compare sales agreement values with ease by viewing them in the default currency of the sales agreement. Track and compare your organization's data by creating granular reports for account manager targets, account forecasts, and sales agreements. Manage the data volume used by account manager targets and account forecasts in your Salesforce org by viewing the usage details.

## Introducing Salesforce Emergency Response Management

Salesforce Emergency Response Management helps you serve your constituents and communities when they need it most. Provide healthcare to symptomatic patients and trace and monitor potentially exposed individuals. Allocate emergency resources and services with more speed and efficiency than ever before.

### Editions

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

#### IN THIS SECTION:

##### [Introducing Contact Tracing for Employees](#)

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.

##### [Introducing Emergency Response Management for Public Health](#)

Mobilize your public health department to serve its constituents and communities when there's a health emergency. Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from further infection with contact tracing. Tracing and contacting people who were possibly exposed to an infected person is one of the most efficient ways to fight widespread community infection. With Contact Outreach, tracers pick up tasks to gather demographic and contact information. The Contact Outreach flow allows tracers to obtain crucial information about a person's condition and medical history. Tracers can also perform the person's living situation, self-isolation, quarantine, and social barriers assessment, and take necessary steps, such as sending a daily monitoring survey or enrolling the person in a care program. Public agencies or hospitals can use the Emergency Response community to request emergency supplies or other services. Individuals can request to participate in assistance programs such as food delivery services or short-term housing. Using Salesforce Maps, dispatch your field responders with speed and efficiency to the locations or citizens who need assistance. Einstein Analytics dashboards give you powerful insights into community health so that you can make faster and smarter decisions.

### Introducing Emergency Response Management for Public Sector

Quickly deploy a single digital destination for constituents and communities to access emergency program information and incident updates. Use the Emergency Response community to feature different services and programs that are available to public agencies and hospitals, such as emergency supply requests. Citizens can request permits for building access and apply for assistance programs like food delivery services. Using the mobile Inspection App field, responders can deliver emergency services quickly and efficiently. Businesses can use the community to request permits to reopen to the public. After the permit is approved, your inspector can use the Inspection App to verify that the site complies with local health and safety ordinances.

### Introducing Volunteer Management

With Volunteer Management, you can manage volunteer projects within Salesforce and make them visible on your community website. Volunteers can sign up for volunteer projects on your community and update their time spent on volunteer activities.

### Emergency Response Management Has New and Changed Objects

Access more data through these new and changed Emergency Response Management objects. Emergency Response Management for Public Health uses all the new objects and fields. Emergency Response Management for Public Sector uses the objects and fields in the Emergency Response section of this topic.

## Introducing Contact Tracing for Employees

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.



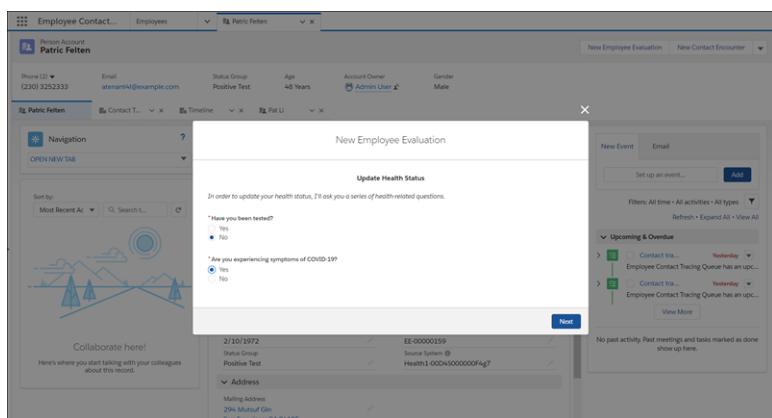
**Note:** Contact Tracing for Employees is available in the Spring '20 release. We include it in the Summer '20 release notes for extra visibility.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Contact Tracing for Employees is enabled.

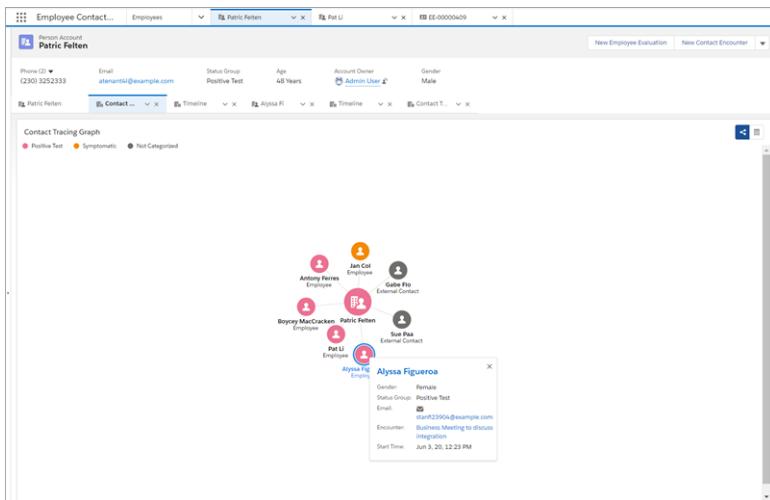
**Who:** To use Contact Tracing for Employees, you must have the Health Cloud and the Contact Tracing for Employees permission set licenses provisioned in Salesforce. To use Contact Tracing for Employees in Work.com, you must also have the Workplace Command Center permission set license provisioned.

**Why:** Salesforce Contact Tracing for Employees helps you to monitor your employees, their contacts, and the events that were a source of potential infection.

Tracing and contacting people who were possibly exposed to an infected person is one of the most efficient ways to fight widespread community infection. Tracers pick up tasks to evaluate employees, gather details about potentially exposed contacts, and enroll employees in care programs. You have the employee's status, a map of exposed contacts, and information on the person's condition consolidated in one place.

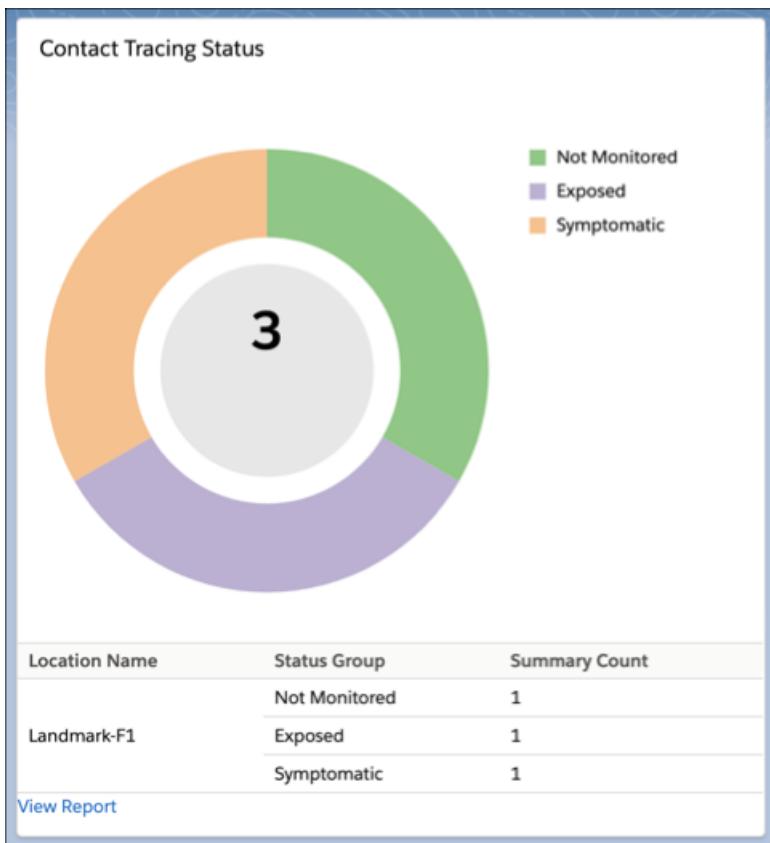


The employee evaluation flow gathers crucial information about a person's condition so that you can enroll affected employees into a care program and monitor their health.



The Contact Tracing Graph gives you a comprehensive view of employees and external contacts so that you can trace infection by people, places, or events. Follow up, assessment, and triage can happen without having to leave the console.

A Contact Tracing Status lightning component is also available for you to add to the Command Center dashboard. With just a few clicks, you can easily view a report that shows you the contact tracing and health status of your employees.



Salesforce recommends that you make contact tracing functionality available only to users who are trained in privacy best practices. We recommend that you share contact tracing data only as needed.

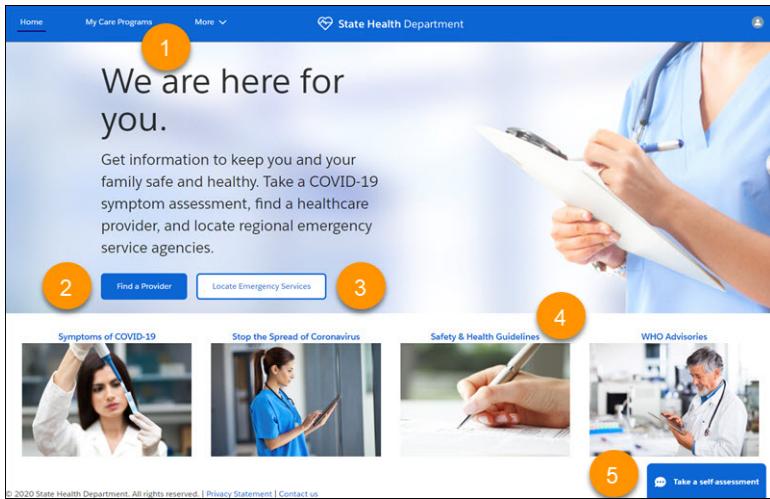
## Introducing Emergency Response Management for Public Health

Mobilize your public health department to serve its constituents and communities when there's a health emergency. Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from further infection with contact tracing. Tracing and contacting people who were possibly exposed to an infected person is one of the most efficient ways to fight widespread community infection. With Contact Outreach, tracers pick up tasks to gather demographic and contact information. The Contact Outreach flow allows tracers to obtain crucial information about a person's condition and medical history. Tracers can also perform the person's living situation, self-isolation, quarantine, and social barriers assessment, and take necessary steps, such as sending a daily monitoring survey or enrolling the person in a care program. Public agencies or hospitals can use the Emergency Response community to request emergency supplies or other services. Individuals can request to participate in assistance programs such as food delivery services or short-term housing. Using Salesforce Maps, dispatch your field responders with speed and efficiency to the locations of citizens who need assistance. Einstein Analytics dashboards give you powerful insights into community health so that you can make faster and smarter decisions.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Emergency Management for Public Sector is enabled.

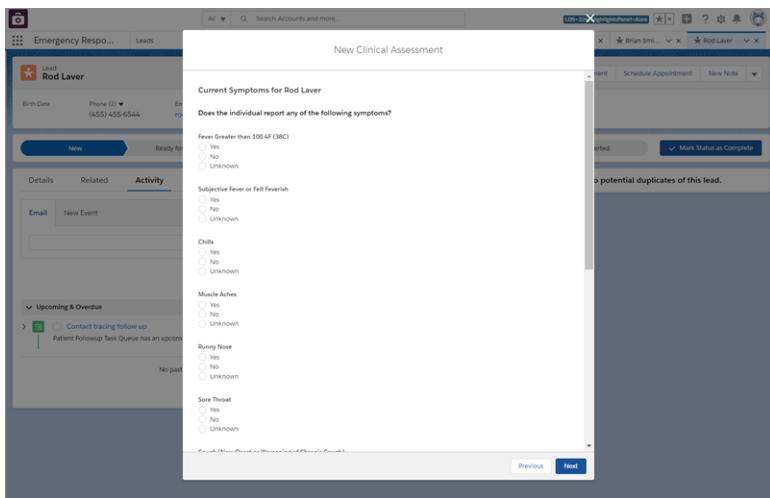
**Who:** To use Emergency Response Management for Public Health, you must have the Emergency Response for Public Sector and the Health Cloud Platform permission set license provisioned in Salesforce. Community users must have the Health Cloud for Community and the Public Sector Community permission set licenses provisioned in Salesforce.

**Why:** Emergency Response Management for Public Health provides a broad range of preconfigured tools that help you respond to a public health emergency at scale. During a public health emergency, the safety, health, and well-being of your community is your top priority. With the Public Health Emergency Community, citizens can take action to get the help that they need.



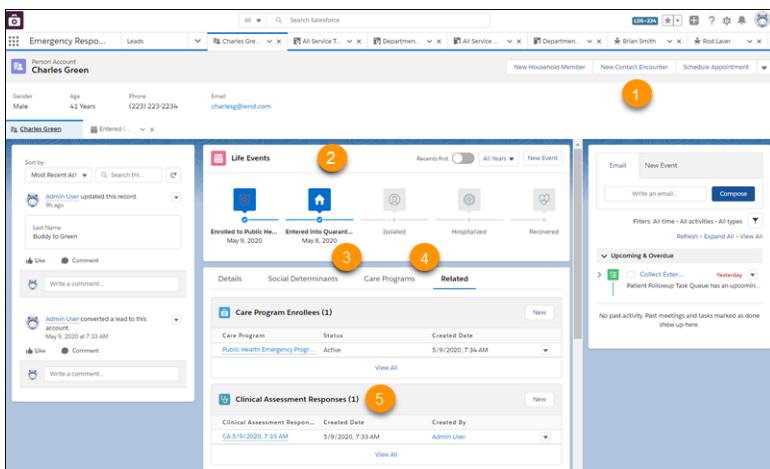
Citizens can see the emergency care programs that they're enrolled in (1) and search for health care providers by specialty, location, and other factors (2). A click of a button gives them the location of the closest emergency services (3) and access to vital information to stay healthy and safe (4). A predefined chatbot dialog guides individuals through a self-assessment based on Centers for Disease Control guidelines with the option to schedule an appointment for follow-up.

During a public health emergency, efficiency in getting individuals assessed, enrolled in a care program, and monitored is crucial. The Emergency Response Management clinical assessment flow gathers crucial information about an individual's condition so you can make care decisions with speed and accuracy.



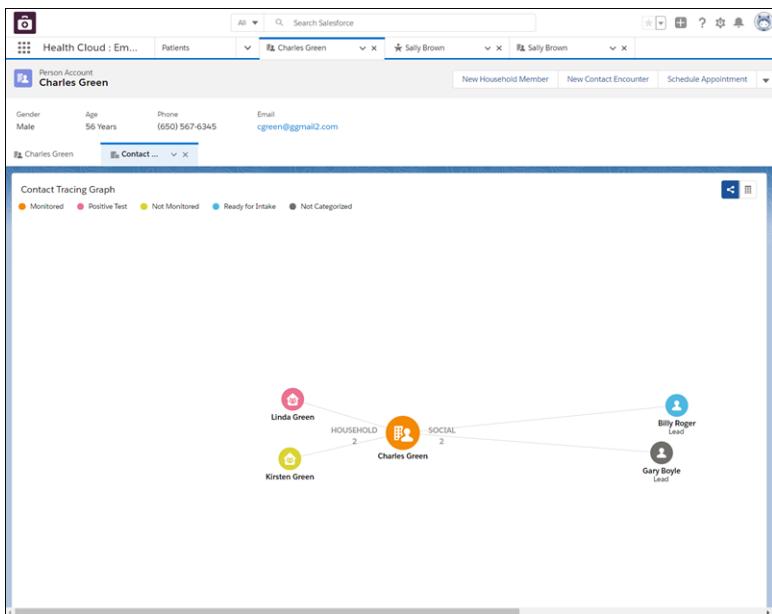
Using the Emergency Response Management Console, create a consistent intake experience using guided workflows and pre-built assessments that can quickly adapt as protocols or guidelines change.

Once a patient is triaged and enrolled in a care program, your care teams can remotely monitor and connect patients to the right care when called for. Care coordinators have all the information they need to make sure that each patient has a program and services tailored to their needs.



Each patient record shows actionable and comprehensive care and social services plans personalized to each patient. Add information about individuals the patient has been in contact with (1) and track incidents and milestones to gain insight into the patient's condition (2). Understand the social and environmental factors that define extra services a patient needs (3), and keep tabs on the care program the patient is enrolled in (4). You can check the patient's symptoms and progress as measured through the daily assessments that are sent to patients enrolled in the emergency care program.

Tracing and then contacting individuals who may have been exposed to an infected person is one of the most efficient ways of fighting widespread community infection. You can see the exposed contacts for every patient right from the patient record.

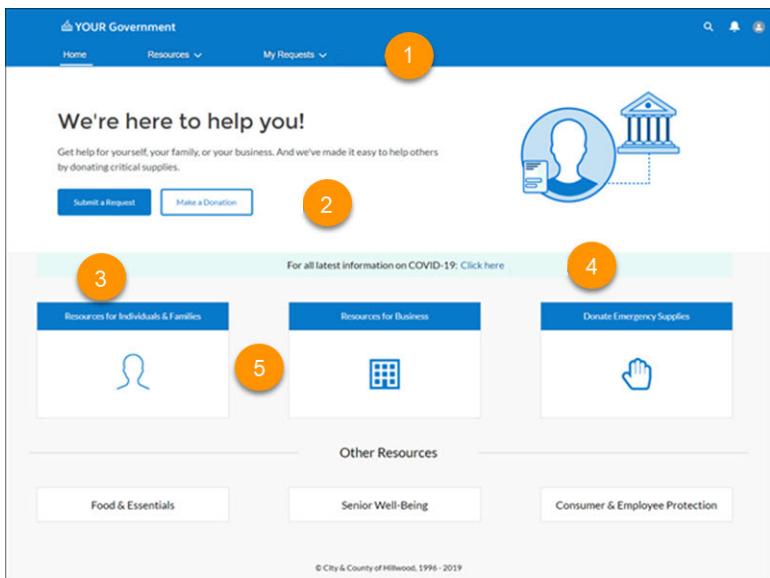


The Contact Tracing Graph gives you a comprehensive view of household members and social relationships so that you can trace infection by people, places, or events. Follow up, assessment, and triage can happen without leaving the console.

With many exposed individuals to contact, it makes sense to bring in workers or volunteers whose job it is to call those exposed contacts.

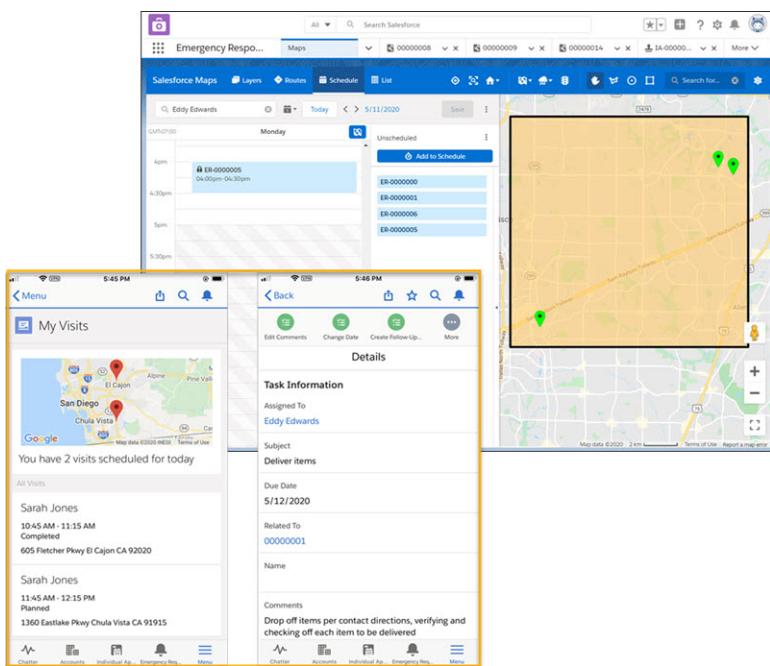
The Contact Tracing Community gives contact tracers an easy and efficient way to pick up contact tracing tasks from a queue and work on them. Tracers can find the tasks that they own (1), pick up new call tasks (2), or add tasks to call contacts not yet reached (3).

The pre-configured Emergency Response Community template makes it easy for citizens to request emergency assistance and get information when they need it most.



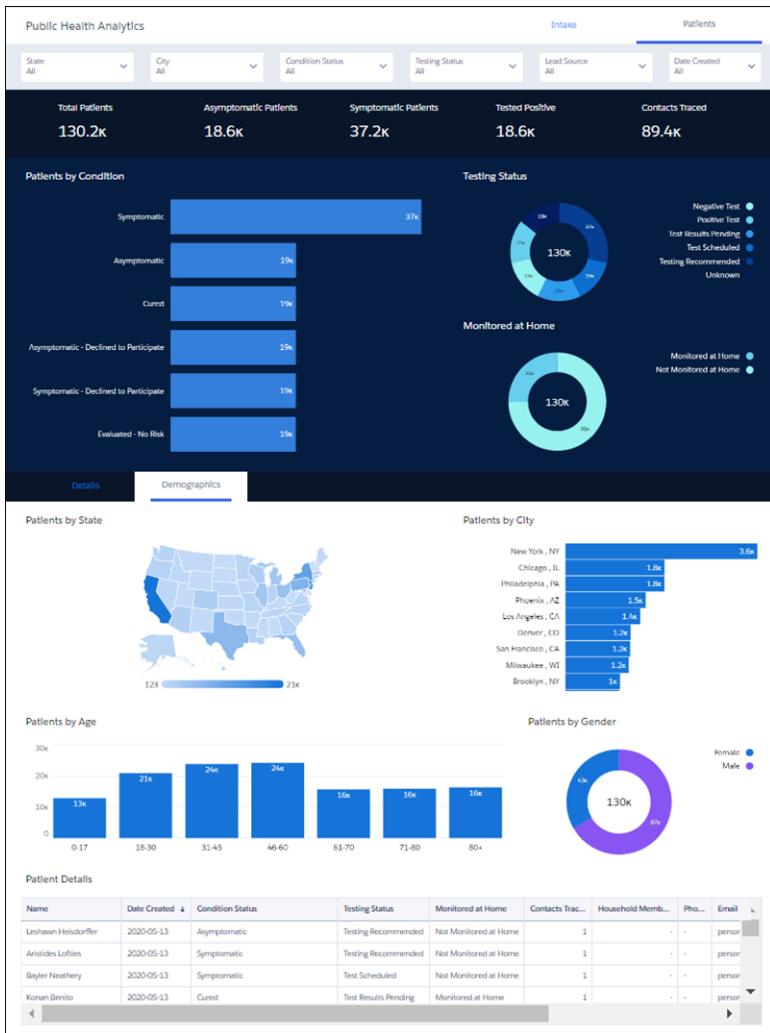
The pre-configured Emergency Response Community template lets you create a hub for citizens during an emergency. Citizens can check the status of existing requests (1), donate surplus emergency supplies (2), submit requests for assistance (3), view updates from your agency (4), or find links to important resources (5). Businesses can request critical supplies that enable them to keep their employees and customers safe and healthy.

From the Emergency Request Console's home page, your agency can quickly approve requests and send them to a dispatcher to schedule a visit.



Help is on its way in no time when your dispatchers use Salesforce Maps. Salesforce Maps injects location intelligence into field operations to make emergency supplies delivery services more efficient. When an emergency event is created, the Schedule an Emergency Visit process starts a flow that creates the visit record, applies the action plan template, and creates the tasks. Your field responders have everything they need to complete a visit right on their mobile phone. Contact information, directions, and a detailed accounting of their tasks are at their fingertips. When a visit and its tasks are finished, the field responder marks it as complete and moves to the next assignment.

Bring actionable, AI-powered insights to your organization with Einstein Analytics for Emergency Response Management. Pre-built templates with industry standard KPIs and best practice analytics help you get to the right answer faster when responding to crises and emergencies.



## IN THIS SECTION:

### Contact Outreach

With Contact Outreach, you can capture information about people who have engaged in an encounter with an infected person and track the spread of disease. Tracers can easily gather information about a person's health condition, perform health-related assessments, and take necessary steps, such as sending a daily monitoring survey or enrolling the person in a care program.

### Contact Encounter Business API

Save time and effort by loading multiple contact participant information for a contact encounter into Salesforce all at once instead of manually adding numerous contact participant information for every contact encounter.

### Encrypt Contact Encounter Information

When contact tracers gather information about people who have engaged in an encounter with an infected person and track the spread of disease, they obtain personal and sensitive data. Add another layer of security to sensitive data with Shield Platform Encryption.

## Contact Outreach

With Contact Outreach, you can capture information about people who have engaged in an encounter with an infected person and track the spread of disease. Tracers can easily gather information about a person's health condition, perform health-related assessments, and take necessary steps, such as sending a daily monitoring survey or enrolling the person in a care program.

Contact Outreach helps you monitor people who have engaged in an encounter with an infected person and track the spread of disease.

Tracing and contacting people who were possibly exposed to an infected person is one of the most efficient ways to fight widespread community infection. Tracers pick up tasks to gather demographic and contact information.

### Editions

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

The screenshot shows a form titled "Contact Outreach". At the top, it says "Please verify your testing and hospitalization status and provide us with your primary care physician's name". Below this, it displays "Medical Care Details for Florrie Lugo". The form includes fields for "COVID-19 Testing Status" (dropdown menu showing "Testing Recommended"), "Testing Facility Name" (text input), "Hospitalization Status" (dropdown menu showing "Admitted"), "Provider Facility Name" (text input), and "Primary Care Physician Name" (text input). At the bottom right, there are "Previous" and "Next" buttons.

The Contact Outreach flow gathers crucial information about a person's condition and medical history. Tracers can also perform the person's living situation, self-isolation, quarantine, and social barriers assessment, and take necessary steps, such as sending a daily monitoring survey or enrolling the person in a care program.

The screenshot shows a user interface titled "Contact Outreach". It includes a message: "Based on what you have told me I want to go over some recommendations for your situation." A section titled "Quarantine Information" contains two questions with radio button options:

- \* Are you able to quarantine for 14 days?
  - Yes
  - No
- \* Have you already started to quarantine?
  - Yes
  - No

Below these are input fields for "Quarantine Start Date" (with a calendar icon) and "Where will you stay while under quarantine?" (with a search bar labeled "Search Locations..."). At the bottom are "Previous" and "Next" buttons.

Salesforce recommends that you make the contact outreach functionality available only to users who are trained on privacy best practices. We recommend that you share contact outreach data only on a need-to-know basis.

#### SEE ALSO:

[Salesforce Help: Create the Contact Outreach Quick Action Button](#)

## Contact Encounter Business API

Save time and effort by loading multiple contact participant information for a contact encounter into Salesforce all at once instead of manually adding numerous contact participant information for every contact encounter.

Loading information about multiple contact encounters and participants just got a lot easier with the Contact Encounter Business API. Instead of manually adding information per encounter and participant, you can now load details of up to 50 participants per encounter and up to 5 encounters in a single payload.

#### EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

## Encrypt Contact Encounter Information

When contact tracers gather information about people who have engaged in an encounter with an infected person and track the spread of disease, they obtain personal and sensitive data. Add another layer of security to sensitive data with Shield Platform Encryption.

You can now encrypt the contents of the following fields:

#### Contact Encounter

- Description\_\_c

#### EDITIONS

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

- Name

SEE ALSO:

[Salesforce Help: Which Standard Fields Can I Encrypt?](#)

## Introducing Emergency Response Management for Public Sector

Quickly deploy a single digital destination for constituents and communities to access emergency program information and incident updates. Use the Emergency Response community to feature different services and programs that are available to public agencies and hospitals, such as emergency supply requests. Citizens can request permits for building access and apply for assistance programs like food delivery services. Using the mobile Inspection App field, responders can deliver emergency services quickly and efficiently. Businesses can use the community to request permits to reopen to the public. After the permit is approved, your inspector can use the Inspection App to verify that the site complies with local health and safety ordinances.

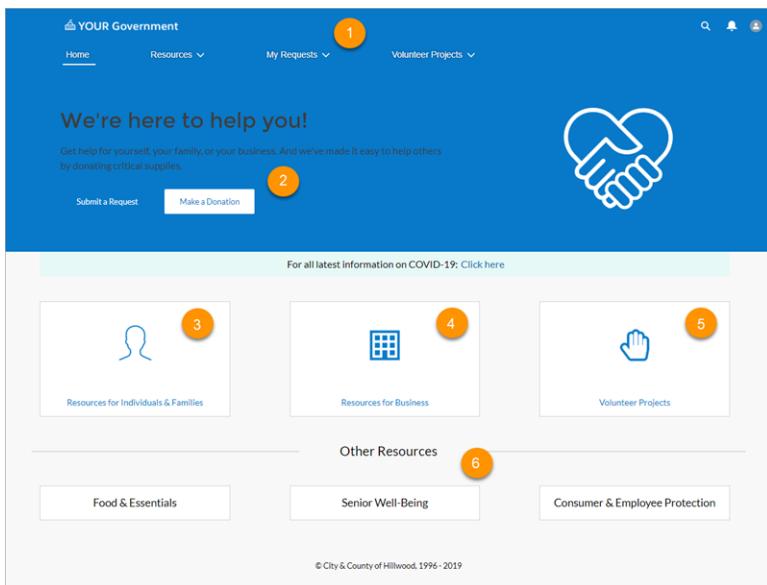
**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Emergency Management for Public Sector is enabled.

**Who:** To use Emergency Response Management, you must have the Emergency Response for Public Sector permission set license provisioned in Salesforce. Community users must have the Public Sector Community permission set licenses provisioned in Salesforce.

**Why:** The pre-configured Emergency Response Community template makes it easy for citizens and businesses to request emergency assistance and get information when they need it most. Salesforce Maps and the Inspection App make it easy to deliver critical supplies and ensure that businesses comply with local health and safety ordinances.

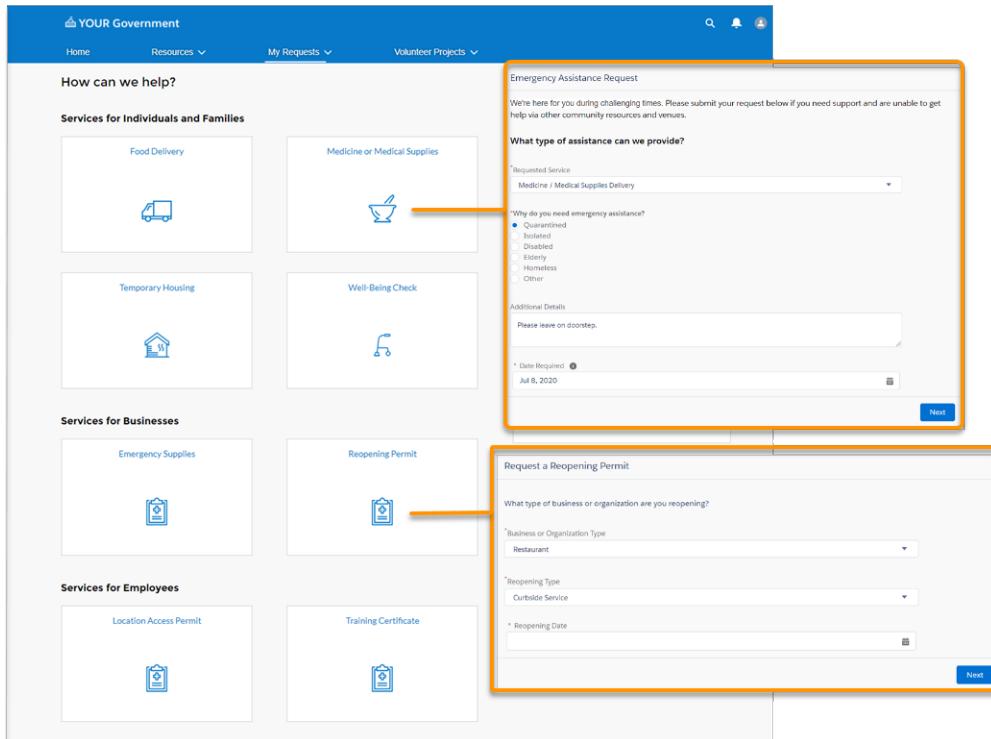
## Emergency Response Community

The pre-configured Emergency Response Community template makes it easy for citizens to request emergency assistance and get information when they need it most.



The Emergency Response Community is a hub for your community during an emergency. Citizens and businesses can check the status of existing requests (1) or donate emergency supplies (2). Individuals and families can submit requests for assistance with temporary housing, emergency supply delivery, and wellness checks. Employees can request a permit to access a building or obtain certification for training they've taken (3). Businesses can request a permit to reopen to the public or request critical supplies that enable them to

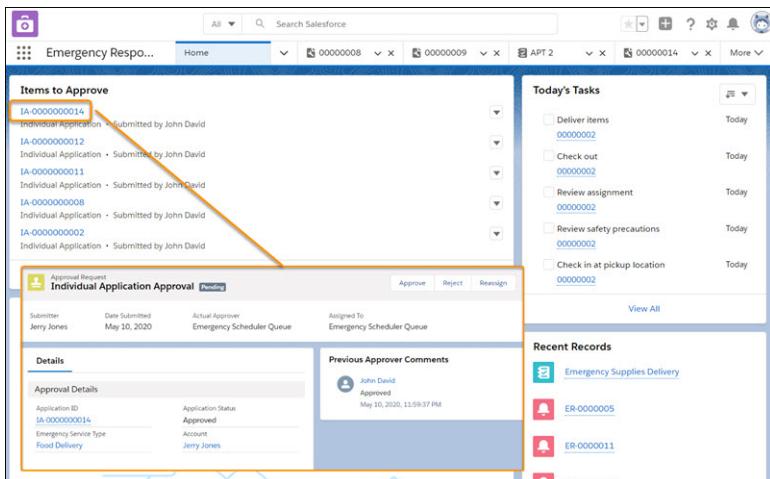
keep employees and customers safe (4). With Volunteer Management, you can create volunteer projects and let people sign up for shifts to help during an emergency (5). And you can add other resources to keep your community informed and protected (6).



Citizens can fill out a simple online form to request supplies or delivery services. Businesses and other organizations can also request emergency supplies or reopening permits.

## Emergency Response Console

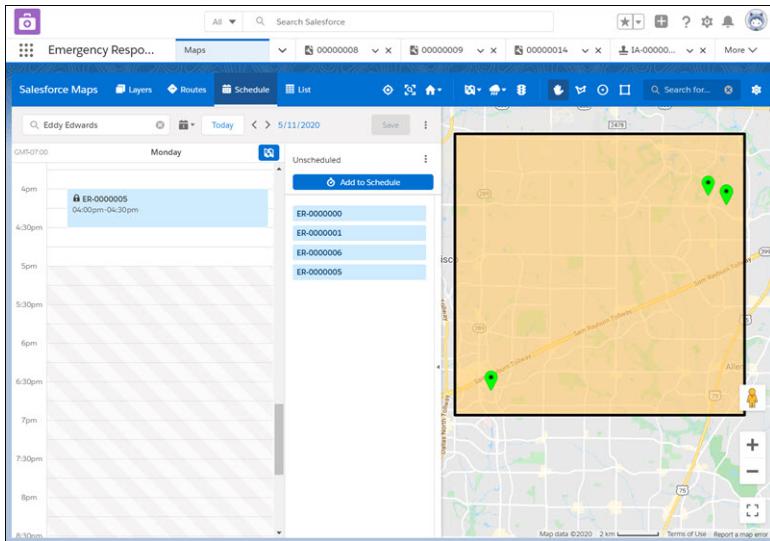
Give your staff the power of the Emergency Response Console to triage and evaluate incoming requests from citizens or businesses.



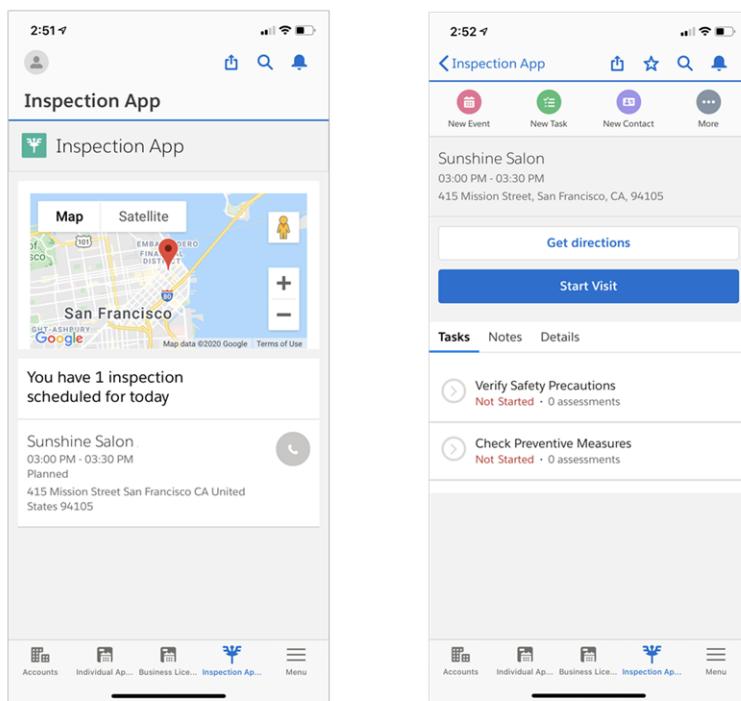
From the Emergency Response Console's home page, your agency can quickly approve requests and then have a dispatcher schedule a delivery or an inspection.

## Salesforce Maps and the Mobile Inspection App

Help is on its way in no time when your dispatchers use Salesforce Maps.



Salesforce Maps injects location intelligence into field operations to make emergency supply delivery more efficient. When an emergency event is created, the Schedule an Emergency Visit process starts a flow that creates the visit record, applies the action plan template, and creates tasks.



Your field responders can complete an inspection or a delivery right on their mobile phone. Contact information, directions, and a detailed accounting of their tasks are at their fingertips. When an inspection or a delivery and the associated tasks are finished, the inspector or field responder marks the visit as complete and begins the next assignment.

**IN THIS SECTION:**[Encrypt Emergency Service Application Request Information](#)

When members of your community create a service request, they share personal and sensitive data with you. Add another layer of security to that sensitive data with Shield Platform Encryption.

[Add Grants Management to the Emergency Response Community](#)

Grants Management helps you launch a Grantee Portal for grant seekers. From the portal, grant seekers can find funding opportunities, apply for funding, view their application status, and submit ongoing progress reports for awarded grants all in one place.

## Encrypt Emergency Service Application Request Information

When members of your community create a service request, they share personal and sensitive data with you. Add another layer of security to that sensitive data with Shield Platform Encryption.

You can now encrypt the contents of these fields.

**Business License**

- Identifier

**Business License Application**

- Site Address (encrypts Site Street and Site City)

**Business Profile**

- Business Operating Name
- Business Tax Identifier

**Course Offering**

- Name

**Public Complaint**

- Business Address
- Business Name
- Email
- First Name
- Last Name
- Mobile Number

**Regulatory Code Violation**

- Corrective Action Description
- Description

**Training Course**

- Description
- Name

**Violation Enforcement Action**

- Description

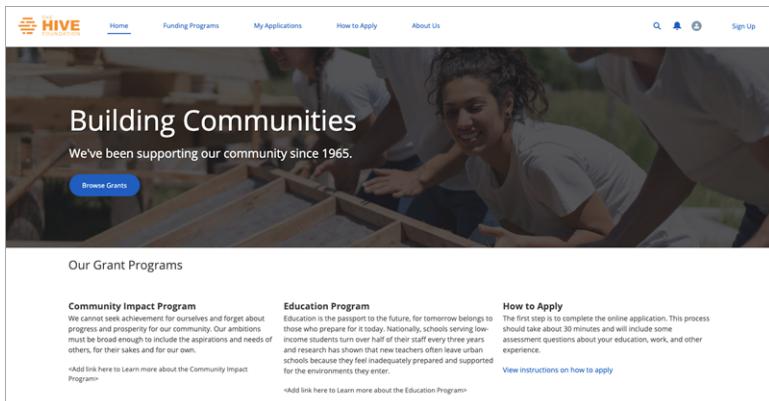
**EDITIONS**

Available in: **Enterprise**, **Performance**, and **Unlimited** editions.

## Add Grants Management to the Emergency Response Community

Grants Management helps you launch a Grantee Portal for grant seekers. From the portal, grant seekers can find funding opportunities, apply for funding, view their application status, and submit ongoing progress reports for awarded grants all in one place.

After you set up Grants Management, you can create a tile in the Emergency Response community template and link to the Grantee Portal.



### Editions

Available in:

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

### SEE ALSO:

[Power of Us Hub: Grants Management](#)

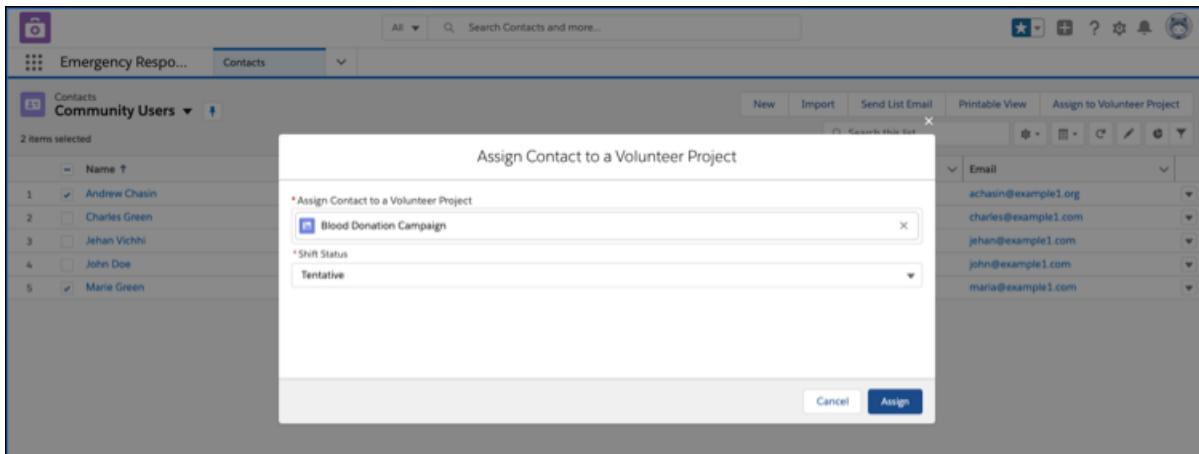
## Introducing Volunteer Management

With Volunteer Management, you can manage volunteer projects within Salesforce and make them visible on your community website. Volunteers can sign up for volunteer projects on your community and update their time spent on volunteer activities.

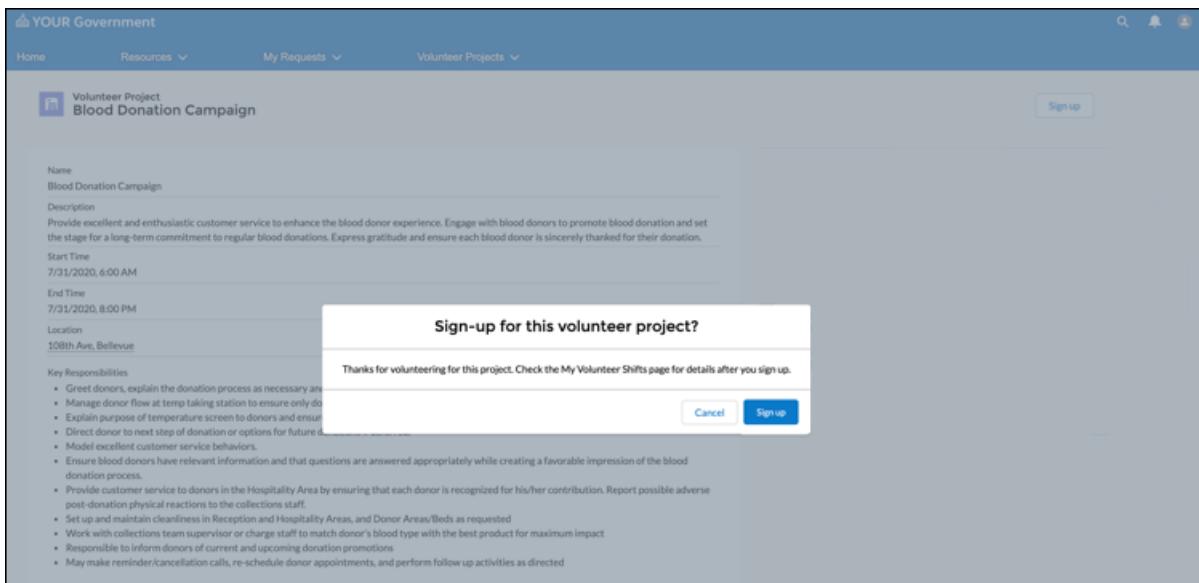
**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Emergency Management for Public Sector or Public Health is enabled.

**Who:** To use Volunteer Management, you must have the Emergency Response for Public Sector or Public Health permission set license provisioned in Salesforce. Community users must have the Public Sector or Public Health Community permission set licenses provisioned in Salesforce.

**Why:** Volunteer Management helps you manage volunteer projects at scale and amplify reach by sharing volunteering opportunities to external community sites. You can identify, create, and publish volunteer project information on your community website. You can also easily assign a contact to a volunteer project within Salesforce.



Volunteers can easily search the list of available volunteer projects, sign up for those that they're interested in, or accept assignments.



With just a few clicks, volunteers can view and update information about activities they signed up for. They can update the start and end times, add completed hours, or add information about a project.

SEE ALSO:

[Salesforce Help: Configure Volunteer Management](#)

## Emergency Response Management Has New and Changed Objects

Access more data through these new and changed Emergency Response Management objects. Emergency Response Management for Public Health uses all the new objects and fields. Emergency Response Management for Public Sector uses the objects and fields in the Emergency Response section of this topic.

### Emergency Response for Public Health

#### Check whether a person's condition is being monitored at their home, rather than a clinical setting

Use the new `Monitored_at_Home__pc` field on the `Account` object.

#### Check a person's stage within the testing and monitoring process

Use the new `StatusGroup__pc` field on the `Account` object.

#### Get the result of a person's most recent test

Use the new `Testing_Status__pc` field on the `Account` object.

#### Get info on a person's condition based on their most recent test or assessment

Use the new `ConditionStatus__pc` field on the `Contact` object.

#### Check whether a person's condition is being monitored at their home, rather than a clinical setting

Use the new `Monitored_at_Home__pc` field on the `Contact` object.

#### Check a person's stage within the testing and monitoring process

Use the new `StatusGroup__pc` field on the `Contact` object.

#### Get the result of a person's most recent test

Use the new `Testing_Status__pc` field on the `Contact` object.

#### Get the date of the appointment

Use the new `AppointmentDate` field on the `Lead` object.

**Get the identifier of the appointment**

Use the new `AppointmentId` field on the `Lead` object.

**Check a person's stage within the testing and monitoring process**

Use the new `StatusGroup__pc` field on the `Lead` object.

**Display the results of an assessment of a patient's health condition**

Use the new `ClinicalAssessmentResponse__c` object.

**Display a period of time during which two or more people were in contact with each other**

Use the new `ContactEncounter` object.

**Display details about a person who was present during a contact encounter**

Use the new `ContactEncounterParticipant` object.

**Get information about the living situations of individuals**

Use the new `HousingAssessment__c` object.

**Check whether the individual was admitted to the hospital**

Use the new `HospitalizationStatus__c` field on the `ClinicalAssessmentResponse__c` object.

**Get the name of the facility where the testing was done for the individual**

Use the new `TestingFacilityName__c` field on the `ClinicalAssessmentResponse__c` object.

**Get the highest recorded temperature, in Fahrenheit, for the individual**

Use the new `HighestRecordedTemperature__c` field on the `ClinicalAssessmentResponse__c` object.

**Get the date when the symptoms started for the individual**

Use the new `OnsetOfSymptoms__c` field on the `ClinicalAssessmentResponse__c` object.

**Check whether consent was provided to interview a minor**

Use the new `ParentalConsent__c` field on the `ClinicalAssessmentResponse__c` object.

**Get the name of the provider of healthcare services such as the hospital, clinic, or medical practitioner other than a primary care physician**

Use the new `ProviderFacilityName__c` field on the `ClinicalAssessmentResponse__c` object.

**The name of the individual's primary care physician**

Use the new `PrimaryCarePhysician__c` field on the `ClinicalAssessmentResponse__c` object.

**Get information on a volunteer activity after a volunteer signs up for a volunteer project**

Use the new `Shift` object.

**Get information about activities that must be carried out within a certain time frame, at a specified location, by one or more volunteers**

Use the new `VolunteerProject` object.

## Emergency Response for Public Sector

**Create an action plan**

Use the new `ActionPlan` object.

**Create an action plan template**

Use the new `ActionPlanTemplate` object.

**Define the parameters that act as markers of compliance for an inspection**

Use the new `AssessmentIndicatorDefinition` object.

**Create the tasks used in inspections to capture information**

Use the new `AssessmentTask` object.

**Associate a content document to a visit**

Use the new `AssessmentTaskContentDocument` object.

**Associate an assessment task with an assessment indicator definition**

Use the new `AssessmentTaskDefinition` object.

**Define parameters that act as markers of compliance for inspections.**

Use the new `AssessmentTaskIndicatorDefinition` object.

**Define information related to the association between an asset and the application for the license of an asset**

Use the new `AuthApplicationAsset` object.

**Define the operating hours during a specified period in which authorization is valid for a place**

Use the new `AuthLocationAccessSchedule` object.

**Create an authorization from a regulatory agency to provide emergency services or products**

Use the new `BusinessLicense` object.

**Create an application form submitted by a business owner**

Use the new `BusinessLicenseApplication` object.

**Define details about the business on the license or permit application**

Use the new `BusinessProfile` object.

**Create a license or permit requirement to provide an emergency service**

Use the new `BusRegAuthorizationType` object.

**Create a category of business activity**

Use the new `BusinessType` object.

**Define an instance of a training course with location and date details of training courses**

Use the new `CourseOffering` object.

**Create a request for emergency supplies or services from an organization or individual**

Use the new `EmergencyRequest__c` object.

**Define examinations authorized by a government authority that qualify a license or permit**

Use the new `Examination` object.

**Create an application form submitted by an individual**

Use the new `IndividualApplication` object.

**Define the assessment indicators recorded during an inspection**

Use the new `InspectionAssessmentInd` object.

**Create a field that displays a type of emergency service**

Use the new `InspectionType` object.

**Define a license application to be filled out by professionals**

Use the new `OccupationalLicenseApplication` object.

**Define the examinations taken by a person**

Use the new `PersonExamination` object.

**Represent the saved applications and pre-screening forms**

Use the new `PreliminaryApplicationRef` object.

**Define the complaints submitted by public users**

Use the new `PublicComplaint` object.

**Create a field that displays an organization or government agency that authorizes emergency service providers**

Use the new `RegulatoryAuthority` object.

**Create a license or permit that grants authority to a business or individual to provide emergency services or products**

Use the new `RegulatoryAuthorizationType` object.

**Create a field that displays an authorization type that's required before an applicant can provide a specific product**

Use the new `RegAuthorizationTypeProduct` object.

**Define regulation codes enforced by the regulatory body**

Use the new `RegulatoryCode` object.

**Define regulatory codes and the assessment indicator definitions associated with them**

Use the new `RegulatoryCodeAssessmentInd` object.

**Represent the regulatory code violations captured across multiple follow-up inspections**

Use the new `RegulatoryCodeViolation` object.

**Define the training classes completed by a person**

Use the new `TrainingCourseParticipant` object.

**Define the training classes authorized by a government authority to qualify for a license or permit**

Use the new `TrnCourse` object.

**Define an action that a regulatory authority takes to address violations**

Use the new `ViolationEnforcementAction` object.

**Define violations types for licenses and permits**

Use the new `ViolationType` object.

**Define the violation types associated with assessment indicator definitions**

Use the new `ViolationTypeAssessmentInd` object.

**Create a visit related to an emergency service**

Use the new `Visit` object.

**Create a visit related to an emergency service**

Use the new `Visit` object.

**Create a visitor related to an emergency service**

Use the new `Visitor` object.

**Get information on a volunteer activity after a volunteer signs up for a volunteer project**

Use the new `Shift` object.

**Get information about activities that must be carried out within a certain time frame, at a specified location, by one or more volunteers**

Use the new `VolunteerProject` object.

## Health Cloud: Emergency Management, Provider Search Logging, Device Sales Support, and More

Health Cloud brings you even more ways to connect with people who need your help. You can help stop the spread of infection and quickly provide care in a public health emergency. Care providers can monitor patients remotely to track health indicators. Medical device providers can register devices and track shipping requests to help get the right equipment to the right patient. Device companies and salespeople get support for effective site visits and inventory management, including a mobile app. You can use consent forms for more kinds of interactions. Call center operators get more usable results when they search for providers on behalf of patients. And if provider searches aren't working right, you can now view a log to help solve the problem.

**IN THIS SECTION:**[Protect Your Community with Emergency Response Management](#)

During a public health emergency, Health Cloud helps you assess, monitor, and track contacts to stop the spread of infection. Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from further infection with contact tracing.

[Track Tasks Better with Enhanced Care Plans](#)

The Tasks subtab now gives your users more control over how they group their tasks in care plans, and how they track a group's progress.

[Provider Search Enhancements](#)

Provider search is easier to use with result sorting and accurate driving distances. And now you can troubleshoot problems when provider data doesn't show up the way you expect it to.

[Engage Patients Through Remote Monitoring](#)

Create a reliable and personalized connection with patients to motivate them on their healthcare journey. Care Coordinators can personalize Care Metric Targets for each patient, making it easy to correlate care metrics and identify healthcare gaps. When a patient's biometric data is out of range, care coordinators can proactively engage with patients. Charts that show biometric data and health metrics such as heart rate, blood glucose levels, or weight, help care coordinators track patient health.

[Plan and Carry Out Surgical Visits with Intelligent Sales for Health Cloud](#)

The Intelligent Sales for Health Cloud desktop app helps your medical device company's sales managers and sales operatives plan visits for surgical cases. And the mobile app helps field reps carry out the visits.

[Register Healthcare Devices or Create Shipping Requests](#)

Help patients stay on course with their care metric targets by registering healthcare devices or creating a shipping request to deliver devices to them. Care Coordinators can track biometric data from these devices, identify healthcare gaps, and engage with patients for follow-ups.

[Show Consent Forms for Assets, Products, and Registered Devices](#)

Easily obtain consent when it's needed. In addition to care programs, you can now show consent forms for assets, products, and registered devices.

[Enroll a Patient in the Same Care Program Multiple Times](#)

Many healthcare scenarios require a patient's enrollment in the same care program multiple times. Care coordinators can now enroll patients in the same care program more than once.

[Associate a Healthcare Professional with a Care Program Provider](#)

You can now easily associate a healthcare professional with a care program provider. You can also assign a healthcare professional as the primary provider for the care program provider.

[Guest Users Don't Automatically Get Inverse Relationship Records](#)

When a guest user provides information that triggers the creation of a contact-to-contact-relationship record, the inverse contact-to-contact relationship is not created, even if the createinverserole flag is on.

[Choose Whether to Show or Hide Closed Statuses in the Care Plan Status Field](#)

Specify whether care coordinators can see closed statuses in the Status picklist. The picklist component filters out all closed type picklist values when admins disable the setting Show Closed Statuses in Case Status Field in Support Settings.

[Uncover AI-Powered Insights Fast with Einstein Analytics for Healthcare Enhancements](#)

New visualizations give medical device sales reps account, inventory, and visit trends, while payers and providers can quickly spot patterns in care plan performance and care requests.

[Health Cloud Has New and Changed Objects](#)

Access more data through these new and changed Health Cloud objects

### [Health Cloud: New and Changed Metadata Types](#)

Do more with these new and changed Health Cloud metadata types.

## Protect Your Community with Emergency Response Management

During a public health emergency, Health Cloud helps you assess, monitor, and track contacts to stop the spread of infection. Quickly triage and evaluate patients, provide ongoing engagement and monitoring, and protect communities from further infection with contact tracing.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use Emergency Response Management for Public Health, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses. Community users must have the Customer Community Plus license.

**Why:** During a public health emergency, the safety, health, and well-being of your community depends on getting people assessed, enrolled in a care program, and monitored. Once a patient is triaged and enrolled in a care program, your care teams can remotely monitor and connect patients to the right care when called for. Care coordinators have all the information they need to make sure that each patient has a program and services tailored to their needs.

### SEE ALSO:

#### [Salesforce Help: Emergency Response Management](#)

## Track Tasks Better with Enhanced Care Plans

The Tasks subtab now gives your users more control over how they group their tasks in care plans, and how they track a group's progress.

### IN THIS SECTION:

#### [Group Tasks by Problems and Goals](#)

Users can now group their tasks by problems and goals in the Tasks subtab of a care plan.

#### [Track Task Closure with Progress Rings](#)

Your users can now see the progress of task groups with progress rings.

#### [Other UI Changes in Care Plans](#)

Updates to the Care Plans page give it a cleaner look and feel. The simplified layout makes it easier for users to quickly spot the information they care about, like task progress.

## Group Tasks by Problems and Goals

Users can now group their tasks by problems and goals in the Tasks subtab of a care plan.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use care plans, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses. Community users must have the Customer Community Plus license.

**Why:** In the Problem & Goal group view of the Tasks subtab, users can see the different parts of a care plan, in their complete hierarchy. They can also create problems, goals, and tasks in the required parts of their care plans from this view.

The screenshot shows the 'All Care Plans' page for 'Charles Green'. The 'Tasks' tab is selected. A dropdown menu 'Group by' is set to 'Problem & Goal'. The tasks are categorized under 'Problem' (Health Lifestyle) and 'Goal' (Lose Weight). Under 'Problem', there is one task: 'Create-a-diet-plan' (due April 16, 2020, status Normal, priority Medium). Under 'Goal', there are two tasks: 'Exercise everyday for 10 minutes' (due April 17, 2020, status Not Starred, priority Low) and '+ Add new task'.

**How:** The Problem & Goal group option is available by default for new customers as the first value in the Group By picklist. For existing customers, the new group option is at the end of the Group By picklist. If your Group By picklist doesn't have this option, follow these steps to add it:

1. Go to **Setup** > **Custom Settings** > **Task Groups**.
2. Click **Manage** and add a task group with these values:

The screenshot shows the 'Task Groups' setup screen. A new group is being created with the following details:

Name	Problem & Goal	Active	<input checked="" type="checkbox"/>
GroupBy Label	Group_Problem_Goal	GroupBy	Problem_And_Goal
Sort Order	1		

## Track Task Closure with Progress Rings

Your users can now see the progress of task groups with progress rings.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use care plans, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses. Community users must have the Customer Community Plus license.

**Why:** Based on the Group By option selected in the Tasks subtab, your tasks are displayed in different groups. Each of these groups has a progress ring next to its header. The ring gradually turns green as the group's tasks are closed.

The screenshot shows the 'All Care Plans' page. At the top, there are filters for 'Open', 'Closed', and 'All'. A 'New Care Plan' button is at the top right. Below, a section for 'Charles Green's Care Plan' displays basic details: Case Number 00001026, Status New, Owner Melinda Smith, Last Modified Date Apr 16, 2020, 6:55:45 AM, and Created Date Apr 16, 2020, 6:55:45 AM. A 'Tasks' tab is selected. The tasks are grouped by 'Due Date' (Due Today) and 'Status' (All). A progress ring is shown for each group. Under 'Due Today', there are five tasks listed:

SUBJECT	DUEDATE	PRIORITY	STATUS	TASK OWN	EXTERNAL	CLOSED	
Create-a-diet-plan	Apr 16...	Normal	Comple...	Melinda...	Charles...	true	<input checked="" type="checkbox"/>
Glean-cigarette-residue-at-home	Apr 16...	Normal	Comple...	Shawna...	Charles...	true	<input checked="" type="checkbox"/>
Evening blood glucose check	Apr 17, ...	Normal	Not Star...	Shawna ...	Charles ...	false	<input type="checkbox"/>
Exercise everyday for 10 minutes	Apr 17, ...	Normal	Not Star...	Shawna ...	Charles ...	false	<input type="checkbox"/>
Morning-blood-glucose-level-check	Apr 17, ...	Normal	Comple...	Shawna ...	Charles ...	true	<input checked="" type="checkbox"/>

**Note:** The ring's progress is based on the number of tasks that are completed, and not the value specified in the Progress field of a goal. Progress rings are also available for tasks grouped by due date.

**How:** This change is available in your org without any additional setup.

## Other UI Changes in Care Plans

Updates to the Care Plans page give it a cleaner look and feel. The simplified layout makes it easier for users to quickly spot the information they care about, like task progress.

The first image shows the previous Care Plans page in Spring '20, and the second shows the updated page in Summer '20.

This screenshot shows the 'All Care Plans' page with orange numbers 1-4 highlighting specific UI elements:

- 1: A circled orange circle above the 'Goal' tab in the 'Tasks' section.
- 2: A circled orange circle around the 'All' status filter in the 'Status' section.
- 3: A circled orange circle around the 'Priority: Medium' filter in the 'Problem' section.
- 4: A circled orange circle around the 'Closed : 2 of 3' count in the 'Problem' section.

This screenshot shows the 'All Care Plans' page with orange numbers 1-4 highlighting specific UI elements:

- 1: A circled orange circle around the 'Problem' filter in the 'Group by' section.
- 2: A circled orange circle around the 'All' status filter in the 'Status' section.
- 3: A circled orange circle around the 'Medium' priority filter in the 'Problem' section.
- 4: A circled orange circle around the 'High Glucose Levels' problem entry in the 'Problem' section.

Callout	Spring '20	Summer '20
1.	The Group By control is a set of buttons.	The Group By control is a picklist.
2.	The Status filter is a set of buttons.	The Status filter is a picklist.
3.	A bar shows overall progress of a group, plus the number of tasks closed and total number of tasks.	A ring shows the overall progress of a group, but not the number of tasks closed or the total number of tasks.
4.	Problem and goal priorities follow the problem or goal's name.	Problem and goal priorities are next to the action button.

## Provider Search Enhancements

Provider search is easier to use with result sorting and accurate driving distances. And now you can troubleshoot problems when provider data doesn't show up the way you expect it to.

### IN THIS SECTION:

#### [Troubleshoot Provider Search Data Synchronization](#)

Ensure the accuracy of provider search results for your patients and call center operators. When you update the data set that enables users to search for health care providers, a new log helps you determine which provider records were successfully synchronized. You can also see which ones didn't make it, and why.

#### [Use Person Accounts in Provider Search](#)

If your data includes person accounts, you're in luck. A healthcare practitioner can now be represented in the Health Care Practitioner object with a person account and not just a contact record.

#### [Sort Provider Search Results by Name or Distance](#)

Call center operators can quickly find the right provider for a patient by sorting the results of their searches. Users can sort by the provider's name or by distance from the patient's address.

#### [Plan Visits More Accurately with Real-World Distances](#)

Patients can plan their health care visits with more confidence now that provider search results show the distance to a provider in real-world driving terms. Until now, we've shown distances calculated "as the crow flies."

## Troubleshoot Provider Search Data Synchronization

Ensure the accuracy of provider search results for your patients and call center operators. When you update the data set that enables users to search for health care providers, a new log helps you determine which provider records were successfully synchronized. You can also see which ones didn't make it, and why.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use provider search, your Salesforce org must have the Health Cloud license. Users need the Health Cloud and the Health Cloud Platform permission set licenses. Community users must have the Customer Community Plus license.

All Provider Search Sync Logs					
Name	Provider	Railcity	Sync Status	Message	Last Sync
1. Kaiser Downtown	Kaiser Downtown	Kaiser Downtown	Success	A record for this provider was created.	4/21/2020 9:00 AM
2. Kaiser JapanTown	Kaiser JapanTown	Kaiser JapanTown	Success	A record for this provider was created.	4/21/2020 9:00 AM
3. Monica Geller	Monica Geller UCSF	UCSF Mission Bay	Success	A record for this provider was created.	4/21/2020 9:00 AM
4. UCSF Mission Bay	UCSF Mission Bay	UCSF Mission Bay	Success	A record for this provider was created.	4/21/2020 9:00 AM

## Use Person Accounts in Provider Search

If your data includes person accounts, you're in luck. A healthcare practitioner can now be represented in the Health Care Practitioner object with a person account and not just a contact record.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**How:** A Health Care Provider record can represent either a practitioner or a facility. Populate the Account field to indicate a facility. Populate the Contact field to represent a practitioner. Never populate both the Account field and the Contact field in the Health Care Provider object.

## Sort Provider Search Results by Name or Distance

Call center operators can quickly find the right provider for a patient by sorting the results of their searches. Users can sort by the provider's name or by distance from the patient's address.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use provider search, your Salesforce org must have the Health Cloud license. Users need the Health Cloud and the Health Cloud Platform permission set licenses. Community users must have the Customer Community Plus license.

The screenshot shows the Provider Search interface. At the top, there are filters for Provider Name, Specialty (Primary Care selected), Subspecialty (Any), Plan Type (Any), Accepts new patients (unchecked), and a custom field (HPF\_Customfield). Below these are dropdowns for Patient Address (50 Fremont Street, San Francisco, CA) and Maximum Distance (10 miles). A 'Search' button is at the bottom right. The results section shows a table with columns for Name, Address, and Distance. One result is highlighted: Kaiser JapanTown, 118 Wood Street, San Francisco, CA 94118, United States, with a distance of 0 miles. The results are sorted by Distance, as indicated by the dropdown menu.

If the patient's address is known, distance is the default sort order. Distances are ordered from shortest to longest. If the user doesn't specify the patient's address, results are sorted by provider name.

## Plan Visits More Accurately with Real-World Distances

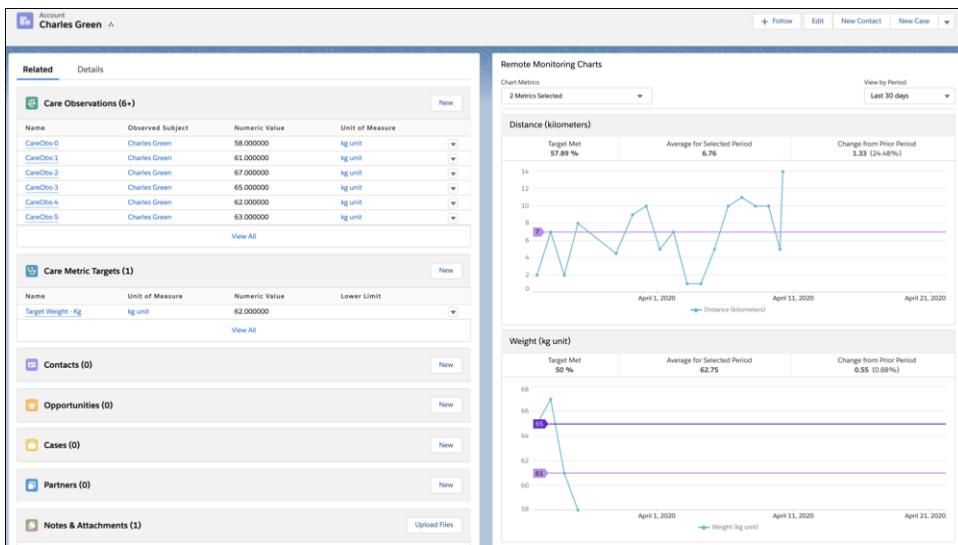
Patients can plan their health care visits with more confidence now that provider search results show the distance to a provider in real-world driving terms. Until now, we've shown distances calculated "as the crow flies."

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use provider search, your Salesforce org must have the Health Cloud license. Users need the Health Cloud and the Health Cloud Platform permission set licenses. Community users must have the Customer Community Plus license.

## Engage Patients Through Remote Monitoring

Create a reliable and personalized connection with patients to motivate them on their healthcare journey. Care Coordinators can personalize Care Metric Targets for each patient, making it easy to correlate care metrics and identify healthcare gaps. When a patient's biometric data is out of range, care coordinators can proactively engage with patients. Charts that show biometric data and health metrics such as heart rate, blood glucose levels, or weight, help care coordinators track patient health.



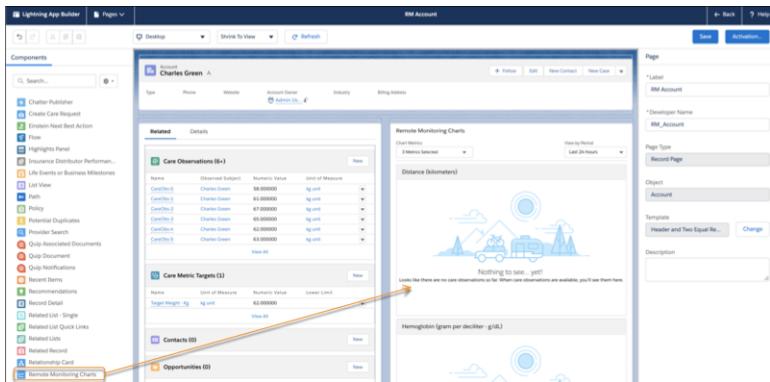
**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

### Why:

- **For the healthcare consumer:** Build trust with providers with more value-based, personalized interactions addressing root causes.
- **For the care coordinator**
  - Build trust with patients through more personalized, informed, and evidence-based interactions.
  - Employ auto-created tasks, care gaps, or cases when patient biometric data is out of range.
  - Spend more time giving useful information to patients than collecting data to identify problems.
  - Improve operational efficiency with fewer care coordinator calls.
- **For the Provider and Payer business**
  - Reduce preventable readmissions and emergency department services.
  - Shift responsibilities to non-clinical providers to free up clinician time.
  - Reduce risk in misdiagnosis or not catching social determinants of health in time.
  - Reduce overall spending on chronic disease.
- **For the Medical Device business:** Enable easier integration with providers and payers.

**How:** To enable remote monitoring, in Object Manager, add Care Observations to the related list for the appropriate page layout. To enable chart visualization, add the Remote Monitoring Charts component in the Patient Account Layout page.



## Plan and Carry Out Surgical Visits with Intelligent Sales for Health Cloud

The Intelligent Sales for Health Cloud desktop app helps your medical device company's sales managers and sales operatives plan visits for surgical cases. And the mobile app helps field reps carry out the visits.

### IN THIS SECTION:

#### [Plan Visits and Manage Field Inventory with the Desktop App](#)

Equip sales managers and sales operatives with visit and inventory planning tools to ensure that the right products and resources are available for every visit. Create and manage surgical visits, and add associated medical devices, attendees, and internal resources. Close product gaps with order and inventory insights, and proactively request transfers and replenishment orders.

#### [Get More Out of Visits with the Mobile App](#)

Maximize on-site success for sales reps with visit and task management from any device. View and complete all prescribed tasks during an appointment and capture relevant information, such as time elapsed, patient information, and more.

## Plan Visits and Manage Field Inventory with the Desktop App

Equip sales managers and sales operatives with visit and inventory planning tools to ensure that the right products and resources are available for every visit. Create and manage surgical visits, and add associated medical devices, attendees, and internal resources. Close product gaps with order and inventory insights, and proactively request transfers and replenishment orders.

### IN THIS SECTION:

#### [Create Visits for Surgical Cases](#)

Sales operatives and sales managers can now create product visits for their surgical cases, and assign the right sales reps and products for those visits.

#### [Foresee Product Shortfalls with Inventory Projections and Request Product Transfers](#)

Give sales teams insights into their field inventory to manage their visits so that they can get ahead of any potential product shortages.

## Create Visits for Surgical Cases

Sales operatives and sales managers can now create product visits for their surgical cases, and assign the right sales reps and products for those visits.

**Where:** These changes apply to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use Intelligent Sales for Health Cloud, your Salesforce org and users must have the Health Cloud and Health Cloud Add-On licenses provisioned.

**Why:** Using visits, sales operatives, sales managers, and sales reps can track the orders they have to fulfill. Visits also have handy information such as the required products, contact points at the site, and tasks sales reps must perform during the visit.

**How:** Enable the Intelligent Sales and Visit Inventory Management org prefs.

## Foresee Product Shortfalls with Inventory Projections and Request Product Transfers

Give sales teams insights into their field inventory to manage their visits so that they can get ahead of any potential product shortages.

**Where:** These changes apply to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use Intelligent Sales for Health Cloud, your Salesforce org and users must have the Health Cloud and Health Cloud Add-On licenses provisioned.

**Why:** Sales teams get product availability projections for specific visits based on all their visit commitments up to that point. If a sales rep doesn't have enough inventory to fulfill a visit, they can request a product transfer from another rep. The requested rep can then choose to accept, reject, or partially accept this request.

**How:** Enable the Intelligent Sales and Visit Inventory Management org prefs.

## Get More Out of Visits with the Mobile App

Maximize on-site success for sales reps with visit and task management from any device. View and complete all prescribed tasks during an appointment and capture relevant information, such as time elapsed, patient information, and more.

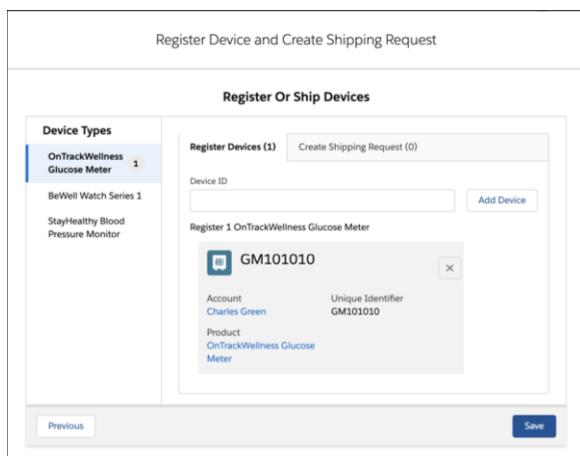
**Where:** These changes apply to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use Intelligent Sales for Health Cloud, your Salesforce org and users must have the Health Cloud and Health Cloud Add-On licenses provisioned.

**How:** Enable the Intelligent Sales and Visit Inventory Management org prefs.

## Register Healthcare Devices or Create Shipping Requests

Help patients stay on course with their care metric targets by registering healthcare devices or creating a shipping request to deliver devices to them. Care Coordinators can track biometric data from these devices, identify healthcare gaps, and engage with patients for follow-ups.



**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**How:** To enable Device Registration for your users, grant them the permission to run flows.

## Show Consent Forms for Assets, Products, and Registered Devices

Easily obtain consent when it's needed. In addition to care programs, you can now show consent forms for assets, products, and registered devices.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**How:** In the Flow Builder, edit the Consent Form List View component. In the Purpose ID field, enter the device ID or the product ID for which you want to show the consent form.

## Enroll a Patient in the Same Care Program Multiple Times

Many healthcare scenarios require a patient's enrollment in the same care program multiple times. Care coordinators can now enroll patients in the same care program more than once.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**How:** In Setup, enter Health Cloud in the Quick Find box, select Program Enrollee Settings, and then enable multiple enrollments.

## Associate a Healthcare Professional with a Care Program Provider

You can now easily associate a healthcare professional with a care program provider. You can also assign a healthcare professional as the primary provider for the care program provider.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**How:** In the App Launcher, select **Care Program Healthcare Providers** and then click **New**.

The screenshot shows a Salesforce form titled "New Care Program Healthcare Provider". The form is divided into sections: "Information" and "Primary Provider". In the "Information" section, there are fields for "Care Provider Association Name" (with a required asterisk), "Care Program Provider" (with a required asterisk and a search bar labeled "Search Care Program Providers..."), "Source System" (with a required asterisk and a search bar labeled "Search Healthcare Providers..."), "Effective To" (with a calendar icon), and "Effective From" (with a calendar icon). To the right of these fields are "Primary Provider" and "Healthcare Provider" sections, each with a checkbox and a search bar. At the bottom of the form are three buttons: "Cancel", "Save & New", and a blue "Save" button.

## Guest Users Don't Automatically Get Inverse Relationship Records

When a guest user provides information that triggers the creation of a contact-to-contact-relationship record, the inverse contact-to-contact relationship is not created, even if the `createinverserole` flag is on.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Who:** To use this feature, you must have the Health Cloud license provisioned in Salesforce. Users need the Health Cloud and Health Cloud Platform permission set licenses.

**Why:** A guest user sometimes may provide information that triggers the creation of a contact-to-contact-relationship record. For example, a patient may log into your community site and fill out a form identifying their parent as a caregiver. This would create a new contact-to-contact relationship record that defines one contact as the parent of the other contact.

For an authenticated Salesforce user, if the `createinverserole` flag is on, creating that contact-to-contact record automatically triggers the creation of another record specifying the other side of that relationship: one contact is the child of the other contact.

For a guest user, the `createinverserole` flag is ignored, and the inverse relationship is not created. This is part of an extensive set of enhancements designed to help you manage the security risks associated with guest users. If you have the `createinverserole` flag on, this may cause an error.

**How:** Turn the `createinverserole` flag off for guest users. In **Setup > Custom Settings > Industries Application Config**, create a new record for the guest user profile with **Create Inverse** unchecked.

### SEE ALSO:

[Guest User: Security Policies Enforced](#)

## Choose Whether to Show or Hide Closed Statuses in the Care Plan Status Field

Specify whether care coordinators can see closed statuses in the Status picklist. The picklist component filters out all closed type picklist values when admins disable the setting Show Closed Statuses in Case Status Field in Support Settings.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions where Health Cloud is enabled.

**Why:** Previously, the status field showed all statuses. Now you can configure support settings to hide closed statuses in the Status field.

**How:** To show closed statuses in the care plan's Status picklist, go to Support Settings and select **Show Closed Statuses in Case Status**

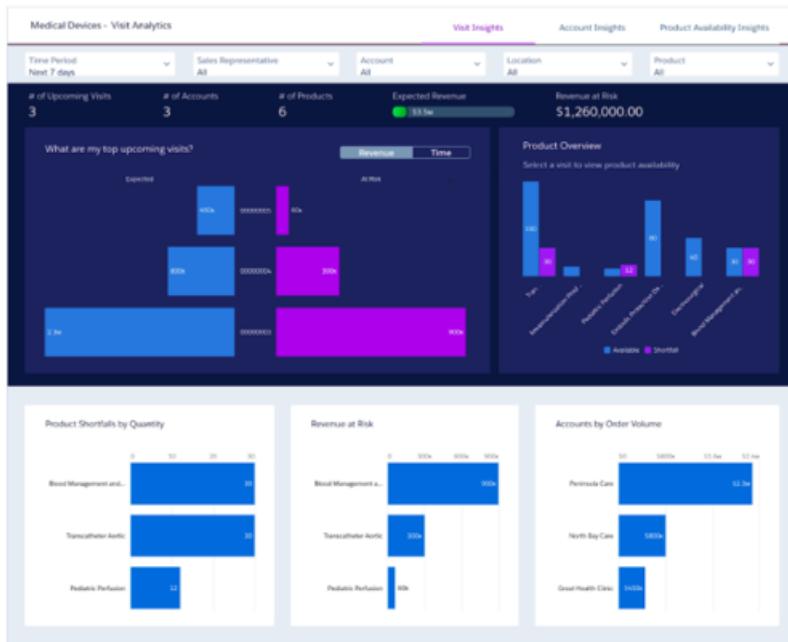
**Field.** To hide closed statuses, deselect **Show Closed Statuses in Case Status Field**. By default, the setting is disabled, so that closed statuses are hidden.

## Uncover AI-Powered Insights Fast with Einstein Analytics for Healthcare Enhancements

New visualizations give medical device sales reps account, inventory, and visit trends, while payers and providers can quickly spot patterns in care plan performance and care requests.

**Who:** To create an app from the Einstein Analytics for Healthcare template, you must also have the Healthcare Analytics Plus add-on license.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise and Unlimited editions where Health Cloud is enabled. Analytics for Healthcare is only for Salesforce Health Cloud users.



**Why:** The Visit Analytics dashboard helps medical device sales reps make sure they have the product needed for a specific surgery available at the right time. Sales managers can use the dashboard to evaluate team performance, manage key accounts, and help sales reps service their accounts effectively. With the Care Plan Comparison Analysis dashboard, care providers and payers can analyze care plan performance – for example, learning if patients are adhering to their plans. And Provider Care Request Analysis lets utilization managers view care request volume and learn about open, denial, and rejection rates.

**How:** Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select **Analytics for Health** and follow the instructions in the wizard to create your app.

## Health Cloud Has New and Changed Objects

Access more data through these new and changed Health Cloud objects

### Remote Monitoring of Patients

#### Store expected values for care metrics at org level and patient level

Use the new CareMetricTarget object.

**Get info on the feed activity of a care metric target record**

Use the new CareMetricTargetFeed object.

**Get info on the changes to values in the fields of a care metric target record**

Use the new CareMetricTargetHistory object.

**Get info on rules for sharing a care metric target object with users other than the owner**

Use the new CareMetricTargetOwnerSharingRule object.

**Get info on the list of access levels to a care metric target record**

Use the new CareMetricTargetShare object.

**Map the Device field in the CareObservation object with the externalIdField on the Asset object maps**

Use the new picklist option RemoteMonitoringDevice in the Role field of the CareSystemFieldMapping object.

**Map the ObservedSubject field in the Care Observation object with the externalIdField on the Account object**

Use the new picklist option RemoteMonitoringPatient in the Role field of the CareSystemFieldMapping object.

**Add the namespace prefix associated with the CareSystemFieldMapping object**

Use the new NamespacePrefix field in the CareSystemFieldMapping object.

**Store observed values for care metrics originating from external systems that contain biometric data**

Use the new CareObservation object.

**Get info on the feed activity of a care observation record**

Use the new CareObservationFeed object.

**Get info on the changes to values in the fields of a care observation record**

Use the new CareObservationHistory object.

**Get info on the unit of measures for care metrics and care observations**

Use the new UnitOfMeasure object.

**Get info on rules for sharing a unit of measure object with users other than the owner**

Use the new UnitOfMeasureOwnerSharingRule object.

**Get info on the list of access levels to a unit of measure record**

Use the new UnitOfMeasureShare object.

**Troubleshoot provider search with a synchronization log**

Use the new ProviderSearchSyncLog object to monitor data copied from objects in the provider data model into the CareProviderSearchableField object for faster provider searches.

## Association of Healthcare Professionals with Care Program Providers

**Get info on the primary healthcare professional associated with a care program provider and look up all healthcare professionals for care program providers**

Use the new CarePgmProvHealthcareProvider object.

**Get info on the feed activity of a healthcare professional for a care program provider record**

Use the new CarePgmProvHealthcareProviderFeed object.

**Get info on the changes to values in the fields of a healthcare professional for a care program provider record**

Use the new CarePgmProvHealthcareProviderHistory object.

## Device Registration

**Store device registration information for a patient or a care program enrollee**

Use the new CareRegisteredDevice object.

**Get info on the feed activity of a device registration record**

Use the new CareRegisteredDeviceFeed object.

**Get info on the changes to values in the fields of a device registration record**

Use the new CareRegisteredDeviceHistory object.

**Get info on the unique string that identifies an asset**

Use the new Uuid field in the Asset object.

**Get info on the ID of the matching record in an external system**

Use the new ExternalIdentifier field in the Asset object.

**Get info on the date when the asset was manufactured**

Use the new ManufactureDate field in the Asset object.

**Get info on why a device is in a specific status**

Use the new StatusReason field in the Asset object.

**Get info on the care program enrollee associated with the product request**

Use the new CareProgramEnrolleeId field in the ProductRequest object.

**Get info on the care program enrollee associated with the product request line item**

Use the new CareProgramEnrolleeId field in the ProductRequestLineItem object.

## Intelligent Sales

**Create a template you can use during visit creation to add a set of visit tasks**

Use the new ActionPlanTemplate object. This object is available in previous versions of the API, but it's new to Health Cloud.

**Add visit tasks to your visit**

Use the new AssessmentTask object. This object is available in previous versions of the API, but it's new to Health Cloud.

**Add a standard price book for your product**

Use the new PriceBook object. This object is available in previous versions of the API, but it's new to Health Cloud.

**Store the products your organization deals in**

Use the new Product object. This object is available in previous versions of the API, but it's new to Health Cloud.

**Associate a user with inventory and account they're responsible for**

Use the new ProductFulfillmentLocation object.

**Store a product's quantity and inventory location**

Use the new ProductItem object. This object is available in previous versions of the API, but it's new to Health Cloud.

**Add a product to a visit**

Use the new ProductRequired object. This object is available in previous versions of the API, but it's new to Health Cloud.

**Create a product transfer between users**

Use the new ProductTransfer object. This object is available in previous versions of the API, but it's new to Health Cloud.

**Schedule visits to fulfill your product orders**

Use the new Visit object. This object is available in previous versions of the API, but it's new to Health Cloud.

**Add the person your sales rep meets at an account during a visit**

Use the new VisitedParty object.

**Add sales reps to the visits they're responsible for**

Use the new Visitor object.

## Care Plans

### Specify which category a care plan template belongs to

Use the Category\_\_c picklist field in the CarePlanTemplate\_\_c object.

## Health Cloud: New and Changed Metadata Types

Do more with these new and changed Health Cloud metadata types.

### Map source system fields to Salesforce objects and fields

Use the new CareSystemFieldMapping metadata type.

### Map custom icons to objects

Use the new Icon metadata type.

## Financial Services Cloud: More Ways to Share Data and Collaborate

Financial Services Cloud offers new ways to display data, share data, and collaborate with partners. Keep policyholder record pages tidy with greater control over policy and claim details you want to show. Streamline partner workflows by enabling Action Plans for Partner Communities. Make it easy to refer mortgage accounts to other lines of business by creating financial accounts, person accounts, contacts, assets, and liabilities from loan application data. Use the Actionable Relationship Center to see account business relationships in a hierarchy view.

### IN THIS SECTION:

#### [Insurance for Financial Services Cloud: Enhanced Support for Multiline Policies, New Display Options for Policies and Insurance Agent Portal, and New Related Lists](#)

We added a setting to let you control whether policy-related metrics consider only parent or both parent and child policies when calculating count and premiums for multiline policies. New options on the Policy component give you greater control over the information you want to display on the component. With enhanced Policy and Life Events or Business Milestones components in the Insurance Agent Portal, show participant policies and hide sensitive life event or business milestone types. Give insurance providers and agents quick and easy access to relevant information with new related lists on various object page layouts.

#### [Action Plans: Assign Tasks to Queues, Add Tasks and Items, and Use Action Plans in Communities](#)

Action plan template tasks can now be assigned to users, roles, or task queues. After an action plan is created from a template, users can add tasks and other items to the plan to customize it as needed. Action plan pages and components are now available in Salesforce Community Cloud for Partner communities that have External Apps for Financial Services licenses.

#### [Actionable Relationship Center: Drive Contextual Action for Your Customer Relationships and Hierarchies \(GA\)](#)

Manage customer relationships including networks of people and business processes with Actionable Relationship Center (ARC). ARC is a single, hierarchical interface that connects people and things related to a customer. It allows users to easily trigger contextual actions on the fly.

#### [Mortgage: Create Financial Accounts from Residential Loan Application Data](#)

Deepen customer relationships with a 360-degree view of mortgage lending customers. Use data collected during the residential loan application process to generate financial accounts, person accounts, contacts, assets, and liabilities in Financial Services Cloud.

#### [Mortgage: Create Loan Opportunity Relationships](#)

You can now relate multiple Residential Loan Applications to a single opportunity record.

#### [Let Your Wealth Management Data Work Even Harder with Financial Services Einstein App Enhancements](#)

Wealth managers can get insights into lead conversion by adding lead history to Wealth Management Analytics app dashboards. In addition, the app includes multiple dataflows, which you can schedule to run at different times so each one runs faster.

### [Streamline Financial Services Cloud Behavior with the Disable Primary Contact ID Setting](#)

Use the new Disable Primary Contact ID setting to remove the dependencies between UI components and triggers on the Account object's Primary Contact field. In the Person Account model, UI components and triggers that relied on the Account object's Primary Contact field now use the Person Contact field. In the Individual model, UI components and triggers that relied on the Primary Contact field now use the Contact object's Contact ID field.

### [New Permission Set License: Financial Services Cloud Extension](#)

Use the new Financial Services Cloud Extension permission set license to allow users access to Financial Services Cloud features delivered after Spring '20. This permission set license includes access to Actionable Relationship Center (ARC) for Summer '20.

### [New Permission Set: Aura-Enabled Apex Class Access](#)

Give users access to all Financial Services Cloud Apex classes that contain `@AuraEnabled` methods by assigning a single permission set. Prepare for the [upcoming critical update](#) on page 517 that restricts access to Aura-Enabled Apex classes by assigning permissions in advance.

### [New and Changed Financial Services Cloud Objects](#)

Do more with new and updated Financial Services Cloud objects.

### [New and Changed Financial Services Cloud Metadata Types](#)

Do more with the new and changed metadata types.

### [New Financial Services Cloud Invocable Actions](#)

Create financial records from residential loan application data by using the new action for Financial Services Cloud.

### [REST API](#)

Financial Services Cloud REST API includes new calls.

## **Insurance for Financial Services Cloud: Enhanced Support for Multiline Policies, New Display Options for Policies and Insurance Agent Portal, and New Related Lists**

We added a setting to let you control whether policy-related metrics consider only parent or both parent and child policies when calculating count and premiums for multiline policies. New options on the Policy component give you greater control over the information you want to display on the component. With enhanced Policy and Life Events or Business Milestones components in the Insurance Agent Portal, show participant policies and hide sensitive life event or business milestone types. Give insurance providers and agents quick and easy access to relevant information with new related lists on various object page layouts.

### IN THIS SECTION:

#### [Get More Control Over Policy Count and Premium Calculations for Multiline Policies](#)

You can now choose to include only parent or both parent and child policies in metrics calculations, depending on how premiums are populated for multiline policies. For example, if premiums are populated for child policies and also aggregated at the parent level, then include only parent policies in metrics calculations.

#### [Policy Component: Policy Hierarchies, Policy Type Filters, Optional Claims Lists, and More](#)

Keep policyholder record pages less cluttered and show just the information your agents need to better understand and address their clients' needs. When you add multiple instances of the Policy component on a page, you can show different levels of details on each instance. For example, you can customize each instance to show a different set of policy types and show or hide policies' claims lists and parent and child policies.

#### [Gain Visibility into Household Policies and Claims with Rollup-by-Lookup Summaries](#)

Give insurance agents a consolidated view of all policies owned by a policyholder's primary household. Various rollup-by-lookup summaries on the household page show total household policies, policy premiums, claims on policies, and claim amount paid. Agents can drill down to see who owns which policies.

### [Hide Sensitive Life Event or Business Milestone Types in the Insurance Agent Portal](#)

The option to hide life event types or business milestone types is now available in the Communities version of the Life Events or Business Milestones component. When you hide a life event or business milestone type, it doesn't appear on the component until you add an event or milestone of that type.

### [Show Participant Policies on the Policy Component in the Insurance Agent Portal](#)

The option to show participant policies is now available in the Communities version of the Policy component. In the list of policies, you can include participant policies in addition to owned policies. Select participant roles to include policies in which the user is a participant. For example, select Beneficiary to include the policies in which the user is a beneficiary.

### [Let Your Insurance Data Work Even Harder with Financial Services Einstein App Enhancements](#)

The Insurance Analytics app now includes a Customers Gained/Lost dashboard that gives agents a waterfall chart to help visualize insurance customer retention trends.

### [Other Changes in Insurance for Financial Services Cloud](#)

Learn about other small but important changes that improve your experience with Insurance for Financial Services Cloud.

## Get More Control Over Policy Count and Premium Calculations for Multiline Policies

You can now choose to include only parent or both parent and child policies in metrics calculations, depending on how premiums are populated for multiline policies. For example, if premiums are populated for child policies and also aggregated at the parent level, then include only parent policies in metrics calculations.

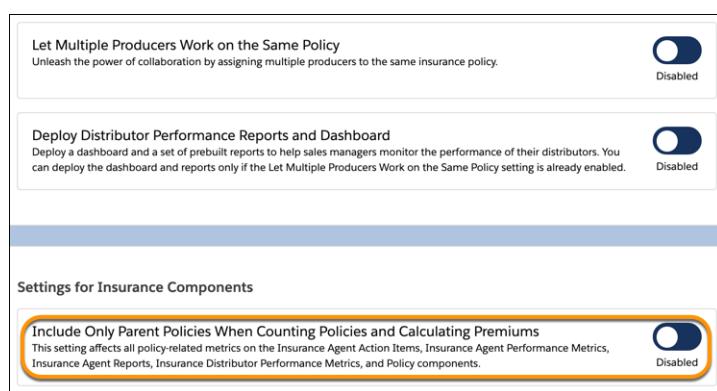
**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions that have Financial Services Cloud enabled.

This change affects the policy-related metrics and charts on the Insurance Agent Action Items, Insurance Agent Performance Metrics, Insurance Agent Reports, Insurance Distributor Performance Metrics, and Policy components.

**Who:** Users need the FSC Insurance permission set to use this feature.

**Why:** When this setting is disabled, metrics calculations include both parent and child policies.

**How:** On the Insurance Settings page in Setup, enable the **Include Only Parent Policies When Counting Policies and Calculating Premiums** setting.



### SEE ALSO:

[Financial Services Cloud Administrator Guide](#): Choose an Option for Metrics Calculations for Multiline Policies (can be outdated or unavailable during release preview)

## Policy Component: Policy Hierarchies, Policy Type Filters, Optional Claims Lists, and More

Keep policyholder record pages less cluttered and show just the information your agents need to better understand and address their clients' needs. When you add multiple instances of the Policy component on a page, you can show different levels of details on each instance. For example, you can customize each instance to show a different set of policy types and show or hide policies' claims lists and parent and child policies.

### IN THIS SECTION:

#### [View a Policy's Parent and Child Policies](#)

Give agents easy access to a policy's parent or child policies right from the list of policies on the client record page. For a multiline policy, agents see both its parent policy and child policies. Agents can click a policy to view the policy details.

#### [Streamline Policy List and Related Metrics](#)

The policy list is easier to read and navigate with fewer policy types in the list. When you exclude a policy type, those policies no longer appear in the list of policies or in any policy-related metrics on the policyholder's record page.

#### [Hide Claims Associated with Policies](#)

You can hide the claims list for policies if you don't want to show it or when you don't have claims data.

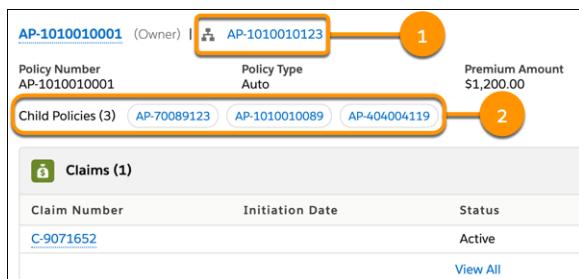
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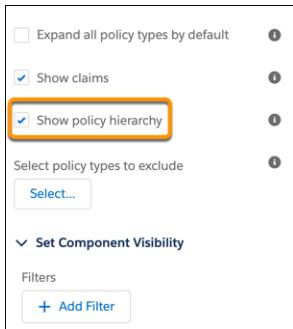
**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions that have Financial Services Cloud enabled.

**Who:** Users need the FSC Insurance permission set to use this feature.

**Why:** It's easier to keep track of policies with a hierarchical view available at a glance. Agents can see the parent policy (1) and child policies (2) for a multiline policy in one place, without going through multiple related lists.



**How:** Edit the account record page, and select the Policy component. In the properties pane, select **Show policy hierarchy**.



#### SEE ALSO:

[Financial Services Cloud Administrator Guide: Show a Policy's Parent and Child Policies](#) (can be outdated or unavailable during release preview)

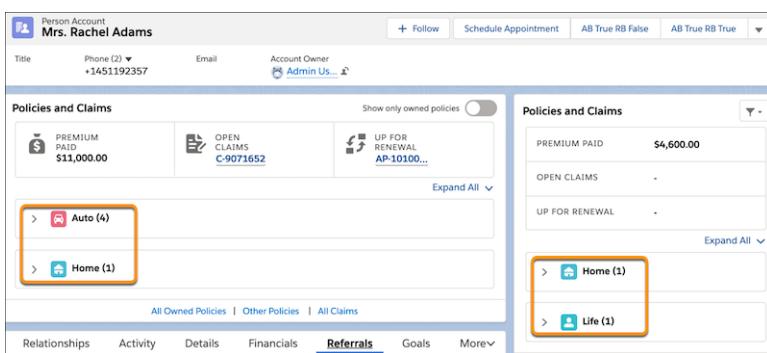
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The policy list is easier to read and navigate with fewer policy types in the list. When you exclude a policy type, those policies no longer appear in the list of policies or in any policy-related metrics on the policyholder's record page.

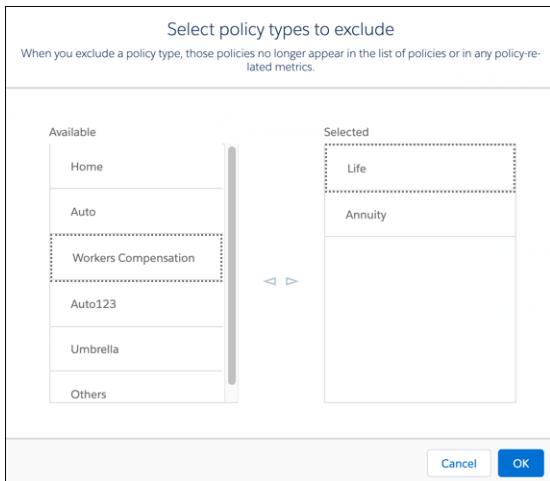
**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions that have Financial Services Cloud enabled.

**Who:** Users need the FSC Insurance permission set to use this feature.

**Why:** When you add multiple instances of the Policy component on the policyholder record page, you can show a different set of policy types on each instance. You don't have to repeatedly show each policy type on each instance.



**How:** Edit the account record page, and select the Policy component. In the properties pane, click **Select**, and then select the policy types that you want to exclude.

**SEE ALSO:**

[Financial Services Cloud Administrator Guide: Filter Policies by Policy Type](#) (can be outdated or unavailable during release preview)

**Hide Claims Associated with Policies**

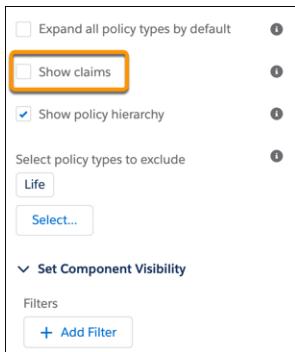
You can hide the claims list for policies if you don't want to show it or when you don't have claims data.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions that have Financial Services Cloud enabled.

**Who:** Users need the FSC Insurance permission set to use this feature.

**Why:** You can have two instances of the Policy component on the policyholder record page—one for your policies and another for your competitors' policies. You can hide the claims list for competitors' policies because it's not relevant for your agents.

**How:** Edit the account record page, and select the Policy component. In the properties pane, deselect **Show claims**.



## SEE ALSO:

[Financial Services Cloud Administrator Guide: Hide Policies' Related Claims](#) (can be outdated or unavailable during release preview)

## Gain Visibility into Household Policies and Claims with Rollup-by-Lookup Summaries

Give insurance agents a consolidated view of all policies owned by a policyholder's primary household. Various rollup-by-lookup summaries on the household page show total household policies, policy premiums, claims on policies, and claim amount paid. Agents can drill down to see who owns which policies.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions that have Financial Services Cloud enabled.

**Who:** Users need the FSC Insurance permission set to use this feature.

**Why:** With greater visibility into these details, agents can create engagement strategies and devise cross-sell and upsell plans.

Account		Adams Household		
Net Worth	USD 2,500,000.00	Household Policies	5	Total Household Premium USD 8,500.00
				Claims on Household Policies 8
				Total Claim Amount Paid USD 3,700.00
Policies	Action Plans	Surveys	Relationships	Related
Account Name		Details		
Adams Household		Next Interaction 4/30/2019		

**How:** Add the provided rollup-by-lookup metrics on the Household page layout.

## SEE ALSO:

[Financial Services Cloud Administrator Guide: Rollups in Financial Services Cloud](#) (can be outdated or unavailable during release preview)

## Hide Sensitive Life Event or Business Milestone Types in the Insurance Agent Portal

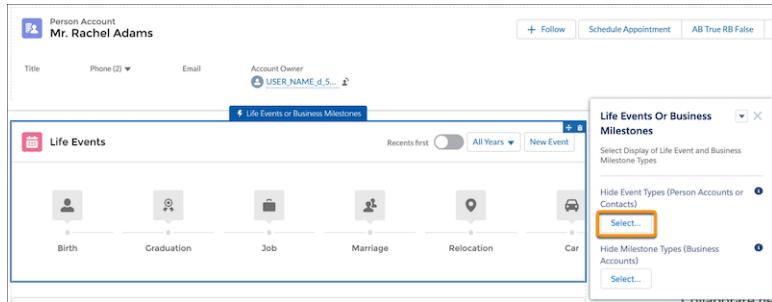
The option to hide life event types or business milestone types is now available in the Communities version of the Life Events or Business Milestones component. When you hide a life event or business milestone type, it doesn't appear on the component until you add an event or milestone of that type.

**Where:** This change applies to communities that are created using the Insurance Agent Portal Lightning template.

**Who:** Users need the Financial Services Community User permission set to use this feature.

**Why:** Not all life events or business milestones apply to every customer. To create a better customer experience, you can hide the life events or business milestones that a customer hasn't achieved or is unlikely to achieve in the future.

**How:** In Experience Builder, select the Life Events or Business Milestones component on the record page. In the properties pane, click **Select**, and then select the life event types or business milestone types that you want to hide.



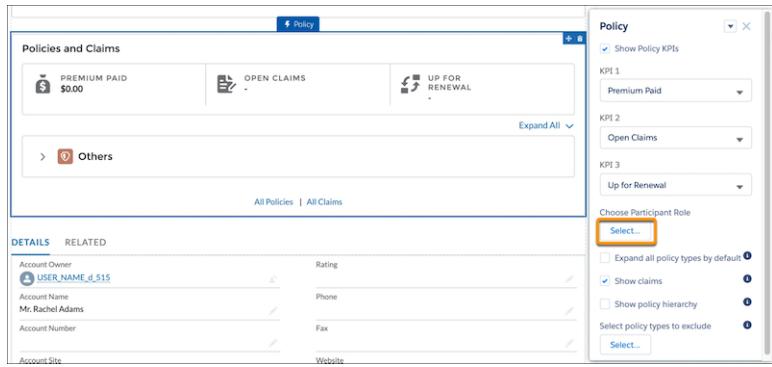
## Show Participant Policies on the Policy Component in the Insurance Agent Portal

The option to show participant policies is now available in the Communities version of the Policy component. In the list of policies, you can include participant policies in addition to owned policies. Select participant roles to include policies in which the user is a participant. For example, select Beneficiary to include the policies in which the user is a beneficiary.

**Where:** This change applies to communities that are created using the Insurance Agent Portal Lightning template.

**Who:** Users need the Financial Services Community User permission set to use this feature.

**How:** In Experience Builder, select the Policy component on the record page. In the properties pane, under Choose Participant Role, click **Select**, and then select the appropriate participant roles.



## Let Your Insurance Data Work Even Harder with Financial Services Einstein App Enhancements

The Insurance Analytics app now includes a Customers Gained/Lost dashboard that gives agents a waterfall chart to help visualize insurance customer retention trends.

**How:** Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select **Analytics for Insurance**, and follow the instructions in the wizard to create your app.



## Other Changes in Insurance for Financial Services Cloud

Learn about other small but important changes that improve your experience with Insurance for Financial Services Cloud.

### IN THIS SECTION:

#### [View an Account's Claims History](#)

The Policy component has a new All Claims link that shows an account's related claims, whatever the claim status.

#### [View the List of Producers in an Insurance Agency](#)

It's easy for insurance providers to view the list of producers in an agency with the Producers related list on the account record page.

#### [Show Policy Participant and Claim Participant Record Rollups at the Household Level](#)

Give your agents a consolidated view of all policy participants and claim participants in a household by rolling up policy participant and claim participant records at the household level.

#### [Manage Supporting Files for Policies, Claims, and Claim Items with Files Related List](#)

Let agents easily add files to a policy, claim, or claim item record and see a list of files associated with the record. Agents can keep all related files in one place and easily manage them.

#### [Show Activities Timeline for Policies and Claims in the Insurance Agent Portal](#)

Independent insurance agents can now track their open activities and activity history for policies and claims with the Activities component in the Insurance Agent Portal.

## View an Account's Claims History

The Policy component has a new All Claims link that shows an account's related claims, whatever the claim status.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions that have Financial Services Cloud enabled.

**Who:** Users need the FSC Insurance permission set to use this feature.

**Why:** Agents can quickly see the claims history for an account.

The screenshot shows the Policies and Claims page. At the top, there are three summary boxes: 'PREMIUM PAID \$18,656.00', 'OPEN CLAIMS CL2022-001', and 'CLAIMS PAID \$5,200.00'. Below these are three categories: 'Agriculture CVR (1)', 'Auto (2)', and 'Property (2)'. At the bottom, there are three navigation links: 'All Owned Policies', 'Other Policies', and 'All Claims' (which is highlighted with a red box).

The screenshot shows the Claims page for Mrs. Rachel Adams. It displays a table with three items, all updated 3 minutes ago. The columns are Claim Number, Claim Type, Status, and Approved Amount.

	Claim Number	Claim Type	Status	Approved Amount
1	C-9071652	Auto	Active	\$4,000.00
2	C-9071664	Home	Closed	\$12,000.00
3	C-9071682	Auto	Settled	\$7,000.00

**How:** Edit the account record page, and select the Policy component. In the properties pane, select **Show claims**.

The screenshot shows the properties pane for the Policy component. Under the 'Show claims' section, the 'Show claims' checkbox is checked and highlighted with a red box. Other options like 'Show policy hierarchy' and 'Select policy types to exclude' are also present.

## SEE ALSO:

[Financial Services Cloud Administrator Guide: View an Account's Claims History](#) (can be outdated or unavailable during release preview)

## View the List of Producers in an Insurance Agency

It's easy for insurance providers to view the list of producers in an agency with the Producers related list on the account record page.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions that have Financial Services Cloud enabled.

**Who:** Users need the FSC Insurance permission set to use this feature.

**How:** Add the Producers related list to the Account page layout.

## Show Policy Participant and Claim Participant Record Rollups at the Household Level

Give your agents a consolidated view of all policy participants and claim participants in a household by rolling up policy participant and claim participant records at the household level.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions that have Financial Services Cloud enabled.

**Who:** Users need the FSC Insurance permission set to use this feature.

**How:** Add the Insurance Policy Participants and Claim Participants related lists to the Household page layout.

## Manage Supporting Files for Policies, Claims, and Claim Items with Files Related List

Let agents easily add files to a policy, claim, or claim item record and see a list of files associated with the record. Agents can keep all related files in one place and easily manage them.

**Where:** This change applies to Lightning Experience in Enterprise, Professional, and Unlimited editions that have Financial Services Cloud enabled.

**Who:** Users need the FSC Insurance permission set to use this feature.

**How:** Add the Files related list to the Insurance Policy, Claim, and Claim Item page layouts.

## Show Activities Timeline for Policies and Claims in the Insurance Agent Portal

Independent insurance agents can now track their open activities and activity history for policies and claims with the Activities component in the Insurance Agent Portal.

**Where:** This change applies to communities that are created using the Insurance Agent Portal Lightning template.

**Who:** Users need the Financial Services Community User permission set to use this feature.

**How:** In Experience Builder, add the Activities component to the insurance policy and claim record pages.

## Action Plans: Assign Tasks to Queues, Add Tasks and Items, and Use Action Plans in Communities

Action plan template tasks can now be assigned to users, roles, or task queues. After an action plan is created from a template, users can add tasks and other items to the plan to customize it as needed. Action plan pages and components are now available in Salesforce Community Cloud for Partner communities that have External Apps for Financial Services licenses.

### IN THIS SECTION:

#### [Assign Action Plan Template Tasks to Queues](#)

Distribute the action plan workload using task queues. Assign an action plan template task to a predefined task queue. When an action plan is created from the template, the task appears in that queue's task list. Any queue member can pitch in to take ownership of the task.

#### [Let Action Plan Users Add Tasks and Items](#)

Adapt action plans for unique situations by letting users add tasks and other items as needed. After users create an action plan from a template, they can add supplemental tasks or document checklist items. Users can customize a standard action plan to meet their needs.

#### [Use Action Plans in Partner Communities](#)

Streamline partner workflow by enabling Action Plans for Partner communities with External Apps for Financial Services licenses. Let partner users create their own action plan templates, generate action plans.

## Assign Action Plan Template Tasks to Queues

Distribute the action plan workload using task queues. Assign an action plan template task to a predefined task queue. When an action plan is created from the template, the task appears in that queue's task list. Any queue member can pitch in to take ownership of the task.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions, where Financial Services Cloud or Salesforce Government Cloud with Lightning Scheduler are enabled.

**How:** Make sure that one or more queues are set up with Task as a supported object. Add a task to an action plan template. In the Assigned To section, choose Queue, and then search for and select one of the predefined queues.

SEE ALSO:

[Set Up Queues](#)

[IdeaExchange: Allow Tasks to Be Assigned to a Queue](#)

## Let Action Plan Users Add Tasks and Items

Adapt action plans for unique situations by letting users add tasks and other items as needed. After users create an action plan from a template, they can add supplemental tasks or document checklist items. Users can customize a standard action plan to meet their needs.

**Where:** This change applies to Lightning Experience in Enterprise and Unlimited editions, where Financial Services Cloud or Salesforce Government Cloud with Lightning Scheduler are enabled.

**How:** When creating an action plan template, the `Let users add items to plans` property allows users to add tasks or other items to plans generated from the template. If allowed, the plan owner can add a task or document checklist item to the plan from the action plan detail page.

SEE ALSO:

[Considerations for Creating Action Plan Templates](#)

## Use Action Plans in Partner Communities

Streamline partner workflow by enabling Action Plans for Partner communities with External Apps for Financial Services licenses. Let partner users create their own action plan templates, generate action plans.

**Where:** This change applies to Lightning communities with External Apps for Financial Services licenses, accessed through Lightning Experience in Enterprise and Unlimited editions, where Financial Services Cloud or Salesforce Government Cloud with Lightning Scheduler are enabled.

**How:** Pages and components for Action Plan Templates and Action Plans are available in the Partner Central template for partner communities. Add pages to the navigation menu, and add components to pages for related objects, like Accounts or Leads. Then assign users and community members to the licenses and the roles that give them the access they need.

SEE ALSO:

[Manage Partner Relationships in Communities](#)

## Actionable Relationship Center: Drive Contextual Action for Your Customer Relationships and Hierarchies (GA)

Manage customer relationships including networks of people and business processes with Actionable Relationship Center (ARC). ARC is a single, hierarchical interface that connects people and things related to a customer. It allows users to easily trigger contextual actions on the fly.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** Traditionally, Financial Services Cloud looks at customers in three ways: who the customer is, what the customer wants, and what the customer needs. ARC redefines and expands that customer representation.

### Who is the customer and what are their relationships?

View and manage customers' relationships in one place. Represent every B2B and B2C relationship for a comprehensive view of your customer.

### What does the customer have?

View all financial accounts, policies, opportunities, cases, and other related information in one location. Know what the customer has to more quickly recognize upsell opportunities.

### What does the customer need?

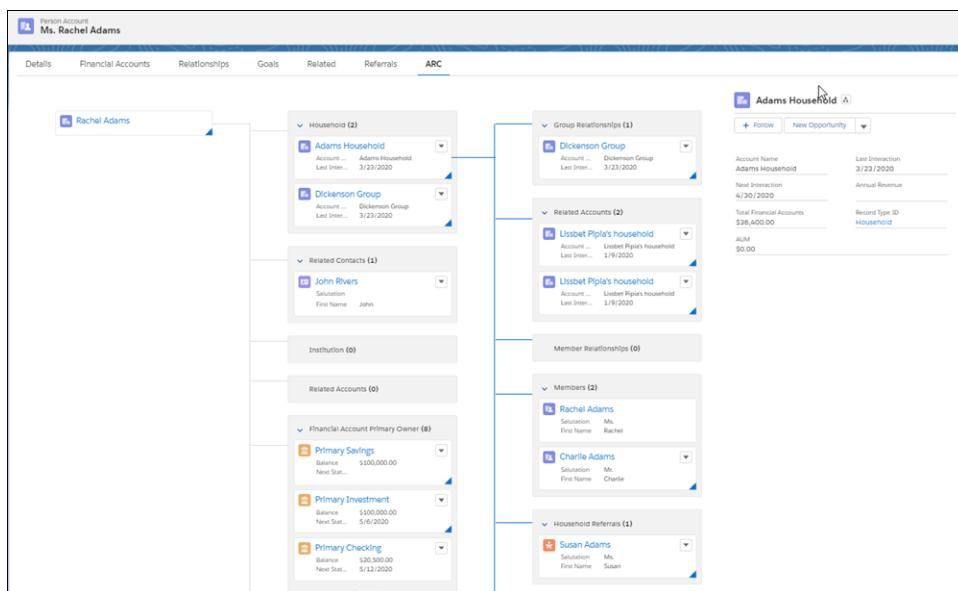
View and manage opportunities and leads, and identify what's missing. Augment the customer's data with Analytics and intelligence to identify customer needs more effectively.

### What actions make sense within the customer context?

Create actions based on the full customer context.

**How:** Add the ARC - Financial Services Cloud standard component to page layouts. Then assign the Financial Services Cloud Extension permission to users or user profiles that need access to ARC.

 **Tip:** The Financial Services Cloud Extension permission will be available within 24 hours after an org is upgraded to the Summer '20 release and a user has logged in to the org.



**SEE ALSO:**

[Financial Services Cloud Administrator Guide: Drive Contextual Action for Your Customer Relationships and Hierarchies](#) (can be outdated or unavailable during release preview)

[New Permission Set License: Financial Services Cloud Extension](#)

## Mortgage: Create Financial Accounts from Residential Loan Application Data

Deepen customer relationships with a 360-degree view of mortgage lending customers. Use data collected during the residential loan application process to generate financial accounts, person accounts, contacts, assets, and liabilities in Financial Services Cloud.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** The loan application process captures a wealth of essential customer data. Make it easy to refer mortgage accounts to other lines of business by moving that data into financial accounts and other Financial Services Cloud records.

**How:** Nine new Mortgage Record Creation settings control which financial records the process generates. Start the record creation process using a REST API call, or by triggering its invocable action. Call the invocable action from user interface controls or from Flow components.

## Mortgage: Create Loan Opportunity Relationships

You can now relate multiple Residential Loan Applications to a single opportunity record.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** To provide business process flexibility, there is no longer a restriction on the number of Residential Loan Applications that can be created for one opportunity.

## Let Your Wealth Management Data Work Even Harder with Financial Services Einstein App Enhancements

Wealth managers can get insights into lead conversion by adding lead history to Wealth Management Analytics app dashboards. In addition, the app includes multiple dataflows, which you can schedule to run at different times so each one runs faster.

**How:** Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select **Analytics for Wealth Management** and follow the instructions in the wizard to create your app.

## Streamline Financial Services Cloud Behavior with the Disable Primary Contact ID Setting

Use the new Disable Primary Contact ID setting to remove the dependencies between UI components and triggers on the Account object's Primary Contact field. In the Person Account model, UI components and triggers that relied on the Account object's Primary Contact field now use the Person Contact field. In the Individual model, UI components and triggers that relied on the Primary Contact field now use the Contact object's Contact ID field.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** Selecting Disable Primary Contact ID removes client UI component and trigger dependencies on the Primary Contact field. After the setting is selected, the Primary Contact field is no longer updated. Removing these dependencies yields these benefits:

- Data conversion speeds for large volumes of data can be increased without the trigger logic execution.
- Data upload speeds can increase without the need to set Primary Contact in the trigger.
- System updates can be faster because Primary Contact is no longer updated.
- Creation of records with lookups to accounts can be faster because the lookup no longer causes Primary Contact to refresh in an asynchronous job.

 **Important:** If any of your business logic, page layouts, or trigger code refers to PrimaryContact\_\_c, do not use the Disable Primary Contact ID setting.

 **Important:** Disable Primary Contact ID is not intended to be turned off after it is selected. Turning the setting off results in data inconsistencies in the PrimaryContact\_\_c field.

**How:** Use of Primary Contact ID is automatically disabled in new Financial Services Cloud installations. To stop using Primary Contact ID in existing Financial Services Cloud organizations, edit Disable Primary Contact ID in the Industries Settings custom setting and select Disable Primary Contact ID.

SEE ALSO:

[Financial Services Cloud Administrator Guide: Disable Updates to the Primary Contact Field on Accounts in Financial Services Cloud \(can be outdated or unavailable during release preview\)](#)

## New Permission Set License: Financial Services Cloud Extension

Use the new Financial Services Cloud Extension permission set license to allow users access to Financial Services Cloud features delivered after Spring '20. This permission set license includes access to Actionable Relationship Center (ARC) for Summer '20.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

 **Tip:** The Financial Services Cloud Extension permission set license will be available within 24 hours after an org is upgraded to the Summer '20 release and a user has logged in to the org.

SEE ALSO:

[Actionable Relationship Center: Drive Contextual Action for Your Customer Relationships and Hierarchies \(GA\)](#)

## New Permission Set: Aura-Enabled Apex Class Access

Give users access to all Financial Services Cloud Apex classes that contain @AuraEnabled methods by assigning a single permission set. Prepare for the [upcoming critical update](#) on page 517 that restricts access to Aura-Enabled Apex classes by assigning permissions in advance.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** An upcoming critical update restricts access to @AuraEnabled Apex methods by default. When that update is activated, users need explicit access to each Apex class that contains @AuraEnabled methods, to use Aura or Lightning web components that call the methods. The new permission set **Aura-Enabled Apex Class Access for Financial Services Cloud** includes all the affected Apex classes for easy assignment.

**How:** To assign the permission set to individual users, go to Setup, type `Aura-Enabled` in the Quick Find box, then select **Aura-Enabled Apex Class Access for Financial Services Cloud**. Click **Manage Assignments**, then select **Add Assignments**. Select the users to assign the permission set to, and click **Assign**.

The new permission set can also be mass assigned to multiple users using the Data Loader or REST API.

#### SEE ALSO:

- [Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile \(Update, Postponed\)](#)
- [Assign a Permission Set to Multiple Users](#)
- [Knowledge Article: Use Data Loader to mass assign permission sets](#)
- [Permission Sets Best Practice: Mass Assign Permission Sets Using the API](#)

## New and Changed Financial Services Cloud Objects

Do more with new and updated Financial Services Cloud objects.

### Action Plans

#### Let users add items to Action Plans

Use the new `IsAdHocItemCreationEnabled` field of the `ActionPlanTemplate` object to let users add tasks and document checklist items to generated action plans.

#### Associate an action plan template with a visit execution

Use the new `VisitExecution` picklist option for the `ActionPlanType` field on the `ActionPlanTemplate` object.

## New Field on InsurancePolicy

#### Reference the legal entity that underwrote the insurance policy

Use the new `UnderwritingEntityId` field.

## New and Changed Financial Services Cloud Metadata Types

Do more with the new and changed metadata types.

#### Let users add tasks and document checklist items to generated action plans

Use the new `isAdHocItemCreationEnabled` field on the existing `ActionPlanTemplate` metadata type.

#### Use the Create Financial Records action with Flows

Use the new `createFinancialRecords` enumeration value on the `actionType` field (FlowActionCall subtype) of the Flow metadata type.

#### Map custom icons to objects

Use the new `Icon` metadata type.

## New Financial Services Cloud Invocable Actions

Create financial records from residential loan application data by using the new action for Financial Services Cloud.

#### Create financial records from loan application data.

Use the new `createFinancialRecords` standard action to create financial account, person account, contact, asset, and liability records from a residential loan application.

## REST API

Financial Services Cloud REST API includes new calls.

## Mortgage

### Create Financial Records from Loan Application Data

Use the new `mapper` call to generate financial accounts and other Financial Services Cloud records from residential loan application data. Make a `POST` request to `/services/data/vXX.X/connect/financialservices/mapper` to create financial account, person account, contact, asset, and liability records from data captured during the loan application process.

# Consumer Goods Cloud: A Customized Mobile App, Salesforce Maps Embedded in Desktop App, and More

Help your sales managers track and manage their territories and help out their reps in the field. You can customize the mobile app for maximum efficiency and embed Salesforce Maps in the desktop app, offering analysis at a glance.

#### IN THIS SECTION:

#### EDITIONS

Available in: Enterprise, Performance, and Unlimited editions.

##### [Customize the Mobile App to Field Reps' Needs](#)

Design the Consumer Goods mobile app so it displays the key info that your field reps need when they're on the go. For example, if field reps rely on third-party apps to see traffic updates or weather forecasts, create Lightning components to add these apps to the Consumer Goods mobile app. You can also choose from several standard Lightning components.

##### [Manage Stores, Accounts, and Promotions with Embedded Salesforce Maps](#)

Help sales managers visualize and track stores in their territories by embedding Salesforce Maps in the Consumer Goods desktop app. For example, you can configure the map to identify stores that are performing well or poorly. And sales managers can see the results on the map. With search results color-coded based on store performance, your sales managers can easily identify the stores that need attention.

##### [Plan Visits Faster with Templates](#)

Now sales managers can efficiently create visit plans for their field reps with Salesforce Maps' Advanced Route Template. They can save time by creating multiple visits with just one template, give field reps an optimal route plan, and ensure that reps visit the right stores at the right time.

##### [Grow Your Business and Improve Retail Execution](#)

The Einstein Analytics for Consumer Goods app's dashboards give you actionable insights on store compliance, last store visit, inventory compliance, product performance, and account hierarchy. You can analyze the comparative performance of stores, accounts, or products for a selected period. Use the pre-configured Einstein Discovery story to get intelligent insights on products likely to run out of stock. Sales reps can track their performance and compare it with their team's average performance.

##### [Do More at the Store by Adding Flows to Action Plan Templates](#)

Sales managers can help field reps increase the impact of their visits by adding flows to action plan templates. The ability to add flows widens the scope of activities that field reps can perform at a store.

##### [Increase Efficiency on Visits](#)

Field reps can stay agile by creating visits in the mobile app whenever they need to.

##### [Other Field Name Changes](#)

We renamed the Data Type field on the Assessment Indicator Definition object. The new field name is Indicator Field Type.

[Einstein Object Detection: Data Safety, Improved Detection, and Some Key Updates](#)

Delete the Object Detection data stored in your inactive Salesforce orgs. Objects are detected by models with the highest accuracy. Admins have more information about their models and datasets. Use all records list and related lists to view Einstein Object Detection records easily.

[Consumer Goods Cloud Has Changed Objects](#)

Access more data through these changed Consumer Goods Cloud objects.

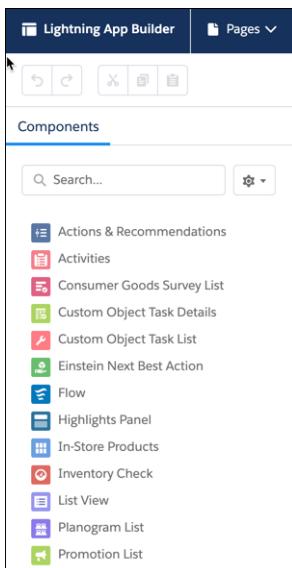
## Customize the Mobile App to Field Reps' Needs

Design the Consumer Goods mobile app so it displays the key info that your field reps need when they're on the go. For example, if field reps rely on third-party apps to see traffic updates or weather forecasts, create Lightning components to add these apps to the Consumer Goods mobile app. You can also choose from several standard Lightning components.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce mobile app in Enterprise, Performance, and Unlimited editions where Retail Execution is enabled.

**Who:** This feature is available to users with the Consumer Goods Cloud License.

**How:** Edit the page and drag the components, such as **Visit List** and **Visit Details**, onto the page.



### SEE ALSO:

[Salesforce Help: Create Pages for Your Org](#) (can be outdated or unavailable during release preview)

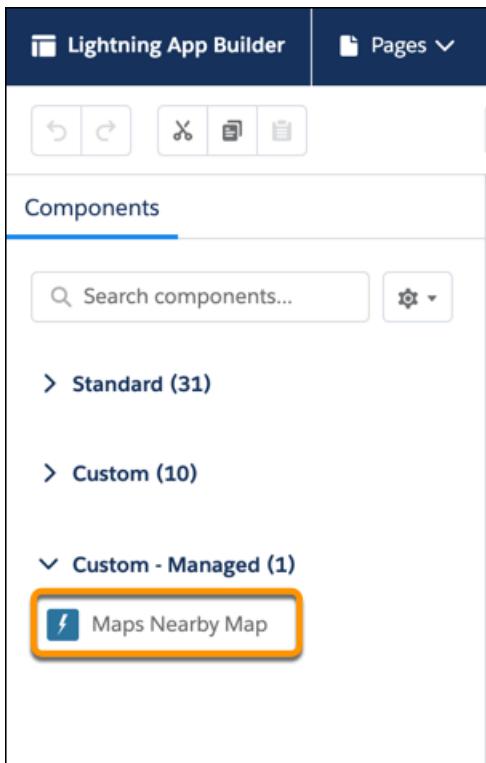
## Manage Stores, Accounts, and Promotions with Embedded Salesforce Maps

Help sales managers visualize and track stores in their territories by embedding Salesforce Maps in the Consumer Goods desktop app. For example, you can configure the map to identify stores that are performing well or poorly. And sales managers can see the results on the map. With search results color-coded based on store performance, your sales managers can easily identify the stores that need attention.

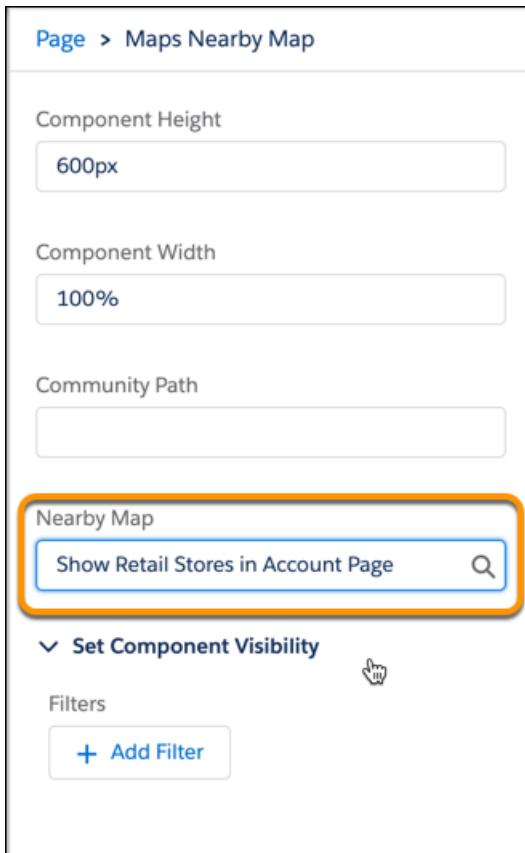
**Where:** This change applies to Lightning Experience and all desktop versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Retail Execution is enabled.

**Who:** This feature is available to users with the Consumer Goods Cloud License.

**How:** Drag the **Salesforce Maps** component onto a record page.



Enter the search criteria in the **Nearby Map** field.



## SEE ALSO:

[Salesforce Help: Configure Salesforce Maps](#) (can be outdated or unavailable during release preview)

## Plan Visits Faster with Templates

Now sales managers can efficiently create visit plans for their field reps with Salesforce Maps' Advanced Route Template. They can save time by creating multiple visits with just one template, give field reps an optimal route plan, and ensure that reps visit the right stores at the right time.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Retail Execution is enabled and Salesforce Maps is installed.

**Who:** This feature is available to users with the Consumer Goods Cloud License.

**Why:** Sales managers can select constraints such as time period, number of visits, and store operating hours to build a template. Then, template in hand, they can create a route of multiple visits with a click.

**How:** From the App Launcher, select **Salesforce Maps**. On the **Maps Advanced Route Template** tab, click **New Visit Plan** to create a template.

New Template

RO Name	
<ol style="list-style-type: none"> <li><b>1</b> Name</li> <li><b>2</b> Routing Object</li> <li><b>3</b> Output</li> <li><b>4</b> Tooltips</li> <li><b>5</b> Define Visit Completion</li> <li><b>6</b> Import Planned Visits</li> <li><b>7</b> Assignment</li> <li><b>8</b> Advanced Prioritization</li> <li><b>9</b> Route Duration</li> <li><b>10</b> Count Completed Visits</li> <li><b>11</b> Confirm and Schedule</li> </ol>	<p>* Name Ex: Enterprise Platinum-first Plan</p> <p>Description Ex: This plan prioritizes Platinum customers for Enterprise salespeople</p>

## SEE ALSO:

[Salesforce Help: Salesforce Maps](#) (can be outdated or unavailable during release preview)

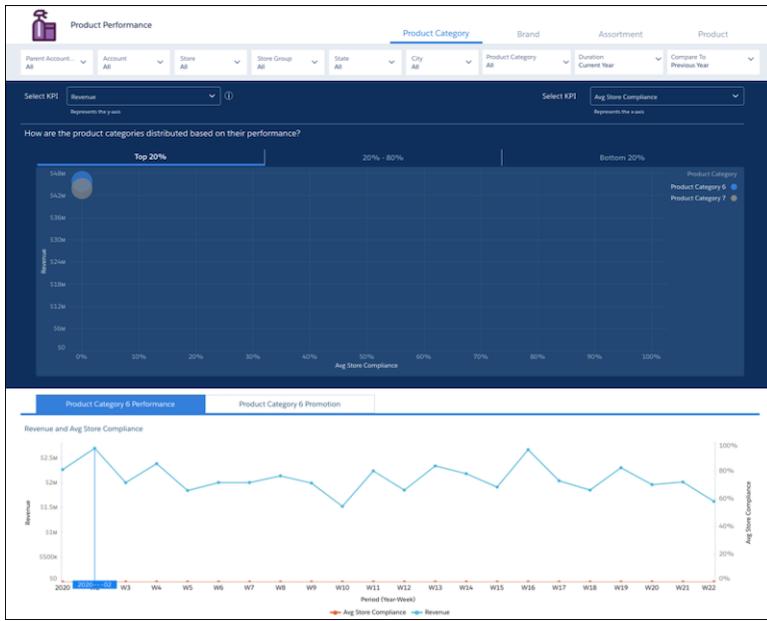
## Grow Your Business and Improve Retail Execution

The Einstein Analytics for Consumer Goods app's dashboards give you actionable insights on store compliance, last store visit, inventory compliance, product performance, and account hierarchy. You can analyze the comparative performance of stores, accounts, or products for a selected period. Use the pre-configured Einstein Discovery story to get intelligent insights on products likely to run out of stock. Sales reps can track their performance and compare it with their team's average performance.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Professional, Performance, and Unlimited editions where Consumer Goods Cloud is enabled.

**Who:** Analytics for Consumer Goods is only for Salesforce Consumer Goods Cloud users. To create an app from the Einstein Analytics for Consumer Goods template, you must also have the Einstein Analytics for Consumer Goods add-on license.

**Why:** Use the Product Performance dashboard to track the performance of products, product categories, brands, or assortments. You can also measure the effectiveness of a promotion across products or product categories.



The enhanced Store Performance dashboard helps you determine the correlation between retail execution KPIs and store performance, and improve your retail execution efficiency.



**How:** Go to Analytics Studio, click **Create**, and select **App**. Select the **Analytics for Consumer Goods** template and follow the instructions in the wizard to create your app.

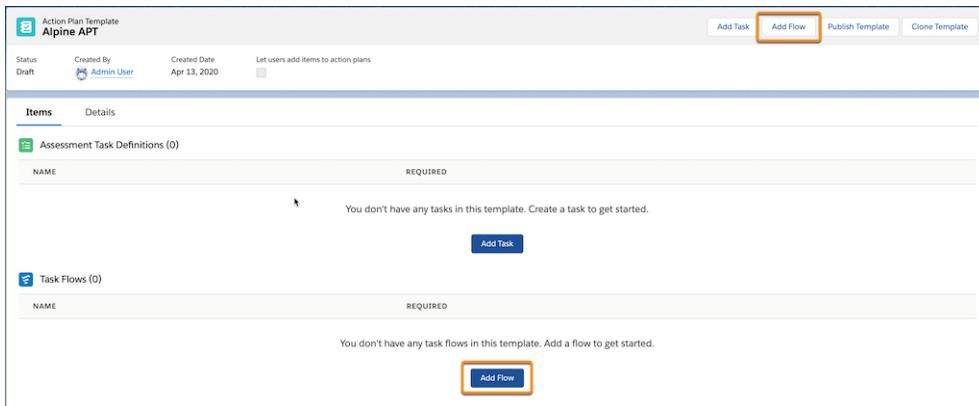
## Do More at the Store by Adding Flows to Action Plan Templates

Sales managers can help field reps increase the impact of their visits by adding flows to action plan templates. The ability to add flows widens the scope of activities that field reps can perform at a store.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Retail Execution is enabled.

**Who:** This feature is available to users with the Consumer Goods Cloud License.

**How:** When creating an action plan template, click **Add Flows**.



## Increase Efficiency on Visits

Field reps can stay agile by creating visits in the mobile app whenever they need to.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Retail Execution is enabled.

**Who:** This feature is available to users with the Consumer Goods Cloud License.

**Why:** If field reps get a call from a store that's having an issue, they can create a visit to the store that same day.

The screenshot shows a mobile application interface for managing visits. At the top, a message says "You have 3 visits scheduled for today" with "2 on High Priority". A blue "+" button is highlighted with a yellow box. Below this, a section titled "All Visits" lists three entries:

- NTO Store - Presidio**  
08:15 AM  
Completed · High  
Old Mason Street San Francisco CA United States 94129
- NTO Store - Presidio**  
09:00 PM  
Planned · Medium  
Old Mason Street San Francisco CA United States 94129
- NTO Store - Presidio**  
10:40 AM  
Planned · High  
Old Mason Street San Francisco CA United States 94129

Each entry includes a blue phone icon.

**SEE ALSO:**

[Salesforce Help: Create a Visit](#) (can be outdated or unavailable during release preview)

## Other Field Name Changes

We renamed the Data Type field on the Assessment Indicator Definition object. The new field name is Indicator Field Type.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Enterprise, Performance, and Unlimited editions where Retail Execution is enabled.

**Who:** This feature is available to users with the Consumer Goods Cloud License.

## Einstein Object Detection: Data Safety, Improved Detection, and Some Key Updates

Delete the Object Detection data stored in your inactive Salesforce orgs. Objects are detected by models with the highest accuracy. Admins have more information about their models and datasets. Use all records list and related lists to view Einstein Object Detection records easily.

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**IN THIS SECTION:**

[Get Improved Data Security for Inactive Orgs](#)

Einstein Object Detection data is permanently deleted 60 days after a Salesforce org is placed in hold, locked, or in pending delete state.

[Detect an Object Using the Most Accurate Models](#)

If you have multiple models that detect the same object, the model that has the highest accuracy now gets selected to detect the object.

### [Improve Models with Data Augmentation](#)

When you build or update a model, Einstein automatically duplicates the images and modifies them. It flips the duplicate images horizontally and resizes them. Now your models can identify objects in different horizontal angles and in different sizes more accurately.

### [Know Critical Details About Your Models](#)

Use the Build Statistics field in Vision Model records to know the duration of tasks in the build process.

### [Know the Status of Your Datasets and Models](#)

In Dataset records, you can use the new Error Message field to know why the dataset file wasn't uploaded. And in Vision Model records, you can use the Error Message field to know why the model wasn't built.

### [Upload a Dataset File](#)

When you create Dataset records, now you can either add the dataset file from your Salesforce org or you can add the URL of the cloud location where your dataset is uploaded. In previous releases, when you added a file and a URL to a Dataset record, we considered only the URL.

### [View Related Records for Datasets and Model Metrics](#)

To view models that are built using a dataset, use the Vision Models related list on Dataset records. To view the accuracy with which a model detects objects, use the Object Metrics related list on Model Metric records.

### [View All Records Easily](#)

The all records list is added for Datasets, Vision Models, Detected Objects, Example Objects, Model Metrics, and Object Metrics. Use this list to see all the object records in your Salesforce org.

## Get Improved Data Security for Inactive Orgs

Einstein Object Detection data is permanently deleted 60 days after a Salesforce org is placed in hold, locked, or in pending delete state.

**Where:** This change applies to Lightning Experience in Unlimited and Enterprise editions that have Consumer Goods Cloud enabled.

## Detect an Object Using the Most Accurate Models

If you have multiple models that detect the same object, the model that has the highest accuracy now gets selected to detect the object.

**Where:** This change applies to Lightning Experience in Unlimited and Enterprise editions that have Consumer Goods Cloud enabled.

## Improve Models with Data Augmentation

When you build or update a model, Einstein automatically duplicates the images and modifies them. It flips the duplicate images horizontally and resizes them. Now your models can identify objects in different horizontal angles and in different sizes more accurately.

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Use the Build Statistics field in Vision Model records to know the duration of tasks in the build process.

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To view models that are built using a dataset, use the Vision Models related list on Dataset records. To view the accuracy with which a model detects objects, use the Object Metrics related list on Model Metric records.

**Where:** This change applies to Lightning Experience in Unlimited and Enterprise editions that have Consumer Goods Cloud enabled.

## View All Records Easily

The all records list is added for Datasets, Vision Models, Detected Objects, Example Objects, Model Metrics, and Object Metrics. Use this list to see all the object records in your Salesforce org.

**Where:** This change applies to Lightning Experience in Unlimited and Enterprise editions that have Consumer Goods Cloud enabled.

## Consumer Goods Cloud Has Changed Objects

Access more data through these changed Consumer Goods Cloud objects.

**Where:** This feature applies to the Consumer Goods app in Developer, Enterprise, Performance, and Professional editions.

**Who:** To access the objects, admins must assign the Consumer Goods Cloud Permission Set licenses to users.

## New Fields for AssessmentTask Object

### Know the duration of a visit

Use the new `StartTime` and `EndTime` fields on the `AssessmentTask` object.

## New Fields for Einstein Object Detection Object

### Know the status of your datasets and models

Use the new `ErrorMessage` field on the `AiDataset` and `AiVisionModel` object.

## Manufacturing Cloud: Shape Your Business Growth Plans, Focus on Specific Account Forecasts, and Improve Comparison Between Planned and Actual Metrics of Sales

Shape your organization's growth plans by setting up measurable targets. Achieve growth plans by assigning targets to your team members. Concentrate on key business areas by strategically distributing targets among specific products and accounts, and by time period. Enhance your focus and user productivity by identifying key accounts and products in your organization. Recalculate all eligible account forecasts with a single click. Compare sales agreement values with ease by viewing them in the default currency of the sales agreement. Track and compare your organization's data by creating granular reports for account manager targets, account forecasts, and sales agreements. Manage the data volume used by account manager targets and account forecasts in your Salesforce org by viewing the usage details.

### IN THIS SECTION:

#### [Account Manager Targets: Translate Growth Plans into Measurable Targets \(Generally Available\)](#)

Use account manager targets to convert your organization's growth plans into measurable targets. Accommodate your business requirements by creating targets for revenue, quantity, and other currency or non-currency measure types. Achieve these targets by allocating specific target percentages to your team members. Meet market demands and organizational requirements by strategically distributing targets by products and accounts. Gain periodic visibility for targets by distributing them by month, quarter, or year.

#### [Account Forecasts: Focused Forecasting and Granular Reporting](#)

Plan your forecasting better by identifying key accounts and products. Only the identified accounts and products are eligible for account forecasting, thus sharpening your focus on these key areas. Recalculate all eligible account forecasts with a single click. Monitor the usage of account forecasts in your Salesforce org with data volume details and the number of times account forecasts are recalculated and regenerated. Track and compare account forecasts by creating reports.

#### [Sales Agreements: View Revenue Metrics in a Single Currency and Refine Your Data with Reports](#)

Bring uniformity in sales agreements by viewing revenue metrics in the default currency of the sales agreement. Compare and track all the granular data of your sales agreements by creating custom reports.

#### [Monitor Business Performance with a Single Dashboard \(Beta\)](#)

Account managers can track the business performance in a single dashboard, making it easier to navigate and access this data. They can compare and track revenue realization, account performance, and upcoming sales agreement renewals in this dashboard.

#### [Analyze Forecast Changes and Improve Your Business](#)

Use the enhanced Forecast Analysis dashboard to analyze the changes in account and product forecasts, and fine-tune your demand planning. Get price recommendations for products and schedules based on historical trends of sales agreements. When you create an app from the Analytics for Manufacturing template, you can select any currency configured in your Salesforce org. You can now filter data by fiscal years, months, or quarters based on the fiscal calendar settings in your Salesforce org. You can also create a lighter version of the app based on the features enabled in your org.

#### [Manufacturing Cloud Has New Objects](#)

Create, distribute, and configure account manager targets with the new Manufacturing Cloud objects. In addition, you can access the history of changes to sales agreements.

#### [Manufacturing Cloud Has New and Changed Metadata Types](#)

Enable, update, and configure account manager targets with Manufacturing Cloud's new metadata types. Also, further configure account forecasts with the changed metadata type.

### [Manufacturing Cloud Has New and Changed Tooling API Objects](#)

Configure account manager targets and get usage details for account forecasts with the new and changed Tooling API objects for Manufacturing Cloud.

### [Manufacturing Cloud Has New and Changed Invocable Actions](#)

Update account manager target assignment values using the new action for Manufacturing Cloud. In addition, recalculate all account forecasts using the changed action.

## Account Manager Targets: Translate Growth Plans into Measurable Targets (Generally Available)

Use account manager targets to convert your organization's growth plans into measurable targets. Accommodate your business requirements by creating targets for revenue, quantity, and other currency or non-currency measure types. Achieve these targets by allocating specific target percentages to your team members. Meet market demands and organizational requirements by strategically distributing targets by products and accounts. Gain periodic visibility for targets by distributing them by month, quarter, or year.

### IN THIS SECTION:

#### [Set Expectations for Your Team Members by Assigning Targets](#)

Account managers can help achieve organizational targets by assigning them to their immediate team members. They can assign a specific target percentage. The sum of target assignments can be less than, more than, or equal to their target value. This flexibility allows account managers to update their target values and edit their target assignments.

#### [Update Assignment Values with a Single Click](#)

Changing markets and business requirements directly affect account managers' targets. To address this constant flux, account managers can change their target values. Account managers can then ensure that their team members' assignments have the latest values that proportionally reflect these changes.

#### [Distribute Targets by Account and Product, and by Time Period](#)

Account managers can help their organizations concentrate on key business areas by distributing targets by accounts and products. They can further distribute these targets and their own targets by time period, thus providing them periodic visibility. Administrators can help account managers by selecting the time period for this distribution as monthly, quarterly, or yearly.

#### [Respond to Changes in Your Organization's Hierarchy](#)

Account managers can respond to organizational changes that invalidate target assignments, such as restructured reporting chains, team mergers, and the entry and exit of employees. Invalid target assignments are identified automatically for account managers and shown in the Invalid Team Assignments section. Account managers can manage an invalid assignment by reassigning it to another team member, changing the owner, moving it to the parent target, or deleting it.

#### [Track Target Assignments for an Account in a Single Page](#)

Account managers can compare and track all the targets related to an account in a single page. They can view all team assignments and targets assigned to them in the Account Manager Targets tab of the account's record.

#### [Analyze Granular Account Manager Target Data with Reports](#)

Account managers can create custom reports that show information by target, account and product distribution, and periodic distribution. In addition, account managers can create dashboards using these reports.

#### [Manage Data Volume Consumption of Account Manager Targets](#)

In a single snapshot, view the volume of data used in your Salesforce org by account manager targets. Compare your data volume usage with the defined limits by checking the percentage of the limit used. You can ensure optimal performance of your Salesforce org by reviewing these details periodically.

## Set Expectations for Your Team Members by Assigning Targets

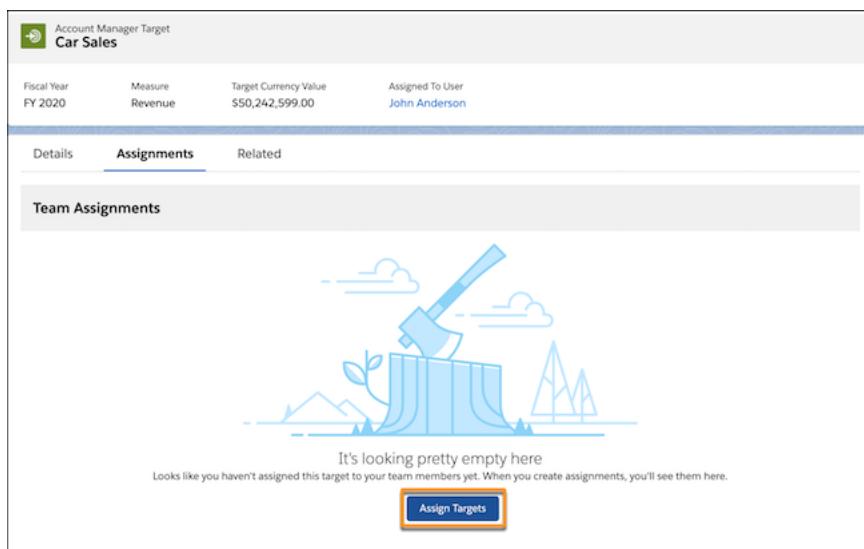
Account managers can help achieve organizational targets by assigning them to their immediate team members. They can assign a specific target percentage. The sum of target assignments can be less than, more than, or equal to their target value. This flexibility allows account managers to update their target values and edit their target assignments.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Manager Targets permission set.

**Why:** Assigning targets gives account managers the flexibility to manage targets according to business needs. For example, account managers can assign specific target values to team members and retain the remaining value as their own target. These target values can also be updated to reflect subsequent changes in market demands or business decisions.

**How:** On the Assignments tab of a new account manager target's record, click **Assign Targets**.



Click **Edit Assignment** to change assignments.

Team Assignments					
Team Member	Target Percentage	Target Value	Distribute By	Actions	
BL1U1	20	\$10,048,519.8	Account and Product	Period	
BL1U2	20	\$10,048,519.8	Account and Product	Period	
BL1U3	20	\$10,048,519.8	Account and Product	Period	
BL1U4	20	\$10,048,519.8	Account and Product	Period	
BL1U5	20	\$10,048,519.8	Account and Product	Period	

### SEE ALSO:

[Salesforce Help: Assign an Account Manager Target](#) (can be outdated or unavailable during release preview)

## Update Assignment Values with a Single Click

Changing markets and business requirements directly affect account managers' targets. To address this constant flux, account managers can change their target values. Account managers can then ensure that their team members' assignments have the latest values that proportionally reflect these changes.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Manager Targets permission set.

**How:** On the Assignments tab of an account manager target's record, click **Propagate to Assignments**. You can also add this functionality to flows and process builders with the new Update Account Manager Target action.

### SEE ALSO:

[Salesforce Help: Propagate Target Value Changes to Assignments](#) (can be outdated or unavailable during release preview)

## Distribute Targets by Account and Product, and by Time Period

Account managers can help their organizations concentrate on key business areas by distributing targets by accounts and products. They can further distribute these targets and their own targets by time period, thus providing them periodic visibility. Administrators can help account managers by selecting the time period for this distribution as monthly, quarterly, or yearly.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Manager Targets permission set.

**How:** To distribute targets by account and product, click **Account and Product** (1) in the Distribute By column on the Assignments tab of an account manager target's record. To distribute targets by period, click **Period** (2) in the Distribute By column.

Team Assignments			
Team Member	Target Percentage	Target Value	Distribute By
BL1U1	20	\$10,048,519.8	<b>1</b> Account and Product    Period
BL1U2	20	\$10,048,519.8	Account and Product    Period
BL1U3	20	\$10,048,519.8	Account and Product    Period
BL1U4	20	\$10,048,519.8	Account and Product    Period
BL1U5	20	\$10,048,519.8	Account and Product    Period

### SEE ALSO:

[Salesforce Help: Distribute Targets by Account and Product](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Distribute Targets by Time Period](#) (can be outdated or unavailable during release preview)

## Respond to Changes in Your Organization's Hierarchy

Account managers can respond to organizational changes that invalidate target assignments, such as restructured reporting chains, team mergers, and the entry and exit of employees. Invalid target assignments are identified automatically for account managers and shown in the Invalid Team Assignments section. Account managers can manage an invalid assignment by reassigning it to another team member, changing the owner, moving it to the parent target, or deleting it.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Manager Targets permission set.

### SEE ALSO:

[Salesforce Help: Manage Invalid Team Assignments](#) (can be outdated or unavailable during release preview)

## Track Target Assignments for an Account in a Single Page

Account managers can compare and track all the targets related to an account in a single page. They can view all team assignments and targets assigned to them in the Account Manager Targets tab of the account's record.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Manager Targets permission set.

### SEE ALSO:

[Salesforce Help: View Distribution Details in the Accounts Page](#) (can be outdated or unavailable during release preview)

## Analyze Granular Account Manager Target Data with Reports

Account managers can create custom reports that show information by target, account and product distribution, and periodic distribution. In addition, account managers can create dashboards using these reports.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Manager Targets permission set.

**How:** From Setup, in the Quick Find box, enter *Reports & Dashboards*. Select **Report Types**. On the Report Types page, click **Continue**. Create a custom report type using the Account Manager Target primary object. Add Account Manager Target Distribution and Account Manager Periodic Target Distribution as related objects. You can create dashboards using the generated report.

## Manage Data Volume Consumption of Account Manager Targets

In a single snapshot, view the volume of data used in your Salesforce org by account manager targets. Compare your data volume usage with the defined limits by checking the percentage of the limit used. You can ensure optimal performance of your Salesforce org by reviewing these details periodically.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Manager Targets permission set.

**How:** From Setup, in the Quick Find box, enter *Manufacturing*. Select **Account Manager Targets**. On the Account Manager Targets Setup page, expand Account Manager Periodic Target Distribution Limits. You can view the percentage of the limit used, the current usage, and the record limit for the Account Manager Periodic Target Distribution object.

Account Manager Periodic Target Distribution Limits			
Limit Type	Current Utilization Percentage	Maximum Limit	Current Utilization Value
Account Manager Periodic Target Distribution Records	0	10000000	1500

#### SEE ALSO:

[Salesforce Help: View the Data Volume Usage, Defined Limits, and the Percentage of Limit Used \(can be outdated or unavailable during release preview\)](#)

## Account Forecasts: Focused Forecasting and Granular Reporting

Plan your forecasting better by identifying key accounts and products. Only the identified accounts and products are eligible for account forecasting, thus sharpening your focus on these key areas. Recalculate all eligible account forecasts with a single click. Monitor the usage of account forecasts in your Salesforce org with data volume details and the number of times account forecasts are recalculated and regenerated. Track and compare account forecasts by creating reports.

#### IN THIS SECTION:

##### [Plan Account Forecasts Better with Forecasting for Key Accounts and Products](#)

Identify key accounts and products in your organization based on business priorities. Only the identified accounts and products are eligible for account forecasting, thus helping account managers focus and manage growth for these key areas.

##### [Recalculate All Account Forecasts with a Single Click](#)

Changes in market demands and business priorities can change a company's list of key accounts and products. With one click, you can recalculate the forecasts for all identified account and product combinations at any time during your company's fiscal year.

##### [Analyze Granular Account Forecasts Data with Reports](#)

Create custom reports that show information by account, product, period, and metric. In addition, account managers can create dashboards using these reports.

##### [Manage Data Volume Consumption of Account Forecasts](#)

In a single snapshot, view the volume of data used in your Salesforce org by account forecasts. Compare your data volume usage with the defined limits by checking the percentage of the limit used. You can ensure optimal performance of your Salesforce org by reviewing these details periodically.

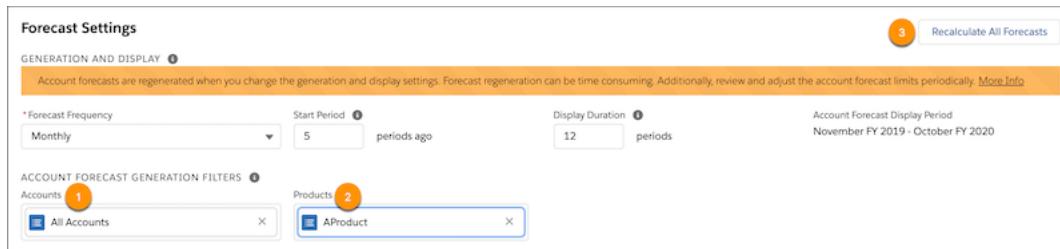
## Plan Account Forecasts Better with Forecasting for Key Accounts and Products

Identify key accounts and products in your organization based on business priorities. Only the identified accounts and products are eligible for account forecasting, thus helping account managers focus and manage growth for these key areas.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Forecast permission set.

**How:** From Setup, in the Quick Find box, enter *Manufacturing*. Select **Account Forecasting**. In the Account Forecast Generation Filter section of the Account Forecasting Setup page, select the two list views that have key accounts (1) and key products (2). Save your changes and click **Recalculate All Forecasts** (3) to help account managers view the latest forecast values.



#### SEE ALSO:

[Salesforce Help: Configure Account Forecast Generation Filters](#) (can be outdated or unavailable during release preview)

## Recalculate All Account Forecasts with a Single Click

Changes in market demands and business priorities can change a company's list of key accounts and products. With one click, you can recalculate the forecasts for all identified account and product combinations at any time during your company's fiscal year.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Forecast permission set.

**How:** From Setup, in the Quick Find box, enter *Manufacturing*. Select **Account Forecasting**. On the Account Forecasting Setup page, click **Recalculate All Forecasts**. You can also recalculate all account forecasts by using the existing Recalculate Forecasts action in both flow and process builder.

#### SEE ALSO:

[Salesforce Help: Recalculate All Account Forecasts](#) (can be outdated or unavailable during release preview)

## Analyze Granular Account Forecasts Data with Reports

Create custom reports that show information by account, product, period, and metric. In addition, account managers can create dashboards using these reports.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Forecast permission set.

**How:** From Setup, in the Quick Find box, enter *Reports & Dashboards*. Select **Report Types**. On the Report Types page, click **Continue**. Create a custom report type using the Account Forecast primary object. Add Account Product Forecast and Account Product Period Forecast as related objects. You can create dashboards using the generated report.

## Manage Data Volume Consumption of Account Forecasts

In a single snapshot, view the volume of data used in your Salesforce org by account forecasts. Compare your data volume usage with the defined limits by checking the percentage of the limit used. You can ensure optimal performance of your Salesforce org by reviewing these details periodically.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Account Forecast permission set.

**How:** From Setup, in the Quick Find box, enter *Manufacturing*. Select **Account Forecasting**. On the Account Forecasting Setup page, expand Account Forecast Limits and Use. You can view the percentage of the limit used, the current usage, and the limit for the:

- Number of records in the Account Product Period Forecast object. You can use the refresh icon on this row to view the latest values.
- Number of times forecasts for all accounts have been recalculated.
- Number of times forecasts for all accounts have been regenerated.

Account Forecast Limits and Use			
To ensure optimal performance, limit the amount of records and actions used to generate account forecasts.			
Type	Percentage of Limit Used	Value of Current Use	Limit
Account Product Period Forecast Records 	0%	84	9000000
Number of Account Forecast Recalculations	15%	8	52
Number of Account Forecast Regenerations	25%	1	4

#### SEE ALSO:

[Salesforce Help: View the Data Volume Usage, Defined Limits, and the Percentage of Limit Used](#)

## Sales Agreements: View Revenue Metrics in a Single Currency and Refine Your Data with Reports

Bring uniformity in sales agreements by viewing revenue metrics in the default currency of the sales agreement. Compare and track all the granular data of your sales agreements by creating custom reports.

#### IN THIS SECTION:

[View All Revenue Metrics of a Sales Agreement in the Same Currency](#)

Improve decision making and productivity by viewing all revenue metrics in the default currency of a sales agreement. When orders and contracts associated with a sales agreement use different currencies, the related revenue metrics are converted and displayed in the agreement's default currency.

[Analyze Granular Sales Agreement Data with Reports](#)

Create custom reports that show information by sales agreement, account, product, and schedule. In addition, account managers can create dashboards using these reports.

### View All Revenue Metrics of a Sales Agreement in the Same Currency

Improve decision making and productivity by viewing all revenue metrics in the default currency of a sales agreement. When orders and contracts associated with a sales agreement use different currencies, the related revenue metrics are converted and displayed in the agreement's default currency.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Sales Agreements permission set.

**Why:** Account managers can easily scan and compare revenue metrics in a sales agreement when they're all in the same currency. For example, let's assume that the actual quantities of your sales agreements are calculated automatically from orders. The products associated with these orders are priced in euros, while the default currency of the sales agreements is in US dollars (USD). The revenue metrics sourced from orders in euros are converted into USD.

## Analyze Granular Sales Agreement Data with Reports

Create custom reports that show information by sales agreement, account, product, and schedule. In addition, account managers can create dashboards using these reports.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

**Who:** This change is available to users with the Manufacturing Sales Agreements permission set.

**How:** From Setup, in the Quick Find box, enter *Reports & Dashboards*. Select **Report Types**. On the Report Types page, click **Continue**. Create a custom report type using the Sales Agreement primary object. Add Sales Agreement Product and Sales Agreement Product Schedule as related objects. You can create dashboards using the generated report.

## Monitor Business Performance with a Single Dashboard (Beta)

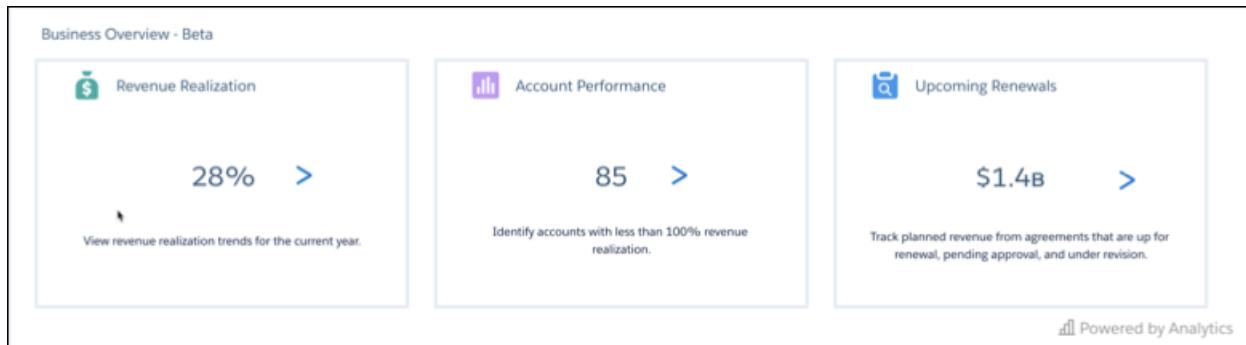
Account managers can track the business performance in a single dashboard, making it easier to navigate and access this data. They can compare and track revenue realization, account performance, and upcoming sales agreement renewals in this dashboard.

**Where:** This change applies to Lightning Experience in Developer, Enterprise, and Unlimited editions that have the Manufacturing Cloud license.

 **Note:** As a beta feature, the Default Analytics Dashboard for Manufacturing is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

**Who:** This change is available to users with the Manufacturing Sales Agreements permission set.

**How:** From Setup, in the Quick Find box, enter *Manufacturing*. Select **Sales Agreements**. On the Sales Agreements Setup page, enable the Default Analytics Dashboard.



### SEE ALSO:

[Salesforce Help: Enable the Default Analytics Dashboard for Manufacturing \(Beta\)](#)

[Salesforce Help: View Your Business Performance in a Single Dashboard \(Beta\)](#)

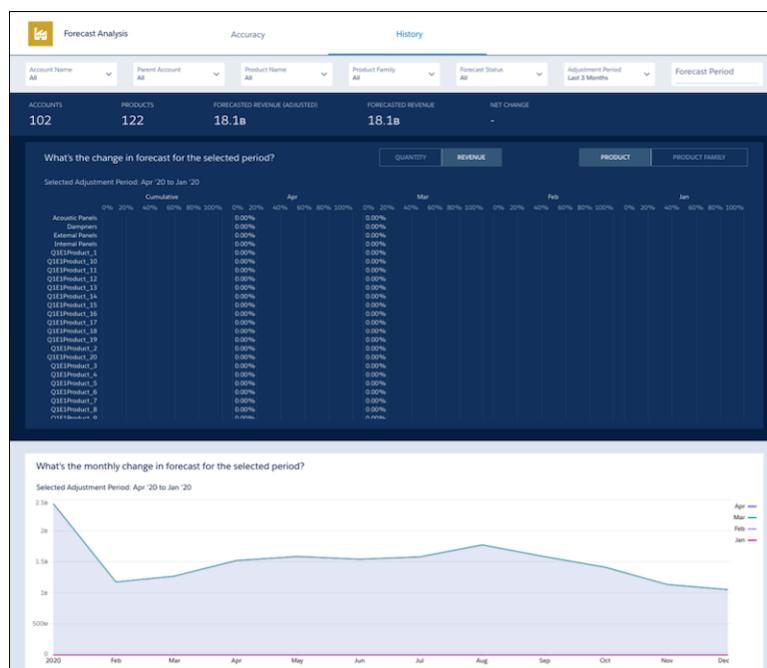
## Analyze Forecast Changes and Improve Your Business

Use the enhanced Forecast Analysis dashboard to analyze the changes in account and product forecasts, and fine-tune your demand planning. Get price recommendations for products and schedules based on historical trends of sales agreements. When you create an app from the Analytics for Manufacturing template, you can select any currency configured in your Salesforce org. You can now filter data by fiscal years, months, or quarters based on the fiscal calendar settings in your Salesforce org. You can also create a lighter version of the app based on the features enabled in your org.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app in Developer, Enterprise, and Unlimited editions where Manufacturing Cloud is enabled. Analytics for Manufacturing is only for Salesforce Manufacturing Cloud users.

**Who:** To create an app from the Einstein Analytics for Manufacturing template, you must also have the Manufacturing Analytics Plus add-on license.

**Why:** Account managers and demand planners can use the enhanced Forecast Analysis dashboard to monitor changes in forecasts and improve accuracy and demand planning.



**How:** Go to Analytics Studio, click **Create**, and select **App**. Select the **Analytics for Manufacturing** template and follow the instructions in the wizard to create your app.

## Manufacturing Cloud Has New Objects

Create, distribute, and configure account manager targets with the new Manufacturing Cloud objects. In addition, you can access the history of changes to sales agreements.

### Create account manager targets for a fiscal year using currency and other measure types

Use the new `AcctMgrTarget` object.

### Get info on the feed activity of an account manager target record

Use the new `AcctMgrTargetFeed` object.

**Get info on the changes to values in the fields of an account manager target record**

Use the new `AcctMgrTargetHistory` object.

**Get info on the list of access levels to an account manager target record**

Use the new `AcctMgrTargetShare` object.

**Record values of an account manager target distributed by account and by product**

Use the new `AcctMgrTargetDstr` object.

**Record distribution values of an account manager target by period, and record those values by account and product**

Use the new `AcctMgrPeriodicTargetDstr` object.

**Get info on the changes to values in the fields of an account manager periodic target distribution record**

Use the new `AcctMgrPeriodicTargetDstrHistory` object.

**Get info on the changes to values in the fields of an account manager target distribution record**

Use the new `AcctMgrTargetDstrHistory` object.

**Capture currency and other measure types for account manager targets**

Use the new `AcctMgrTargetMeasure` object.

**Get info on the changes to values in the fields of a sales agreement product record**

Use the new `SalesAgreementProductHistory` object.

**Get info on the changes to values in the fields of a sales agreement product schedule record**

Use the new `SalesAgreementProductScheduleHistory` object.

## Manufacturing Cloud Has New and Changed Metadata Types

Enable, update, and configure account manager targets with Manufacturing Cloud's new metadata types. Also, further configure account forecasts with the changed metadata type.

**Enable account manager targets**

Use the `enableIndustriesMfgTargets` field on the existing `IndustriesManufacturingSettings` metadata type.

**Configure account manager targets**

Use the new `AcctMgrTargetSettings` metadata type.

**Specify key accounts and products**

Use the new `accountFilter` and `productFilter` fields on the existing `AccountForecastSettings` metadata type.

**Get the number of Account Product Period Forecast records**

Use the new `acctPrdctPrdFrcstVolCnt`, `recalculateAllFrcstCnt`, and `regenerateForecastCnt` fields on the existing `AccountForecastSettings` metadata type.

**Use the Update Account Manager Target action with Flows**

Use the new `updateAcctMgrTarget` enumeration value on the `actionType` (FlowActionCall subtype) field of the Flow Metadata Type.

## Manufacturing Cloud Has New and Changed Tooling API Objects

Configure account manager targets and get usage details for account forecasts with the new and changed Tooling API objects for Manufacturing Cloud.

**Configure account manager targets**

Use the new `AcctMgrTargetSettings` object.

**Get the number of records and times account forecasts are recalculated and regenerated**

Use the new `AcctPrdctPrdFrcstVolCnt`, `RecalculateAllFrcstCnt`, and `RegenerateForecastCnt` fields on the existing `AccountForecastSettings` object.

## Manufacturing Cloud Has New and Changed Invocable Actions

Update account manager target assignment values using the new action for Manufacturing Cloud. In addition, recalculate all account forecasts using the changed action.

**BEHAVIOUR CHANGE: Recalculate all account forecasts**

Use the changed `recalculateForecast` standard action to recalculate all account forecasts in addition to a single account forecast.

**Update account manager target assignment values**

Use the new `updateAcctMgrTarget` standard action to update an account manager target's assignment values when the target's value changes.

## Analytics: Knowledge Category Filters, New Data Prep Tool, Tree-Based Models

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Gain more detailed insights about your knowledge articles by filtering knowledge reports by category. Create recipes with the new, approachable editor, Data Prep (Beta). Get the best predictions from three modeling algorithms.

**IN THIS SECTION:**

[Reports and Dashboards: Knowledge Category Filters, Subscription .csv File Attachments \(Beta\), Enhanced Folder Sharing \(Update\)](#)

Gain more detailed insights about your knowledge articles by filtering knowledge reports by category. To work with report data in a spreadsheet application, attach report data to subscription emails as a .csv file. If your org was created before Summer '13 and is still using legacy folder sharing, a release update helps upgrade to enhanced folder sharing.

[Einstein Analytics: New Data Prep Tool, Tree-Based Models, Live Connections to Snowflake](#)

Create recipes with the new, approachable editor, Data Prep (Beta). Get the best predictions from three modeling algorithms. Run explorations on your data in Snowflake warehouse without loading the data into Salesforce.

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Gain more detailed insights about your knowledge articles by filtering knowledge reports by category. To work with report data in a spreadsheet application, attach report data to subscription emails as a .csv file. If your org was created before Summer '13 and is still using legacy folder sharing, a release update helps upgrade to enhanced folder sharing.

**IN THIS SECTION:**

[Filter Knowledge Reports by Category](#)

Return information about entire categories and subcategories of knowledge articles with a new filter type, category filters.

[Attach .csv Files to Report Subscriptions \(Beta\)](#)

When people subscribe to a report, a new option lets them choose to receive results as a .csv file attached to the subscription email. The email itself includes the report name in the subject line, but there is no email body. Row-level record details are included in the attached .csv file instead. And small changes to the Edit Subscription menu design include a new Attach File button and a refined layout.

[Enable Enhanced Folder Sharing \(Update\)](#)

Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards. In the Winter '21 release (subject to change to a later release), legacy folder sharing is retiring and enhanced folder sharing replaces it.

[Work with up to 5 Unique Fields in Report Row-Level Formulas](#)

We're raising the limit on how many unique fields a report row-level formula can reference from 3 to 5.

[Build Reports Based on Price Book Entries](#)

Create custom report types based on price book entries. Managing and updating pricing is easier and more efficient now because users can build reports based on products and pricing. When creating custom report types, you can use price book entries as a primary object. For custom report types that have product as the primary object, we added price book entries as a secondary object.

[Discover Details About the Flows You Build with the Screen Flows Report](#)

Analyze the time spent in screen flows by using a prebuilt report. See who's running the screen flows you build. Review the status of a flow interview. The new Sample Flow Report: Screen Flows custom report type and report are ready to go. No configuration on your part is required.

[In Salesforce console, report links open in a new subtab](#)

When you open a link in a report from the Salesforce console, the link now opens in a new subtab instead of in a new workspace tab.

## Filter Knowledge Reports by Category

Return information about entire categories and subcategories of knowledge articles with a new filter type, category filters.

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

**Why:** Say you have categories defined by geographic region. The root category lists countries like United States, Mexico, and Canada. Under United States, categories include individual states like Arizona, California, and Oregon. Under each state, categories include cities. Category filters have their own operators:

- **at**—Return knowledge articles in the specified category.
- **above**—Return knowledge articles above and in the specified category.
- **below**—Return knowledge articles below and in the specified category.
- **above or below**—Return all knowledge articles above, below, and in the specified category. If there is more than one root category, then the filter returns only knowledge articles that are part of the parent root category.

So with a category filter on *United States below Arizona*, your report returns knowledge articles about cities like Tucson and Phoenix. Or, with a category filter on *United States above Arizona*, your report instead excludes knowledge articles about cities in Arizona.

**How:** While editing a report, add a category filter from the Filters pane. To filter by United States at Arizona, click  > **Add Category Filter** (1). A category filter section appears in the filters pane (2). Select **United States** for Category, **above** for operator, and **Arizona** for Value, then click **Apply** (3).

The screenshot shows the Salesforce Reports and Dashboards interface. In the top left, there's a cloud icon and a 'Sales' button. The top navigation bar includes 'All', a search bar ('Search Salesforce'), and various menu items like 'Home', 'Analytics', 'Opportunities', etc. On the right, there are icons for 'Reports' (highlighted), 'More', and user profile.

The main area is titled 'REPORT' and 'Knowledge Report'. It shows a preview of a report with columns: 'Case Association Count', 'Created By: Full Name', 'Created Date', 'Knowledge ID', and 'Last Modified By: Full Name'. A message says 'Previewing... and number of records. Run the report to see everything.' There's a checkbox for 'Update Preview Automatically'.

**Fields** sidebar: Shows 'Filters' section with 'Add filter...', 'Add Filter Logic', 'Show Me All knowledge', 'Archived Dates All Time', and 'Add Category Filter' (circled 1). Below it is a 'Category Filters' section (circled 2) containing 'United States (at) Arizona'. A large orange box highlights the 'Filter By' modal (circled 3).

**Filter By** modal:

- Category:** United States
- Operator:** at
- Value:** Quick Find (with a search icon)
- Quick Find Results:**
  - All
  - Arizona
    - Tucson
  - California
    - San Francisco
  - 94105
- Currency:** USD

**Note:** Data category filters are only available on report types that include the Knowledge object, such as Knowledge Articles or Knowledge with Cases.

## Attach .csv Files to Report Subscriptions (Beta)

When people subscribe to a report, a new option lets them choose to receive results as a .csv file attached to the subscription email. The email itself includes the report name in the subject line, but there is no email body. Row-level record details are included in the attached .csv file instead. And small changes to the Edit Subscription menu design include a new Attach File button and a refined layout.

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

**Note:** As a beta feature, Report Subscription Attachments is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Report Subscription Attachments in the [IdeaExchange](#) or in the [Trailblazer Community](#). For information on enabling this feature in your org, contact Salesforce.

**How:** In Setup, from Reports and Dashboards Settings, select **Let users attach reports as files to report subscription emails in Lightning Experience**, and save your changes.

To attach files to a report subscription, subscribe to a report, click **Attach File**, choose **Details Only**. The attachment format is **Comma Delimited .csv** by default. Optionally change encoding or keep the default, and save your changes. The edit subscription dialog shows that the subscription includes an attachment. Finish setting other subscription criteria, such as frequency, and click **Save**.

The screenshot shows the 'Edit Subscription' dialog box. At the top, it says 'Edit Subscription'. Below that is a 'Settings' section with 'Frequency' set to 'Weekly' (highlighted in blue). Under 'Days', 'Tue' is selected. The 'Time' is set to '3:00 PM'. In the 'Attachment' section, there is a button labeled 'Attach File' which is highlighted with an orange box. Below this, under 'Run Report As', 'Me' is selected. There's a 'Conditions' section with a note about setting up conditions on the report. At the bottom right are 'Cancel' and 'Save' buttons.



**Note:** Even if your org participated in the Spring '20 closed beta, to attach files to report subscription emails, a Salesforce admin must enable this feature from setup.

#### SEE ALSO:

[IdeaExchange: Schedule Reports as Attachments and add Adobe PDF, Excel Option](#)

## Enable Enhanced Folder Sharing (Update)

Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards. In the Winter '21 release (subject to change to a later release), legacy folder sharing is retiring and enhanced folder sharing replaces it.

**Where:** This change applies to Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions.

**When:** Retirement is targeted for Winter '21 and is subject to change. For specific dates, go to <https://status.salesforce.com/> and check information for your instance.

**Why:** After enabling enhanced folder sharing, your Salesforce users get view access to their report and dashboard folders, except for hidden folders, even if they previously had editor access. Hidden folders aren't shared with anyone, but users with the user permissions View Reports in Public Folders, Manage Reports in Public Folders, and their dashboard equivalents can view or manage hidden folders. To restore editor access to the user, it can be necessary to assign them new user permissions and then grant folder-level access.

Enhanced folder sharing features more customizable report and dashboard sharing via a familiar folder-based sharing model. Benefits include:

- Consistent sharing concepts across users, roles, and groups
- Sharing reports and dashboards with individual users
- Three access levels for each folder: view, edit, manage
- A symmetric set of user permissions for reports and dashboards

For example, in legacy folder sharing, Sally and Tim build a dashboard that's saved in a public folder with read and write access. Sally has the user permissions Manage Dashboards and View All Data, but Tim has only View All Data. After turning on enhanced folder sharing, Sally automatically receives the user permissions Manage Dashboards in Public Folders and Create Dashboard Folders, but Tim only receives the user permission View Dashboards in Public Folders. Before Tim can receive edit access to the folder, an admin must assign Tim the user permission Create and Customize Dashboards. Then, Sally can give Tim edit access to the dashboard folder, and they can continue to collaborate on the dashboard.

**How:** To get familiar with the new user permissions and folder access levels, Salesforce recommends that you turn on enhanced folder sharing in a sandbox or developer edition org first. Once you turn on enhanced folder sharing, you can't revert to legacy folder sharing.

 **Note:** If your org was created in or after the Summer '13 release or later, you already have enhanced folder sharing and won't notice any change. No action is required.

#### SEE ALSO:

[Salesforce Help: Transition Your Org to Enhanced Folder Sharing for Reports and Dashboards](#) (can be outdated or unavailable during release preview)

[Salesforce Help: User Permissions for Sharing Reports and Dashboards](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Compare Access Levels for Report and Dashboard Folders](#) (can be outdated or unavailable during release preview)

[Release Updates \(Beta\)](#)

## Work with up to 5 Unique Fields in Report Row-Level Formulas

We're raising the limit on how many unique fields a report row-level formula can reference from 3 to 5.

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

#### SEE ALSO:

[Salesforce Help: Evaluate Each Record in Reports with Row-Level Formulas](#) (can be outdated or unavailable during release preview)

## Build Reports Based on Price Book Entries

Create custom report types based on price book entries. Managing and updating pricing is easier and more efficient now because users can build reports based on products and pricing. When creating custom report types, you can use price book entries as a primary object. For custom report types that have product as the primary object, we added price book entries as a secondary object.

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

#### SEE ALSO:

[Streamline Pricing Management with Product and Pricing Custom Report Types](#)

## Discover Details About the Flows You Build with the Screen Flows Report

Analyze the time spent in screen flows by using a prebuilt report. See who's running the screen flows you build. Review the status of a flow interview. The new Sample Flow Report: Screen Flows custom report type and report are ready to go. No configuration on your part is required.

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

SEE ALSO:

[Analyze Screen Flow Usage](#)

## In Salesforce console, report links open in a new subtab

When you open a link in a report from the Salesforce console, the link now opens in a new subtab instead of in a new workspace tab.

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

## Einstein Analytics: New Data Prep Tool, Tree-Based Models, Live Connections to Snowflake

Create recipes with the new, approachable editor, Data Prep (Beta). Get the best predictions from three modeling algorithms. Run explorations on your data in Snowflake warehouse without loading the data into Salesforce.

IN THIS SECTION:

[Data Integration: Easier Data Preparation, Write Connectors, Sentiment Analysis](#)

Create recipes with the new, visual editor, Data Prep (Beta). Write the outcome of recipes to external systems like Amazon S3 and Snowflake. Detect the sentiment of text such as product reviews and social media posts.

[Analytics Prebuilt Apps: Appointment Analytics App, Template Gallery, Enhancements to Industries and Customer Lifecycle Apps](#)

Deliver personalized service with Appointment Analytics dashboards populated with Lightning Scheduler data. Find the best templates for your apps in the Template Gallery. Get insights into lead conversion and improve branch manager service appointments with Wealth Management Analytics. Understand insurance customer retention trends from the Insurance Analytics Customers Gained/Lost dashboard. And automatically add the right survey data to Customer Lifecycle Analytics with an enhanced wizard.

[Analytics App Building: Analytics VS Code Extension, Data Blending in Explorer, Direct Data Exploration with Snowflake \(Beta\)](#)

The Analytics VS Code Extension makes Analytics Templates development faster and easier. Expand business insights by blending data from multiple datasets in the explorer. And explore data directly in Snowflake without first loading it into Salesforce or preparing it in datasets (Beta).

[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

Get the best predictions from three modeling algorithms. Create accurate models using random forest algorithms (pilot). Replace deployed models easily.

[Analytics for Everyone: Subscriptions to Tables, Watchlist Enhancements, Learning Resources Panel](#)

Subscribe to table widgets and receive the table data in a .csv file attached to your subscription email (beta). Experience the enhanced watchlist in a new interface on the home page (beta). Add custom onboarding for each chart to create a step-by-step learning progression through the dashboard.

## Data Integration: Easier Data Preparation, Write Connectors, Sentiment Analysis

Create recipes with the new, visual editor, Data Prep (Beta). Write the outcome of recipes to external systems like Amazon S3 and Snowflake. Detect the sentiment of text such as product reviews and social media posts.

### IN THIS SECTION:

#### [Prepare Data with the Next Generation of Data Prep \(Beta\)](#)

The latest version of Data Prep, called *Data Prep (Beta)*, expands on the intuitive, visual interface that allows you to easily point-and-click your way to build recipes. Use the new graphical view of a recipe to see at a glance where data comes from and how it flows through the recipe to the target. To validate the recipe as you build, you can continue to preview how raw data is transformed at every step of the way.

#### [Get a Sense of How Your Customers and Prospects Feel](#)

Text information such as product reviews and social media posts can be a mine of information for your business. Use the Detect Sentiment transformation in a Data Prep (Beta) recipe to quickly bucket that information into sentiment categories: positive, negative, and neutral. For example, detect the sentiment of survey responses to evaluate how customers feel about your product support. If more than a certain percentage—say 30%—of the comments are negative, escalate the feedback to support management.

#### [Output Your Einstein Analytics Data to Amazon S3 \(Beta\)](#)

Output connectors now let you push your data from Analytics into Amazon S3 when you use Data Prep (Beta). You designed powerful recipes that combine data from multiple sources, add formula fields, and transform data into datasets tailored to your business needs. With output connectors and Data Prep (Beta), datasets are liberated from Analytics and written as one or more .csv files for you to improve your overall business processes with better data. For example, output processed and transformed customer service data for individual agents to understand what they could be doing to improve customer satisfaction.

#### [Write Your Einstein Analytics Data to Snowflake \(Beta\)](#)

Output connectors let you push your data from Analytics into Snowflake when you use Data Prep (Beta). You designed powerful recipes that combine data from multiple sources, add formula fields, and transform data into datasets tailored to your business needs. With output connectors and Data Prep (Beta), datasets are liberated from Analytics and written as a table for you to improve your overall business processes with better data.

#### [Sync Complete TinyInt Column Values from Select AWS RDS Connectors](#)

The full range of TinyInt data column values, from -127 to 127, is now synced from AWS RDS MySQL, Maria DB, and Aurora MySQL connections. Previously, this data type was interpreted as a bit that showed 0 or 1. Update your logic, filters, or transformations that rely on the 0 or 1 behavior to use the actual values instead.

#### [Filter Data Synced from the Google BigQuery Standard SQL Connector](#)

To speed up data sync and pull only the data that you need, you can now use data sync filters with connected objects from the Google BigQuery Standard SQL connector. Previously, you imported all data from a remote object and used a dataflow or recipe filter to limit the external data in a dataset. Now, you can exclude unnecessary or sensitive data from syncing to Analytics in the first place. For example, set up a filter to import only Canadian marketing data if you are analyzing your Canadian business unit's progress.

#### [Sync Remote Data to Government Cloud Orgs with Connectors That Comply with FIPS 140 Requirements](#)

In conjunction with US government cryptographic requirements, Analytics connectors now use FIPS 140 validated encryption. The list of connectors available to Government Cloud orgs will expand as FIPS 140 validated encryption is confirmed.

#### [Always Get the Latest Data by Scheduling Recipes to Run After Syncs](#)

Determining the right time to schedule a recipe is difficult when you don't know how long the data sync takes. So stop guessing what time to run the recipe and schedule it to start automatically after the data sync completes.

### [Keep Your Data More Up-To-Date with Shorter Schedule Intervals](#)

You can now schedule data sync, dataflow, and recipe jobs to run every 15, 20, 30, or 60 minutes with sub hour scheduling if your org uses an Einstein Analytics Plus license. You previously contacted Salesforce Support to enable subhourly scheduling. If you don't have an Einstein Analytics Plus license, you must still contact Salesforce Support. This change doesn't apply to sandboxes.

### [Keep Tabs on Recipe Jobs with Notifications](#)

Set recipe notifications to receive an email notification when a recipe finishes. You can be notified only when there are warnings, only when the recipe fails, or every time the recipe finishes. You can also set an elapsed time notification to notify you when a recipe takes longer than a specified length of time.

### [Restore Previous Dataflow Versions Easily with History Feature](#)

Using Dataflow History, edit a dataflow and save new versions along with brief descriptions of what's changed. When you save a new version, it becomes the live version that keeps Analytics data up to date. All previous versions can be viewed through the Analytics Data Manager, and you can quickly revert to or delete any of them.

## Prepare Data with the Next Generation of Data Prep (Beta)

The latest version of Data Prep, called *Data Prep (Beta)*, expands on the intuitive, visual interface that allows you to easily point-and-click your way to build recipes. Use the new graphical view of a recipe to see at a glance where data comes from and how it flows through the recipe to the target. To validate the recipe as you build, you can continue to preview how raw data is transformed at every step of the way.

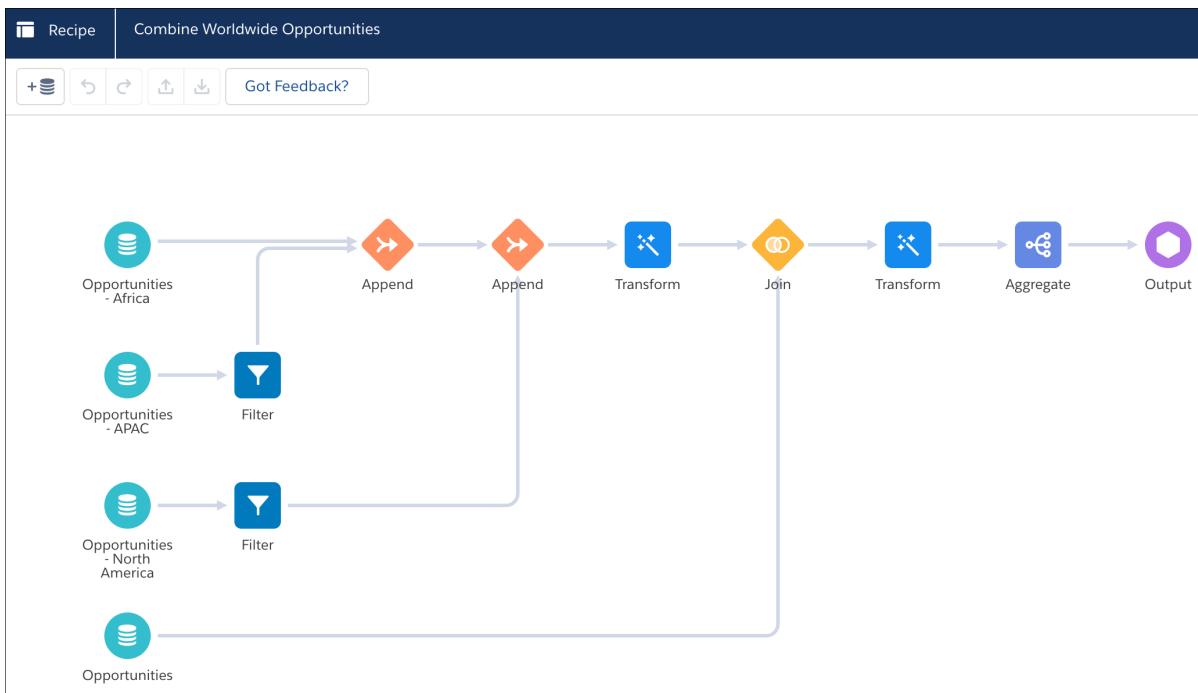
**Where:** This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

As a beta feature, Data Prep (Beta) is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

**When:** This feature is being added on a rolling basis during the Summer '20 release.

**Who:** To use Data Prep (Beta), you must enable it in your org and have the Edit Analytics Dataflows or Edit Dataset Recipes user permission.

**Why:** Data Prep (Beta) graphs are easy to read, even with lots of transformations.



Unlike a dataflow graph, which can be a bit cluttered, a Data Prep (Beta) graph doesn't show every transformation. It shows only inputs (source data), appends, aggregates, filters, joins, and the output (where the data is written). It also shows transforms, which are groups of transformations that change the raw data, such as concatenation and column type conversions. By hiding lower-level data changes, the graph provides a higher-level, easier-to-read view of the flow of data. We call each object shown in the graph a *node*. A recipe can have multiple Input, Append, Aggregate, Filter, Join, and Transform nodes, but only a single Output node.

Although the graph doesn't show individual data transformations, you can select a Transform node (1) in the Graph area to see its transformations in the Details area (2).

Date	External Opp ID	Amount	Industry Formula	Billing State/Province
01T00:00:00.000Z	35	136464	telecommunications	MI - Morocco
22T00:00:00.000Z	40	266400	banking	IL - Morocco
12T00:00:00.000Z	69	356880	energy	VA - Morocco
08T00:00:00.000Z	143	5198280	consulting	FL - Morocco
01T00:00:00.000Z	150	1876750	communications	NH - Morocco
15T00:00:00.000Z	172	228220	technology	MS - South Africa
22T00:00:00.000Z	179	24536	electronics	ID - Morocco

Like the existing version of Data Prep, select a transformation step in the left panel of the Details area to preview the results of that transformation in the Preview tab. Similarly, you can select any node in the graph to preview the results of that node.

The screenshot shows the Data Prep interface. On the left, there's a transformation graph with three nodes labeled 1. FORMULA, 2. FORMULA, and 3. FORMULA. Node 2. FORMULA is highlighted with an orange box. On the right, there's a preview table with columns: Date, External Opp ID, Amount, Industry Formula, and Billing State/Province. The table contains several rows of data. A specific row for 'ID - Morocco' is also highlighted with an orange box.

Date	External Opp ID	Amount	Industry Formula	Billing State/Province
01T00:00:00.000Z	35	136464	telecommunications	MI - Morocco
22T00:00:00.000Z	40	266400	banking	IL - Morocco
12T00:00:00.000Z	69	356880	energy	VA - Morocco
08T00:00:00.000Z	143	5198280	consulting	FL - Morocco
01T00:00:00.000Z	150	1876750	communications	NH - Morocco
15T00:00:00.000Z	172	228220	technology	MS - South Africa
22T00:00:00.000Z	179	24536	electronics	ID - Morocco

**How:** Einstein Analytics currently offers two versions of Data Prep: *Data Prep* and *Data Prep (Beta)*. Data Prep (Beta) is the latest version, which offers the same features as the previous version (Data Prep), except for column profiling. When Data Prep (Beta) becomes generally available, it will have full parity with and replace the previous version. For now, recipes built in one version can't be opened in the other.

To enable users to access Data Prep (Beta), select the **Use the new version of data prep (Beta)** Analytics setting under setup.

The screenshot shows the Salesforce Setup page. In the sidebar, under Feature Settings, the Analytics section is expanded, showing sub-options like Analytics, Analytics, Getting Started, Settings, Sharing Inheritance, Coverage Assessment, Whitelist, Einstein Data Insights, Einstein Discovery, Reports & Dashboards, and Access Policies. The 'Analytics' option under Analytics is selected. On the main page, the 'Settings' tab is selected. Under the 'Analytics' section, there is a checkbox for 'Use the new version of data prep (Beta)' which is checked and highlighted with an orange box.

To create a Data Prep (Beta) recipe, open the Recipes tab in Data Manager. Click the dropdown (), and then select **Create with Data Prep (Beta)**. (Use the **Create with Data Prep** option to create a recipe using the previous version of Data Prep.)

The screenshot shows the Einstein Data Manager interface. On the left, there's a sidebar with icons for Monitor, Dataflows & Recipes (which is selected), Data, and Connect. The main area is titled "Dataflows & Recipes" with the sub-tab "RECIPES" active. It displays a table of existing recipes:

Name	Last Modified	Last Modifie...	Run Status	Next Run	Target Dataset	Target Datas...
Combine Worldwide Opportunities	Today at 10:59	Fred Williamso	Success	Not Scheduled	Combine Work	Not Cr
Determine Sentiment of Comments	Yesterday at 11	Fred Williamso	Success	Not Scheduled	Determine Sen	Not Cr

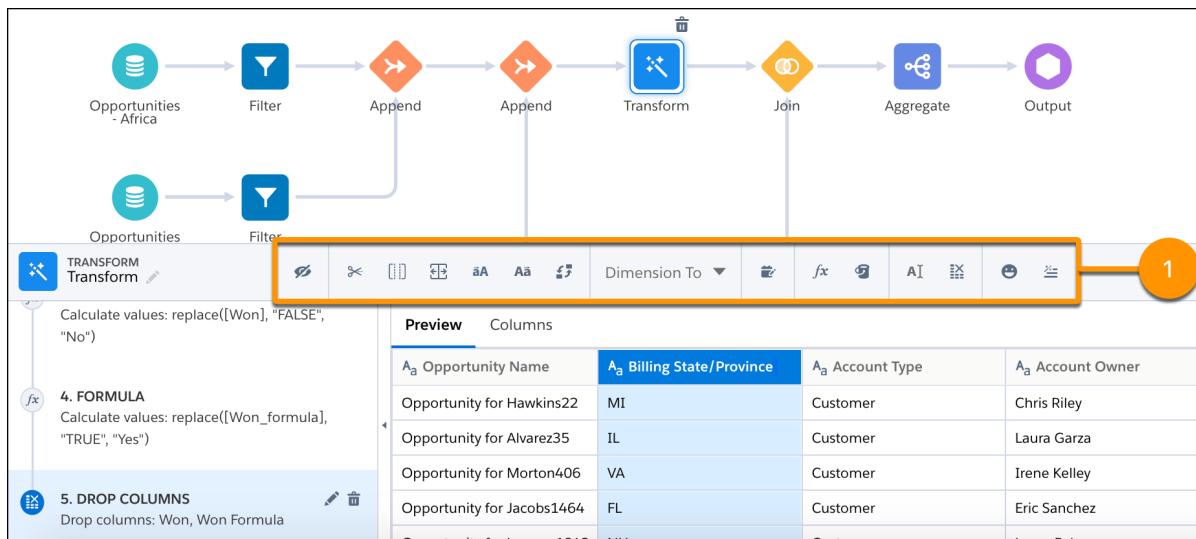
At the top right, there are buttons for "Create with Data Prep" and "Create with Data Prep (Beta)", with the latter being highlighted by an orange box.

When you create a recipe, you first select the input data, which is added as an Input node in the graph. Then, click + in the graph to add nodes. For example, you can add a Transform node.

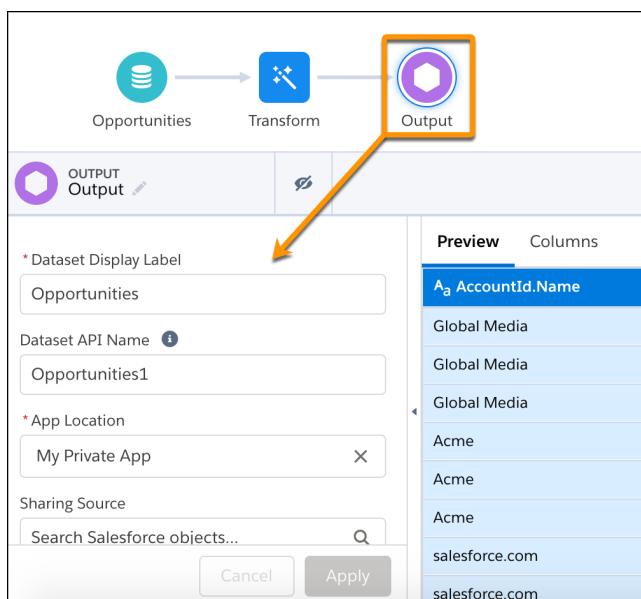
The screenshot shows a modal dialog box titled "ADD NODE". It lists several node types with corresponding icons:

- Transform (highlighted with an orange box)
- Filter
- Aggregate
- Join
- Append
- Output

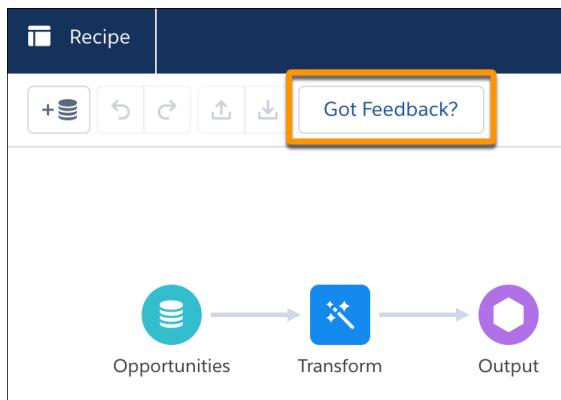
In a Transform node, you can then add data transformations, which we just call *transformations*, to manipulate the data. To add a transformation, select one or more columns in the Preview or Columns tab and click a transformation from the Transform toolbar (1).



To write the recipe results to a dataset, specify the dataset details by adding an Output node at the end of the recipe.



Want to share some feedback about the beta version? Click **Got Feedback** in Data Prep (Beta) to tell us what's on your mind. We're listening.



## Get a Sense of How Your Customers and Prospects Feel

Text information such as product reviews and social media posts can be a mine of information for your business. Use the Detect Sentiment transformation in a Data Prep (Beta) recipe to quickly bucket that information into sentiment categories: positive, negative, and neutral. For example, detect the sentiment of survey responses to evaluate how customers feel about your product support. If more than a certain percentage—say 30%—of the comments are negative, escalate the feedback to support management.

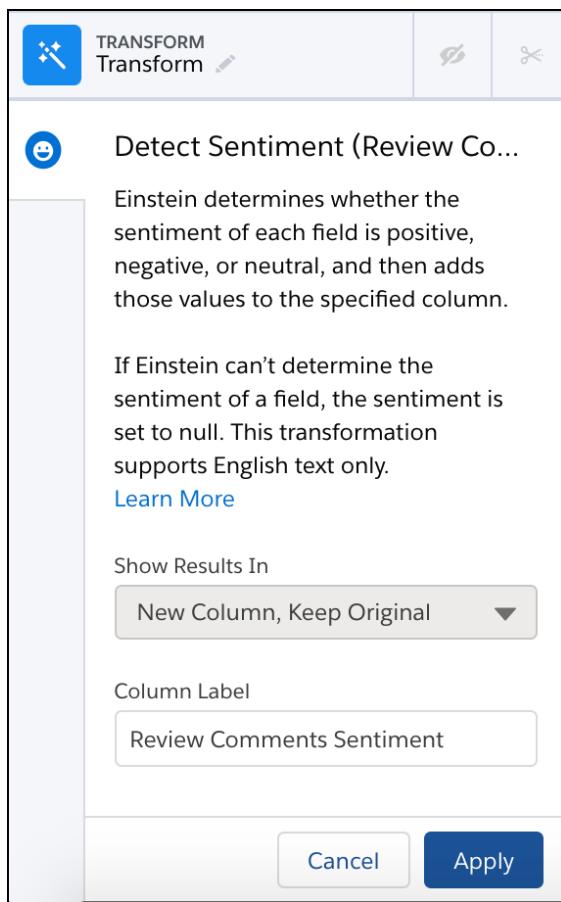
**Where:** This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** If you haven't already done so, enable Data Prep (Beta) in your org. For more information, see [Prepare Data with the Next Generation of Data Prep \(Beta\)](#) on page 307.

In a Transform node of a Data Prep (Beta) recipe, select the dimension column in Preview, and then click the Detect Sentiment transformation.

A <sub>a</sub> Review Comments	A <sub>a</sub> Color	A <sub>a</sub> Product	A <sub>a</sub> Date	A <sub>a</sub> , Rating
Love my speaker!	Charcoal	Smart Speaker CH	31-Jul-18	5
	Charcoal	Smart Speaker CH	31-Jul-18	3
Excelente, lo unico es que nc	Charcoal	Smart Speaker CH	30-Jul-18	5
It was a waste of my money!	Charcoal	Smart Speaker CH	31-Jul-18	1
It's a speaker. Nothing else to	Sandstone	Smart Speaker SA	31-Jul-18	3
I like being able to turn light	Walnut	Smart Speaker WA	31-Jul-18	4
I have had a lot of fun with th	Charcoal	Smart Speaker CH	31-Jul-18	5
I received it as a gift. I neede	Heather	Smart Speaker HE	31-Jul-18	5

When you run the recipe, Analytics writes the results to a new column. If needed, edit the column label and click **Apply**.



**Note:** The Show Results In field is grayed out because this transformation can only write the sentiments to a new column and keep the original dimension column. Unlike other transformations, you can't select the other options to write the results to a new column and discard the original column, or overwrite the original column.

Preview shows "Sentiment TBD" in the new column.

A_a Review Comments	A_a Product	Rating	A_a Review Comments Se...
Love my speaker!	Smart Speaker CH	5	Sentiment TBD
	Smart Speaker CH	3	Sentiment TBD
Excelente, lo unico es que nc	Smart Speaker CH	5	Sentiment TBD
It was a waste of my money!	Smart Speaker CH	1	Sentiment TBD
It's a speaker. Nothing else tc	Smart Speaker SA	3	Sentiment TBD
I like being able to turn lights	Smart Speaker WA	4	Sentiment TBD
Without having a cellphone, .	Smart Speaker SA	3	Sentiment TBD
Looks great	Smart Speaker HE	5	Sentiment TBD
Love it! I've listened to songs	Smart Speaker HE	5	Sentiment TBD
Really happy with this purcha	Smart Speaker HE	5	Sentiment TBD
I got a second unit for the be	Smart Speaker SA	3	Sentiment TBD
Fun item to play with and get	Smart Speaker CH	4	Sentiment TBD
I like it	Smart Speaker CH	4	Sentiment TBD

This transformation supports English text only. It processes non-English text as English and ignores images, including emojis. The transformation returns a null if the sentiment can't be determined, such as when the input value is null. Typically, the transformation generates the correct sentiments, but the results can vary based on the data. For example, text without sentiment (such as IDs, nouns, addresses, and alphanumeric values) can return unexpected results.

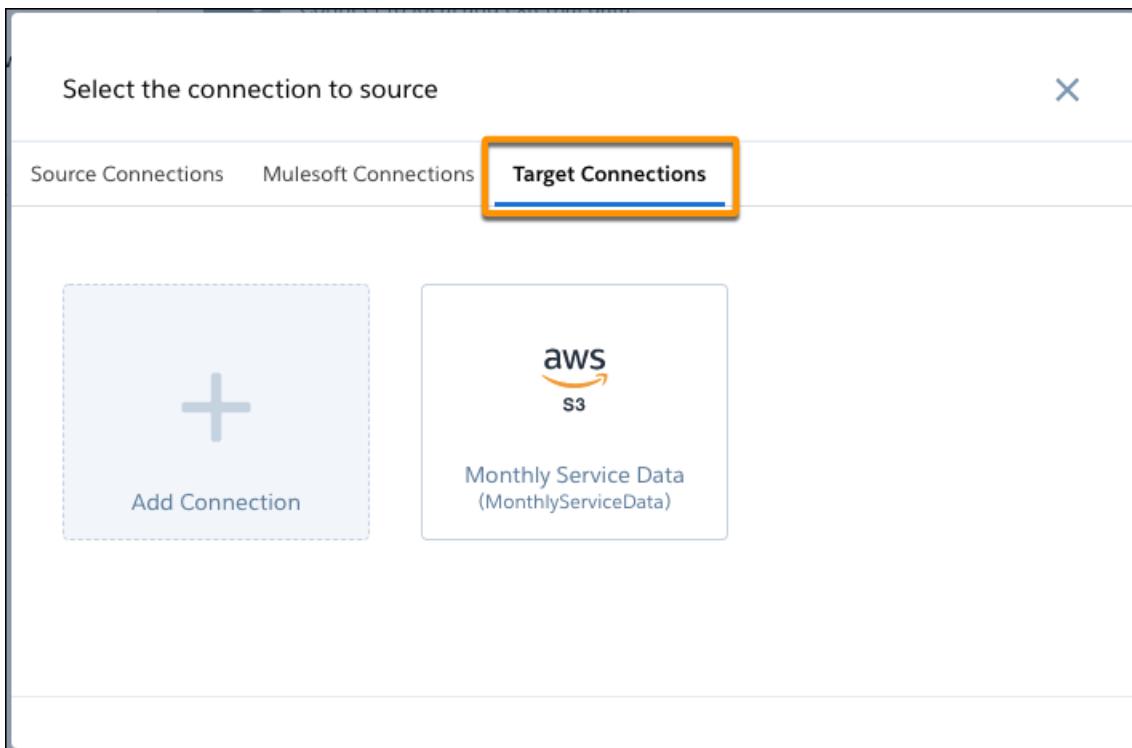
## Output Your Einstein Analytics Data to Amazon S3 (Beta)

Output connectors now let you push your data from Analytics into Amazon S3 when you use Data Prep (Beta). You designed powerful recipes that combine data from multiple sources, add formula fields, and transform data into datasets tailored to your business needs. With output connectors and Data Prep (Beta), datasets are liberated from Analytics and written as one or more .csv files for you to improve your overall business processes with better data. For example, output processed and transformed customer service data for individual agents to understand what they could be doing to improve customer satisfaction.

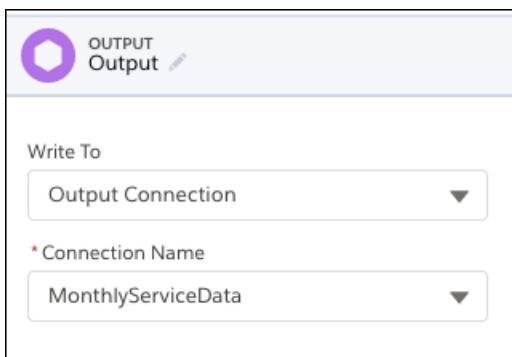
**Where:** This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

As a beta feature, the Amazon S3 output connector is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the Amazon S3 output connector in the [Einstein Analytics Pilot and Beta Connectors group](#) in the Trailblazer Community.

**How:** Create the output connection to Amazon S3 from the Connect section of the Einstein Analytics Data Manager, using the Target Connections tab.



After you enable Data Prep (Beta), build out your recipe with Data Prep (Beta) and add an Output node. Select to write to the Output connection and choose the Amazon S3 connection in the output node of the recipe. In this example, the dataset is saved to the MonthlyServiceData Amazon S3 connection.



Save the recipe. When the recipe runs, Analytics creates a folder in the directory you chose when you created the connection, with a name based on the folder path. For example, if you chose the folder path `...support/servicedata`, a new folder `servicedata` is created at the path `...support/servicedata/servicedata`. The new folder contains the recipe outcome file `servicedata_0.csv`, a `schema.json` metadata file, and a `_SUCCESS` file. When you run the recipe again, the files previously generated are deleted and the new version of the files are written.

#### SEE ALSO:

[Salesforce Help: Amazon S3 Output Connection \(can be outdated or unavailable during release preview\)](#)

[Prepare Data with the Next Generation of Data Prep \(Beta\)](#)

## Write Your Einstein Analytics Data to Snowflake (Beta)

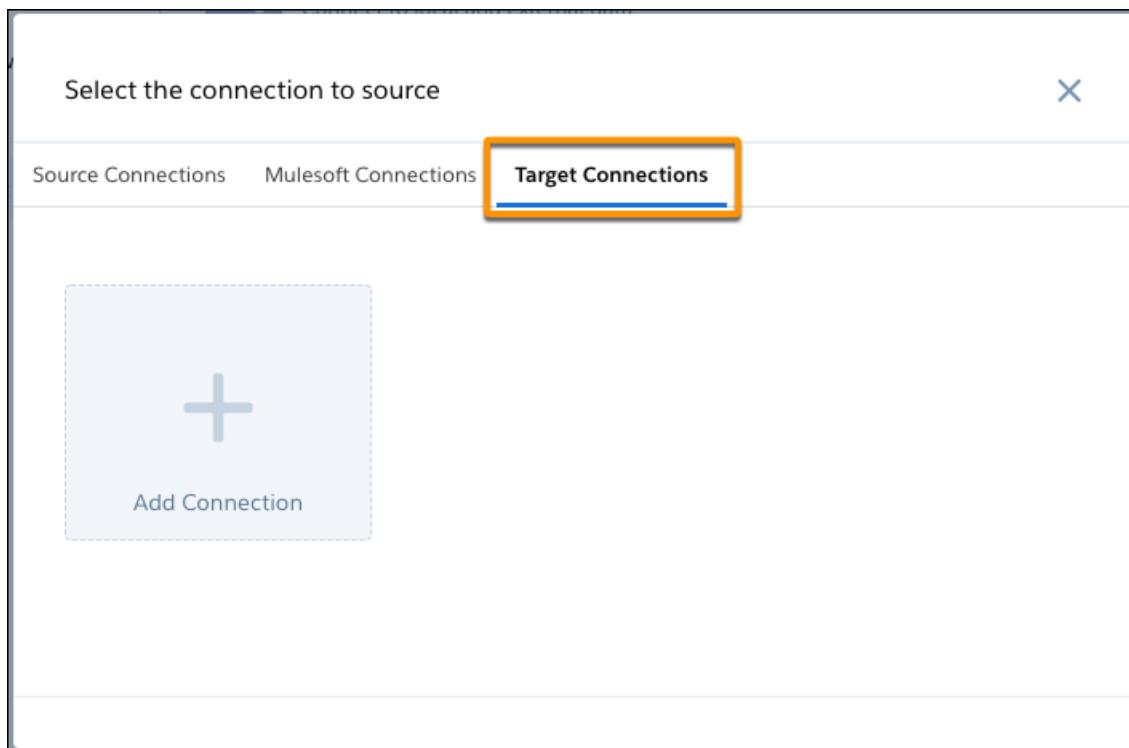
Output connectors let you push your data from Analytics into Snowflake when you use Data Prep (Beta). You designed powerful recipes that combine data from multiple sources, add formula fields, and transform data into datasets tailored to your business needs. With output connectors and Data Prep (Beta), datasets are liberated from Analytics and written as a table for you to improve your overall business processes with better data.

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

As a beta feature, the Snowflake output connector is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the Snowflake output connector in the [Einstein Analytics Pilot and Beta Connectors group](#) in the Trailblazer Community.

**When:** This connector will be added during the Summer '20 release.

**How:** Create the output connection to Snowflake from the Connect section of the Einstein Analytics Data Manager, using the Target Connections tab.



Build out your recipe with Data Prep (Beta) and add an Output node. Select to write to the Output connection and choose the Snowflake connection in the output node of the recipe. Save the recipe. When the recipe runs, Analytics writes the outcome to Snowflake.

## Sync Complete TinyInt Column Values from Select AWS RDS Connectors

The full range of TinyInt data column values, from -127 to 127, is now synced from AWS RDS MySQL, Maria DB, and Aurora MySQL connections. Previously, this data type was interpreted as a bit that showed 0 or 1. Update your logic, filters, or transformations that rely on the 0 or 1 behavior to use the actual values instead.

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

**Why:** The actual values help you use these columns more extensively in your datasets and recipes. You see the values throughout Analytics, including data preview and bulk extracts.

### SEE ALSO:

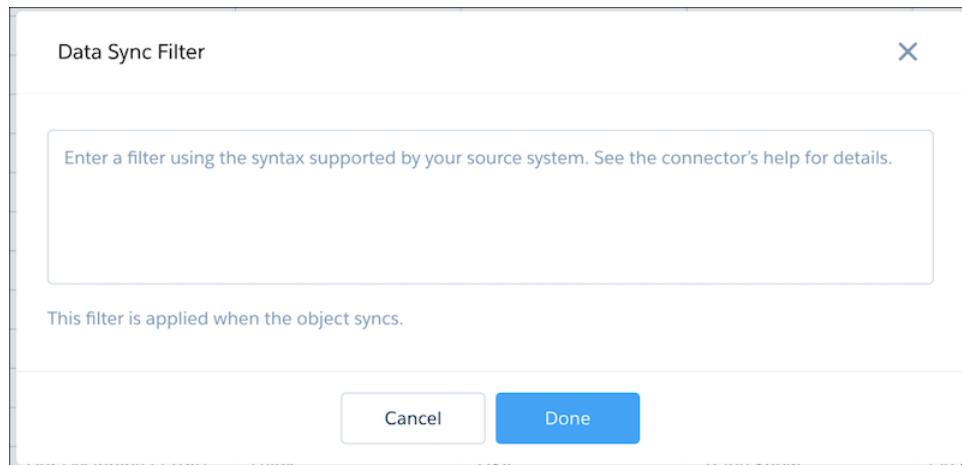
[Salesforce Help: Amazon RDS Connection \(can be outdated or unavailable during release preview\)](#)

## Filter Data Synced from the Google BigQuery Standard SQL Connector

To speed up data sync and pull only the data that you need, you can now use data sync filters with connected objects from the Google BigQuery Standard SQL connector. Previously, you imported all data from a remote object and used a dataflow or recipe filter to limit the external data in a dataset. Now, you can exclude unnecessary or sensitive data from syncing to Analytics in the first place. For example, set up a filter to import only Canadian marketing data if you are analyzing your Canadian business unit's progress.

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

**How:** Click  from the Preview Source Data page when you add or modify a connected remote object. Enter a filter using Google's Standard SQL Query Syntax, described in [Google's Data Analytics Help](#).



## Sync Remote Data to Government Cloud Orgs with Connectors That Comply with FIPS 140 Requirements

In conjunction with US government cryptographic requirements, Analytics connectors now use FIPS 140 validated encryption. The list of connectors available to Government Cloud orgs will expand as FIPS 140 validated encryption is confirmed.

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

The current list of connectors available to Government Cloud orgs is available in the knowledge article [Select Einstein Analytics connectors are available to Government Cloud orgs](#) (can be outdated or unavailable during release preview).

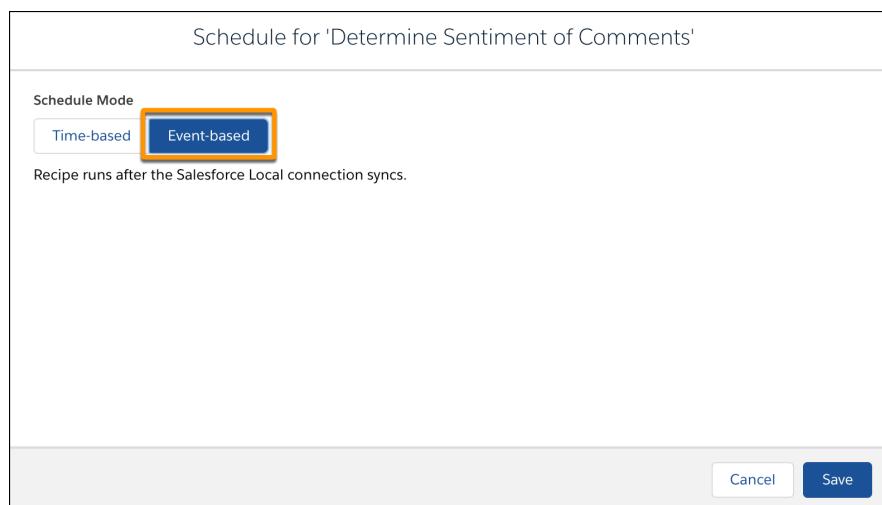
## Always Get the Latest Data by Scheduling Recipes to Run After Syncs

Determining the right time to schedule a recipe is difficult when you don't know how long the data sync takes. So stop guessing what time to run the recipe and schedule it to start automatically after the data sync completes.

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

**Why:** Recipes that run on a time-based schedule can result in stale data if the recipe starts before the sync completes. To prevent this issue, use an event-based schedule. You can use event-based schedules for recipes created with Data Prep or Data Prep (Beta).

**How:** In the Recipes subtab in Data Manager, click the dropdown (▼) to the right of the recipe, and select **Schedule > Event-based**.



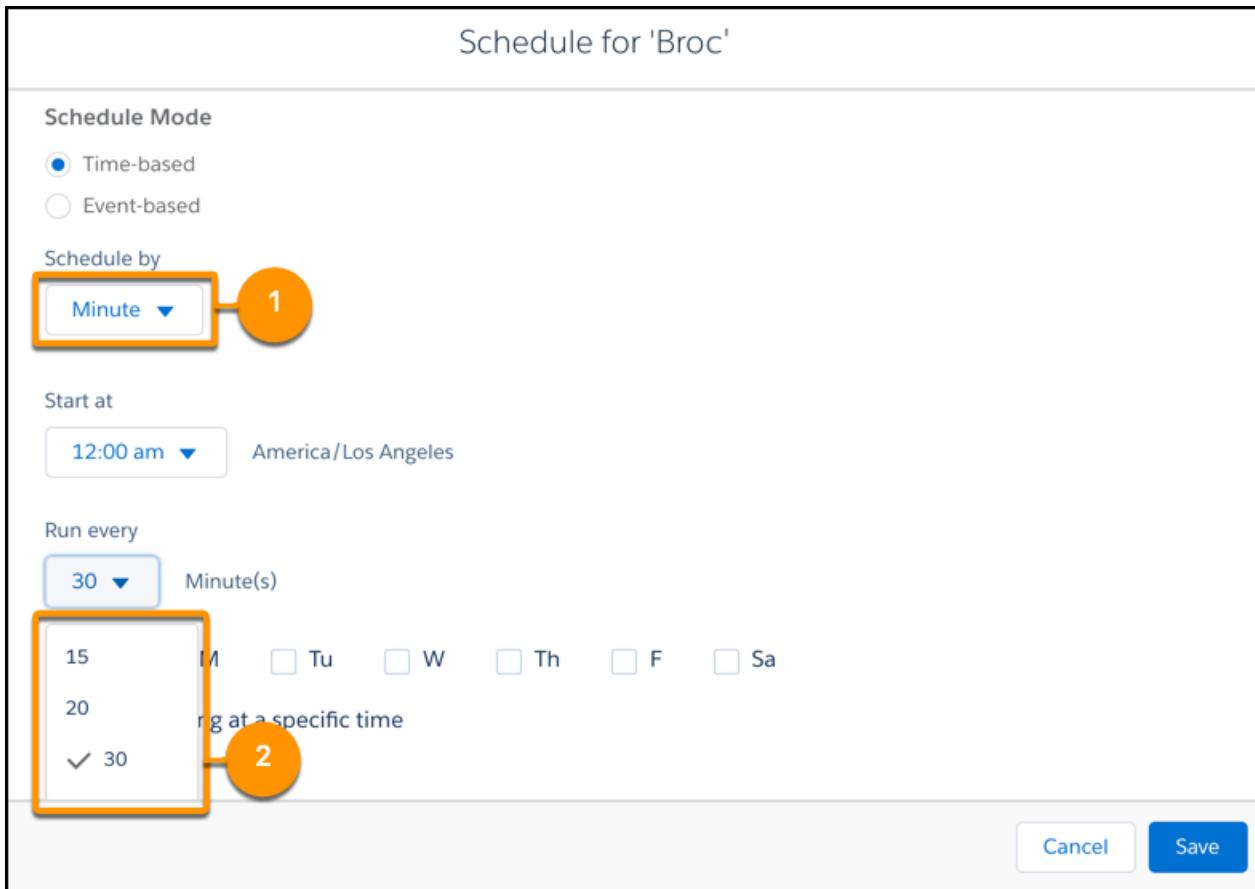
The recipe runs every time the sync runs—not the other way around. If multiple recipes and dataflows use event-based scheduling for the same connected object, they all run after the sync completes.

## Keep Your Data More Up-To-Date with Shorter Schedule Intervals

You can now schedule data sync, dataflow, and recipe jobs to run every 15, 20, 30, or 60 minutes with sub hour scheduling if your org uses an Einstein Analytics Plus license. You previously contacted Salesforce Support to enable subhourly scheduling. If you don't have an Einstein Analytics Plus license, you must still contact Salesforce Support. This change doesn't apply to sandboxes.

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

**How:** To schedule more frequent jobs, select **Minute** (1) in the Schedule By field and then choose the 15, 20, or 30-minute interval (2) in the Run Every field.



If the scheduler tries to run a data sync, dataflow, or recipe that's already running or queued, the currently running job continues, but the new job fails. To prevent scheduled jobs from failing, ensure that the schedule interval is greater than the time it takes to complete the job. See historical runs to determine how much time the job takes to complete.

#### SEE ALSO:

[Salesforce Help: Troubleshoot Canceled Data Sync and Dataflow Runs Due to Overlapping Schedules](#) (can be outdated or unavailable during release preview)

## Keep Tabs on Recipe Jobs with Notifications

Set recipe notifications to receive an email notification when a recipe finishes. You can be notified only when there are warnings, only when the recipe fails, or every time the recipe finishes. You can also set an elapsed time notification to notify you when a recipe takes longer than a specified length of time.

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

**Who:** To subscribe to recipe notifications, you must have the Edit Analytics Dataflows or Edit Recipes user permission.

**How:** In the Recipes subtab in Data Manager, click the dropdown (▼) to the right of the recipe, and select **Notification**. This option appears for both Data Prep and Data Prep (Beta) recipes.

The screenshot shows the Einstein Data Manager interface. On the left, there's a sidebar with options like Monitor, Dataflows & Recipes (which is selected), Data, and Connect. The main area is titled "Dataflows & Recipes" with a sub-section "RECIPES". It lists several recipes with columns for Name, Last Modified, Last Modified..., Run Status, Next Run, Target Dataset, and a dropdown menu. A context menu is open over the first recipe, showing options like "Edit with Data Prep (Beta)", "Duplicate", "Run Now", "Schedule", and "Notification". The "Notification" option is highlighted with a red box.

Name	Last Modified	Last Modified...	Run Status	Next Run	Target Dataset	Target Database...
Combine Opps from Different Regions	Dec 18, 2019 at	Fred Williamson	Success	Not Scheduled	Combine Opps f	Not Cre ▾
Convert Dim to Date	Today at 1:11 AM	Fred Williamson	Success	Not Scheduled	Convert Dim	<input type="button" value="Edit with Data Prep (Beta)"/>
Opps with Predictions	Beta!	Apr 24, 2020 at	Fred Williamson	Success	Not Scheduled	Opps with Pre
Predict Missing Values	Aug 21, 2019 at	Fred Williamson	Success	Not Scheduled	Opportunities	<input type="button" value="Edit with Data Prep (Beta)"/>
WorldWide Opportunities - Clean	Beta!	Apr 22, 2020 at	Fred Williamson	Success	Not Scheduled	WorldWide C
Drop Columns Transformation	Beta!	Apr 24, 2020 at	Fred Williamson	Success	Not Scheduled	Drop Column
Combine Worldwide Opportunities	Beta!	Apr 22, 2020 at	Fred Williamson	Success	Not Scheduled	Combine Wo
Add Sentiment for Review Comments	Beta!	Apr 22, 2020 at	Fred Williamson	Success	Not Scheduled	Add Sentiment f

From the Notify Me About picklist, select what you want to be notified about. You can be notified only when there are warnings, only when the recipe fails, or every time the recipe finishes.

This is a modal dialog titled "Send Notifications for 'Temp Opps Recipe'". It contains a "Notify Me About" section with a dropdown menu showing "Warnings" (selected) and "Elapsed time notification" (unchecked). Below that is a "Recipient Email" field containing "test@1564512587726.org". At the bottom are "Cancel" and "Save" buttons.

To receive an elapsed time notification, select **Elapsed time notification** and the number of hours and minutes.

**Note:** By default, email notifications are sent only to the person setting the notifications. Other people with the Edit Analytics Dataflows or Edit Recipes permission can subscribe to a recipe by setting notifications.

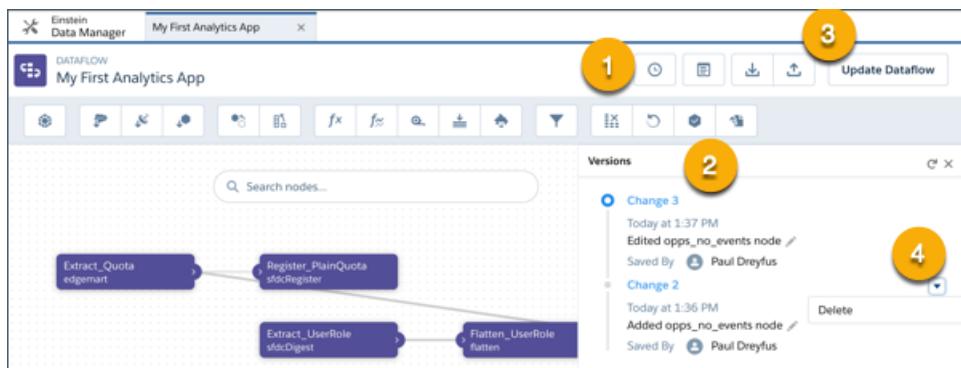
## Restore Previous Dataflow Versions Easily with History Feature

Using Dataflow History, edit a dataflow and save new versions along with brief descriptions of what's changed. When you save a new version, it becomes the live version that keeps Analytics data up to date. All previous versions can be viewed through the Analytics Data Manager, and you can quickly revert to or delete any of them.

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

**How:** In the Analytics Data Manager, select **Dataflows & Recipes**. Open a dataflow, then click the history icon (1) All versions of the dataflow appear in the **Versions** panel (2), with the live version on top.

When you finish working on the dataflow, click **Update Dataflow** (3), enter a description in the **Version History** field, and click the **Update Dataflow** button. That becomes the current version and it appears at the top of the **Versions** panel. To revert to a previous version, click its name and then click **Update Dataflow**. Delete a previous version by click **Delete** from the version options (4).



## Analytics Prebuilt Apps: Appointment Analytics App, Template Gallery, Enhancements to Industries and Customer Lifecycle Apps

Deliver personalized service with Appointment Analytics dashboards populated with Lightning Scheduler data. Find the best templates for your apps in the Template Gallery. Get insights into lead conversion and improve branch manager service appointments with Wealth Management Analytics. Understand insurance customer retention trends from the Insurance Analytics Customers Gained/Lost dashboard. And automatically add the right survey data to Customer Lifecycle Analytics with an enhanced wizard.

### IN THIS SECTION:

#### [Personalize Your Service Appointments with Insights from the Appointment Analytics App](#)

Appointment Analytics lets you make data-driven decisions to help deliver the right service resources to the right customer at the right time. Use the template to create an app with dashboard visualizations of customer appointments data from Lightning Scheduler.

#### [Discover Featured Templates in the Template Gallery](#)

Get inspired by perusing the app template overviews in the Einstein Analytics Template Gallery. The gallery gives you a quick view of the potential for your dashboards and helps you to select the best template for your use case. The enhanced gallery sports screenshots and categorization tags for quick reference, and it includes a Recommended section with the most popular templates.

### SEE ALSO:

[Let Your Insurance Data Work Even Harder with Financial Services Einstein App Enhancements](#)

[Let Your Wealth Management Data Work Even Harder with Financial Services Einstein App Enhancements](#)

[Analyze Forecast Changes and Improve Your Business](#)

[Monitor Business Performance with a Single Dashboard \(Beta\)](#)

[Customer Lifecycle Analytics: Topic Analysis, Customer Lifecycle Maps, Response Analysis, Internal Survey Analysis, and Enhanced Configuration Wizard](#)

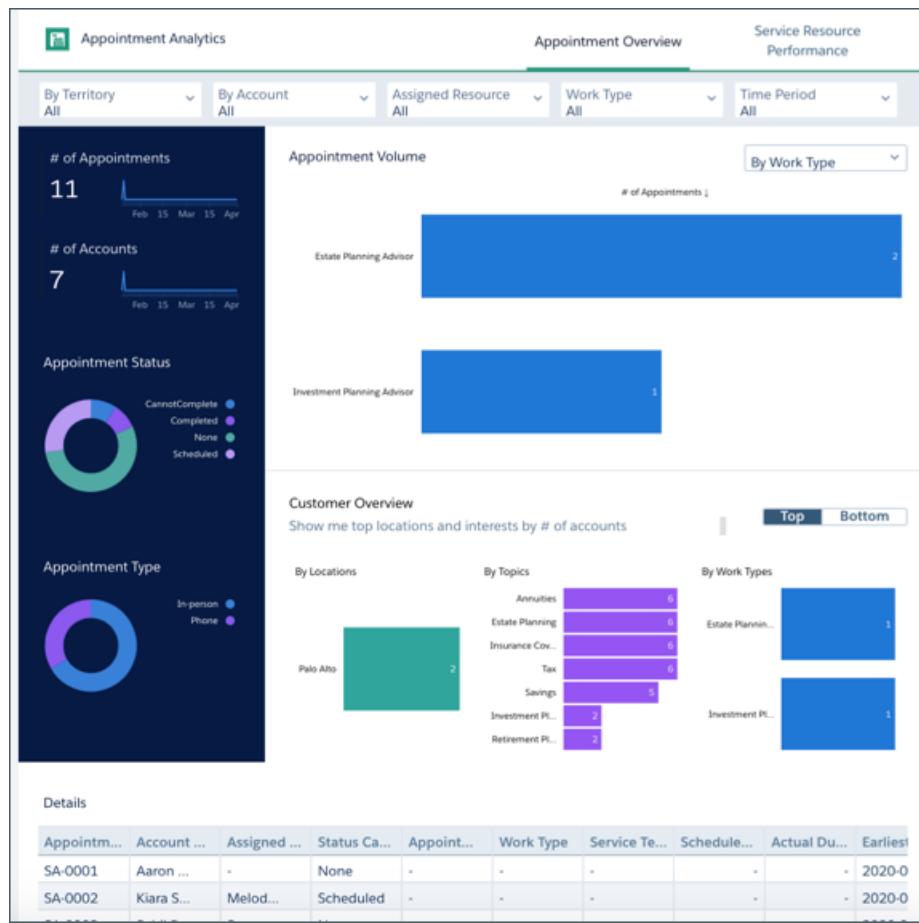
[Grow Your Business and Improve Retail Execution](#)

## Personalize Your Service Appointments with Insights from the Appointment Analytics App

Appointment Analytics lets you make data-driven decisions to help deliver the right service resources to the right customer at the right time. Use the template to create an app with dashboard visualizations of customer appointments data from Lightning Scheduler.

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

**Why:** Understand how your team has been allocated for service appointments by viewing past appointment volumes across accounts, work types, and territories. Dig deeper to find out how long your reps spend on service appointments to help analyze their performance. And sort appointment key performance indicators by location, type, service rep, and other factors to get key details to help manage the business.



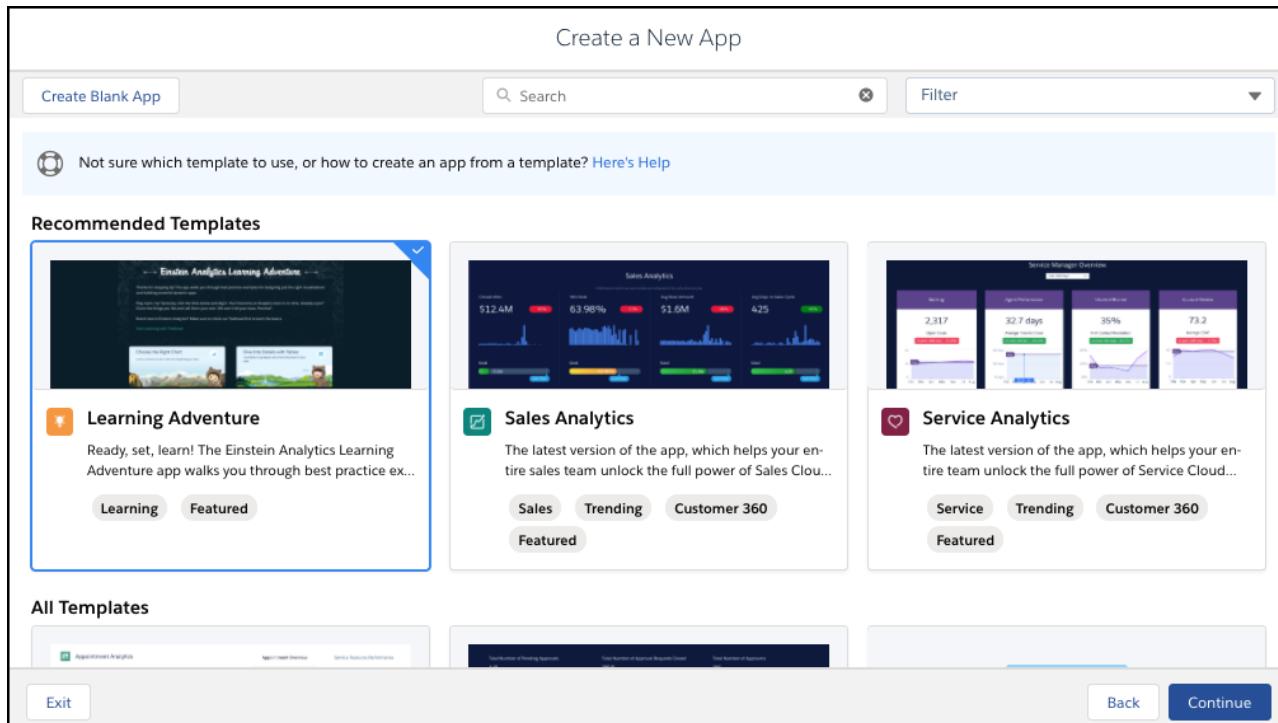
**How:** Go to Analytics Studio, click **Create**, choose **App**, and click **Start from Template**. Select **Appointment Analytics**, and follow the instructions in the wizard to create your app.

## Discover Featured Templates in the Template Gallery

Get inspired by perusing the app template overviews in the Einstein Analytics Template Gallery. The gallery gives you a quick view of the potential for your dashboards and helps you to select the best template for your use case. The enhanced gallery sports screenshots and categorization tags for quick reference, and it includes a Recommended section with the most popular templates.

**Where:** These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** Click **Template Gallery** in the left panel of the Einstein Analytics Studio home page, or click the **Create** button and select **App**. In the gallery, select a template to preview, or click **Create Blank App** to start from scratch.



## Analytics App Building: Analytics VS Code Extension, Data Blending in Explorer, Direct Data Exploration with Snowflake (Beta)

The Analytics VS Code Extension makes Analytics Templates development faster and easier. Expand business insights by blending data from multiple datasets in the explorer. And explore data directly in Snowflake without first loading it into Salesforce or preparing it in datasets (Beta).

 **Note:** Looking for [new and changed Einstein Analytics REST APIs](#)? In this release, we added the Einstein Analytics API updates with the other new and change items for APIs near the end of the Development section. We're still covering all the changes that you want to know about. Organizing all Salesforce API content in one place makes it easier to for developers to find. Let us know what you think. Use the feedback form on release note topics or tweet us at [@salesforcedocs](#).

### IN THIS SECTION:

#### [Accelerate Analytics Template Development with the Analytics VS Code Extension](#)

The Analytics extension for Visual Studio Code (VS Code) gives developers a faster, more efficient path to developing templates based on Analytics apps.

### [Explore Multiple Datasets with a Single Query \(Generally Available\)](#)

Answers to business questions sometimes require data that's not in the current dataset. Or, your dataset structure may not match the way you want to explore your data. With data blending, there's no need to go back into data prep and create joined datasets. Now you can blend data from multiple datasets in the explorer and query the blended data just as you would a single dataset.

### [Gain Insights on Data Directly in Snowflake \(Beta\)](#)

Run explorations on your data in Snowflake warehouse without loading data into Salesforce or preparing it in datasets. After you set up a live connection to Snowflake, you can run queries on the Snowflake schema associated with the connection in real time. You can even build dashboard charts and tables based on the queries that you run on Snowflake data.

### [Accent Vital Pivot Table Data with Formatting](#)

Draw attention to the decision-driving information in pivot tables by formatting them. To highlight data that meets specific criteria, set conditional formatting rules on a column. Or, highlight data based on conditions set on a reference column. To make a column stand out without applying any conditions, jazz it up with text alignment and text styles.

### [Summarize Data by Multiple Measures in Pivot Tables](#)

Pivot tables are no longer limited to one measure. Summarize key fields in your datasets and surface more insights in a single lens with multiple measures in pivot tables.

### [Add Dynamic Values to Dashboard Text Without Code](#)

Numbers and charts are great for visualizing data, but sometimes it helps to put it in writing. That's why we made it easier to add data from queries directly to your dashboard text. For example, want to say "Sales revenue this quarter is \$1,234,567", or "Sita closed the most opportunities this month"? It's easy when "\$1,234,567" and "Sita" come straight from your data and get updated dynamically. Best of all, you can add dynamic values to your dashboard text without creating a binding to another query with code.

### [Sort Data in Dashboards with a Single Click](#)

Sort records in dashboard tables or charts without having to code—regardless of the underlying query type. To sort on a field in ascending or descending order, simply click the field header you want to sort the dashboard component by.

### [Choose Where Users Open Embedded Dashboards](#)

Now you can set Einstein Analytics embedded dashboards to open in the Salesforce Lightning Analytics tab or you can disable the launch button. The default launch button is at the top right of the dashboard header, that launches the dashboard in the Einstein Analytics Studio app.

## Accelerate Analytics Template Development with the Analytics VS Code Extension

The Analytics extension for Visual Studio Code (VS Code) gives developers a faster, more efficient path to developing templates based on Analytics apps.

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

**Why:** The Analytics VS Code extension lets you access all Salesforce CLI Analytics commands through VS Code instead of having to use SFDX to run the commands. Also, for editing Analytics template JSON files, it includes all the features you'd expect when you use VS Code, including:

- Hover text that explains the use of code elements.
- Code completion and correction, which lists available options for such things as template JSON attributes, types, actions.
- Code formatting and validation.
- Error checking and quick fixes.
- Internal linking between template files for easy access to all parts of the template.

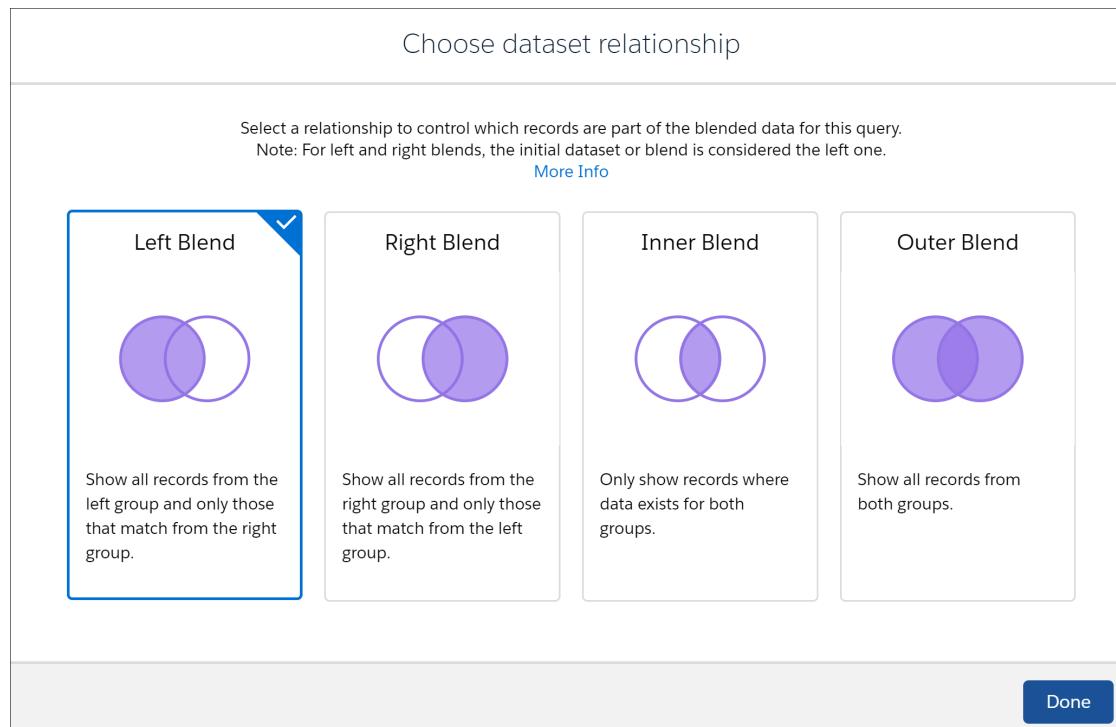
**How:** In VS Code, install the Salesforce Analytics Extension Pack from the Extensions Marketplace. Then use Analytics CLI commands right from VS Code to perform all the tasks associated with Analytics template development.

## Explore Multiple Datasets with a Single Query (Generally Available)

Answers to business questions sometimes require data that's not in the current dataset. Or, your dataset structure may not match the way you want to explore your data. With data blending, there's no need to go back into data prep and create joined datasets. Now you can blend data from multiple datasets in the explorer and query the blended data just as you would a single dataset.

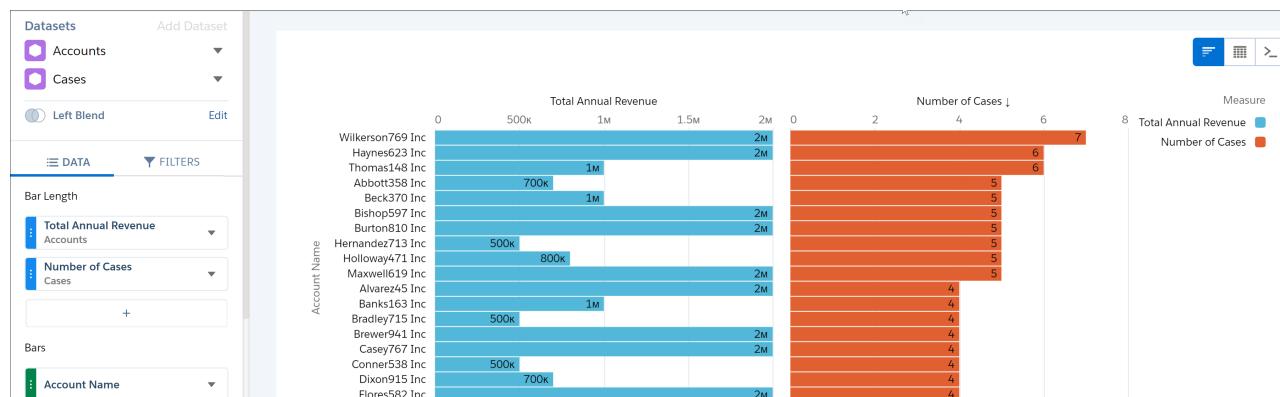
**Where:** This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** From the Einstein Analytics explorer's dataset panel, click **Add Dataset** to add up to four datasets. Depending on which records you want to include in the blended data query, choose left, right, inner, or outer blend. For example, to include all the records from the initial dataset and only those records that match them from the added datasets, choose Left Blend.



For side-by-side comparisons, select the field to group by from each dataset. When defining groups, measures, and filters, select fields from any of the blended datasets.

Let's say you blend data from the Accounts and Cases datasets. You can now draw a visual comparison between annual revenue from each account and the number of support tickets associated with the account.



Now that data blending is generally available, these features are supported.

- Formulas
- Filters on date fields
- Global filters

## SEE ALSO:

[Salesforce Help: Explore Multiple Datasets with a Single Query](#) (can be outdated or unavailable during release preview)

## Gain Insights on Data Directly in Snowflake (Beta)

Run explorations on your data in Snowflake warehouse without loading data into Salesforce or preparing it in datasets. After you set up a live connection to Snowflake, you can run queries on the Snowflake schema associated with the connection in real time. You can even build dashboard charts and tables based on the queries that you run on Snowflake data.

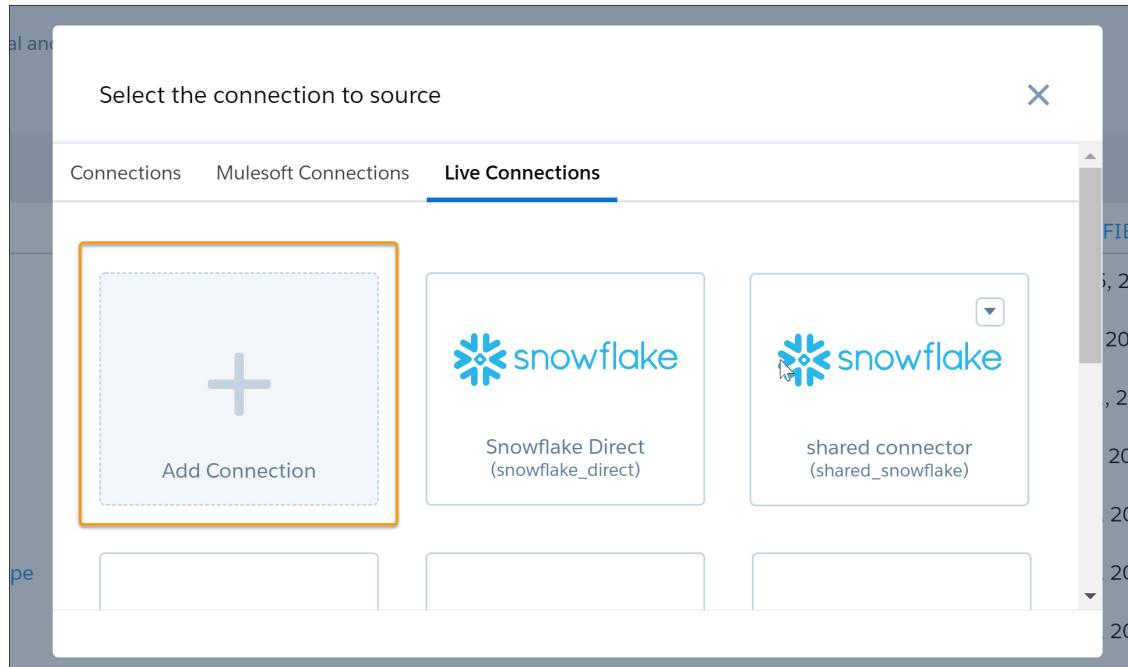
**Where:** This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

 **Note:** As a beta feature, Einstein Analytics Salesforce Direct Data for Snowflake is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or about it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the feature in the [Trailblazer Community](#).

**Who:** Exploring Snowflake data using a live connection requires the Explore External Data Directly permission.

**How:**

1. To opt your org into the Salesforce Direct Data for Snowflake (Beta), select `Enable Einstein Analytics Direct Data for external data sources` in the Analytics Settings page.
2. On the Connect tab of the Einstein Analytics data manager, click **Connect to Data**.
3. Click **Add Connection** on the Live Connections tab and enter its settings.



When setting up the connection, use the Analytics app setting to control which Salesforce users, roles, and groups have access to explore Snowflake data with the connection. When done, click **Save** or **Save and Test**.

 **Note:** When creating connections to Snowflake, we recommend using a Snowflake user account with read-only access.

From the All Items tab in Analytics Studio, users can view the Snowflake connections under Live Data.

Live Data						<a href="#">View All</a>
Title	App	Type	Created By	Last Modified By	Last Modified	
Snowflake Direct	Snowflake	SnowflakeDirect	User	User	01/27/20, 12:24 PM	
snowflake atr	Snowflake	SnowflakeDirect	User	User	01/27/20, 12:53 PM	
shared connector	Snowflake	SnowflakeDirect	User	User	01/27/20, 12:53 PM	
Live Connection Test	Snowflake	SnowflakeDirect	User	User	01/28/20, 5:48 PM	
snowflake so	Snowflake	SnowflakeDirect	User	User	02/11/20, 12:19 PM	

To begin exploring, click a connection under Live Data and select a data object that is available with the connection.

In the beta release, Direct Data for Snowflake includes these features.

- Charts, values, and pivot tables
- Fields panel
- Query actions
- Filtering on measures, dimensions, and absolute and relative dates

- Filter logic and aggregate filters

## SEE ALSO:

[Salesforce Help: Explore Data Directly in Snowflake \(Beta\)](#)

[Salesforce Help: Create a Live Connection to Snowflake \(Beta\)](#)

## Accent Vital Pivot Table Data with Formatting

Draw attention to the decision-driving information in pivot tables by formatting them. To highlight data that meets specific criteria, set conditional formatting rules on a column. Or, highlight data based on conditions set on a reference column. To make a column stand out without applying any conditions, jazz it up with text alignment and text styles.

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

**Why:** Let's say you're reviewing the annual revenue from all accounts by country and industry. In the accounts table pivoted on country, applying conditional formatting to the annual revenue column can help you quickly identify where to focus your sales efforts.

Billing Country	Australia	Belgium	Brazil	Canada	China
Industry	Annual Revenue	Annual Revenue	Annual Revenue	Annual Revenue	Annual Revenue
Finance	19,074,554,000	21,566,765,000	11,783,287,000	120,324,582,000	18,616,499,000
Healthcare	8,526,057,000	917,642,000	19,336,466,000	153,792,344,000	16,052,055,000
Insurance	31,768,706,000	11,196,954,000	56,240,725,000	209,067,710,000	28,733,170,000
Manufacturing	51,593,168,000	36,055,996,000	18,273,556,000	219,649,653,000	38,210,333,000
Media	25,664,901,000	12,000,324,000	34,089,321,000	189,686,163,000	10,083,409,000
Retail	17,578,989,000	13,389,320,000	9,515,635,000	124,813,568,000	18,214,744,000
Technology	14,326,044,000	71,525,400,000	20,883,685,000	236,261,880,000	22,274,017,000
Telecommunications	10,012,227,000	15,859,737,000	14,825,370,000	140,916,874,000	3,148,299,000
Transportation	27,870,497,000	42,410,071,000	3,513,243,000	155,763,336,000	24,450,791,000
Utilities	13,766,708,000	30,571,752,000	19,710,280,000	56,755,733,000	17,891,548,000

Conditional Formatting X
  
 Apply to this Column: Annual Revenue
   
 Reference Column: Annual Revenue
   
 Condition: Is Less Than 
  
 Text Color: █ Background Color: █
  
 Cancel Apply

**How:** In pivot table mode, click to open the Formatting panel. In the Column tab, choose a column other than the pivoted dimension to set the conditional formatting rule on. Also, specify the reference column used to set the formatting rule if it's different from the one you'll apply conditional formatting to. Specify a condition and set the colors for it. Or, set the range values for the condition and select colors for each range. In addition to conditional formatting, you can apply text alignment and styles to any column in the pivot table. When done, apply your changes.

The screenshot shows a pivot table with columns for Billing Country (Sweden, Thailand, Turkey) and Industry (Agriculture, Apparel, Banking, Biotechnology, Communications, Consulting, Education). The 'Industry' column is highlighted with a blue border. To the right, a 'COLUMN' configuration panel is open, showing settings for 'Choose Column' (set to 'Industry'), 'Show Data As' (set to 'Text'), 'Text Alignment' (set to 'Left'), 'Text Style' (set to 'Bold'), and 'Conditional Formatting'. An orange arrow points from the 'Industry' column in the table to the 'Choose Column' dropdown in the panel.

## Summarize Data by Multiple Measures in Pivot Tables

Pivot tables are no longer limited to one measure. Summarize key fields in your datasets and surface more insights in a single lens with multiple measures in pivot tables.

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

**How:** Suppose that you want to compare sales and profits for product categories by region. With the pivot mode selected in the lens, group data by product category and region. Now, by adding the Sum of Profit and Sum of Sales columns, you get to view these important metrics side by side. Previously, you could pivot on only one of these measures.

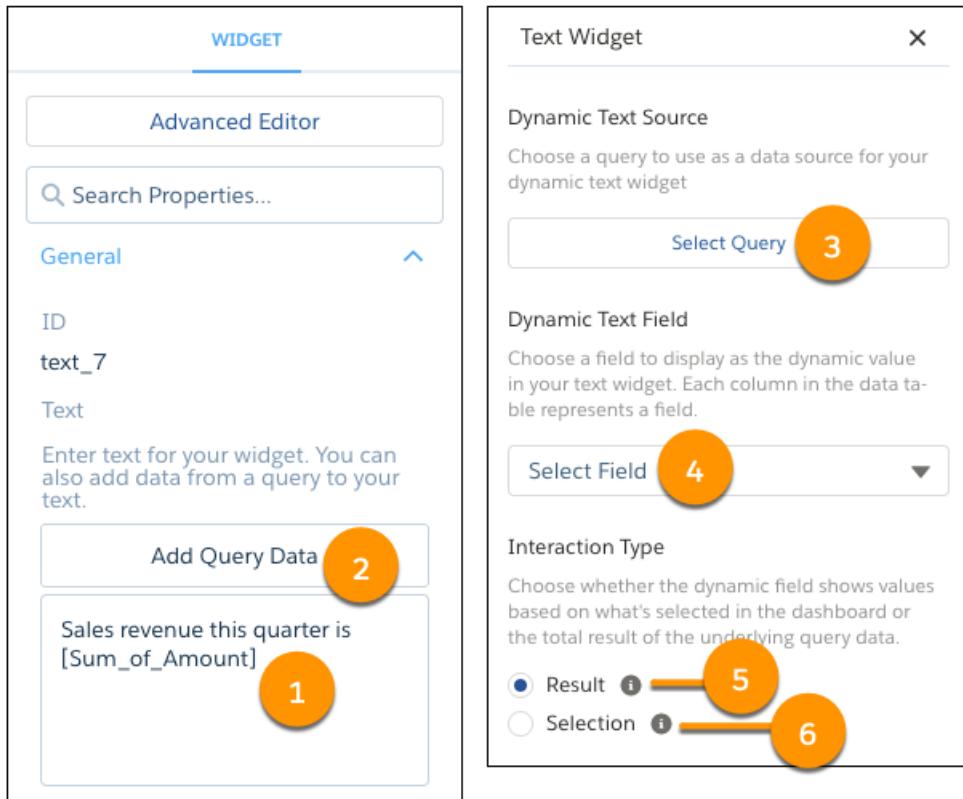
The screenshot shows a pivot table with columns for Region (Central, East, South) and Product Category (Furniture, Office Supplies, Technology). The data pane on the left shows 'Columns' selected, with 'Sum of Profit' and 'Sum of Sales' added to the list. 'Group By' is set to 'Product Category' and 'Region'. An orange box highlights the 'Sum of Profit' and 'Sum of Sales' fields in the 'Columns' list.

## Add Dynamic Values to Dashboard Text Without Code

Numbers and charts are great for visualizing data, but sometimes it helps to put it in writing. That's why we made it easier to add data from queries directly to your dashboard text. For example, want to say "Sales revenue this quarter is \$1,234,567", or "Sita closed the most opportunities this month"? It's easy when "\$1,234,567" and "Sita" come straight from your data and get updated dynamically. Best of all, you can add dynamic values to your dashboard text without creating a binding to another query with code.

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

**How:** Create a text widget, place your cursor where you want to add a dynamic value (1), then click **Add Query Data** (2). Choose a query as the source for your dynamic text (3), then choose a field from the source query (4). Available fields from the query appear as columns in a table.



You can remove a dynamic value by deleting it in the text box.

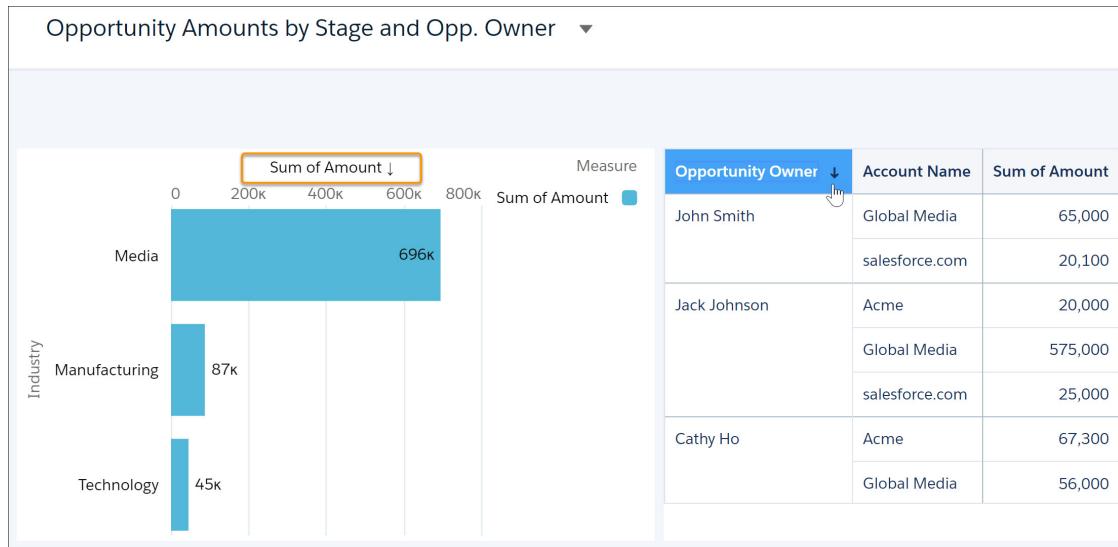
You can also choose whether a dynamic text value is based on the result of the query (5), or whatever's selected in the dashboard (6). Keep in mind that if you show values based on selection, the text is blank until you make a selection in the dashboard.

## Sort Data in Dashboards with a Single Click

Sort records in dashboard tables or charts without having to code—regardless of the underlying query type. To sort on a field in ascending or descending order, simply click the field header you want to sort the dashboard component by.

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

**How:** In this example, to arrange opportunities from highest to lowest values by Industry, click **Sum of Amount** in the bar chart. And, to sort the Opportunities table by its owner, click the **Opportunity Owner** column header.

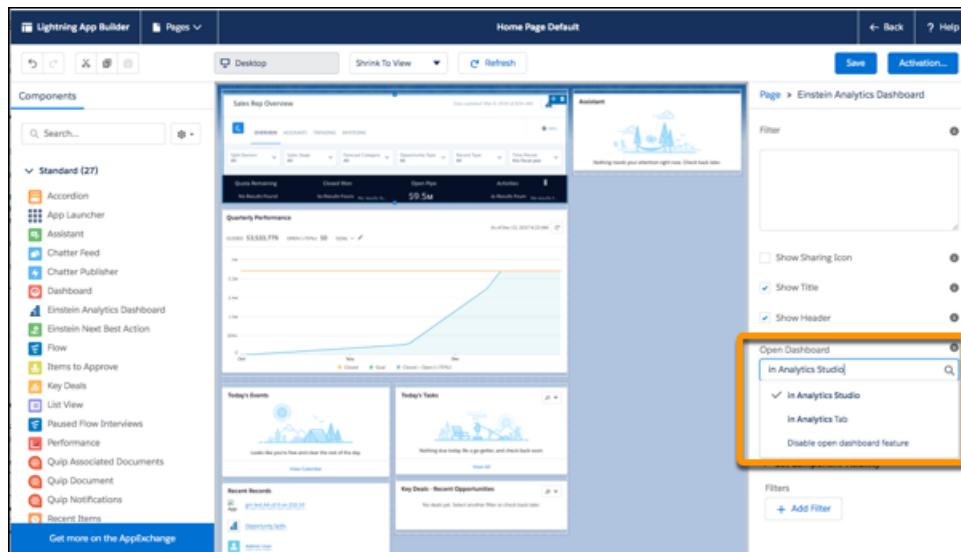


## Choose Where Users Open Embedded Dashboards

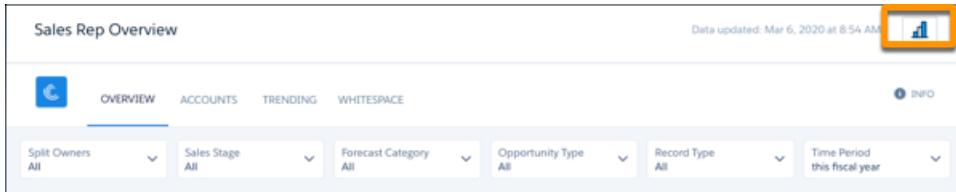
Now you can set Einstein Analytics embedded dashboards to open in the Salesforce Lightning Analytics tab or you can disable the launch button. The default launch button is at the top right of the dashboard header, that launches the dashboard in the Einstein Analytics Studio app.

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

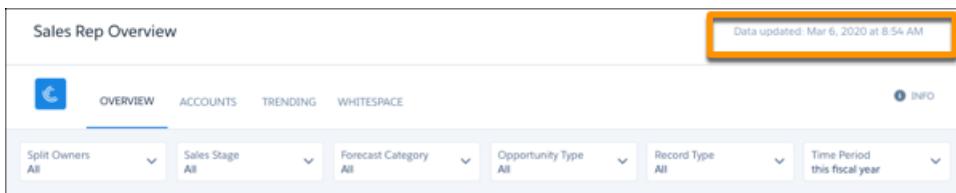
**How:** On the Lightning App Builder page editor, use the Einstein Analytics Dashboard component editor to set the functionality of the launch button. Click the **Open Dashboard** text box to display the options and make a selection.



The changes show in the page editor and on the embedded dashboard when you save your changes.



An embedded dashboard with the launch button.



An embedded dashboard with the launch button disabled.

## Einstein Discovery: Tree-Based Modeling Types, Random Forest Models (Pilot), and Deployed Model Replacement

Get the best predictions from three modeling algorithms. Create accurate models using random forest algorithms (pilot). Replace deployed models easily.

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### IN THIS SECTION:

#### [Get the Best Predictions from Three Modeling Algorithms](#)

Einstein Discovery now supports three modeling algorithms to predict outcomes: Generalized Linear Model (GLM), Gradient Boost Machine (GBM), and XGBoost. When you create a story with a predictive model, you can select a specific algorithm. Alternatively, you can have Einstein Discovery use all three algorithms to create the model and then show the results of the model that performed best. You get the winning approach.

#### [Build Accurate Models Using Random Forest Algorithms \(Pilot\)](#)

Einstein Discovery now adds a fourth type of model that is based on a modeling algorithm known as *random forest*. Einstein Discovery uses this supervised learning algorithm to create highly accurate models via multiple decision trees, randomization, and other optimization techniques. You can compare a random forest model with other types of models to determine whether this algorithm provides better accuracy for your story.

#### [Replace Deployed Models Easily](#)

To expedite model improvements, a streamlined workflow makes updating deployed models simpler. If you create a version of a story that is associated with a deployed model, you must redeploy the model based on the updated settings. Previously, you deployed the new model segment, disabled the old deployed model segment, and enabled the new one. You can now simply replace the existing model with the latest settings. The model accuracy monitoring graph indicates when model updates occurred.

#### [Compare Story Versions Using What Changed Insight Cards](#)

Einstein Discovery lets you compare story versions after each iteration and select the best one to analyze or deploy. When you create a story version, Einstein summarizes the impact of your changes, and lets you compare versions side by side to help you decide which version to use.

### [Score Salesforce Records in Bulk](#)

You can now score predictions on multiple records at a time. For example, use bulk scoring to refresh all prediction scores after you deploy an updated model. You can also run bulk scoring on historical data to see how well your model performs. With bulk scoring, you can score all records, a segment of the records, or records that have not reached the terminal state.

### [Remove Bias from Your Insights and Predictions](#)

Businesses aren't always aware of biases in their datasets which can produce discriminatory results. Einstein Discovery lets you identify fields as sensitive during story setup, and highlights these sensitive fields in story insights. You can even filter insights using these sensitive fields to further examine their impact on story outcomes and ensure that bias doesn't yield damaging results.

### [Assess Model Quality for Linear Regressions with Root Mean Square Error](#)

In Model Manager, the Overview tab for linear regressions now displays the average Root Mean Square Error (RMSE) instead of the Mean Squared Error (MSE). RMSE is a more easily interpretable statistic that measures the difference between the values predicted by the model and the actual values. The RMSE now appears whenever you open a prediction for a linear regression in Model Manager.

### [Get Transparent Access to Model Details](#)

You no longer need the Share Einstein Discovery Stories user permission to view the R Code tab in Model Metrics. Now anyone can examine the underlying details of the model that Einstein Discovery created from your story. The Share Einstein Discovery user permission now applies only to exporting insights to Quip.

### [Track Prediction Performance with Background Monitoring](#)

Prediction performance monitoring in Model Manager no longer requires the SFDCLiveMetricsFlow dataflow. This process now runs in the background, so the dataflow no longer appears in Einstein Analytics Data Manager under the Monitor or Dataflows & Recipes tabs.

### [Recalculate Correlations for Updated Variable Settings](#)

In story setup, if you change variable (field) settings, you can quickly see the effect of your changes by recalculating correlation percentages. That way, you can decide the best settings to use for your story analysis, resulting in more relevant insights and better predictions.

#### SEE ALSO:

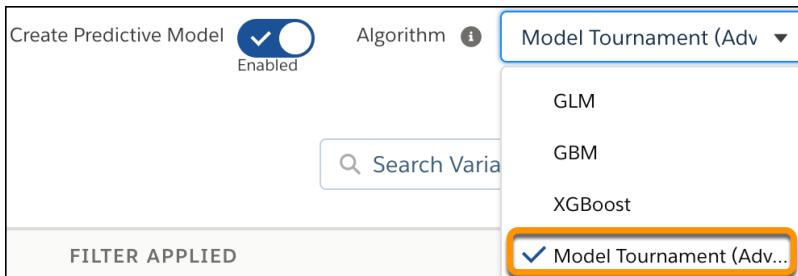
[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## Get the Best Predictions from Three Modeling Algorithms

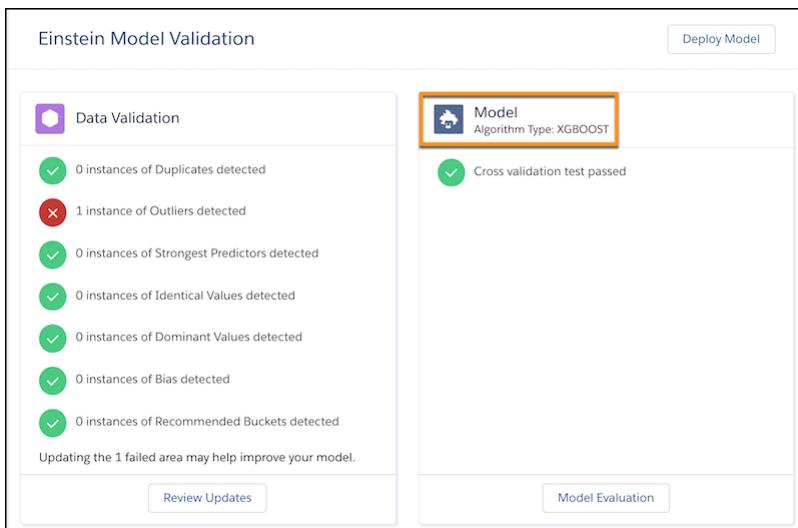
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**Where:** This change applies to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** In story setup, Einstein Discovery automatically uses GLM by default. To create the model with all three algorithms, select **Model Tournament (Advanced)** from the **Algorithm** list.



In Model Metrics, the Overview tab shows you the algorithm type for the model.



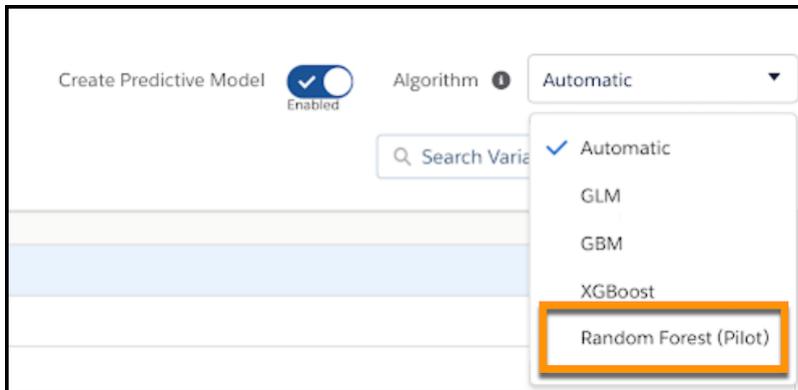
## Build Accurate Models Using Random Forest Algorithms (Pilot)

Einstein Discovery now adds a fourth type of model that is based on a modeling algorithm known as *random forest*. Einstein Discovery uses this supervised learning algorithm to create highly accurate models via multiple decision trees, randomization, and other optimization techniques. You can compare a random forest model with other types of models to determine whether this algorithm provides better accuracy for your story.

 **Note:** We provide random forest model functionality to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Random forest models are not generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available products and features. You can provide feedback and suggestions for random forest models in the applicable IdeaExchange group in the Trailblazer Community.

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

**How:** In story setup, click the **Algorithm** list and select **Random Forest (Pilot)**.



After creating the story, go to Model Metrics and compare the accuracy of this model with models created using other algorithms.

**Note:** For the pilot, random forest models have limited interpretability and cannot be deployed.

#### SEE ALSO:

[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

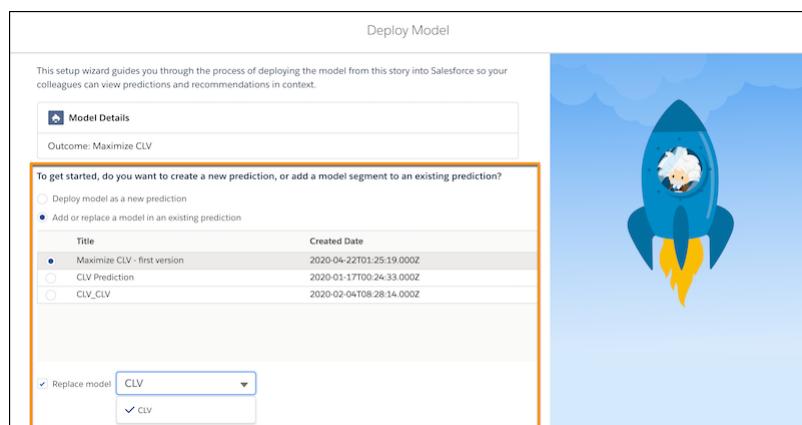
## Replace Deployed Models Easily

To expedite model improvements, a streamlined workflow makes updating deployed models simpler. If you create a version of a story that is associated with a deployed model, you must redeploy the model based on the updated settings. Previously, you deployed the new model segment, disabled the old deployed model segment, and enabled the new one. You can now simply replace the existing model with the latest settings. The model accuracy monitoring graph indicates when model updates occurred.

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

**How:** Open the story version associated with the model you want to update. Change settings to improve it (such as field filters), and create a story version. Verify your changes by comparing story versions, and then compare the new and deployed models in Model Metrics to confirm model improvements.

Next, deploy the new model. In the deployment wizard, select **Add or replace a model in an existing prediction**, select the new model from the list, select **Replace model**, and select the deployed model you want to replace.



Finish deploying the new model, then open it in Model Manager to view its accuracy graph. A vertical bar indicates when the model was updated.



The bar appears as more statistics are collected. To trigger the display of this line, you can run a bulk score on the model.

**Note:** To revert to a previous model, you can deploy the model from its earlier story version and replace the current model in production.

#### SEE ALSO:

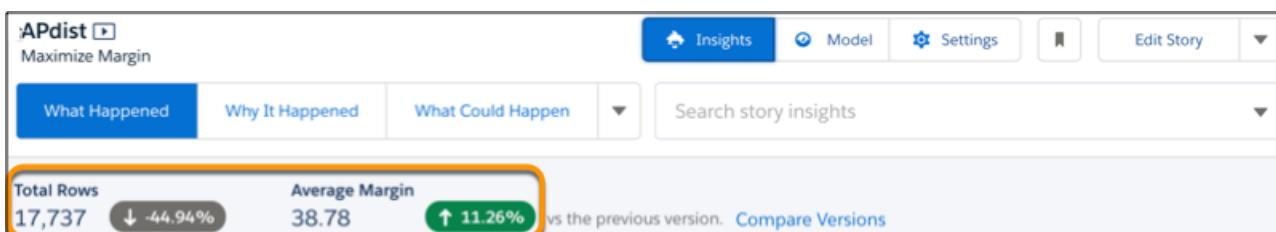
[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

## Compare Story Versions Using What Changed Insight Cards

Einstein Discovery lets you compare story versions after each iteration and select the best one to analyze or deploy. When you create a story version, Einstein summarizes the impact of your changes, and lets you compare versions side by side to help you decide which version to use.

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

**How:** Make changes to an existing story then update the story to create a new version. The What Happened insight displays a change summary that shows you the net difference between versions.



To compare version insights, click **Compare Versions**. Select a previous version to see insights for the selected versions that show in a comparison view.

**Minimize Churn**  
Minimize Churn (TRUE)

Comparing Version 3 to: Version 2 (December 3, 2019 9:05 PM)

CHANGE IN CHURN (TRUE) BY TOTALCHARGES

The correlation between **TotalCharges** and **Churn (TRUE)** is same in both versions.

Churn (TRUE)

TotalCharges Range	Churn (TRUE) - Version 2	Churn (TRUE) - Version 1
18.8 to 84.41	52	52
84.41 to 268.5	40	40
268.5 to ...	30	30

SEE ALSO:

[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

## Score Salesforce Records in Bulk

You can now score predictions on multiple records at a time. For example, use bulk scoring to refresh all prediction scores after you deploy an updated model. You can also run bulk scoring on historical data to see how well your model performs. With bulk scoring, you can score all records, a segment of the records, or records that have not reached the terminal state.

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

**How:** In the Model Manager, open a prediction and click the **Scoring** tab.

Model Manager

Prediction: Predicted Churn

Analyze Accuracy

1 Model

Overview Settings Scoring

Score Records

Score Records

- Score all Customer records
- Score any Customer records that haven't reached a terminal state
- Score a subset of Customer records

Cancel Start Scoring

Select how you want to score records: all records in the dataset, only records that have not reached a terminal state, or a subset of the records based on segmentation filters you specify.

SEE ALSO:

[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

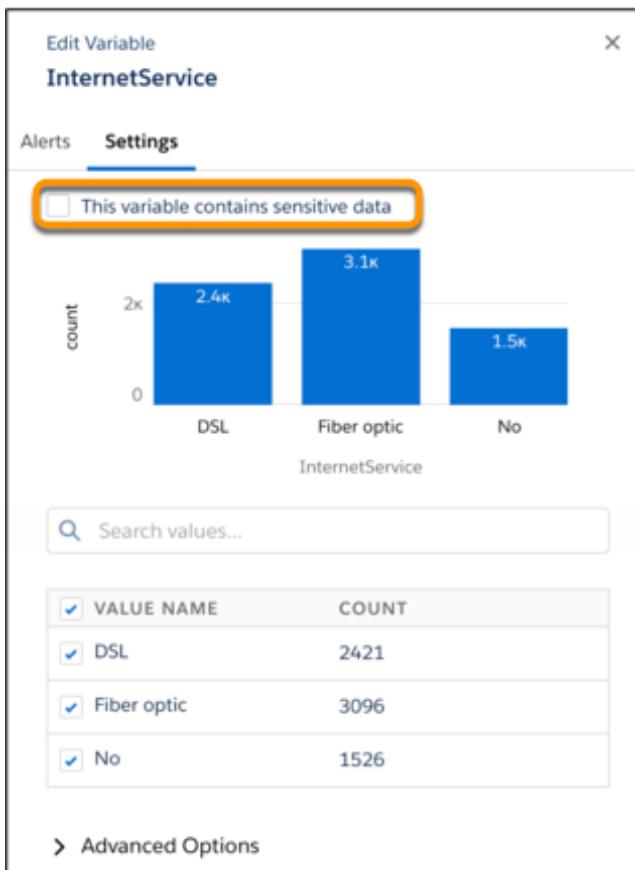
## Remove Bias from Your Insights and Predictions

Businesses aren't always aware of biases in their datasets which can produce discriminatory results. Einstein Discovery lets you identify fields as sensitive during story setup, and highlights these sensitive fields in story insights. You can even filter insights using these sensitive fields to further examine their impact on story outcomes and ensure that bias doesn't yield damaging results.

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

**Who:** Identifying sensitive fields from a story requires the Create and Update Einstein Discovery Stories permission.

**How:** In Story Settings, click the field identified as sensitive and select **This variable contains sensitive data**.



A shield will appear with a dropdown menu to compare sensitive field insights.

### SEE ALSO:

[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

## Assess Model Quality for Linear Regressions with Root Mean Square Error

In Model Manager, the Overview tab for linear regressions now displays the average Root Mean Square Error (RMSE) instead of the Mean Squared Error (MSE). RMSE is a more easily interpretable statistic that measures the difference between the values predicted by the model and the actual values. The RMSE now appears whenever you open a prediction for a linear regression in Model Manager.

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

SEE ALSO:

[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

## Get Transparent Access to Model Details

You no longer need the Share Einstein Discovery Stories user permission to view the R Code tab in Model Metrics. Now anyone can examine the underlying details of the model that Einstein Discovery created from your story. The Share Einstein Discovery user permission now applies only to exporting insights to Quip.

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

SEE ALSO:

[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

## Track Prediction Performance with Background Monitoring

Prediction performance monitoring in Model Manager no longer requires the SFDCLiveMetricsFlow dataflow. This process now runs in the background, so the dataflow no longer appears in Einstein Analytics Data Manager under the Monitor or Dataflows & Recipes tabs.

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

SEE ALSO:

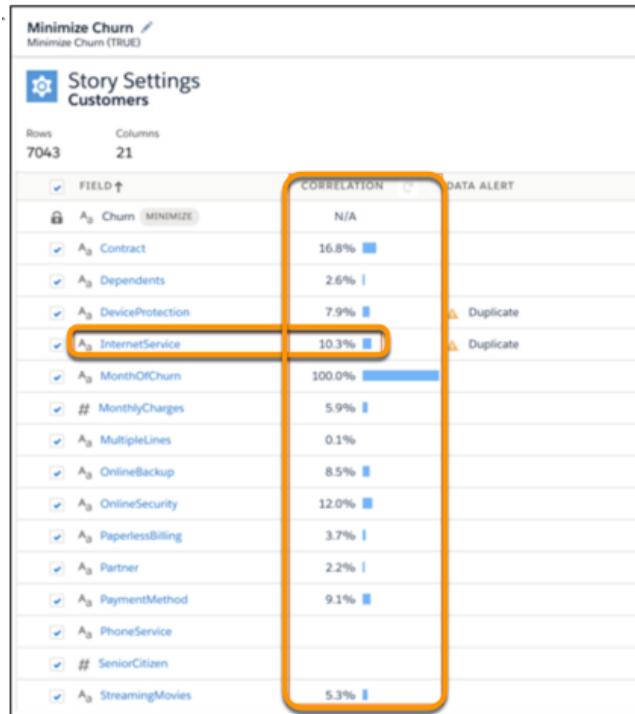
[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

## Recalculate Correlations for Updated Variable Settings

In story setup, if you change variable (field) settings, you can quickly see the effect of your changes by recalculating correlation percentages. That way, you can decide the best settings to use for your story analysis, resulting in more relevant insights and better predictions.

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

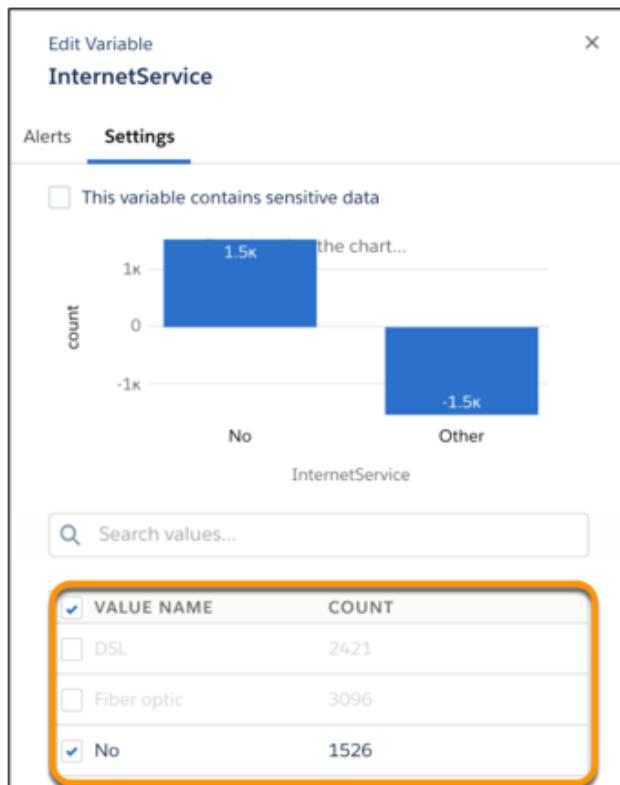
**How:** Open a story and go to Settings. Fields selected in story setup are listed with their correlation.



The screenshot shows the 'Story Settings' interface for the 'Customers' story. On the left, a list of fields is shown with checkboxes next to them. The 'InternetService' field has its checkbox checked and is highlighted with an orange rectangle. To the right of the list is a 'CORRELATION' table. The 'InternetService' row in this table is also highlighted with an orange rectangle. The table lists various fields and their correlation values:

Field	Correlation
A <sub>3</sub> Churn (MINIMIZE)	N/A
A <sub>3</sub> Contract	16.8%
A <sub>3</sub> Dependents	2.6%
A <sub>3</sub> DeviceProtection	7.9%
<b>A<sub>3</sub> InternetService</b>	<b>10.3%</b>
A <sub>3</sub> MonthOfChurn	100.0%
# MonthlyCharges	5.9%
A <sub>3</sub> MultipleLines	0.1%
A <sub>3</sub> OnlineBackup	8.5%
A <sub>3</sub> OnlineSecurity	12.0%
A <sub>3</sub> PaperlessBilling	3.7%
A <sub>3</sub> Partner	2.2%
A <sub>3</sub> PaymentMethod	9.1%
A <sub>3</sub> PhoneService	5.3%
# SeniorCitizen	
A <sub>3</sub> StreamingMovies	

Click a field to view and change its settings.



The screenshot shows the 'Edit Variable' dialog for the 'InternetService' variable. At the top, there are tabs for 'Alerts' and 'Settings'. The 'Settings' tab is selected. Below the tabs, there is a checkbox labeled 'This variable contains sensitive data'. Underneath the checkbox is a bar chart with the x-axis labeled 'InternetService' and categories 'No' and 'Other'. The y-axis is labeled 'count' and ranges from -1k to 1k. The 'No' bar is at 1.5k and the 'Other' bar is at -1.5k. Below the chart is a search bar with the placeholder 'Search values...'. At the bottom is a table titled 'VALUE NAME COUNT' with three rows:

Value Name	Count
DSL	2421
Fiber optic	3096
No	1526

After you change a field, click the recalculate icon to see how the correlation change.



## SEE ALSO:

[Einstein Discovery: Tree-Based Modeling Types, Random Forest Models \(Pilot\), and Deployed Model Replacement](#)

## Analytics for Everyone: Subscriptions to Tables, Watchlist Enhancements, Learning Resources Panel

Subscribe to table widgets and receive the table data in a .csv file attached to your subscription email (beta). Experience the enhanced watchlist in a new interface on the home page (beta). Add custom onboarding for each chart to create a step-by-step learning progression through the dashboard.

## IN THIS SECTION:

### [Subscribe to Tables \(Beta\)](#)

Enhancements to Einstein Analytics subscriptions give you more control and deliver more information to you. Now you can subscribe to table widgets and receive the table data in .csv files attached to your regularly scheduled subscription email. When you click any subscription in preview or email, the dashboard opens with all the filters and selections you applied when you created the subscription. Take action from the Subscription Preview with widget dropdown menus. And now that you can provide titles when creating subscriptions, it's easier to distinguish subscriptions to multiple widgets or multiple subscriptions to the same widget filtered for different insights.

### [Experience the Enhanced Einstein Analytics Watchlist \(Beta\)](#)

The updated Einstein Analytics Watchlist gives you an expanded Watchlist page for capturing up to 20 KPIs. The Watchlist lets users track metrics across different dashboards in one place, plus historical trending to monitor changes over time.

### [Create a Learning Journey in the Dashboard Learning Resources Panel](#)

Now it's much easier for Einstein Analytics users to discover your in-app guidance. When they select Learn on a dashboard widget, the Learning Resources panel opens, revealing the available onboarding content for all widgets in the dashboard. Add custom onboarding for each chart to create a step-by-step learning progression through the dashboard.

### [Learn More with Popular Topics in the Learning Center](#)

Raise your Einstein Analytics education to the next level with the new Popular Topics section in the Learning Center. Links to learning resources are arranged by function and you can click **Explore More** to go to the Best Practices page of the Einstein Analytics Learning Map.

### [Analytics Mobile Apps: Explore More in the Salesforce App](#)

With the latest update to the new Salesforce mobile app, Android users can access Einstein Analytics assets from the Analytics navigation item.

## Subscribe to Tables (Beta)

Enhancements to Einstein Analytics subscriptions give you more control and deliver more information to you. Now you can subscribe to table widgets and receive the table data in .csv files attached to your regularly scheduled subscription email. When you click any subscription in preview or email, the dashboard opens with all the filters and selections you applied when you created the subscription. Take action from the Subscription Preview with widget dropdown menus. And now that you can provide titles when creating subscriptions, it's easier to distinguish subscriptions to multiple widgets or multiple subscriptions to the same widget filtered for different insights.

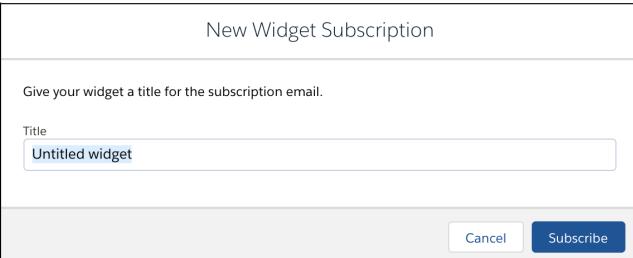
**Where:** These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

 **Note:** As a beta feature, Einstein Analytics subscription is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

**Who:** To subscribe to tables, you must have the Subscribe to Einstein Analytics Tables user permission in a permission set associated with an Einstein Analytics Growth or Einstein Analytics Plus license.

**How:** In Setup, on the Analytics Settings page, select **Enable email subscriptions to Einstein Analytics dashboard widgets (Beta)**. The **Subscribe** option appears in all widget menus except maps.

To enter a title for a new subscription, select **Subscribe** in the widget menu.



New Widget Subscription

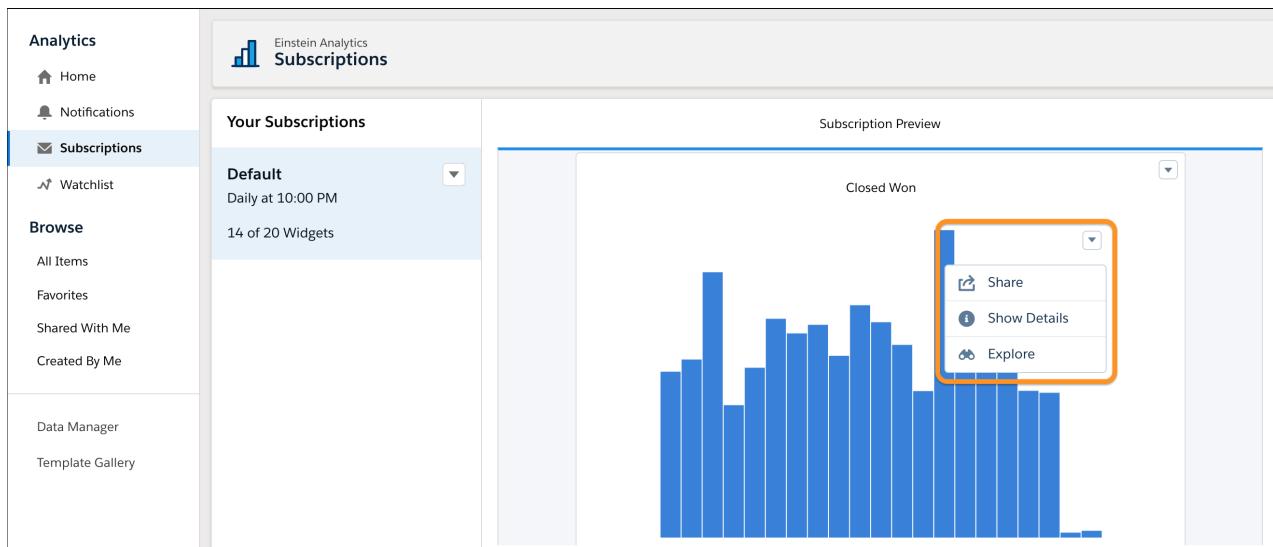
Give your widget a title for the subscription email.

Title

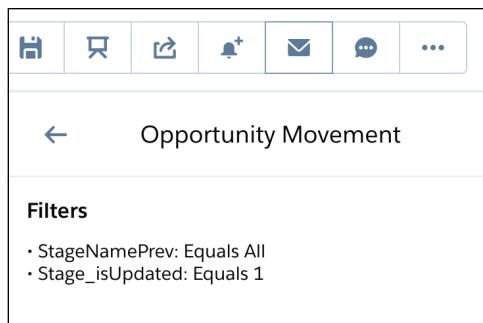
Untitled widget

Cancel    Subscribe

To take action from the Subscription Preview, open the dropdown on the widget snapshot.



To view the filters on a widget subscription, open the subscription by clicking its title in the Subscription Preview or in the dashboard Subscriptions panel.



**Note:** Filters in SAQL queries aren't listed but are referenced as "custom."

To subscribe to a table widget on a dashboard, select **Subscribe** from the table's dropdown menu. The Subscription Preview shows the first rows of the table and you can scroll to see succeeding rows.

The screenshot shows a 'Subscription Preview' window. At the top, it says 'Opportunities'. Below that, a note states 'Table data in CSV format is attached to subscription email.' A table with 13 rows is displayed, showing columns for #, Industry, Lead Source, Account Name, Amount, and Close Date.

#	Industry	Lead Source	Account Name	Amount	Close Date
5	Media	Advertisement	Global Media	\$00,000	
6	Media	Word of mouth	Global Media	35,000	
7	Manufacturing	Word of mouth	Acme	20,000	
8	Media	Partner	Global Media	10,000	
9	Media	Partner	Global Media	15,000	
10	Media	Trade Show	Global Media	8,000	
11	Manufacturing	Word of mouth	Acme	65,000	
12	Media	Partner	Global Media	23,000	
13	Manufacturing	Advertisement	Acme	2,300	

The subscription email body contains a placeholder for the table and a `.csv` file of the table data is attached. Table data attachments can be up to 3 MB each, with total attachments per email up to 15 MB.

The screenshot shows an email inbox with a message from 'Einstein Analytics'. The subject line is 'Your subscription: Wednesday, March 18, 2020'. The message body includes a 'OPEN EINSTEIN ANALYTICS' button and a section titled 'Table Filtered' with a note 'See attached: Table Filtered.csv'. The last update date is listed as 'Tuesday, March 17, 2020'.

**Note:** Limitations on downloading data apply to table data `.csv` files in subscriptions.

#### SEE ALSO:

- [Salesforce Help: Get Scheduled Updates with Email Subscriptions \(Beta\)](#) (can be outdated or unavailable during release preview)
- [Salesforce Help: Download Analytics Images and Export Filtered Data](#) (can be outdated or unavailable during release preview)

## Experience the Enhanced Einstein Analytics Watchlist (Beta)

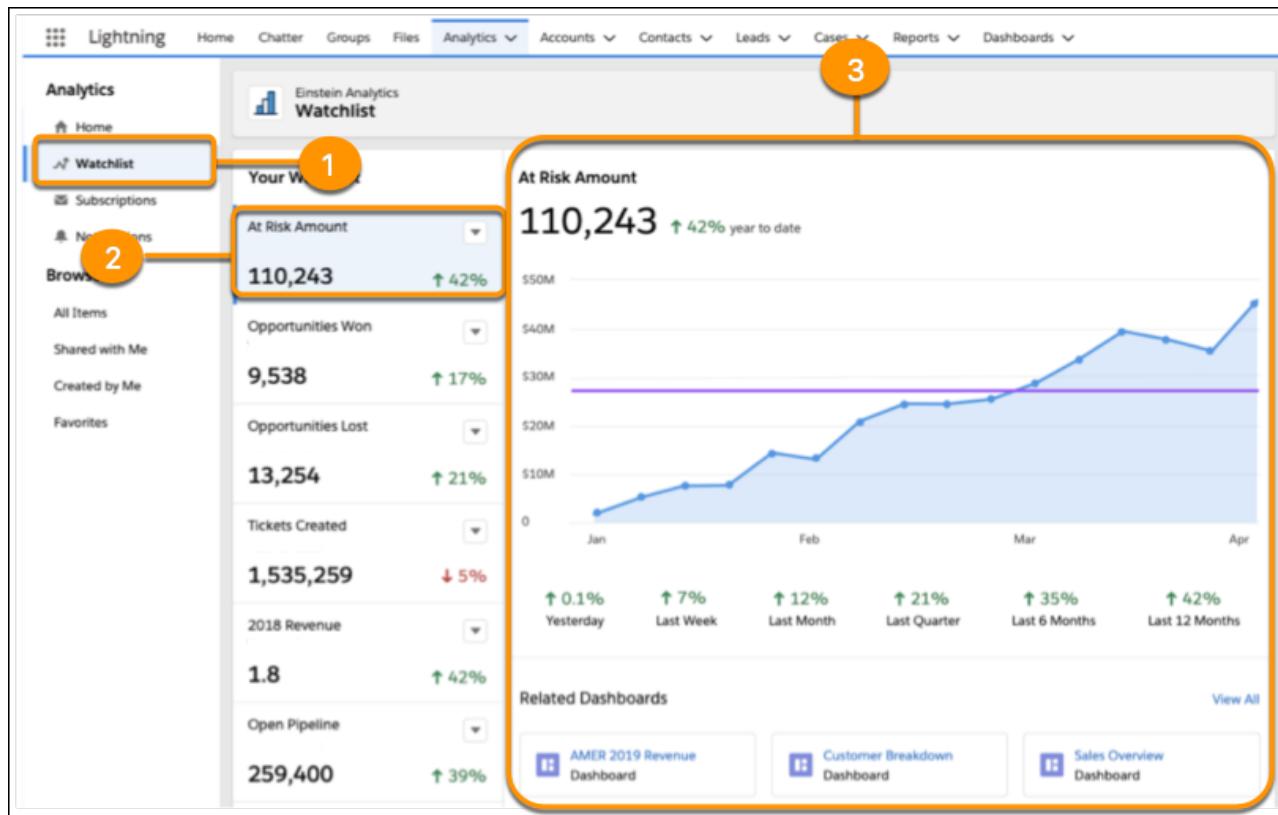
The updated Einstein Analytics Watchlist gives you an expanded Watchlist page for capturing up to 20 KPIs. The Watchlist lets users track metrics across different dashboards in one place, plus historical trending to monitor changes over time.

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

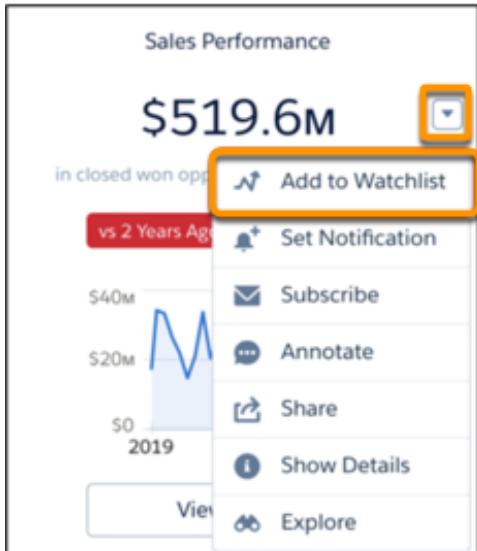
 **Note:** As a beta feature, the Einstein Analytics Watchlist is a preview and isn't part of Einstein Analytics under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or about it. All restrictions, Salesforce reservation of rights, obligations concerning Einstein Analytics, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the Einstein Analytics Watchlist in the Trailblazer Community.

**How:** In Setup, on the Analytics Settings page, select **Enable Watchlist (Beta)**.

With the Watchlist (1), users can create a personalized list of up to 20 metrics. Click Watchlist items to view metric values (2), and timeline charts (3). No more switching between dashboards to see what has changed, users can quickly and easily track their metrics all in one place.



Get your Watchlist started by adding metrics directly from a dashboard. Simply select **Add to Watchlist** from a widget's menu.



Users can then give their metric a name (1), select how changes are reported (2), and add an optional reference line (3) for trend comparisons.

**Add to Watchlist**

Metric Name **1**  
Change  
Use symbols (%\$, and so on) in your metric name to signify value, "Revenue (£)".

**Change Format** **2**  
 Standard: An increase in change is positive (eg 5%)  
 Reversed: An increase in change is negative (eg 5%)

**Reference Lines** **3**  
 Reference Line 1 X  
 Value: 0  
 Label:  
 Color: #8932ED  
 Save Cancel

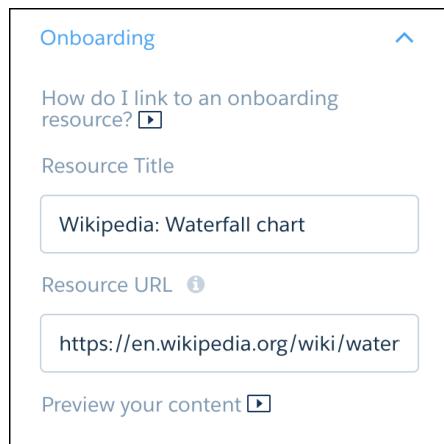
Trending starts immediately after a metric is added to the Watchlist. Snapshots are captured on a daily basis to show how dashboard items are performing at any given moment, so there's never any stale data.

## Create a Learning Journey in the Dashboard Learning Resources Panel

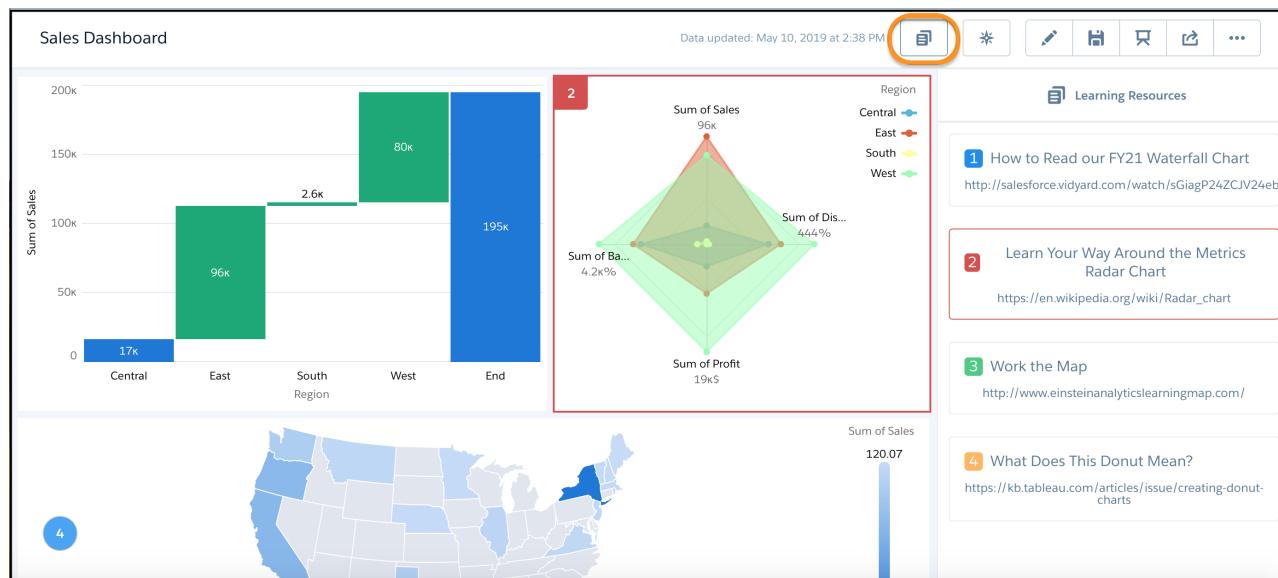
Now it's much easier for Einstein Analytics users to discover your in-app guidance. When they select Learn on a dashboard widget, the Learning Resources panel opens, revealing the available onboarding content for all widgets in the dashboard. Add custom onboarding for each chart to create a step-by-step learning progression through the dashboard.

**Where:** These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** Add the **Learn** option in a widget's dropdown menu through the Onboarding property in the dashboard designer.



When you have at least one widget with onboarding, the Learning Resources icon appears. Click the icon to open and close the Learning Resources panel. When the panel is open, hover on a learning resource to highlight the chart that goes with it. Each learning resource is numbered and the numbers appear on the charts for easy reference.



## Learn More with Popular Topics in the Learning Center

Raise your Einstein Analytics education to the next level with the new Popular Topics section in the Learning Center. Links to learning resources are arranged by function and you can click **Explore More** to go to the Best Practices page of the Einstein Analytics Learning Map.

**Where:** These changes apply to Einstein Analytics in Lightning Experience and Salesforce Classic. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**How:** In the Analytics Studio, click **Learning Center** and find the new Popular Topics section after Extended Learning (formerly titled "Continue Learning").

The screenshot shows the Einstein Analytics Studio interface. On the left is a sidebar with navigation links like Home, Notifications, Subscriptions, Watchlist, Browse (All Items, Favorites, Shared With Me), and Learning Center (Data Manager, Template Gallery, Community). The main content area has a header 'Extended Learning' with a sub-header 'Visit these resources to elevate your skills'. It features four cards: 'Learning Map' (Find resources at every stage of your Analytics adventure), 'Einstein Analytics Help' (Consult complete Help pages), 'Trailblazer Community' (Ask questions and look for answers with Customer Success Ohana), and 'Einstein Analytics Trainings' (Join hands-on training sessions taught by experts). Below this is a 'Popular Topics' section with a sub-header 'Browse learning content based on the topic that interests you'. It lists four categories with sub-links: 'Data Preparation' (Integrate Your Data in Einstein Analytics, Data Manager video series, Einstein Analytics Data Integration Basics), 'Data Visualization' (Explore and Visualize Your Data in Einstein Analytics, Explorer video series, Einstein Analytics Desktop Exploration), 'App Building' (Build Einstein Analytics Dashboard, Dashboard Designer video series, Einstein Analytics Dashboard Building Basics), and 'Adding Intelligence' (Explain, Predict, and Recommend with Einstein Discovery, Einstein Discovery video series, Gain Insight with Einstein Discovery). A blue 'Explore More' button is located in the top right corner of the Popular Topics section.

## Analytics Mobile Apps: Explore More in the Salesforce App

With the latest update to the new Salesforce mobile app, Android users can access Einstein Analytics assets from the Analytics navigation item.

### IN THIS SECTION:

#### [Use Einstein Analytics in the Salesforce Mobile App for Android](#)

With the latest update to the new Salesforce mobile app, Android users can access Einstein Analytics assets from the Analytics navigation item. The new item creates a familiar user experience between desktop and mobile, and gives Salesforce mobile app users a home page for accessing apps and dashboards.

#### [Analytics Mobile Apps: Upgrade to the Summer '20 Versions of Einstein Analytics for iOS and Android](#)

Einstein Analytics version 10.0 is generally available.

## Use Einstein Analytics in the Salesforce Mobile App for Android

With the latest update to the new Salesforce mobile app, Android users can access Einstein Analytics assets from the Analytics navigation item. The new item creates a familiar user experience between desktop and mobile, and gives Salesforce mobile app users a home page for accessing apps and dashboards.

**Where:** This change applies to the new Salesforce mobile app for Android. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**When:** The new navigation item will be generally available the week of September 7, 2020.

**How:** Admins can add the Analytics navigation item to Lightning apps in the Lightning App Builder. Analytics does not show up in the Mobile Only navigation item list in the App Launcher.

 **Note:** Lenses and datasets that aren't supported in the Salesforce mobile app open in the Einstein Analytics for Android app.

## Analytics Mobile Apps: Upgrade to the Summer '20 Versions of Einstein Analytics for iOS and Android

Einstein Analytics version 10.0 is generally available.

### IN THIS SECTION:

#### [Additional Enhancements in Einstein Analytics for iOS](#)

Einstein Analytics for iOS now supports additional Summer '20 features.

#### [Additional Enhancements in Einstein Analytics for Android](#)

Einstein Analytics for Android now supports additional Summer '20 features.

### Additional Enhancements in Einstein Analytics for iOS

Einstein Analytics for iOS now supports additional Summer '20 features.

**Where:** These changes apply to Einstein Analytics for iOS. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**Why:** Enhancements in the latest releases include the following features.

- New Mobile Experience: Access your Analytics insights with ease with a new Home and an updated app experience.
- Watchlist: Track your most important metrics and see change over time.
- Pivot Tables: Full support for pivot tables with formatting and multiple measures.
- Performance Improvements: Dashboards with tables load even faster!
- Bug fixes and other usability enhancements.

**How:** Analytics is available for devices running iOS 12.2 and later. The new Home and updated app experience requires iOS 13.3 or later. For the latest enhancements, download Einstein Analytics from the App Store.

### Additional Enhancements in Einstein Analytics for Android

Einstein Analytics for Android now supports additional Summer '20 features.

**Where:** These changes apply to Einstein Analytics for Android. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited Editions.

**Why:** Enhancements in the latest releases include the following features.

- Support for Summer '20 features, including dynamic text in dashboards.
- Bug fixes.

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

# Commerce: B2B Commerce on Lightning Experience, Enhanced Order Management Capabilities

Salesforce B2B Commerce on Lightning Experience brings the power of the Salesforce platform to your business-to-business (B2B) commerce solutions. Enhanced capabilities in Salesforce Order Management include support for multiple currencies, gross tax type on orders, refunds on cancellations, order product discounts, unmanaged orders, accounts and contacts, and payment processing with Adyen.

## IN THIS SECTION:

### [B2B Commerce on Lightning Experience](#)

Salesforce B2B Commerce on Lightning Experience gives you the tools to design, build, and launch a business-to-business (B2B) commerce solution.

### [Salesforce Order Management](#)

Expand order processing capabilities with support for multiple currencies, gross tax type on orders, refunds on cancellations, order product discounts, unmanaged orders, accounts and contacts, and payment processing with Adyen.

## B2B Commerce on Lightning Experience

Salesforce B2B Commerce on Lightning Experience gives you the tools to design, build, and launch a business-to-business (B2B) commerce solution.

## IN THIS SECTION:

### [Salesforce B2B Commerce: Design, Build, and Launch a Business-to-Business Commerce Solution](#)

Use Lightning functionality with the B2B Commerce license to build self-service stores and enable retailers, wholesalers, and distributors to purchase goods and services from your brand.

## Salesforce B2B Commerce: Design, Build, and Launch a Business-to-Business Commerce Solution

Use Lightning functionality with the B2B Commerce license to build self-service stores and enable retailers, wholesalers, and distributors to purchase goods and services from your brand.

**Where:** This feature is new in Lightning Experience.

**Who:** This feature is available to users with a B2B Commerce license.

**Why:** Using B2B Commerce on Lightning Experience:

- Users can access Commerce Objects on core Salesforce.
- Admins can use the Lightning Flow Builder to create a checkout flow.
- Admins can make products discoverable for customers using Search.
- Admins and Managers can use the Commerce App to manage store content, entitlements, price books, and buyers.
- Admins can easily create a store with built-in functionality, using the B2B Commerce template.
- Admins can import orders that are managed by an external order management system into Salesforce as unmanaged order summaries.

Users can create a store with the new B2B Commerce Lightning template. Or they can create a storefront using B2B Commerce for Visualforce. Check out [B2B Commerce for Visualforce Spring '20 \(Version 4.12\) Release Notes](#) to see the latest developments for our B2B Commerce managed package.

You can also work with Salesforce B2B Commerce on Lightning Experience using [Connect REST API](#) and [Connect in Apex](#).

#### IN THIS SECTION:

##### [Access B2B Commerce Objects from the Salesforce Core Platform](#)

B2B Commerce on Lightning Experience is built directly on the Salesforce platform. You get a single view of the customer, increased opportunities for sales and service teams, and built-in innovation that scales with the growth of your business.

##### [Manage Content, Entitlements, Price Books, and Buyers with the Commerce App](#)

Between promotions, sales, and constantly evolving markets, store managers have a lot on their plates. The Commerce app provides a streamlined way to configure and update stores, assure that prices are displayed correctly, and ensure that buyers access the right store.

##### [Create a B2B Checkout Flow Using Lightning Flow Manager](#)

Create your unique checkout experience using the flexible Lightning Flow Manager. Leveraging the power of flows, you can expand your checkout to create a complex, multi-step process, or streamline it to fit the needs of your small business.

##### [Make Products Discoverable to Buyers Through Search](#)

You control the products and fields that are discoverable in your store. Mark them as Searchable, select the product fields to use as filters, and build a search index. Search indexing provides an easy way to publish new content to your store and ensure that the new content is returned in search results.

##### [Create a Beautiful Buyer Experience with the B2B Commerce Template](#)

Get your buyer experience up and running with the commerce-optimized pages and components available in the B2B Commerce template. The B2B Commerce template helps you manage the complexity underlying the creation of a buyer experience. It gives you a reliable, secure, and rapid way to create that experience and get selling.

#### SEE ALSO:

##### [Store Records for Unmanaged Orders in Salesforce Order Management](#)

#### **Access B2B Commerce Objects from the Salesforce Core Platform**

B2B Commerce on Lightning Experience is built directly on the Salesforce platform. You get a single view of the customer, increased opportunities for sales and service teams, and built-in innovation that scales with the growth of your business.

**Where:** This feature is new in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

**Who:** This feature is available to users with a B2B Commerce license.

**Why:** B2B Commerce on Lightning Experience is directly connected to all your Salesforce objects. Your sales teams can reach new customers seeking products with commerce capabilities. Your service teams get a single view of their customers so they can provide exceptional support throughout the sales cycle. Because B2B Commerce on Lightning Experience is built directly on the Salesforce platform, it benefits from the innovation of three releases a year.

#### SEE ALSO:

##### [Salesforce Help: Salesforce B2B Commerce for Lightning Experience \(can be outdated or unavailable during release preview\)](#)

##### [Salesforce Help: Set Up Lightning B2B Commerce \(can be outdated or unavailable during release preview\)](#)

##### [Salesforce Help: Create Permission Sets for Buyer Users and Buyer Managers \(can be outdated or unavailable during release preview\)](#)

## Manage Content, Entitlements, Price Books, and Buyers with the Commerce App

Between promotions, sales, and constantly evolving markets, store managers have a lot on their plates. The Commerce app provides a streamlined way to configure and update stores, assure that prices are displayed correctly, and ensure that buyers access the right store.

**Where:** This feature is new in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

**Who:** This feature is available to users with a B2B Commerce license.

**Why:** The Commerce App lets you quickly set up content-rich, multilingual stores. Quick links, tiles, and workspaces, allow store managers to stay in the context of the screen that they are working on while moving between multiple set-up areas. From the Commerce app, store managers can configure:

- Products into categories, and associate them to stores via catalogs.
- Rich media content, to enrich the buyer's experience.
- Stores with multiple languages, including translations on products and categories.
- Price book associations, whether with products or buyer groups.
- They can also determine, whether standard or negotiated prices are offered in a store.
- Buyer's access to a store and the products and prices that they are entitled to.

SEE ALSO:

[Salesforce Help: Salesforce B2B Commerce for Lightning Experience \(can be outdated or unavailable during release preview\)](#) Set Up Checkout

[Salesforce Help: Manage Your Store Data on the Commerce App \(can be outdated or unavailable during release preview\)](#) Set Up Checkout

## Create a B2B Checkout Flow Using Lightning Flow Manager

Create your unique checkout experience using the flexible Lightning Flow Manager. Leveraging the power of flows, you can expand your checkout to create a complex, multi-step process, or streamline it to fit the needs of your small business.

**Where:** This feature is new in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

**Who:** This feature is available to users with a B2B Commerce license.

**Why:** Build your checkout using our template and control each step of the checkout process. Understand how the pieces of your checkout connect and influence each other on the visual canvas of Lightning Flow Manager, then finish your checkout in Experience Builder. Connect to your external systems for pricing, taxation, inventory, and shipping and receive information about your products immediately.

SEE ALSO:

[Salesforce Help: Salesforce B2B Commerce for Lightning Experience \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Set Up Checkout \(can be outdated or unavailable during release preview\)](#)

## Make Products Discoverable to Buyers Through Search

You control the products and fields that are discoverable in your store. Mark them as Searchable, select the product fields to use as filters, and build a search index. Search indexing provides an easy way to publish new content to your store and ensure that the new content is returned in search results.

**Where:** This feature is new in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

**Who:** This feature is available to users with a B2B Commerce license.

**Why:** The power to mark products and fields searchable gives you complete control over the information that your buyers see. Use product fields as filters, give your buyers control over their own search results. Changes remain internal-only until you build or rebuild your search index. The delay lets your store designers set up the way a product is presented before they offer it to buyers.

Mark products and fields once, and you're done. Build your search index, then rebuild it each time you make qualified changes to your store.

#### SEE ALSO:

[Salesforce Help: Salesforce B2B Commerce for Lightning Experience](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Set Up and Manage Search](#) (can be outdated or unavailable during release preview)

## Create a Beautiful Buyer Experience with the B2B Commerce Template

Get your buyer experience up and running with the commerce-optimized pages and components available in the B2B Commerce template. The B2B Commerce template helps you manage the complexity underlying the creation of a buyer experience. It gives you a reliable, secure, and rapid way to create that experience and get selling.

**Where:** This feature is new in Lightning Experience, in Personal, Enterprise, Performance, and Developer editions.

**Who:** This feature is available to users with a B2B Commerce license.

**Why:** There's so much complexity when you build a B2B Commerce solution. Catalogs, buyer entitlements, translations, pricing—you want all this background stuff to be precise and robust. But you also want to tuck it behind a beautiful user interface that shields your buyers from the elaborate details. That interface must offer multiple views of products, ways to bring in and display product data, and a way to preview pages before buyers see them. The Commerce app takes you a long way towards your commercial goals. The B2B Commerce template brings you to a smooth finish with a beautiful, buyer-facing experience.

The B2B Commerce template has store logic built-in to its pages and components. Many components let you pick the product fields to show in search results. No coding is required because the data from the fields that you picked is pulled right onto the page. On the Product Detail Page, an image carousel lets you show multiple product perspectives. With close alignment with CMS, you can readily pull images and attachments into your store. And you get multiple page views. Pages are available to show list, grid, and detail product views for catalog pages and search results.

Here are some of the commerce-ready pages the template provides:

- The Cart and Checkout pages support buyers as they select and purchase products.
- Category pages show, for example, all the products in a selected category.
- Search pages give you control over the layout, look, and feel of product search results.
- The No Search Results page lets you create your buyers' experience when search returns no products.
- The Quick Order page gives buyers a fast way to order one or more well-known products.
- The Order History page provides convenient access to a buyer's previous orders.
- With the Lists page (Beta), buyers get a view up to 10 personal lists with up to 100 list items on each.
- The Account Management page gives your store managers a concise view of buyer accounts and tools to manage them.

#### SEE ALSO:

[Salesforce Help: Salesforce B2B Commerce for Lightning Experience](#) (can be outdated or unavailable during release preview)

[Salesforce Help: B2B Commerce Template Pages](#) (can be outdated or unavailable during release preview)

## Salesforce Order Management

Expand order processing capabilities with support for multiple currencies, gross tax type on orders, refunds on cancellations, order product discounts, unmanaged orders, accounts and contacts, and payment processing with Adyen.

### IN THIS SECTION:

#### [Enable Multiple Currencies](#)

Set up the ability to use multiple currencies in currency fields throughout Order Management by enabling the Salesforce multiple currency feature for your organization.

#### [Service Orders Using Gross or Net Tax Values](#)

Countries that use a gross tax type, such as a value added tax (VAT), include tax amounts on order products, adjustments, and shipping differently than countries that use a net tax type, such as a sales tax. You can now manage orders using either tax type in Salesforce Order Management.

#### [Process Refunds on Canceled Order Items](#)

You can process refund payments when canceling items from an order if you capture payment at the time of order creation.

#### [Apply Discounts to Order Product Summaries](#)

You can apply discounts to order product summaries. You can also preview the result of applying a discount before actually applying it. Salesforce Order Management includes a standard flow, actions in Flow Builder, Connect in Apex methods, and Connect REST API resources to process discounts. The functionality is very similar to the cancel and return features that you know and love.

#### [Store Records for Unmanaged Orders in Salesforce Order Management](#)

You can store externally managed order data in your Salesforce org together with the orders that you manage in Salesforce Order Management by creating unmanaged order summaries. Users can directly edit unmanaged order summaries and related records, but Salesforce Order Management tools can't process them.

#### [Represent Shoppers with Standard Accounts and Contacts Instead of Person Accounts](#)

You can now configure Salesforce Order Management to represent shoppers with standard account and contact records. Person accounts are no longer required.

#### [Process Asynchronous Payment Transactions with Adyen](#)

You can now use the Adyen payments platform to process asynchronous payment transactions in Salesforce Order Management.

#### [Access New Processing Features with Updated Standard Flows](#)

The standard flows—Return Flow, Cancel Flow, and Order Summary Flow—are updated to support new functionality in this release.

#### [Update Salesforce Order Management from Version 224 to Version 226](#)

To update an existing Salesforce Order Management implementation to version 226, follow the instructions in the Update from a Previous Version section of the *Salesforce Order Management Implementation Guide*. If you don't use the new features, some steps still are required.

## Enable Multiple Currencies

Set up the ability to use multiple currencies in currency fields throughout Order Management by enabling the Salesforce multiple currency feature for your organization.

**Where:** This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

**Why:** If your company conducts business in more than one country, enabling the multiple currency feature lets you manage orders using the currencies for all the countries in which you do business.

When you enable multiple currencies, your Salesforce admin sets the corporate currency, which reflects the currency of the corporate headquarters. Your admin also sets up a list of active currencies and their conversion rates relative to the corporate currency. The active currencies represent the countries in which you do business. Order Management only imports orders that use one of your active currencies.

**How:** To enable this feature, from Setup enter Company Information in the Quick Find box. Then select Company Information and click Edit. Enable Activate Multiple Currencies and save your changes.

 **Important:** Turning on multiple currencies introduces permanent changes in your organization. This feature can't be turned off. Review the [Considerations for Enabling Multiple Currencies](#) before enabling.

SEE ALSO:

[Salesforce Help: Enable Multiple Currencies](#) (can be outdated or unavailable during release preview)

## Service Orders Using Gross or Net Tax Values

Countries that use a gross tax type, such as a value added tax (VAT), include tax amounts on order products, adjustments, and shipping differently than countries that use a net tax type, such as a sales tax. You can now manage orders using either tax type in Salesforce Order Management.

**Where:** This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

**Why:** By default, Order Management displays net tax values on orders, order summaries, fulfillment orders, invoices, and credit memos. If your company conducts business in countries that use a value added tax, you need to see gross tax values on orders, order summaries, fulfillment orders, invoices, and credit memos so that you can properly service these orders. Order Management now lets you distinguish between net and gross tax orders and adjusts the user interface display for order objects accordingly.

When an order is created, Order Management determines whether the original transaction order is a gross or net tax order. The tax type for the order displays in the new Tax Locale Type field on the Order Summary page. The tax locale type determines which fields display in the user interface.

- Gross - If the tax locale type is set to gross, most prices and taxes display as combined values.
- Net - If the tax locale type is set to net, most prices and taxes display as separate values.

You can have orders using gross tax and orders using net tax, but you cannot use both tax types in a single order. If the tax locale is not specified in the transaction order, the tax locale type defaults to net.

**How:** To display gross fields and values in the Totals component on the Order Summary page, edit the component fields using Lightning App Builder.

SEE ALSO:

[Salesforce Order Management Implementation Guide](#) (can be outdated or unavailable during release preview)

## Process Refunds on Canceled Order Items

You can process refund payments when canceling items from an order if you capture payment at the time of order creation.

**Where:** This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

**Why:** If you capture payment when an order is created, and your customer cancels one or more items from the order before it is fulfilled, you owe the customer a refund. The Cancel Item flow is updated to check for excess funds when you initiate a cancellation using the Cancel Item action on the Order Summary page. If the Cancel Item flow detects excess funds, the flow calls the Ensure Refunds action to initiate a refund for the canceled items. The Cancel Item preview screen shows the refund amount applied to the order for the canceled

items. Refund details show on the Feed tab on the Order Summary page after you submit the cancellation. Order Management does not generate an invoice or a credit memo for the capture and refund transactions in this scenario.

**How:** To use the new Cancel Item flow, clone and activate the new flow, and make any existing versions inactive. Then update the corresponding Actions & Recommendations deployment with the new Cancel Item flow.

SEE ALSO:

[Salesforce Help: Cancel Order Items \(can be outdated or unavailable during release preview\)](#)

## Apply Discounts to Order Product Summaries

You can apply discounts to order product summaries. You can also preview the result of applying a discount before actually applying it. Salesforce Order Management includes a standard flow, actions in Flow Builder, Connect in Apex methods, and Connect REST API resources to process discounts. The functionality is very similar to the cancel and return features that you know and love.

**Where:** This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

## Store Records for Unmanaged Orders in Salesforce Order Management

You can store externally managed order data in your Salesforce org together with the orders that you manage in Salesforce Order Management by creating unmanaged order summaries. Users can directly edit unmanaged order summaries and related records, but Salesforce Order Management tools can't process them.

**Where:** This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions. It also applies to Salesforce B2B Commerce, which is available for an additional cost in Lightning Experience in Personal, Enterprise, Performance, and Developer editions.

**Why:** Because Order Management objects have very complex relationships and manage sensitive financial data, the ability to edit them is strictly limited. For example, you can't directly change the quantity of an order product summary or decrease the total amount charged for an order summary. Instead, we provide tools such as standard flows and APIs for processing orders and order data. These tools keep records synchronized and prevent malicious tampering.

What about orders that you aren't managing in Salesforce Order Management, but want to store in your Salesforce org? For example, an online retailer has historical data from a legacy order management system, but doesn't want to spread its order records across multiple systems. By creating unmanaged order summaries to represent the historical data, they can maintain a combined repository of all order data, past and present. And they don't have to worry about accidentally trying to process a legacy order.

**How:** To create an unmanaged order summary, specify the Order Lifecycle Type as *Unmanaged* in the input for a Create Order Summary flow, action, or API.

To allow a user to directly edit data on records related to an unmanaged order summary, assign them the Edit Unmanaged Order Summaries or B2B Commerce Integrator User permission.

SEE ALSO:

[Salesforce B2B Commerce: Design, Build, and Launch a Business-to-Business Commerce Solution](#)

## Represent Shoppers with Standard Accounts and Contacts Instead of Person Accounts

You can now configure Salesforce Order Management to represent shoppers with standard account and contact records. Person accounts are no longer required.

**Where:** This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

**How:** To represent shoppers with person accounts, activate Person Accounts for Shoppers in the Order Management org settings. To represent shoppers with standard accounts and contacts, deactivate Person Accounts for Shoppers. You can even change your mind, although things can get tricky. While Order Management is configured to use person accounts, the B2C Commerce integration doesn't recognize shopper records that were created as standard accounts. If one of those shoppers places an order, it creates a separate person account record for them and associates it with the new order. But when Order Management is configured to use standard accounts, it recognizes existing shoppers that were created as person accounts. It associates any new orders that they place with their existing person accounts.



**Note:** Changes to this setting can take up to an hour to take effect.

## Process Asynchronous Payment Transactions with Adyen

You can now use the Adyen payments platform to process asynchronous payment transactions in Salesforce Order Management.

**Where:** This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

**Why:** Use Adyen's asynchronous APIs to process post-purchase payment transactions and see the status of pending, completed, and failed transactions, including payment capture and refunds.

**How:** Access the Adyen integration for Salesforce Order Management on AppExchange.

## Access New Processing Features with Updated Standard Flows

The standard flows—Return Flow, Cancel Flow, and Order Summary Flow—are updated to support new functionality in this release.

**Where:** This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

**Why:** The Return Flow, Cancel Flow, and Order Summary Flow are updated to support multiple currencies, and net and gross tax locales. These flows are also updated to run only on managed order summaries. They do not run on unmanaged (external) order summaries. In addition, the Cancel Flow is updated to support refunds for canceled items. To use these new standard flows, clone and activate the new versions, and make any existing versions inactive. Then update the corresponding Actions & Recommendations deployment with the new flows.

If you customized the flows in a previous release, you must reapply your customizations to the new flows. We recommend putting customizations into a subflow so future updates to standard flows can be cloned to a new flow, and then the customized subflow can be called from the new cloned flow.

### SEE ALSO:

[Salesforce Order Management Implementation Guide](#) (can be outdated or unavailable during release preview)

## Update Salesforce Order Management from Version 224 to Version 226

To update an existing Salesforce Order Management implementation to version 226, follow the instructions in the Update from a Previous Version section of the [Salesforce Order Management Implementation Guide](#). If you don't use the new features, some steps still are required.

**Where:** This change applies to Salesforce Order Management, which is available for an additional cost in Lightning Experience in Enterprise, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce Order Management Implementation Guide](#) (can be outdated or unavailable during release preview)

## Communities: Enhanced Personalization, Revamped Menu Components, and Guest User Security

Personalization sees a slew of enhancements available in both Experience Builder and the API. Display different link sets in navigation components, such as the revamped Tile Menu, and so much more. Various security enhancements help keep your data safe. And starting in Winter '21, you no longer have the option of opting out of enabling guest user security settings, so now is the time to prepare.

 **Tip:** There's lots of Lightning striking Salesforce these days—Lightning Experience, the Lightning framework, Lightning web components—and it can be tricky to know how it all applies to Communities. Here's the rundown.

Lightning communities use the same underlying technology as Lightning Experience—namely, the Lightning Platform and Lightning components—but you aren't required to enable Lightning Experience to use them.

Also check out the [Lightning Components section of the release notes](#) for changes that affect community users.

### Editions

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

#### IN THIS SECTION:

[Lightning Communities: Revamped Tile Menu, Easier Page Management, and On-Demand Sitemap Generation](#)

Customize your community with the revamped Tile Menu component. Manage your community's pages more easily with folders. And generate your site's SEO sitemap whenever you want.

[Developer Productivity: Personalization, ExperienceBundle, and the Build Your Own \(LWC\) Template](#)

Develop communities more efficiently with improvements to personalization, ExperienceBundle, and the Build Your Own (LWC) Template.

[Guest User: Security Policies Enforced](#)

In the past few releases, Salesforce implemented various security settings that comprise an overall public site security policy. In Summer '20, some settings are auto-enabling in your org, which you can opt out of, though we don't recommend it. Starting with the next release, Winter '21, the public site security settings are enabled, and you no longer have the option of opting out. Make sure your org enables all the security settings needed, and test out your implementation.

[Security and Sharing: Two-Factor Authentication for External Users, Embedded Login](#)

Enable two-factor authentication for your external users. Configure Embedded Login to use the login page type already set up for your community.

[Other Changes in Communities](#)

Learn about smaller changes that improve your experience with communities.

# Lightning Communities: Revamped Tile Menu, Easier Page Management, and On-Demand Sitemap Generation

Customize your community with the revamped Tile Menu component. Manage your community's pages more easily with folders. And generate your site's SEO sitemap whenever you want.

## IN THIS SECTION:

### [Prepare Your Community for Upcoming CSP Changes](#)

In Spring '21 (February 2021), the **Allow Inline Scripts and Script Access to Any Third-party Host** CSP setting is being removed. If your community was created before Spring '19 and currently uses this setting, now is the time to prepare.

### [Override Standard Actions in Lightning Communities](#)

Personalize your communities users' experience by adding a custom Lightning component to replace standard forms when users click the New or Edit button. Use action overrides when your community and portal users require a more customized user experience than the Salesforce standard page provides.

### [Take Personalization Further with Navigation Menus, Tile Menus, and CMS Collections](#)

You can now determine not only what component a user sees, but also what they see within a component. You can personalize CMS collections, navigation menu, and tile menu variations within their components. Previously, you could only personalize page variations, branding sets, and components.

### [Reset Mission Activity Counts](#)

With the click of a button, you can now reset mission badge activity counters. Previously, when you created a mission the activity counts didn't reset, and members got badges without extra effort. So we fixed it. But use this power wisely, as it resets the counters for all the gamification activities in your community.

### [Better Manage Your Community Pages](#)

The improved Community Pages Menu makes it easier to navigate to and edit your pages. Search for a page to see the folder where a page lives and select and edit the page directly from the search results.

### [Generate Sitemaps for Your Community Pages](#)

Now you can generate an SEO sitemap for your community outside of the automatic sitemap generation process. Easily initiate a manual refresh of your sitemap once every 24 hours. The full sitemap automatically refreshes once every Sunday, while the sitemap including all new pages is refreshed once every 24 hours.

### [Add Dynamic SEO Properties to Content Detail Pages](#)

Improve search engine results and help customers find the Salesforce CMS content they seek by adding dynamic SEO values to the content detail pages of your Lightning community.

### [Super Customize Your Community with the Revamped Tile Menu](#)

Use the revamped Lightning web component Tile Menu to create a visually stunning navigation experience in your community. The customizations in the new Tile Menu give you many more options for customization than the old version. Find the new Tile Menu in the component panel. If you currently use the old version of Tile Menu in your community pages and want to try out the new version, simply delete that component and use the new version. The new version contains all of the old version's customizations and more.

### [Get Flexible with the New User Profile Menu Component](#)

Now you can configure menu items, use personalization, and choose to show the user's company logo and name. Starting in Summer '20, the Customizable User Profile Menu component replaces the User Profile component in Lightning communities using the new B2B Commerce Template and new communities using specific themes, including Ember, Stella, Webster, Citizen, Cypress, and Jepson. Existing communities using those themes get the new component instead of the old version when they reapply or change themes.

[Get More Options for Multi-Level Navigation in Your Community](#)

Use the new Multi-Level Navigation Menu component to apply a fresh look and feel to community navigation.

## Prepare Your Community for Upcoming CSP Changes

In Spring '21 (February 2021), the **Allow Inline Scripts and Script Access to Any Third-party Host** CSP setting is being removed. If your community was created before Spring '19 and currently uses this setting, now is the time to prepare.

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

**Why:** The **Allow Inline Scripts and Script Access to Any Third-party Host** CSP option allows access to all third-party hosts and provides no added security. So to improve security for all communities, the setting is being removed in Spring '21.

To prepare for that change and ensure that you have adequate time for testing, we recommend switching your community to a more secure option now. You can choose from the following security levels.

Security Level	Description
Strict CSP: Block Inline Scripts and Script Access to All Third-party Hosts	<p>Provides maximum security.</p> <ul style="list-style-type: none"> <li>Blocks the execution of all inline scripts and all requests for remote JavaScript files.</li> <li>Allows the display of non-script resources, such as images, from third-party hosts that are explicitly allowed.</li> <li>Lightning Locker is turned on.</li> </ul>
Allow Inline Scripts and Script Access to Whitelisted Third-party Hosts	<p>Provides moderate security.</p> <ul style="list-style-type: none"> <li>Allows inline scripts to run in your site.</li> <li>Allows the loading of remote JavaScript files and the display of non-script resources, such as images, from third-party hosts that are explicitly allowed.</li> <li>Allows you to turn off Lightning Locker.</li> </ul>

### SEE ALSO:

[Salesforce Help: CSP and Lightning Locker in Lightning Communities](#) (can be outdated or unavailable during release preview)

## Override Standard Actions in Lightning Communities

Personalize your communities users' experience by adding a custom Lightning component to replace standard forms when users click the New or Edit button. Use action overrides when your community and portal users require a more customized user experience than the Salesforce standard page provides.

**Where:** This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** To override actions in a community, select the Override standard actions with the Lightning component option in Experience Workspaces > Administration. The action you choose in Lightning Experience is the same action that you use to override actions in Lightning communities.

The screenshot shows the 'Administration' page with the 'Preferences' tab selected. In the 'Community Management' section, there is a checkbox labeled 'Override standard actions with a Lightning component'. This checkbox is highlighted with a red rectangular box. Other options in this section include 'Allow members to flag content', 'Allow members to upvote and downvote', 'Enable setup and display of reputation levels', 'Enable guest users to participate in topics', and 'Suggest topics in new community posts'. Below this section is another titled 'Record Ownership'.

## SEE ALSO:

[Salesforce Help: Standard Action Overrides](#) (can be outdated or unavailable during release preview)

## Take Personalization Further with Navigation Menus, Tile Menus, and CMS Collections

You can now determine not only what component a user sees, but also what they see within a component. You can personalize CMS collections, navigation menu, and tile menu variations within their components. Previously, you could only personalize page variations, branding sets, and components.

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

**How:** In Experience Builder, click the component. Click **Personalize**, and assign audiences to the collection, navigation menu, or tile menu.

The screenshot shows the 'Tile Menu' component configuration screen in Experience Builder. It includes fields for 'Default Menu' (set to 'Tile'), 'Edit Tile' button, 'Personalization' section with a 'Personalize' button, 'Image Layout' (set to 'Full, No Overlay'), and sections for 'Tile Formatting' and 'Text Formatting'.

## Reset Mission Activity Counts

With the click of a button, you can now reset mission badge activity counters. Previously, when you created a mission the activity counts didn't reset, and members got badges without extra effort. So we fixed it. But use this power wisely, as it resets the counters for all the gamification activities in your community.

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

**How:** In Workspaces, click **Gamification**. Open the missions page, and click **Reset Activity Count**.

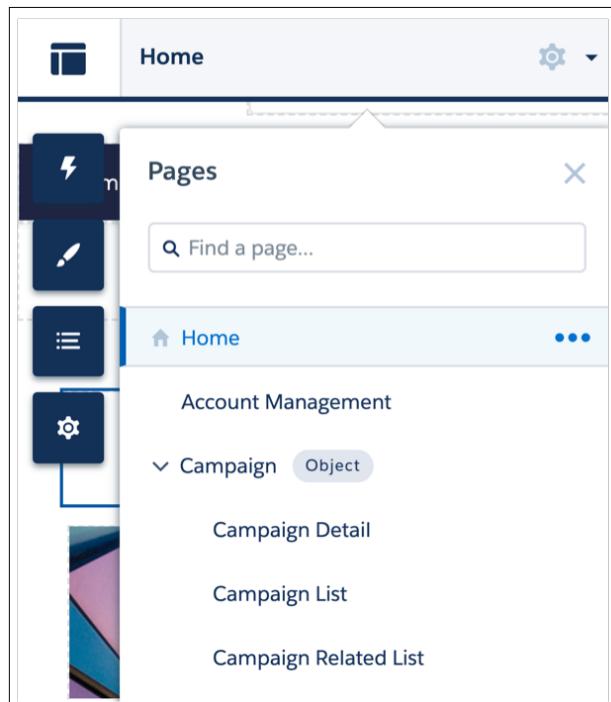
You can also reset mission activity counts with [Connect REST API](#) and [Connect in Apex](#).

## Better Manage Your Community Pages

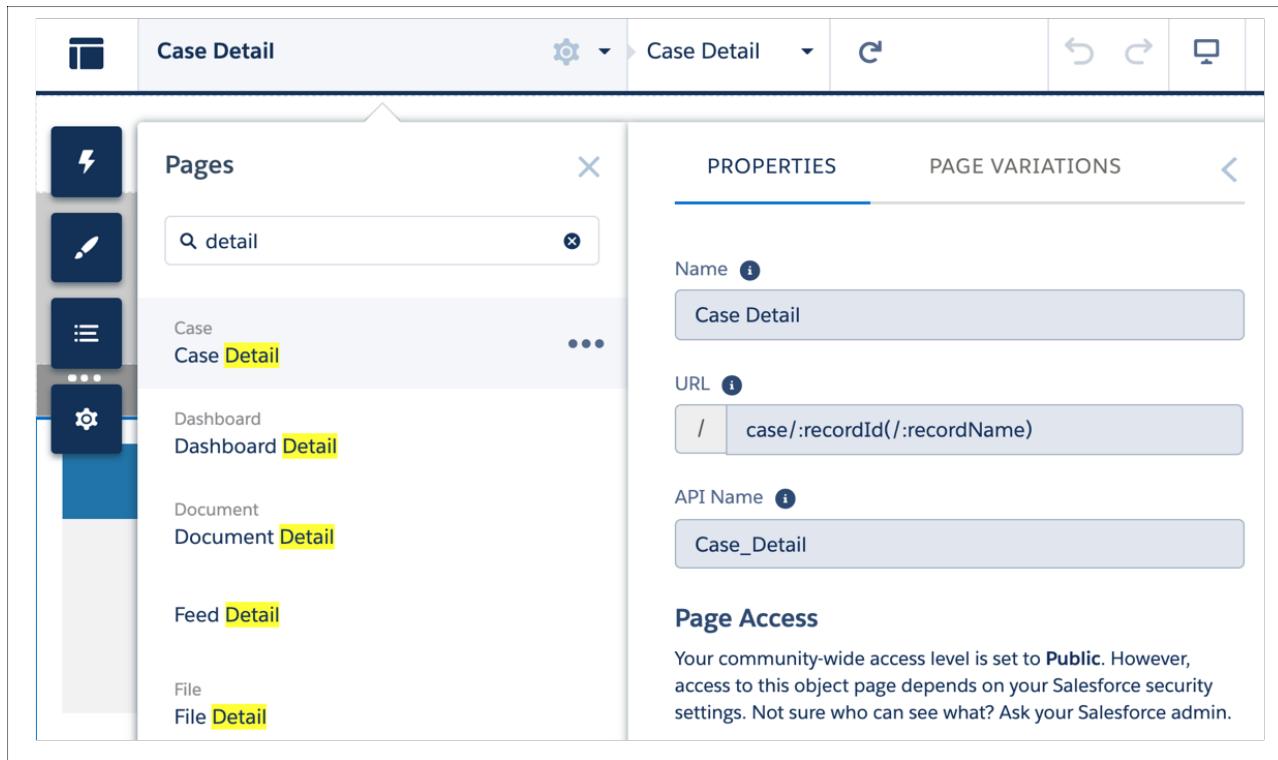
The improved Community Pages Menu makes it easier to navigate to and edit your pages. Search for a page to see the folder where a page lives and select and edit the page directly from the search results.

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

**How:** In Experience Builder, navigate to the Pages menu panel to see all the pages in your community. Object and Content pages are grouped with their associated pages, such as detail and related list pages.



Click on a page in the Page Menu to view it in the canvas and edit its page properties. You can also edit page properties directly from the search results when you search for a page title.



## Generate Sitemaps for Your Community Pages

Now you can generate an SEO sitemap for your community outside of the automatic sitemap generation process. Easily initiate a manual refresh of your sitemap once every 24 hours. The full sitemap automatically refreshes once every Sunday, while the sitemap including all new pages is refreshed once every 24 hours.

**Where:** This change applies to Salesforce CMS and Lightning communities accessed through Lightning Experience in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

**How:** In Experience Builder, navigate to the SEO tab in settings and click the **Generate Sitemap** button to manually generate a sitemap for your community. You can manually generate a sitemap once every 24 hours, and track the status of the sitemap as it processes.

After your sitemap is generated, the sitemap status updates to read **Complete**. For the best possible experience, make sure to perform a manual sitemap generation at an off-peak time without making any changes in Builder.

When you add new pages to your community, these links are included in an automatic sitemap refresh every 24 hours. If you add new pages after you manually generate a sitemap, they are added to the sitemap automatically.

OBJECT NAME	INDEXED RECORDS
Topics	3
Groups	1
Knowledge Articles	1
Questions	6

## Add Dynamic SEO Properties to Content Detail Pages

Improve search engine results and help customers find the Salesforce CMS content they seek by adding dynamic SEO values to the content detail pages of your Lightning community.

**Where:** This change applies to Lightning communities using Salesforce CMS, accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

### SEE ALSO:

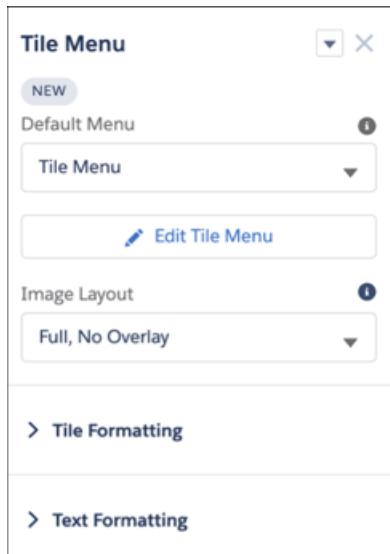
[Add Dynamic SEO Properties to Content Detail Pages](#)

## Super Customize Your Community with the Revamped Tile Menu

Use the revamped Lightning web component Tile Menu to create a visually stunning navigation experience in your community. The customizations in the new Tile Menu give you many more options for customization than the old version. Find the new Tile Menu in the component panel. If you currently use the old version of Tile Menu in your community pages and want to try out the new version, simply delete that component and use the new version. The new version contains all of the old version's customizations and more.

**Where:** This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**How:** Use the new Tile Menu in Experience Builder.



Use the new Tile Formatting and Text Formatting section of the component properties to customize the Tile Menu to your liking.

 **Note:** If you're using the old version and delete it, you can't recover. Use the new version once the old version is deleted.

#### SEE ALSO:

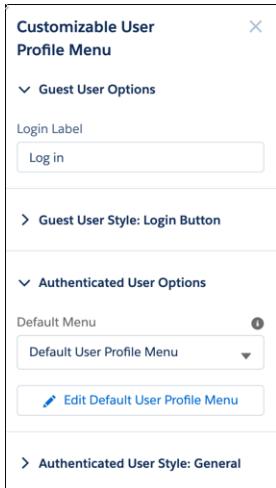
[Salesforce Help: Tile Menu \(can be outdated or unavailable during release preview\)](#)

## Get Flexible with the New User Profile Menu Component

Now you can configure menu items, use personalization, and choose to show the user's company logo and name. Starting in Summer '20, the Customizable User Profile Menu component replaces the User Profile component in Lightning communities using the new B2B Commerce Template and new communities using specific themes, including Ember, Stella, Webster, Citizen, Cypress, and Jepson. Existing communities using those themes get the new component instead of the old version when they reapply or change themes.

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

**How:** Open Experience Builder. In the header, click the user profile to open the properties editor. Expand Authenticated User Options and click Edit Default User Profile Menu. Customize to fit your needs. Not seeing the editing options? Click the header component and check that the Customizable User Profile Menu component is shown in the User Profile Component dropdown.

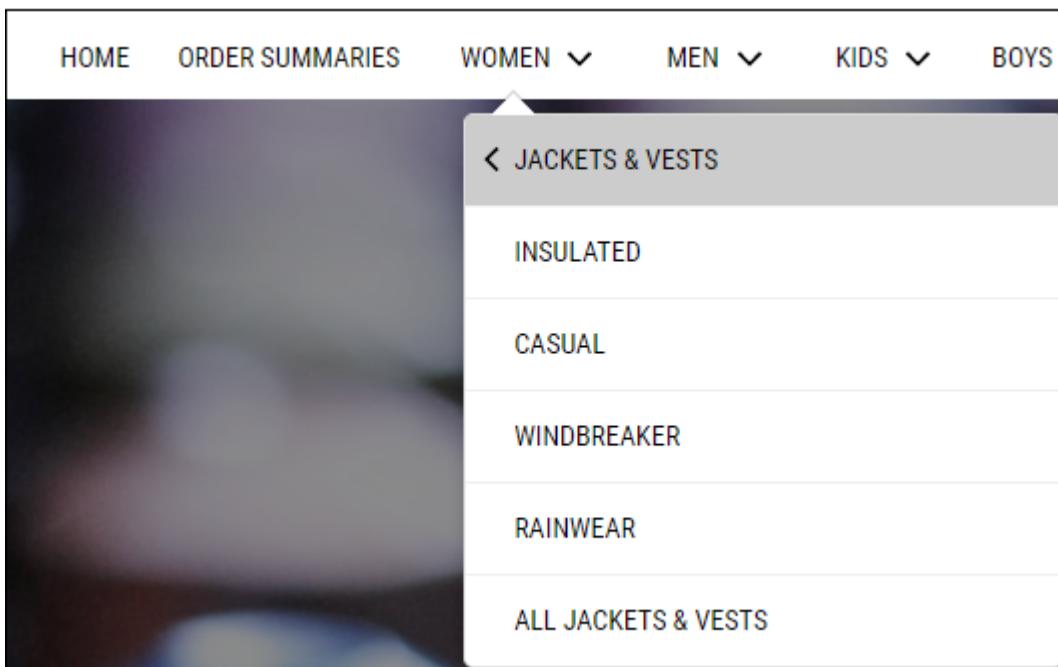


## Get More Options for Multi-Level Navigation in Your Community

Use the new Multi-Level Navigation Menu component to apply a fresh look and feel to community navigation.

**Where:** This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**Why:** You can use the Multi-Level Navigation Menu component in both your community and your B2B store. Rather than showing a menu hierarchy, the new component shows one level at a time with icons that guide users up and down levels. Show up to five category levels.



### SEE ALSO:

[Salesforce Help: Navigation Menu](#) (can be outdated or unavailable during release preview)

## Developer Productivity: Personalization, ExperienceBundle, and the Build Your Own (LWC) Template

Develop communities more efficiently with improvements to personalization, ExperienceBundle, and the Build Your Own (LWC) Template.

### IN THIS SECTION:

#### [Build Fast, Efficient Experiences with the LWC-Based Template \(Developer Preview\)](#)

Use the latest Build Your Own (LWC) template to develop communities that load quickly and scale well. Based on Lightning Web Components (LWC), a new programming model that delivers exceptional performance, this lightweight template supports fully customized LWC solutions. This template includes some changes since the previous release.

#### [Get Information About the Current Community in Lightning Web Components](#)

Use the `@salesforce/community` scoped module to import information about the current community context when developing Lightning web components for Lightning communities.

#### [ExperienceBundle Supports Theme Layout Properties](#)

ExperienceBundle now includes theme layout properties when retrieved, making it easier than ever to programmatically update your Lightning communities.

## Build Fast, Efficient Experiences with the LWC-Based Template (Developer Preview)

Use the latest Build Your Own (LWC) template to develop communities that load quickly and scale well. Based on Lightning Web Components (LWC), a new programming model that delivers exceptional performance, this lightweight template supports fully customized LWC solutions. This template includes some changes since the previous release.

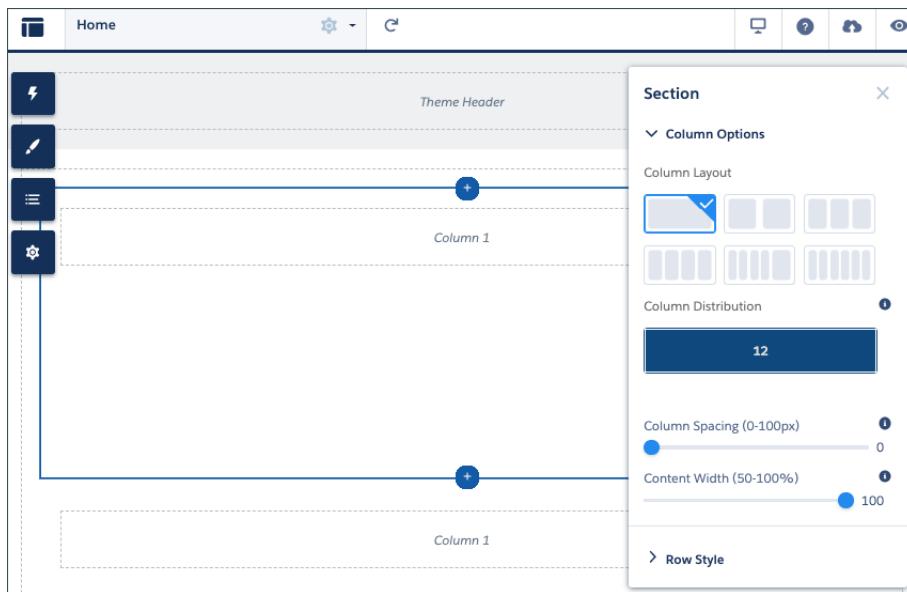
**Where:** This developer preview applies to communities accessed through Lightning Experience and Salesforce Classic in Developer editions.



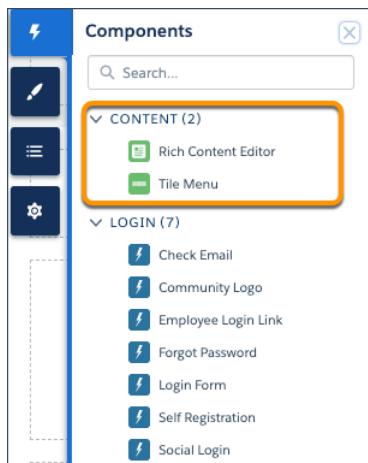
**Note:** The Build Your Own (LWC) template is available as a developer preview in Developer orgs. Build Your Own (LWC) isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools. You can provide feedback and suggestions for the template in the [Lightning Web Runtime Communities group in the Trailblazer Community](#).

**Why:** The Build Your Own (LWC) template is based exclusively on the Lightning Web Components programming model and delivers unparalleled performance and page load speeds. Since the previous release, we made several enhancements, including:

- Flexible layouts for pages so you can adjust the spacing between columns in the same way as in Aura communities.



- New Tile Menu and Rich Content Editor components.

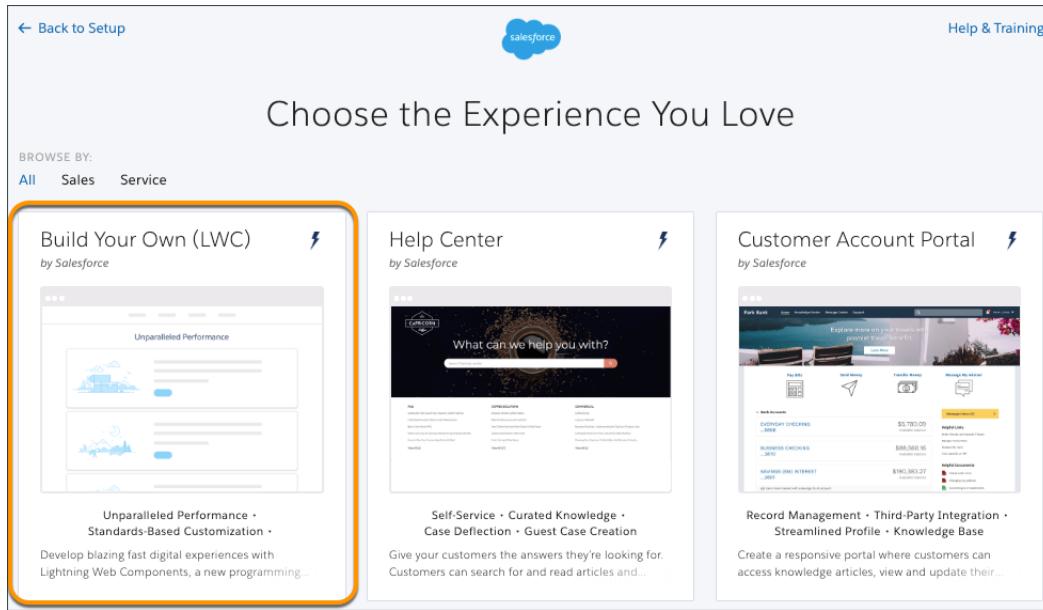


- Several limitations removed so that @salesforce modules can provide more consistent behavior between Aura and LWC communities. Referential integrity is supported—for example, you no longer must republish the community when a content asset name changes. Also, the following @salesforce modules are now supported:
  - @salesforce/community
  - @salesforce/messageChannel (Beta)

**Tip:** Build Your Own (LWC) is a minimal template that provides few components and only the most essential pages. So the template is best suited to developers who are comfortable developing Lightning web components and working with Salesforce DX, User Interface API, and Apex.

**How:** To start using the template, from Setup, enter *Communities Settings* in the Quick Find box, and then select **Communities Settings**. Select **Enable the Build Your Own (LWC) template**, and save your changes.

After you enable the template, it appears in the community creation wizard.



**!** **Important:** For previous developer preview participants, you must reenable SLDS styling in the head markup of your community. Otherwise, the Rich Content Editor and flexible layouts enhancements don't show correctly.

In Experience Builder, click **Settings > Advanced > Edit Head Markup**, and change all double-bracket expressions to single-bracket expressions.

For example, replace:

```
<link rel="stylesheet" href="{{ basePath }}/assets/styles/styles.css?{{ versionKey }}>
```

With:

```
<link rel="stylesheet" href="{{basePath}}/assets/styles/styles.css?{{versionKey}}>
```

#### SEE ALSO:

[Super Customize Your Community with the Revamped Tile Menu](#)

[Get Information About the Current Lightning Community](#)

## Get Information About the Current Community in Lightning Web Components

Use the `@salesforce/community` scoped module to import information about the current community context when developing Lightning web components for Lightning communities.

**Where:** This change applies to Lightning web components in Lightning communities, accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

#### SEE ALSO:

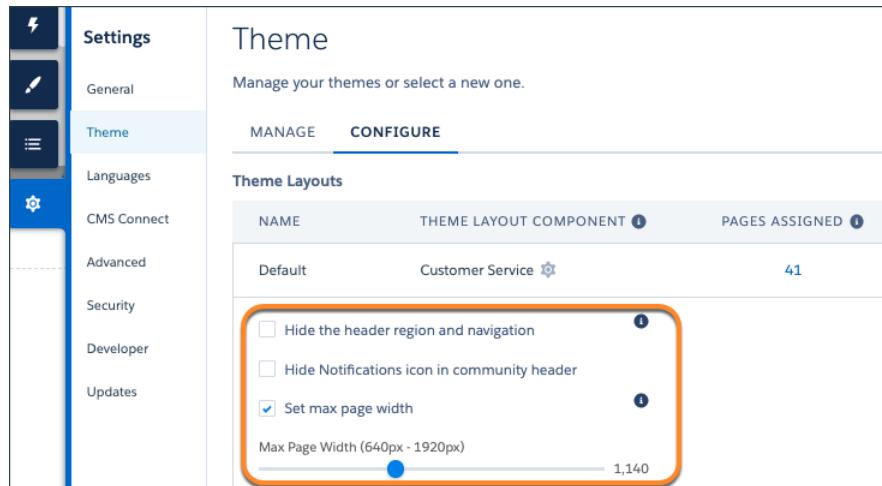
[Get Information About the Current Lightning Community](#)

## ExperienceBundle Supports Theme Layout Properties

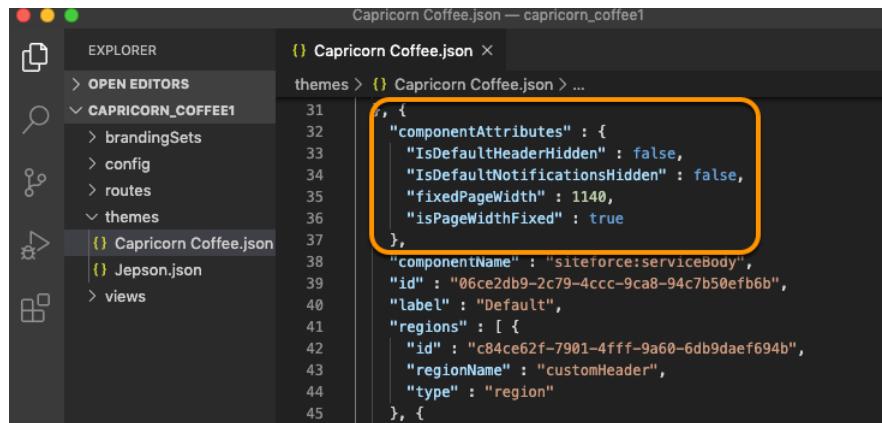
ExperienceBundle now includes theme layout properties when retrieved, making it easier than ever to programmatically update your Lightning communities.

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

**Why:** In Experience Builder, each theme layout includes several properties that let you configure the layout, such as hiding the header and navigation or setting the maximum page width.



Previously, ExperienceBundle didn't include these properties in the `theme_name.json` files contained in the theme folder.



## Guest User: Security Policies Enforced

In the past few releases, Salesforce implemented various security settings that comprise an overall public site security policy. In Summer '20, some settings are auto-enabling in your org, which you can opt out of, though we don't recommend it. Starting with the next release, Winter '21, the public site security settings are enabled, and you no longer have the option of opting out. Make sure your org enables all the security settings needed, and test out your implementation.

## IN THIS SECTION:

### [Block Certain Fields in the User Record for Orgs with Communities and Portals \(Previously Released Security Alert and Update, Enforced\)](#)

Salesforce is giving customers the option to enable a user setting that allows the hiding of certain personal information fields on the user records in orgs with communities or portals. The fields are hidden from view when external users are accessing user records. External users can still see their own user records. This change doesn't apply to queries running in System Mode.

### [Automatically Assign Records Created by Guest Users to a Default Owner \(Previously Released Security Alert\)](#)

To increase the security of your Salesforce data, set up your org so that guest users are no longer automatically the owner of records they create. Instead, when a guest user creates a record, the record is assigned to a default active user in the org, who becomes the owner.

### [Opt Out of Enforcing Guest User Object Permission Changes \(Update\)](#)

In Salesforce orgs created before Winter '21, this update opts out your org from enforcing guest user object permission changes aimed at increasing your data security.

### [Opt Out of Guest User Security Policies Before Summer '20 \(Previously Released Update\)](#)

By activating this update, you opt out of three policies aimed at increasing your data security for guest, or unauthenticated, users. Activating this update opts your org out of having the following settings automatically enabled with the Summer '20 release: Secure guest user record access, Assign new records created by guest users to the default owner, and Assign new records created by Salesforce Sites guest users. If your org already has these settings enabled, activating this update doesn't change your configuration.

### [Guest Users Can't Be Assigned as Owners of Already Existing Records](#)

Before the Summer '20 release, guest users couldn't be assigned as owners of newly created records. Starting in Summer '20, guest users can't be assigned as owners of records already existing in the org.

### [Secure Guest Users' Org-Wide Defaults and Sharing Model \(Previously Released Security Alert, Enforced\)](#)

Learn about the Secure guest user record access setting in this security alert, and how to safeguard your org's data. This setting enforces private org-wide defaults for guest users and restricts the sharing mechanisms that you can use to grant record access to guest users. If you have a Salesforce org created before Winter '20, we recommend that you review the external org-wide defaults, public groups, queues, manual sharing, and Apex managed sharing that you use to grant access to guest users. Then replace the access previously granted by these sharing mechanisms with guest user sharing rules before the security alert is enforced.

### [Create Guest User Sharing Rules Before Enabling Secure Record Access](#)

To help you prepare your Salesforce org for guest user security improvements, you can now create guest user sharing rules before you enable the Secure guest user record access setting. A guest user sharing rule is a type of criteria-based sharing rule that can grant Read Only access to guest users. When the Secure guest user record access setting is enabled, you can grant guest users access to records only through guest user sharing rules.

### [View All Users and Other Permissions Disabled in Guest User Profiles \(Previously Released Security Alert, Enforced\)](#)

Guest users typically don't need access to view all users in a Salesforce org, so to promote data security, we disabled the View All Users permission in guest user profiles. If you have a production org that was created before Winter '20, we recommend that you check guest user access and deselect the View All Users permission in all your guest user profiles. To enhance security, we also removed these permissions from the guest user profile: Can Approve Feed Post and Comments, Enable UI Tier Architecture, Remove People from Direct Messages, View Topics, and Send Non-Commercial Email.

### [Modify All Data, View All Data, Edit, and Delete Permissions on Guest User Profiles in Orgs Created in Summer '20](#)

Orgs created in the Summer '20 release don't have Modify All Data, View All Data, or delete permissions on any standard or custom objects for guest user profiles. Guest users in orgs created in Summer '20 still have edit permissions for custom objects and the following three standards objects: Order, Contract, and Survey Response.

### [Modify All Data, View All Data, Edit, and Delete Permissions on Guest User Profiles in Orgs Created Before Summer '20](#)

In orgs created before the Summer '20 release, we're removing the View All Data, Modify All Data, and delete permissions on custom and standard objects for guest users, but only if they were never enabled on the guest profile or permission sets for guest users. In orgs created before the Summer '20 release, guest user profiles retain guest edit permissions on all custom objects and the following standard objects: Order, Contract, and Survey Response. Guest users only had edit permissions on the three standard objects mentioned, and this behavior has not changed. If your org was created before the Summer '20 release, and you have View All Data, Modify All Data, edit, or delete permissions on any object for a guest user, you're notified by a [Security Alert](#) to make the necessary changes to your org.

### [Allow Guests to Safely Upload Files](#)

Guest users may not have been able to upload files in public communities if the Secure guest user record access setting is enabled. To allow guest users to upload files to a record, developers can specify the `fileFieldName` and `fileFieldValue` attributes in `lightning:fileUpload`. The attributes are used to store a value in a custom field in the `ContentVersion` object.

### [Reduce Object Permissions for Guest Users by the Winter '21 Release \(Security Alert\)](#)

With the Winter '21 release, Salesforce is removing the View All Data, Modify All Data, and delete permissions for guest users, and they can never be used for guest users on any objects. If a custom or standard object has View All Data, Modify All Data, or delete permissions for guest users, all the permissions are turned off with the Winter '21 release. Reduce object permissions for guest users if they have View All Data, Modify All Data, or delete permissions on a standard or custom object.

### [Opt Out of Turning Off Community-Specific Setting for Guest Users to See Other Members \(Previously Released Update\)](#)

By activating this update, you opt out of turning off the community-specific Let guest users see other members of this community setting in the Winter '21 release.

### [Ensure Guest User Access to Emails Created with Visualforce Email Templates](#)

Protect access to your company's data when you send emails that use Visualforce Classic email templates to guest users. Review and update these templates so that they can still be used.

### [Override Entity Permissions When Using <apex:inputField>](#)

The new `ignoreEditPermissionForRendering` attribute on `<apex:inputField>` allows you to override entity edit permissions for users, even when the underlying permission on the object doesn't allow edits. This override affects all users but is intended to be used only for guest users. This attribute works only with a custom controller in without sharing mode.

#### SEE ALSO:

[Guest Users Don't Automatically Get Inverse Relationship Records](#)

## **Block Certain Fields in the User Record for Orgs with Communities and Portals (Previously Released Security Alert and Update, Enforced)**

Salesforce is giving customers the option to enable a user setting that allows the hiding of certain personal information fields on the user records in orgs with communities or portals. The fields are hidden from view when external users are accessing user records. External users can still see their own user records. This change doesn't apply to queries running in System Mode.

**Where:** This change applies to all orgs with communities or portals.

**When:** This update was activated automatically on January 5, 2020 in production orgs.

**How:** Salesforce is introducing an org setting that allows for the hiding of other users' personal information in pages showing the user record to external user profiles, and in SOSL and SOQL queries that run as external users.

The affected fields are

- Alias
- EmployeeNumber

- FederationIdentifier
- SenderEmail
- Signature
- Username
- Division
- Title
- Department
- Extension

Admins can enable the setting **Hide Personal Information** for the org under User Management Settings. After enabling the setting, searches on user records don't show the affected fields of other users to external users.

 **Important:**

Enabling the **Hide Personal Information** setting is a Salesforce security best practice.

 **Tip:** This update is both an update and a security alert, and appears in both the Release Updates node and the Security Alerts page in Setup. To ensure a smooth transition, follow the step-by-step recommendations on the Security Alerts page.

SEE ALSO:

[Release Updates \(Beta\)](#)

## Automatically Assign Records Created by Guest Users to a Default Owner (Previously Released Security Alert)

To increase the security of your Salesforce data, set up your org so that guest users are no longer automatically the owner of records they create. Instead, when a guest user creates a record, the record is assigned to a default active user in the org, who becomes the owner.

**Where:** This change applies to orgs with active communities in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

**Why:** Having an internal org user be the owner of records created by guest users is a Salesforce security best practice. While we strongly encourage you to assign a default owner, changing record ownership can affect your guest users' ability to access records. Test all changes in a sandbox environment to see the effects on data sharing and visibility before you change your implementation in production.

**How:** From Setup, enter *Communities Settings* in the Quick Find box, then select **Communities Settings**. Select Assign new records created by guest users to the default owner. Click **Save**.

In newly created communities, Salesforce automatically assigns the user that created the community as the default owner of all records created by guest users. Change the default owner in the Administration workspace of your community, under Preferences.

 **Note:** Existing records in the org that are already owned by guest users aren't impacted by this change. However, to improve data security, we still recommend transferring ownership of records owned by guest users to another user in your org.

## Opt Out of Enforcing Guest User Object Permission Changes (Update)

In Salesforce orgs created before Winter '21, this update opts out your org from enforcing guest user object permission changes aimed at increasing your data security.

**Where:** This critical update applies to all Salesforce Sites (formerly Force.com Sites), Site.com sites, and communities that have guest user access enabled.

**How:** Activating this critical update keeps the following permissions unchanged. If they are enabled, they remain enabled, and if they are disabled, they remain disabled:

- Edit, delete, Modify All Data, and View All Data for custom objects.
- Edit, delete, Modify All Data, and View All Data for the following standard objects: Order, Contract, Survey Response, ProfileSkillUser, and ProfileSkillEndorsement.

These permissions are scheduled to be turned off for custom objects and the previous standard objects with the rollout of the Winter '21 release. But you can still enable them to meet your business needs. After your org updates with the Winter '21 release, you can no longer activate this update.

If you opt-out, your opt-out period is only valid for the Winter '21 release. With the Spring '21 release, these permissions are permanently removed for guest users, and can no longer be enabled.

Salesforce strongly recommends that you closely check your org's guest user profiles, permission sets, and permission set groups to ensure that the settings aren't enabled for any standard or custom objects. If the settings are enabled, disable them and test your org's configuration before the Winter '21 release. Salesforce understands that some customers require more time to comply with removing the permissions from guest user profiles. This critical update gives you ample time to get ready.

 **Important:** If a permission set or permission set group is assigned to the guest user and grants edit, Modify All Data, or View All Data to custom objects, or Order, Contract, Survey Response, ProfileSkillUser, and ProfileSkillEndorsement, then the guest user is removed from the permission set or permission set group. If any other permissions were granted using the same permission set or permission set group, the guest user no longer has access to them. Use this opt-out to stop the removal of the guest user from permission sets or permission set group. If your guest user is removed with the Winter '21 release, you can simply reassign the guest user to the permission set or permission set group. But you can no longer assign Modify All Data, View All Data, edit or delete permissions to guest users, even with a permission set or permission set group, with the Spring '21 release.

## Opt Out of Guest User Security Policies Before Summer '20 (Previously Released Update)

By activating this update, you opt out of three policies aimed at increasing your data security for guest, or unauthenticated, users. Activating this update opts your org out of having the following settings automatically enabled with the Summer '20 release: Secure guest user record access, Assign new records created by guest users to the default owner, and Assign new records created by Salesforce Sites guest users. If your org already has these settings enabled, activating this update doesn't change your configuration.

**Where:** The release update is visible in orgs with active communities in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

**When:** The Secure guest user record access, Assign new records created by guest users to the default owner, and Assign new records created by Salesforce Sites guest users settings are automatically enabled with the Summer '20 release. This update gives you the extra time to get ready. If you opt out of these settings for the Summer '20 release, you must comply with our new guest security policies before Winter '21, when they are enforced on all orgs.

**How:** To opt out of automatically enabling these settings, activate the update. To access the settings in the UI to see if they are enabled or not:

- From Setup, enter *Sharing Settings* in the Quick Find box. Select **Sharing Settings**. You can see the Secure guest user record access checkbox on the page.
- From Setup, enter *Communities Settings* in the Quick Find box, then select **Communities Settings**. You can see the Assign new records created by guest users to the default owner checkbox on the page.
- From Setup, enter *Sites* in the Quick Find box, then select **Sites**. You can see the Assign new records created by Salesforce Sites guest users checkbox on the page.

**!** **Important:** Activating this update only affects orgs that don't have these settings enabled. If your org already has these settings enabled, activating this update doesn't change your configuration.

SEE ALSO:

[Secure Guest Users' Org-Wide Defaults and Sharing Model \(Previously Released Security Alert, Enforced\)](#)

[Automatically Assign Records Created by Guest Users to a Default Owner \(Previously Released Security Alert\)](#)

## Guest Users Can't Be Assigned as Owners of Already Existing Records

Before the Summer '20 release, guest users couldn't be assigned as owners of newly created records. Starting in Summer '20, guest users can't be assigned as owners of records already existing in the org.

**Where:** This change applies to all orgs with guest user profiles for communities, Site.com sites, and Salesforce Sites.

**How:** This change is enforced in new orgs created after the Summer '20 release. Check out [Opt Out of Guest User Security Policies Before Summer '20 \(Critical Update\)](#) for orgs created before the Summer '20 release.

SEE ALSO:

[Opt Out of Guest User Security Policies Before Summer '20 \(Previously Released Update\)](#)

## Secure Guest Users' Org-Wide Defaults and Sharing Model (Previously Released Security Alert, Enforced)

Learn about the Secure guest user record access setting in this security alert, and how to safeguard your org's data. This setting enforces private org-wide defaults for guest users and restricts the sharing mechanisms that you can use to grant record access to guest users. If you have a Salesforce org created before Winter '20, we recommend that you review the external org-wide defaults, public groups, queues, manual sharing, and Apex managed sharing that you use to grant access to guest users. Then replace the access previously granted by these sharing mechanisms with guest user sharing rules before the security alert is enforced.

**Where:** This change applies to orgs with active communities and sites in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

**When:** The timelines for the rollout and enforcement of this setting are published in [Guest User Security Policies and Timelines](#).

**How:** Review the required actions before this security alert is enforced. From Setup, enter *Security Alerts* in the Quick Find box, then select **Security Alerts**. For Secure Guest Users' Org-Wide Defaults and Sharing Model, click **Get Started**. Follow the instructions in the step-by-step guides for reviewing guest user sharing settings and creating guest user sharing rules.

SEE ALSO:

[Opt Out of Guest User Security Policies Before Summer '20 \(Previously Released Update\)](#)

[Security Alerts](#)

[Salesforce Help: Secure Guest Users' Sharing Settings and Record Access \(can be outdated or unavailable during release preview\)](#)

## Create Guest User Sharing Rules Before Enabling Secure Record Access

To help you prepare your Salesforce org for guest user security improvements, you can now create guest user sharing rules before you enable the Secure guest user record access setting. A guest user sharing rule is a type of criteria-based sharing rule that can grant Read Only access to guest users. When the Secure guest user record access setting is enabled, you can grant guest users access to records only through guest user sharing rules.

**Where:** This change applies to all communities accessed through Lightning Experience and Salesforce Classic in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

**When:** Before the Secure guest user record access setting is enabled, we recommend that you create guest user sharing rules that replace the sharing mechanisms that you previously used to grant access to guest users. The timelines for the rollout and enforcement of this setting are published in [Guest User Security Policies and Timelines](#).

**How:** From Setup, in the Quick Find box, enter *Sharing Settings*, then select **Sharing Settings**. In the Sharing Rules related list for the object, click **New** and select the **Guest user access, based on criteria** rule type.

#### SEE ALSO:

[Secure Guest Users' Org-Wide Defaults and Sharing Model \(Previously Released Security Alert, Enforced\)](#)

[Salesforce Help: Secure Guest Users' Sharing Settings and Record Access](#)

[Salesforce Help: Create Sharing Rules](#)

## View All Users and Other Permissions Disabled in Guest User Profiles (Previously Released Security Alert, Enforced)

Guest users typically don't need access to view all users in a Salesforce org, so to promote data security, we disabled the View All Users permission in guest user profiles. If you have a production org that was created before Winter '20, we recommend that you check guest user access and deselect the View All Users permission in all your guest user profiles. To enhance security, we also removed these permissions from the guest user profile: Can Approve Feed Post and Comments, Enable UI Tier Architecture, Remove People from Direct Messages, View Topics, and Send Non-Commercial Email.

**Where:** This change applies to orgs with active communities in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

**When:** The timelines for the rollout and enforcement of this setting are published in [Guest User Security Policies and Timelines](#).

**How:** These changes are auto-enabled in your org. However, you can opt out. In the Summer '20 release, these changes are mandatory and you no longer have the option to opt out.

 **Note:** These permissions are completely removed in sandboxes refreshed before the Spring '20 release. Sandboxes refreshed after the Spring '20 release mirror permissions seen in your production org.

## Modify All Data, View All Data, Edit, and Delete Permissions on Guest User Profiles in Orgs Created in Summer '20

Orgs created in the Summer '20 release don't have Modify All Data, View All Data, or delete permissions on any standard or custom objects for guest user profiles. Guest users in orgs created in Summer '20 still have edit permissions for custom objects and the following three standards objects: Order, Contract, and Survey Response.

**Where:** This change applies to all orgs with guest user profiles for communities, Site.com sites, and Salesforce Sites.

 **Important:** While we're not removing the edit permission for guest users on custom objects and Order, Contract, and Survey Response yet, we're removing it with the Winter '21 release. Test your configuration by removing the edit permission on all objects for guest users to see how your implementation is affected.

## Modify All Data, View All Data, Edit, and Delete Permissions on Guest User Profiles in Orgs Created Before Summer '20

In orgs created before the Summer '20 release, we're removing the View All Data, Modify All Data, and delete permissions on custom and standard objects for guest users, but only if they were never enabled on the guest profile or permission sets for guest users. In orgs created before the Summer '20 release, guest user profiles retain guest edit permissions on all custom objects and the following standard objects: Order, Contract, and Survey Response. Guest users only had edit permissions on the three standard objects mentioned, and this behavior has not changed. If your org was created before the Summer '20 release, and you have View All Data, Modify All Data, edit, or delete permissions on any object for a guest user, you're notified by a [Security Alert](#) to make the necessary changes to your org.

**Where:** This change applies to all orgs with guest user profiles for communities, Site.com sites, and Salesforce Sites.

 **Important:** While we're not removing the edit permission for guest users on custom objects and Order, Contract, and Survey Response yet, we're removing it with the Winter '21 release. Test your configuration by removing the edit permission on all objects for guest users to see how your implementation is affected.

SEE ALSO:

[Reduce Object Permissions for Guest Users by the Winter '21 Release \(Security Alert\)](#)

## Allow Guests to Safely Upload Files

Guest users may not have been able to upload files in public communities if the Secure guest user record access setting is enabled. To allow guest users to upload files to a record, developers can specify the `fileFieldName` and `fileFieldValue` attributes in `lightning:fileUpload`. The attributes are used to store a value in a custom field in the `ContentVersion` object.

**Where:** The release update is visible in orgs with active public communities in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

## Reduce Object Permissions for Guest Users by the Winter '21 Release (Security Alert)

With the Winter '21 release, Salesforce is removing the View All Data, Modify All Data, and delete permissions for guest users, and they can never be used for guest users on any objects. If a custom or standard object has View All Data, Modify All Data, or delete permissions for guest users, all the permissions are turned off with the Winter '21 release. Reduce object permissions for guest users if they have View All Data, Modify All Data, or delete permissions on a standard or custom object.

**Where:** This change applies to all Salesforce orgs with one or more standard or custom objects with View All Data, Modify All Data, update, or delete permissions enabled for guest users.

**How:** Follow the step-by-step recommendations of the security alert if it appears in your org.

If a security alert appears in your org, your org data may be exposed to guest users because you have one or more standard or custom objects with View All Data, Modify All Data, update, or delete permissions enabled for guest users.

 **Important:** While we're not removing the update permission for guest users yet, we're removing it at a future date. Test your configuration by removing the update permission on all objects for guest users to see how your implementation is affected.

## Opt Out of Turning Off Community-Specific Setting for Guest Users to See Other Members (Previously Released Update)

By activating this update, you opt out of turning off the community-specific Let guest users see other members of this community setting in the Winter '21 release.

**Where:** The update is visible in Salesforce orgs with active public communities in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

**When:** The Let guest users see other members of this community setting is automatically disabled in all communities in Winter '21. This update gives you the extra time you may need to get ready.

**How:** Before Winter '20, the **Community User Visibility** setting, when enabled, allowed guest users and authenticated community users to see each other within the community. In the Winter '20 release, we introduced a new community-specific setting, Let guest users see other members of this community, that lets admins control guest user visibility independently from community user visibility.

Depending on your security configuration, this setting might allow a guest user, essentially anyone on the internet, to access community users' personally identifying information. This can include first and last name, email, custom, and other fields.

To protect your customer data and privacy, Salesforce is turning off the Let guest users see other members of this community setting for all communities.

Depending on your business needs, enabling this setting and allowing guest users to see one another may be required for your site to function properly. Therefore, we are asking that you reassess and validate the need to enable Let guest users see other members of this community for each community. If you have one or more communities that must have this setting turned on, activate this update to opt out of the Winter '21 update. However, we encourage you to work towards modifying your site's customization to allow this setting to be disabled. Limiting guest user visibility is a Salesforce security best practice.

If you don't activate this update, the Let guest users see other members of this community setting is turned off on all your communities (not just the ones created after Winter '20). Make sure to assess all the communities in your org, including the ones created after Winter '20.

## Ensure Guest User Access to Emails Created with Visualforce Email Templates

Protect access to your company's data when you send emails that use Visualforce Classic email templates to guest users. Review and update these templates so that they can still be used.

**Where:** This change applies to Salesforce orgs with active public communities, sites, and portals in Enterprise, Performance, Unlimited, and Developer editions.

**When:** This security policy was released in Spring '20 and was immediately enforced.

**Who:** This change applies to Visualforce email templates that target guest users in communities.

**Why:** Emails that use Visualforce email templates send information based on a user's access to Salesforce data. But because data access for guest users is limited in Salesforce, the template doesn't work.

 **Important:** Assess the impact of the guest security policy and, if necessary, update Visualforce email templates sent to guest users.

**How:** Add an attribute to the `emailTemplate` tag in your Visualforce email template.

1. Ensure that you have the Author Apex user permission.



**Note:** Any user who creates or updates Visualforce email templates must have this permission.

2. Open a Visualforce email template and add this attribute to the `emailTemplate` tag:

```
renderUsingSystemContextWithoutSharing="True"
```

3. Save the template.

**SEE ALSO:**

[Email Templates: Update Visualforce Email Templates for Guest Users](#)

[Salesforce Help: Create Visualforce Email Templates in Salesforce Classic \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Guest User Security Policies and Timelines \(can be outdated or unavailable during release preview\)](#)

## Override Entity Permissions When Using `<apex:inputField>`

The new `ignoreEditPermissionForRendering` attribute on `<apex:inputField>` allows you to override entity edit permissions for users, even when the underlying permission on the object doesn't allow edits. This override affects all users but is intended to be used only for guest users. This attribute works only with a custom controller in without sharing mode.

**Where:** This change applies to Salesforce orgs in Enterprise, Performance, Unlimited, and Developer editions.

**How:** This attribute bypasses entity edit permissions and field-level security edit checks, so any form field that uses `<apex:inputField>` with this attribute is open for edit. To validate fields or block edit access when using this attribute, use additional checks in the page's custom Apex controller.

 **Warning:** Salesforce is not responsible for any exposure of your data to unauthenticated users based on this change from default settings.

## Security and Sharing: Two-Factor Authentication for External Users, Embedded Login

Enable two-factor authentication for your external users. Configure Embedded Login to use the login page type already set up for your community.

**IN THIS SECTION:**

[Set Up Two-Factor Authentication for External Identity with a User Permission](#)

Enable two-factor authentication for your external users simply by assigning the Two-Factor Authentication for User Interface Logins user permission, which we added to the External Identity license.

[Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals \(Update\)](#)

Activating this update enables the Allow using standard external profiles for self-registration and user creation setting in your org. This setting allows admins to use standard external profiles for self-registration, user creation, and login.

[Assign Your Community's Login Page Type to Embedded Login](#)

Configure Embedded Login to use the discoverable login page type or any other custom login page type already set up for your community.

[Improve Your Community's Login Experience with Custom URLs](#)

Use optional login URLs for your community to streamline the single sign-on process for your users.

## Set Up Two-Factor Authentication for External Identity with a User Permission

Enable two-factor authentication for your external users simply by assigning the Two-Factor Authentication for User Interface Logins user permission, which we added to the External Identity license.

**Where:** This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Essentials, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Enable Two-Factor Authentication for External Users](#)

## Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals (Update)

Activating this update enables the Allow using standard external profiles for self-registration and user creation setting in your org. This setting allows admins to use standard external profiles for self-registration, user creation, and login.

**Where:** This change applies to all communities and portals accessed through Lightning Experience and Salesforce Classic in Performance, Enterprise, Unlimited, and Developer editions.

**Who:** This change applies to all orgs using standard external profiles:

- CustomerCommunityPlus
- CustomerCommunityPlusLogin
- CustomerPortalManager
- CustomerPortalManagerCustom
- CustomerPortalManagerStandard
- IdeasOnlyPortal
- LimitedCustomerPortalMgrCustom
- LimitedCustomerPortalMgrStandard
- OverageCustomerPortalMgrCustom
- OverageCustomerPortalMgrStandard
- BronzePartner
- ExternalAppsPlusLogin
- ExternalAppsPlusMember
- GoldPartner
- Partner
- PartnerCommunity
- PartnerCommunityLogin
- SilverPartner
- AuthenticatedWebsite
- CSPLitePortal
- CustomerCommunity
- CustomerCommunityLogin
- ExternalAppsLogin
- ExternalAppsMember
- ExternalIdentityLogin
- HighVolumeCustomerPortal
- HighVolumePortal

- OverageAuthenticatedWebsite
- OverageHighVolumeCustomerPortal
- PlatformPortal

**How:** Activate this update if you're currently using one of the standard external profiles for login, self-registration, or user creation in communities or portals. After the Spring '21 release, users in your org who are assigned to external standard profiles can no longer log into communities.

From Setup, enter *Release Updates* in the Quick Find box, then select **Release Updates**. For Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals, click **Activate**.

-  **Note:** Enabling the Allow using standard external profiles for self-registration and user creation setting is not a Salesforce security best practice. We strongly recommend that you clone standard external profiles, and change object permissions to meet your business needs. If you've already enabled the setting in your org, this update is shown as activated.

## Assign Your Community's Login Page Type to Embedded Login

Configure Embedded Login to use the discoverable login page type or any other custom login page type already set up for your community.

**Where:** This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Customize Your Embedded Login Page Type](#)

## Improve Your Community's Login Experience with Custom URLs

Use optional login URLs for your community to streamline the single sign-on process for your users.

**Where:** This change applies to Lightning communities accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Improve SSO with Custom Community URLs](#)

## Other Changes in Communities

Learn about smaller changes that improve your experience with communities.

IN THIS SECTION:

[Share Data with Partners via External Account Hierarchies](#)

External account hierarchies take the complexity out of sharing data. Now partners and customers can easily share data with other external accounts in their hierarchy.

[Focused Conversations with an Improved Chat Header](#)

Provide a modern experience for your customers with a streamlined Embedded Chat header. The narrower design keeps the critical content in the main window for more focused interaction.

### [See a Live Channel Menu Preview](#)

Quickly preview your Channel Menu branding choices during setup. See how your colors, icons, fonts, and text look in a live view before deployment to your website or Salesforce community.

## Share Data with Partners via External Account Hierarchies

External account hierarchies take the complexity out of sharing data. Now partners and customers can easily share data with other external accounts in their hierarchy.

**Where:** This change applies to Lightning communities accessed through Lightning Experience and Salesforce Classic in Performance, Unlimited, and Developer editions.

**Who:** This feature is available to Partner and Customer users only.

**What:** Like Salesforce role hierarchies, data that belongs to accounts in an external account hierarchy is available to the parent in the hierarchy. As a result, external users don't have to rely on sharing rules to access data from their child accounts.

**How:** Enable external account hierarchies in Communities Settings. After you enable the preference, the External Account Hierarchy object is available in your org.

## Focused Conversations with an Improved Chat Header

Provide a modern experience for your customers with a streamlined Embedded Chat header. The narrower design keeps the critical content in the main window for more focused interaction.

**Where:** This change applies to communities accessed through Lightning Experience and Salesforce Classic in Essentials, Professional, Performance, and Unlimited editions.

SEE ALSO:

### [Enhance Conversations with an Improved Chat Header](#)

## See a Live Channel Menu Preview

Quickly preview your Channel Menu branding choices during setup. See how your colors, icons, fonts, and text look in a live view before deployment to your website or Salesforce community.

**Where:** This change applies to communities accessed through Lightning Experience Salesforce Classic in Essentials, Professional, Performance, and Unlimited editions.

SEE ALSO:

### [See a Live Channel Menu Preview](#)

## Salesforce CMS: New Image and Document Types, Mass Import, and B2B Integration

Manage your Salesforce CMS content more easily with new image and document content types. Quickly import multiple content items, such as images, news, documents, or custom content types. And use your CMS content in B2B Commerce on Lightning Experience.

**IN THIS SECTION:**[Centralize Your CMS Content with Image and Document Types](#)

With image and document content types, you can organize your content without leaving the CMS app. Create, manage, and share your work—all in one place.

[Import Content Into Your Salesforce CMS Workspace](#)

Import content, such as images, news, documents, or custom content types, into a workspace in Salesforce CMS by uploading a .zip archive of JSON files. Transfer content from an external source or CMS or mass-import images from an external digital asset manager (DAM) for product enrichment.

[Add Dynamic SEO Properties to Content Detail Pages](#)

Improve search engine results and help customers find the Salesforce CMS content they seek. Now you can add dynamic SEO values to the content detail pages of your Lightning community.

[Personalize CMS Collections](#)

Create a custom experience for your users with the new Personalization option in the CMS Collection component. Use it to determine which collection your user sees based on audience criteria.

[Use Salesforce CMS Content with B2B Commerce on Lightning Experience](#)

Salesforce CMS supports B2B Commerce on Lightning Experience, which is now generally available. Add images and attachments to a CMS workspace in Salesforce CMS, and then include them with the products and categories in your store.

[Create CMS Workspaces and Channels User Permission](#)

We updated the name of the user permission that controls who can create Salesforce CMS workspaces and channels. The Manage CMS Workspaces and Channels user permission is now called Create CMS Workspaces and Channels. When enabled, the Create CMS Workspaces and Channels permission lets users create and edit CMS Workspaces and add CMS Channels.

## Centralize Your CMS Content with Image and Document Types

With image and document content types, you can organize your content without leaving the CMS app. Create, manage, and share your work—all in one place.

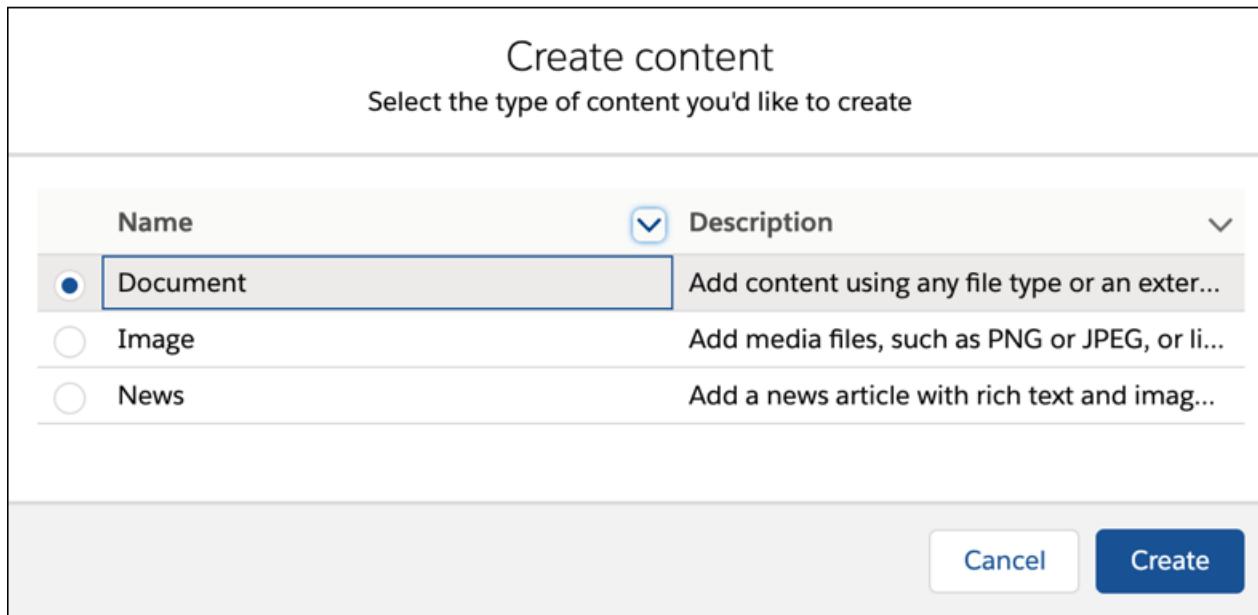
**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** To create content, you must have a contributor role in that CMS workspace.

**How:** Managing your Salesforce CMS content just got easier with image and document content types. When you add content to a workspace, you can choose to either upload a file directly from your desktop, or link to an external URL.



**Note:** For URL links, make sure the domain you're using is allowed by your org so that your users can access your content.

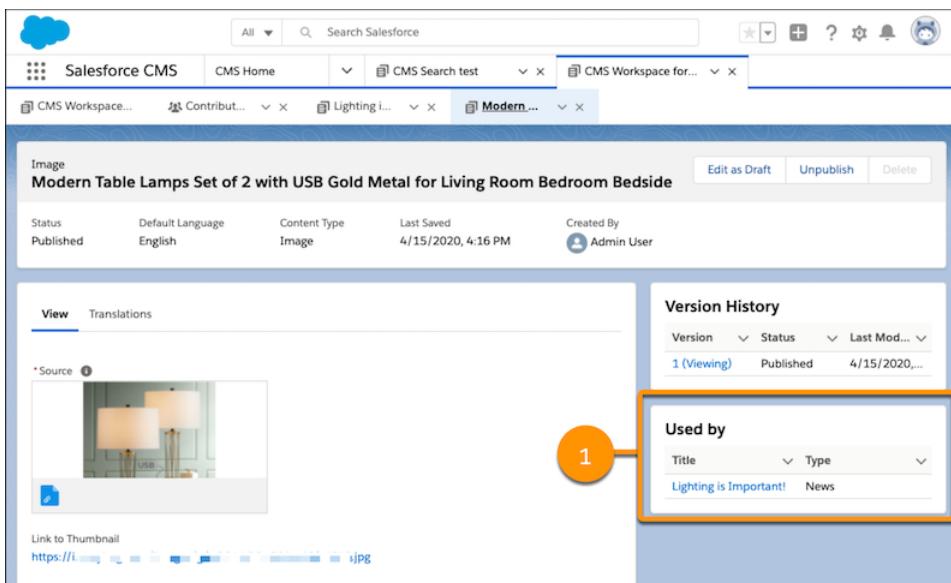


Redefine the content experience for your users without worrying about any record limits, because images and documents don't count towards content record limits. As your business grows, so can your content.

 **Note:** Review the guidelines for however many files you can store in your org. Any content that you add counts towards your org's storage limit.

Your content lives in the homepage of your CMS Workspace. Here, you can search by title for an image or document you added to your workspace, check the draft status of your items, and grow your community with new content to suit your business needs.

You can find images that were previously stored in the Asset Library in the CMS workspace where they were used. Now, you can see what other content references an image with an at-a-glance Used By card on the image detail page. (1) Include images already in your workspace in a news article or any custom content without leaving the CMS app. Publish your images to view and select them from the content detail page. Or, publish images directly when you add a new image from a news or custom content type.



Updating your content with images is easy. Publish a new version of an image and all content that references it is updated too. Unpublish an image and all content that references it no longer displays the image. The at-a-glance Used by card on the image details page shows where an image is referenced. You can still publish a blog post with a reference to an unpublished or deleted image. We'll display a message in the authoring detail page to let you know that the image reference isn't available without holding you back from publishing your content.

#### SEE ALSO:

[Salesforce Help: Add Your Website to the CORS Whitelist](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Data and File Storage Allocations](#) (can be outdated or unavailable during release preview)

[Salesforce CMS Image Content and References](#)

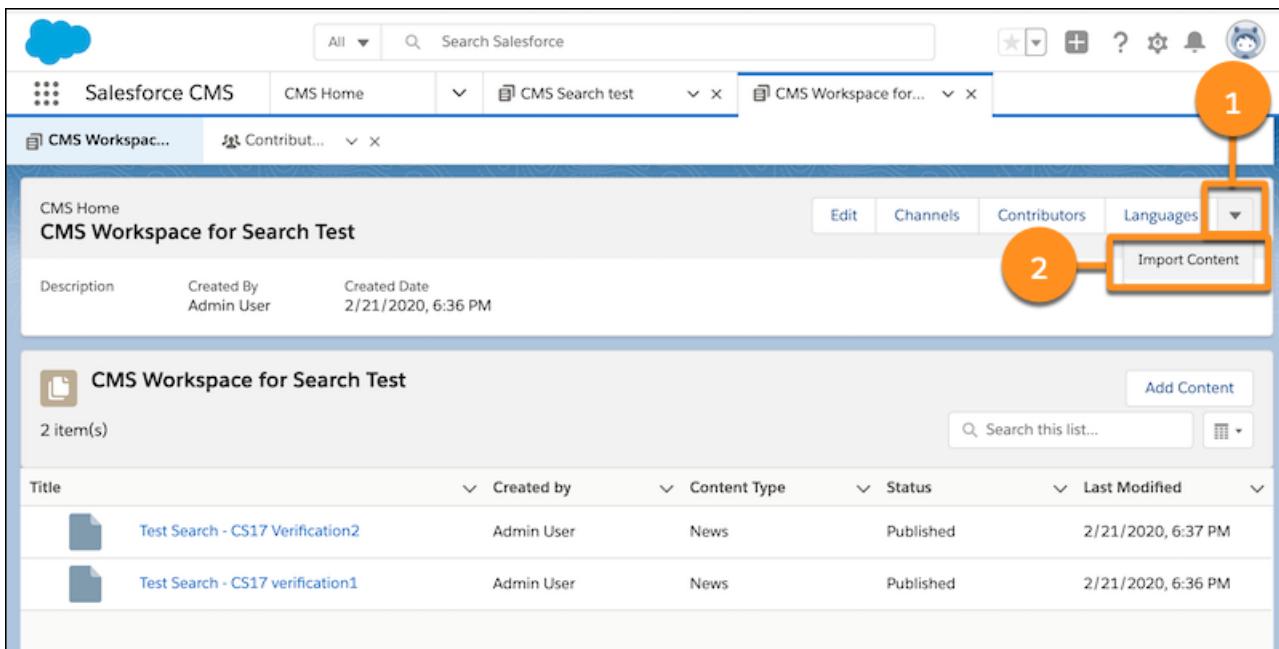
## Import Content Into Your Salesforce CMS Workspace

Import content, such as images, news, documents, or custom content types, into a workspace in Salesforce CMS by uploading a .zip archive of JSON files. Transfer content from an external source or CMS or mass-import images from an external digital asset manager (DAM) for product enrichment.

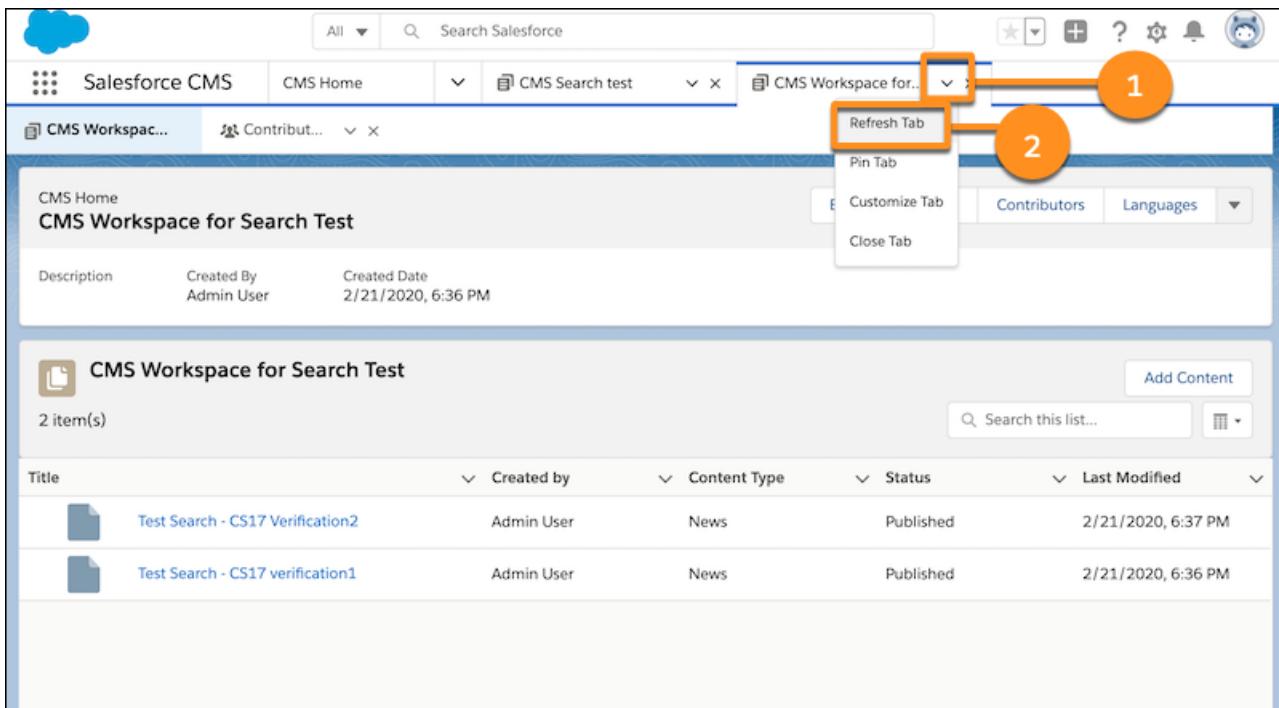
**Where:** This change applies to Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** To import content, you must have a content admin role in that CMS workspace or be a Salesforce admin.

**How:** Enter the content details into JSON files and create a .zip archive of the files. Then, when the workspace is open in Salesforce CMS, click the menu dropdown (1) and select **Import Content** (2), then select the .zip file to upload.



When the content successfully imports into Salesforce CMS, it populates the CMS workspace content list. Click the dropdown menu on the workspace title tab (1) and select **Refresh Tab** (2) to see it.



#### SEE ALSO:

[Import Content Into Your Salesforce CMS Workspace](#)

[JSON File Format for Importing Content into Salesforce CMS](#)

## Add Dynamic SEO Properties to Content Detail Pages

Improve search engine results and help customers find the Salesforce CMS content they seek. Now you can add dynamic SEO values to the content detail pages of your Lightning community.

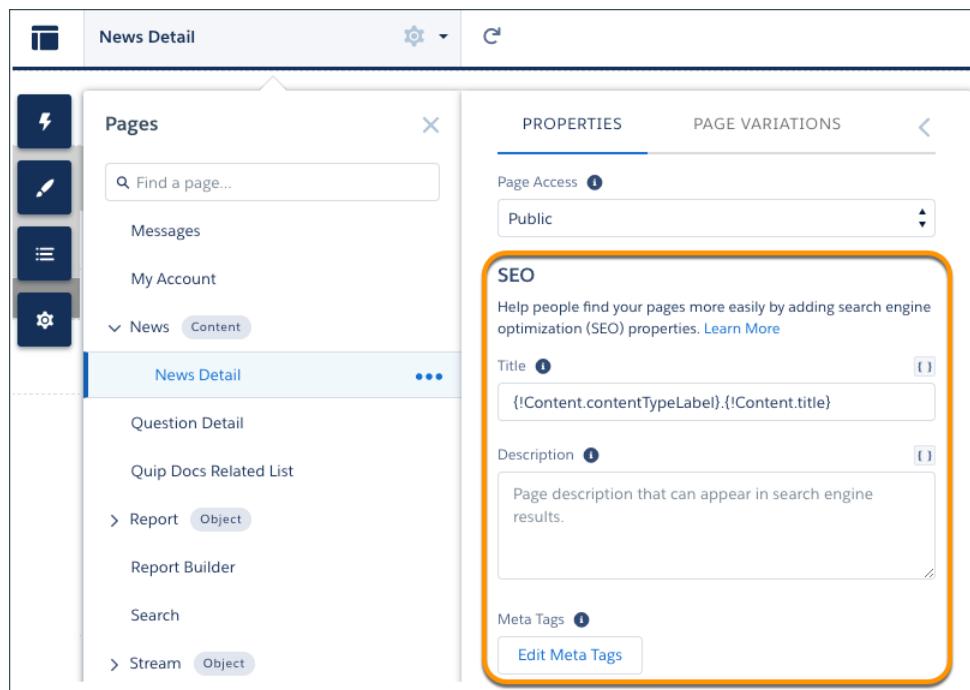
**Where:** This change applies to Salesforce CMS with Lightning community channels, accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**How:** In the page's properties in Experience Builder, you can use expressions to add dynamic page title and description values from the associated content, along with dynamic metadata tags.

For example, you can show a content item's type and title in search results using the expression

```
{!Content.contentTypeLabel}. {!Content.title}.
```

These SEO properties are available to all content detail pages, such as News Detail, Document Detail, and Image Detail pages. And content detail pages are automatically included in the sitemap.



## Personalize CMS Collections

Create a custom experience for your users with the new Personalization option in the CMS Collection component. Use it to determine which collection your user sees based on audience criteria.

**Where:** This change applies to Lightning communities using Salesforce CMS, accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

### SEE ALSO:

[Take Personalization Further with Navigation Menus, Tile Menus, and CMS Collections](#)

## Use Salesforce CMS Content with B2B Commerce on Lightning Experience

Salesforce CMS supports B2B Commerce on Lightning Experience, which is now generally available. Add images and attachments to a CMS workspace in Salesforce CMS, and then include them with the products and categories in your store.

**Where:** This change applies to B2B Commerce with Salesforce CMS enabled, accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** This feature is available to users with a B2B Commerce license.

SEE ALSO:

[B2B Commerce on Lightning Experience](#)

## Create CMS Workspaces and Channels User Permission

We updated the name of the user permission that controls who can create Salesforce CMS workspaces and channels. The Manage CMS Workspaces and Channels user permission is now called Create CMS Workspaces and Channels. When enabled, the Create CMS Workspaces and Channels permission lets users create and edit CMS Workspaces and add CMS Channels.

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

## Files: Increased File Security and Retiring Support for Adobe Flash Rendition

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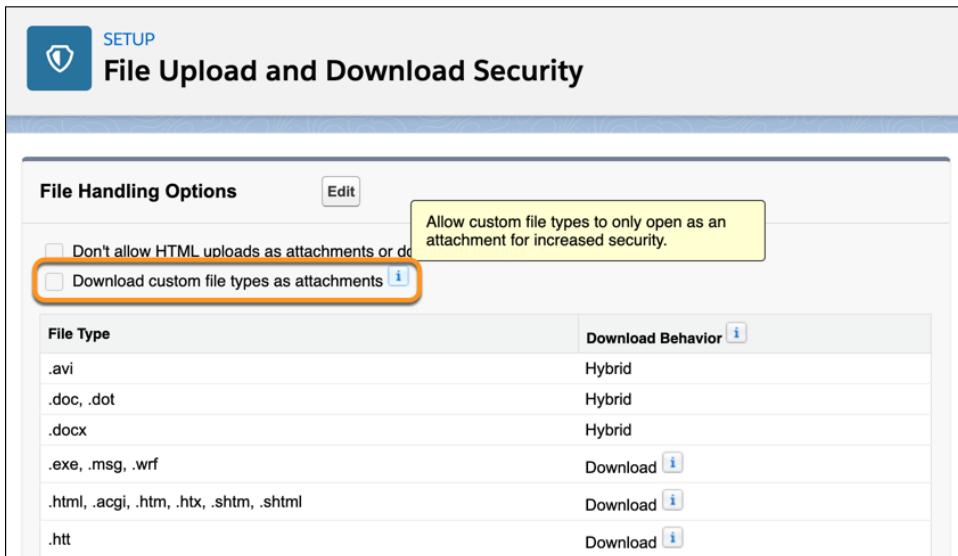
Allow your users to download all custom file types as attachments. Switch your file rendition in Connect REST API from Adobe Flash to SVG.

### Allow Custom File Types to Download as Attachments

To increase the security of your Salesforce data, allow your users to download all custom file types as attachments.

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

**How:** Select Download custom file types as attachments from the File Upload and Download Security page in Setup. With this preference enabled, Salesforce securely downloads unrecognized file types instead of opening them in the browser. We strongly recommend that you enable the setting and see how it affects your configuration before this preference is automatically enabled.



## Switch Your File Rendition in Connect REST API

With Summer '20, Connect REST API no longer returns an Adobe Flash rendition by default. In Winter '21, Connect REST API stops creating Adobe Flash renditions. Switch to an SVG rendition.

**Where:** This change applies to Lightning Experience and Salesforce Classic in every edition, except Professional.

**How:** If you require Adobe Flash renditions in Summer '20, contact Customer Support. We recommend using the [Connect REST API File Preview resource](#) to get an SVG rendition instead.

## Mobile: Salesforce Mobile App and Notifications Enhancements

Get more done without leaving the Salesforce mobile app with personalized navigation and mobile activity reminders (pilot). Send more push notifications, and send custom notifications to external apps. Anyone with access to a Lightning community can now access the Mobile Publisher Playground app (beta).

### IN THIS SECTION:

#### [Salesforce Mobile App: Navigation Improvements and Mobile Activity Reminders \(Pilot\)](#)

Go from your email to Salesforce for iOS seamlessly with Universal Links. Reorder your navigation items for Lightning apps right from the mobile app. Put activity reminders in your users' pockets with the mobile pilot.

#### [Notifications: Notification Builder Platform and More Push Notifications](#)

Send custom notifications to your external connected apps. Reach more users more often with increased push notification limits.

#### [Mobile Publisher for Communities: Switch Between Different Testing Modes and Greater Access to the Publisher Playground App](#)

The Mobile Publisher Playground app is now available to more users who can access to Lightning communities. There's also a new setting screen that lets you switch between different testing modes.

### [Salesforce Anywhere: Streamline and Optimize Salesforce Collaboration \(Beta\)](#)

Centralize the Salesforce collaboration experience and increase team productivity with the Salesforce Anywhere mobile app. Your users can chat about and collaborate on Salesforce records, get personalized alerts about changes to Salesforce data, and make in-app record updates on the go.

## Salesforce Mobile App: Navigation Improvements and Mobile Activity Reminders (Pilot)

Go from your email to Salesforce for iOS seamlessly with Universal Links. Reorder your navigation items for Lightning apps right from the mobile app. Put activity reminders in your users' pockets with the mobile pilot.

### IN THIS SECTION:

#### [Everything That's New in the Salesforce Mobile App](#)

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

#### [App Store and Google Play Updates](#)

Although major releases bring major changes to the Salesforce mobile app, we're always working to improve your mobile experience. We sometimes make smaller but still mighty changes that we can't wait to share with you, so we release them in App Store® and Google Play™ updates. Learn about our latest release in Salesforce Help.

#### [Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android](#)

Salesforce for Android users now have a home base for their Einstein Analytics apps and dashboards with the new Analytics navigation item for Lightning apps. With the new item, users can browse their apps and access their favorites. With more functionality in the Salesforce app, Einstein Analytics users don't have to switch between apps to complete important business tasks.

## Everything That's New in the Salesforce Mobile App

Our latest round of new and improved Salesforce mobile app features makes it easier to access Salesforce on the go.

The new Salesforce mobile app is available for all editions, except Database.com, without an additional license. Your org's Salesforce edition and licenses, as well as a user's assigned profile and permission sets, determines the Salesforce data and features that are available to each user.

Most features become available for the Salesforce mobile app the week of July 20, 2020.

Salesforce Mobile App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
<b>Browser and Operating System</b>			
<a href="#">Salesforce Mobile App Requirements Have Changed</a> on page 391	✓	✓	
<a href="#">Retiring Salesforce Mobile Web Browser Experience</a> on page 392			
<b>Einstein Analytics</b>			
<a href="#">Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android</a> on page 398	✓		✓
<b>Data Access and Views</b>			

Salesforce Mobile App Enhancements and Changes	Salesforce for Android	Salesforce for iOS	Set Up in the Full Site
<a href="#">Access All Lists on Android Object Home Pages</a> on page 393	✓		
<a href="#">Clear Your Cache Anytime on Android</a> on page 393	✓		
<a href="#">Get to the Point with Report Highlights</a> on page 393		✓	✓
<b>Navigation and Actions</b>			
<a href="#">Reorder Navigation Menu Items for Lightning Apps</a> on page 394	✓	✓	
<a href="#">Open Links with One Tap on iOS</a> on page 395		✓	
<b>Sales Features</b>			
<a href="#">Keep Your Reps on Time and on Task with Mobile Activity Reminders (Pilot)</a> on page 396	✓	✓	✓
<b>Notifications</b>			
<a href="#">Push Notification Limits Have Increased</a> on page 396	✓	✓	
<b>Access and Security</b>			
<a href="#">Protect Your Data with Enhanced Mobile Security Updates</a> on page 397	✓	✓	✓
<b>Ongoing Enhancements</b>			
<a href="#">App Store and Google Play Updates</a> on page 397	✓	✓	

## Salesforce Mobile App Requirements Have Changed

Salesforce is revising the requirements for using the Salesforce mobile app for iOS and Android. Learn about the mobile platform requirements and the devices that we use for feature and performance testing as we continue to improve the Salesforce experience.

### Mobile Platform Requirements

#### Operating System and Version Requirements

Android users can now run the Salesforce mobile app on Android 7.0 or later. Previously, we supported Android 6.0 or later.

#### Mobile Browser Requirements

We retired Salesforce mobile web. To access Salesforce from a mobile device, use the downloadable Salesforce mobile app from the App Store or Google Play, or use Lightning Experience on iPad Browsers.

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, minimum platform requirements are subject to change at the sole discretion of Salesforce, with or without advance notice.

### Mobile Devices Used for Salesforce Testing

Salesforce performs automated and manual testing of the Salesforce mobile app for iOS and Android on a select set of mobile devices. This is the list of devices for Summer '20.

Platform	Phones	Tablets
<b>Android</b>	<ul style="list-style-type: none"> <li>• Google Pixel 4 XL</li> <li>• Google Pixel 3a</li> <li>• Google Pixel 3</li> <li>• Google Pixel 2 / Pixel 2 XL</li> <li>• Samsung Galaxy S20</li> <li>• Samsung Galaxy S10 / S10+</li> <li>• Samsung Galaxy S9 / S9+</li> <li>• Samsung Galaxy S8 / S8+</li> <li>• Samsung Galaxy S7</li> <li>• Samsung Galaxy Note 9</li> <li>• Samsung Galaxy Note 8</li> </ul>	
<b>iOS</b>	<ul style="list-style-type: none"> <li>• iPhone 11 Pro / Pro Max</li> <li>• iPhone 11</li> <li>• iPhone XR</li> <li>• iPhone XS Max</li> <li>• iPhone X</li> <li>• iPhone 8 / 8 Plus</li> <li>• iPhone 7 / 7 Plus</li> <li>• iPhone SE</li> <li>• iPhone 6S</li> <li>• iPhone 6</li> </ul>	<ul style="list-style-type: none"> <li>• iPad Pro 10.5"</li> <li>• iPad Air 2</li> <li>• iPad Mini 4</li> </ul>

Customers aren't blocked from using Salesforce on untested devices that meet current platform requirements. Salesforce might not be able to replicate some issues for customers using Salesforce on untested devices due to manufacturer-specific customizations.

To allow for innovation and to keep Salesforce current in the rapidly evolving mobile market, the list of Salesforce-tested devices is subject to change at the sole discretion of Salesforce, with or without advance notice.

## Retiring Salesforce Mobile Web Browser Experience

We retire access to the Salesforce Mobile Web in Summer '20. To access Salesforce from a mobile device, use the downloadable Salesforce mobile app from Google Play or the App Store. Or use Lightning Experience on iPad Safari.

**Where:** This change applies to the Salesforce Mobile Web in all editions, except Database.com.

### SEE ALSO:

[Knowledge Article: Salesforce Mobile Web Experience Retirement](#)

## Access All Lists on Android Object Home Pages

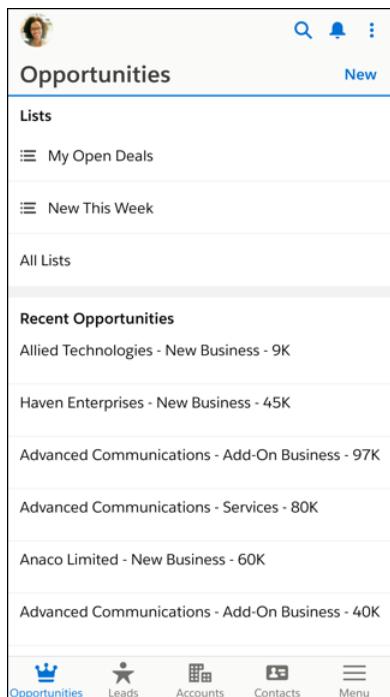
Android users can access all of their lists on object home pages. Previously, users saw only the two most recent lists they accessed on the Salesforce desktop site, which left new users with empty, not-so-useful object home pages.

**Where:** This change applies to the Salesforce mobile app for Android in all editions, except Database.com.

**When:** This change is available the week of July 20, 2020.

**Why:** For many users, lists are a great way to sort, prioritize, and analyze the records that are most important to them. In addition to the user's two most recently accessed lists, each object home page includes a link to view All Lists for that object.

Below the lists, users can easily revisit recently accessed records for the object.



## Clear Your Cache Anytime on Android

Android users can ensure that they see the most up-to-date record layouts and data by clearing the cache right in the Salesforce mobile app. Previously, Android users had to go to their device settings to clear the cache.

**Where:** This change applies to the Salesforce mobile app for Android in all editions, except Database.com.

**When:** This change is available the week of July 20, 2020.

**Why:** Instead of quitting the app, then reopening it to force data to update, users can now go to their profile menu. Under Settings, tap **Advanced**, then tap **Clear Cached Data**.

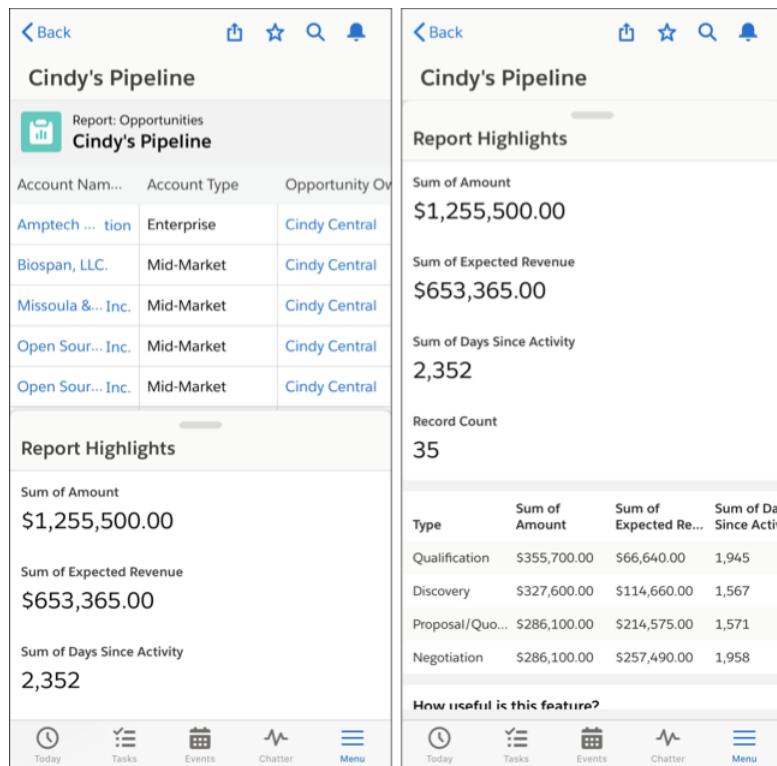
## Get to the Point with Report Highlights

Users can get a high-level overview of their reports on the Salesforce mobile app. Report Highlights shows summaries of up to eight key metrics, including average amounts, grand totals, subtotals, record counts, and formula column results. For summary and matrix reports, users can also see totals for groups based on the first-level group field.

**Where:** This change applies to the Salesforce mobile app for iOS in all editions, except Database.com.

**When:** This change is available the week of July 20, 2020.

**Why:** When users view reports on a mobile device, they want information at a glance, instead of scrolling (and scrolling) through a long, detailed report table. Summed totals help them get in and out of their data, and on with their day.



Users can customize the metrics that appear in Report Highlights from the report run page on Lightning Experience desktop.

#### SEE ALSO:

[Customize Report Views in the Run Page](#)

## Reorder Navigation Menu Items for Lightning Apps

Mobile users have more control over how they set up their navigation bar and navigation menu. In any Lightning app with personalization enabled, users can reorder their navigation items in the Salesforce mobile app. Previously, users had to make changes in the desktop version of a Lightning app. These changes affect the mobile navigation menu, the mobile navigation bar, and the desktop navigation bar.

**Where:** This change applies to the Salesforce mobile app for iOS and Android in all editions, except Database.com.

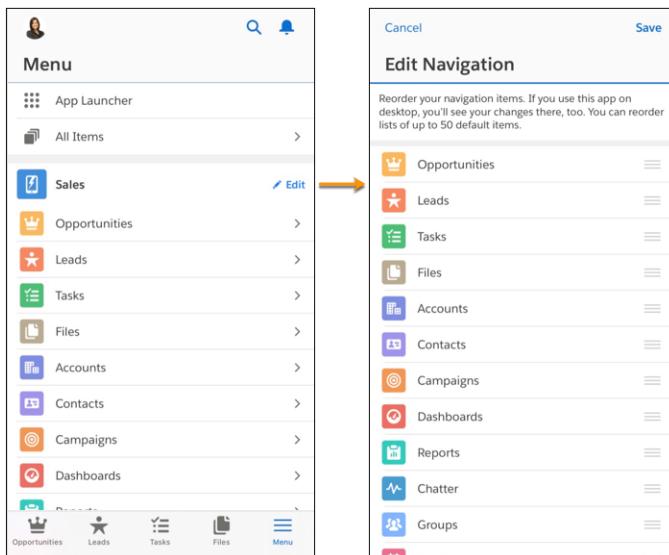
**When:** This change is available the week of July 20, 2020.

**Why:** Whether a user is mostly mobile or just on a long trip, reorganizing navigation items to suit the mobile workflow is a smart productivity move. Users can reorder their navigation items to put the items they use most frequently at the top of their navigation menu. The first four items in the menu also appear in the navigation bar at the bottom of the screen, where they're always within easy reach. And now that users can make changes from within the Salesforce mobile app, they can personalize the navigation items for a mobile-only Lightning app without having to ask their admins for help.



**Note:** Items that are available only in the Salesforce mobile app, such as Today, can't be reordered.

To reorder items, go to the navigation menu, tap the Edit icon, then drag items as needed.



**How:** Personalization is enabled by default in a Lightning app. But if you don't want your users to personalize the navigation bar for a specific app, disable personalization. From Setup in Lightning Experience, go to the **App Manager**. For the desired app, select **App Options**. Select **Disable end user personalization of nav items in this app**.

#### SEE ALSO:

[Salesforce Help: Customize a Lightning App Navigation Menu in the Salesforce Mobile App](#) (can be outdated or unavailable during release preview)

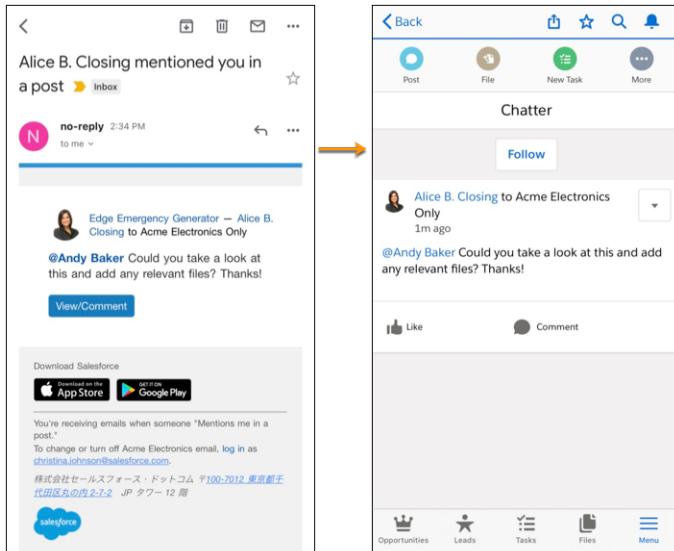
## Open Links with One Tap on iOS

Salesforce mobile app users with iOS 13 or later can now tap only once to open Lightning URL and Chatter notification links on their phones. Previously, users tapped their way through an obstacle course of screens to view the content.

**Where:** This change applies to the Salesforce mobile app for iOS in all editions, except Database.com. This change doesn't apply to the Salesforce mobile app created from the Mobile Publisher program.

**When:** This change is available the week of July 20, 2020.

**Why:** Previously, when users tapped a Salesforce link from their mobile email, they tapped through the "Open in Salesforce?" popup before getting to their content. If users didn't have the mobile app installed, there were more screens and more taps. Now, getting to the mobile app is simple.



This feature also works on iPad for users who have the Salesforce app installed on their device. iPad users without the app installed are taken to the page in Lightning Experience on their browsers. iPhone users without the app installed are prompted to install it.

Android users are prompted to choose the right app the first time they tap a Salesforce link, and they can tell Android to remember their choice. That experience doesn't change.

#### SEE ALSO:

[Salesforce Help: Open Links with One Tap on iOS \(can be outdated or unavailable during release preview\)](#)

## Keep Your Reps on Time and on Task with Mobile Activity Reminders (Pilot)

Your reps have a lot on their minds with deals to close and meetings to attend. Help them stay on top of their to-do lists with mobile activity reminders. Your users can receive their event and task reminders as push and in-app notifications for the Salesforce mobile app. Previously, event and task reminders were only available for desktop.

**Where:** This change applies to Lightning Experience and the Salesforce mobile app for iOS and Android in all editions, except Database.com.



**Note:** We provide Mobile Activity Reminders to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Mobile Activity Reminders isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Mobile Activity Reminders in the [Lightning on Mobile Trailblazer Community](#).

**How:** To use mobile activity reminders, your org must be enrolled in the Mobile Activity Reminder pilot. For information about joining the pilot, contact your Account Executive.

## Push Notification Limits Have Increased

You can send up to 20,000 iOS and 10,000 Android push notifications per hour per org.

**Where:** This change applies to the Salesforce mobile app for iOS and Android in all editions, except Database.com.

## Protect Your Data with Enhanced Mobile Security Updates

More protection has been built into the enhanced mobile security for the Salesforce mobile app. You can now enforce new policies such as forcing a user to log in again when their mobile device has been restarted. These new policies further secure your Salesforce app data and users' personal data.

**Where:** Available for an extra cost for the new Salesforce mobile app in all editions, except Essentials and Database.com.

**When:** This change will be available the week of July 20, 2020.

**Who:** Available for users with the Enforce Enhanced Mobile App Security user permission.

**Why:** Enhanced mobile security updates include enforcing users to log in again when their mobile devices have been restarted or a new biometric ID has been added. You can also specify a number of days a user is offline without a policy refresh and disable URL caching (iOS only).

**How:** In Setup, search for *Connected Apps* and select **Manage Connected Apps**. Select the app that you want to modify, and add and configure policies as custom attributes.

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with a 'Quick Find' bar at the top, followed by sections like 'Setup Home', 'Lightning Experience Transition Assistant', 'New Salesforce Mobile App QuickStart', 'Lightning Usage', 'ADMINISTRATION' (with 'Users', 'Data', 'Email' sub-sections), 'PLATFORM TOOLS' (with 'Apps' (sub-sections: 'App Manager', 'AppExchange Marketplace'), 'Connected Apps' (sub-sections: 'Connected Apps OAuth Usage', 'Manage Connected Apps' (which is highlighted with an orange box), 'Lightning Bolt', 'Mobile Apps', 'Packaging'), 'Feature Settings', and 'Einstein'). The main content area is titled 'SETUP'. It contains several sections: 'Notifications Settings' (checkbox for 'Display full content push notifications' is checked), 'Mobile Integration' (checkbox for 'Require PIN after:' is checked, 'Pin Length' is set to 4), 'Custom Connected App Handler' (checkbox for 'Apex Plugin Class' is checked, 'Run As' is listed), 'User Provisioning Settings' (checkbox for 'Enable User Provisioning' is unchecked), 'Trusted IP Range for OAuth Web Server Flow' (text input field 'No application-defined IP ranges'), and 'Custom Attributes' (a table with columns 'Action', 'Attribute key', and 'Attribute value'. There are five rows of data: 'Edit | Del' for 'mobile.security.MINIMUM\_OS\_VERSION' with value '{\"value\": \"12.0\", \"severity\": \"warn\"}'; 'Edit | Del' for 'mobile.security.DEVICE\_PASSCODE' with value '{\"value\": true, \"severity\": \"error\"}'; 'Edit | Del' for 'mobile.security.BLOCK\_FILE\_BACKUP' with value '{\"value\": true}'; 'Edit | Del' for 'mobile.security.MAN\_IN\_MIDDLE' with value '{\"value\": true, \"severity\": \"critical\"}'; and 'Edit | Del' for 'mobile.security.JAILBROKEN\_DEVICE' with value '{\"value\": true, \"severity\": \"critical\"}'). A 'New' button is located at the top right of the 'Custom Attributes' table. Below it is a section for 'OAuth Custom Scopes' with a 'Manage OAuth Custom Scopes' button and a note 'No OAuth custom scopes associated with this app'.

### SEE ALSO:

[Salesforce Mobile App Security Guide](#) (can be outdated or unavailable during release preview)

## App Store and Google Play Updates

Although major releases bring major changes to the Salesforce mobile app, we're always working to improve your mobile experience. We sometimes make smaller but still mighty changes that we can't wait to share with you, so we release them in App Store® and Google Play™ updates. Learn about our latest release in Salesforce Help.

**226.010**

This version of the Salesforce mobile app is available the week of August 3, 2020.

**226.020**

This version of the Salesforce mobile app is available the week of August 17, 2020.

## Access Einstein Analytics on the Go With the New Mobile Navigation Item for Android

Salesforce for Android users now have a home base for their Einstein Analytics apps and dashboards with the new Analytics navigation item for Lightning apps. With the new item, users can browse their apps and access their favorites. With more functionality in the Salesforce app, Einstein Analytics users don't have to switch between apps to complete important business tasks.

**Where:** This change applies to the Salesforce mobile app for Android. Einstein Analytics is available in Developer Edition and for an extra cost in Enterprise, Performance, and Unlimited editions.

**When:** The new navigation item will be generally available the week of September 7, 2020.

**How:** Admins can add the Analytics navigation item to Lightning apps in the Lightning App Builder. Analytics does not show up in the Mobile Only navigation item list in the App Launcher.



**Note:** Lenses and datasets that aren't supported in the Salesforce mobile app open in the Einstein Analytics for Android app.

### SEE ALSO:

[Analytics Mobile Apps: Explore More in the Salesforce App](#)

## Notifications: Notification Builder Platform and More Push Notifications

Send custom notifications to your external connected apps. Reach more users more often with increased push notification limits.

### IN THIS SECTION:

[Send Custom Notifications to External Apps with Notification Builder Platform](#)

With Notification Builder Platform, custom notifications are going places. App owners can subscribe their connected apps to custom notification types in order to receive and display in-app and push notifications. Previously, custom notifications were available only for Salesforce-provided apps.

[Send More Push Notifications with Increased Limits](#)

We increased our limits for mobile push notifications to 20,000 iOS and 10,000 Android push notifications per hour per org. Previously, we limited push notifications per day, and the limits varied by type of mobile app.

## Send Custom Notifications to External Apps with Notification Builder Platform

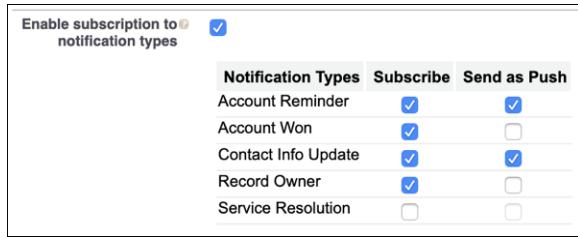
With Notification Builder Platform, custom notifications are going places. App owners can subscribe their connected apps to custom notification types in order to receive and display in-app and push notifications. Previously, custom notifications were available only for Salesforce-provided apps.

**Where:** This change applies to Lightning Experience in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions. Packaging of connected apps with custom notifications is available in Developer edition.

**Why:** Custom notifications keep connected app users engaged with their workflows. Use the Notification Builder Platform to send relevant updates and reminders to users in your own org. Or package your app for distribution and the custom notifications it subscribes to along with it, including the notification types and triggers. The notifications work right out of the box.

**How:** You can subscribe your app to custom notifications after you create the notification type and enable the appropriate supported channels for the type. You can manage your custom notification types via the Custom Notifications page in Setup or via API. To associate triggers with your custom notification type, add it to a process or flow.

To subscribe a connected app to a custom notification type, from Setup, enter *Apps* in the Quick Find box, then select **App Manager**. Locate the desired app, then select **Edit** from the dropdown menu. In the Mobile App Settings section on the connected app page, select **Enable subscription to notification types**. Select **Subscribe** or both **Subscribe** and **Send as Push** for the desired custom notification types, then save your changes.



Use the Salesforce Mobile Push Notifications Implementation Guide to implement in-app and push notifications for your app. Use the new Connect REST API Notifications Resources to get, update, or view the status of custom notifications in your org.

To package your custom notifications with your connected app, from Setup, enter *Package* in the Quick Find box, then select **Package Manager**. When you create a new managed package or edit an existing managed package, add your connected app and the custom notification types it subscribes to as components.

#### SEE ALSO:

- [Salesforce Help: Send Custom Notifications with Notification Builder Platform](#) (can be outdated or unavailable during release preview)
- [Salesforce Mobile Push Notifications Implementation Guide](#) (can be outdated or unavailable during release preview)
- [Connect REST API Developer Guide: Notifications Resources](#) (can be outdated or unavailable during release preview)
- [Salesforce Help: Manage Your Notifications with Notification Builder](#) (can be outdated or unavailable during release preview)
- [Salesforce Help: Package and Distribute Your Apps](#) (can be outdated or unavailable during release preview)

## Send More Push Notifications with Increased Limits

We increased our limits for mobile push notifications to 20,000 iOS and 10,000 Android push notifications per hour per org. Previously, we limited push notifications per day, and the limits varied by type of mobile app.

**Where:** This change applies to all mobile apps that send push notifications via the Universal Notification Service, including:

- Salesforce-provided mobile apps, including the Salesforce mobile app, the Field Service Lightning mobile app, the Einstein Analytics mobile app, and mobile apps created with Mobile Publisher
- Custom connected mobile apps that send push notifications via Apex code or Notification Builder Platform
- Mobile apps installed from the AppExchange that send push notifications

**Why:** The new limits make it easier to reach your users. Plus, they're simpler. You can send push notifications without worrying whether an app is provided by Salesforce, developed by your company, or installed from the AppExchange.



**Note:** When an org's hourly push notification limit is met, any additional notifications are still created for in-app display and retrieval via REST API.

#### SEE ALSO:

[Salesforce Mobile Push Notifications Implementation Guide: Push Notification Limits](#) (can be outdated or unavailable during release preview)

## Mobile Publisher for Communities: Switch Between Different Testing Modes and Greater Access to the Publisher Playground App

The Mobile Publisher Playground app is now available to more users who can access to Lightning communities. There's also a new setting screen that lets you switch between different testing modes.

#### IN THIS SECTION:

##### [Switch Between Testing Modes with the Publisher Playground App \(Beta\)](#)

You can quickly switch between Production, Sandbox, and Demo test modes in the Publisher Playground app (iOS only).

##### [Easier Access to the Publisher Playground App \(Beta\)](#)

Before Summer '20, users had to obtain a courtesy license from Salesforce to access the Publisher Playground app. Now anyone with access to a Lightning community can access the Publisher Playground app.

##### [Push Notification Limits Have Increased](#)

You can send up to 20,000 iOS and 10,000 Android push notifications per hour per org.

## Switch Between Testing Modes with the Publisher Playground App (Beta)

You can quickly switch between Production, Sandbox, and Demo test modes in the Publisher Playground app (iOS only).

**Where:** This change applies to Lightning communities accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.



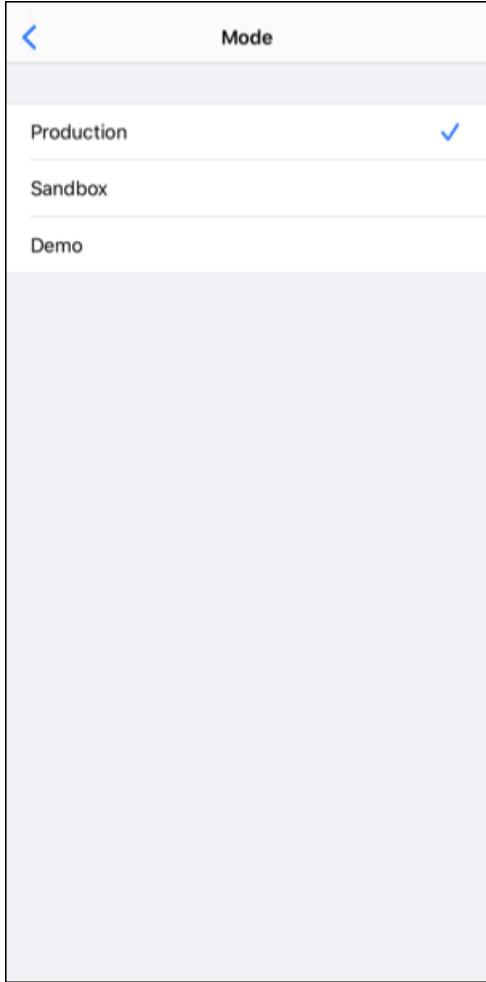
**Note:** We provide this app to customers through a public Beta program. This public Beta app isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available features.

**When:** This public Beta app is available in the Summer '20 release.

**Who:** Available for users who can access a Lightning Community.

**Why:** We want to make sure that you can quickly switch between different testing modes.

**How:** In the Publisher Playground app iOS settings, you can select between Production, Sandbox, and Demo testing modes.



## Easier Access to the Publisher Playground App (Beta)

Before Summer '20, users had to obtain a courtesy license from Salesforce to access the Publisher Playground app. Now anyone with access to a Lightning community can access the Publisher Playground app.

**Where:** This change applies to Lightning communities accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

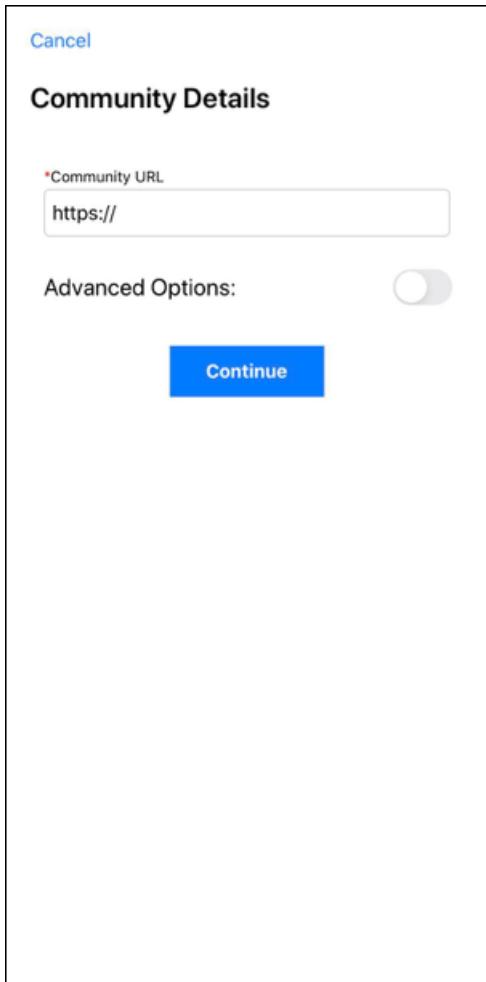
 **Note:** We provide this app to customers through a public Beta program. This public Beta app isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only based on generally available features.

**When:** This public Beta app is available in the Summer '20 release.

**Who:** Available for users who can access a Lightning Community.

**Why:** We want to make sure that users can easily access the Publisher Playground app to test the functionality of their mobile communities.

**How:** The Publisher Playground app supports most of the features and functionality of the fully branded Mobile Publisher for Communities app.



## Push Notification Limits Have Increased

You can send up to 20,000 iOS and 10,000 Android push notifications per hour per org.

**Where:** This change applies to Mobile Publisher and Lightning communities accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Send More Push Notifications with Increased Limits](#)

## Salesforce Anywhere: Streamline and Optimize Salesforce Collaboration (Beta)

Centralize the Salesforce collaboration experience and increase team productivity with the Salesforce Anywhere mobile app. Your users can chat about and collaborate on Salesforce records, get personalized alerts about changes to Salesforce data, and make in-app record updates on the go.

**Where:** The Salesforce Anywhere mobile app is available on iOS mobile phones in Enterprise, Performance, and Unlimited editions.



**Note:** Salesforce Anywhere is a Non-GA Service and not a "Service" or part of the "Services", as defined in the Master Subscription Agreement ("MSA") with Salesforce. Such Non-GA Service is subject to the terms and conditions of the [Universal Pilot Research Agreement \("UPRA"\)](#), including the [Data Processing Addendum](#) to the UPRA. Use of this Non-GA Service is at your sole discretion, and any purchase decisions should be made only on the basis of Salesforce generally available products and features. Automatic availability of Salesforce Anywhere depends on your MSA with Salesforce and the type of Services you have purchased. If you do not see Salesforce Anywhere in Setup, contact your Account Executive to get access to Salesforce Anywhere.

**When:** Salesforce Anywhere becomes available on a rolling basis starting July 13, 2020. To ensure that your org is enrolled in the Salesforce Anywhere beta program, complete the [sign-up form](#).

**Who:** To use Salesforce Anywhere, end users must have a Salesforce, Salesforce Platform, or Lightning Platform user license.

Learn about Salesforce Anywhere's mobile and Lightning Experience features in the [Salesforce Anywhere Release Notes](#).

## Salesforce Sustainability Cloud: Better Carbon Tracking and Improved International Support

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Gain easy access to key performance indicators and emissions trends with new Einstein Analytics dashboards. Take advantage of increased flexibility and support of Sustainability Cloud. Enter data with SI (metric) units and change the language to one of six languages. Run Sustainability Cloud in your Government Cloud org.

For the latest information, see the monthly release notes on the [Trailblazer Community: Sustainability Cloud](#) or [Partner Community: Sustainability Cloud](#).

### IN THIS SECTION:

#### [Track Your Carbon Footprint with Einstein Analytics Dashboards](#)

Get a snapshot of your company's energy usage and carbon emissions with three Einstein Analytics dashboards. The Climate Action Dashboard and the Business Travel Impact dashboard use data from Sustainability Cloud to visualize key performance indicators. The Audit Dashboard uses your company's sustainability data to provide visualizations of your records.

#### [Install and Run Sustainability Cloud in Government Cloud Orgs](#)

The Sustainability Cloud app is supported in Government Cloud.

#### [Change the Language for Sustainability Cloud](#)

All 18 standard Salesforce languages are available in Sustainability Cloud. You can now use Sustainability Cloud in English (en\_US), French (fr), German (de), Japanese (ja), Spanish (es), Spanish (Mexico) (es\_MX), and more.

#### [Enter Energy Use and Emissions Data in SI Units](#)

Now you can use the International System of Units (SI) throughout Sustainability Cloud. You can now change the picklist value of units fields to enter data without converting to US customary units. Many calculated fields show values in SI units.

#### [Get More Reference Data](#)

Sustainability Cloud is now preloaded with electricity grid reference data from the International Energy Agency (IEA) and electricityMap. Reference data from these sources is included and loaded during installation.

#### [Calculate Your Captured Data](#)

If you enter the distance you traveled and the fuel you used, Salesforce calculates the fuel efficiency. You can always use vendor-provided emissions if you have them. If you have your own custom carbon calculations, enter them on an Energy Use Record to calculate them with the rest of your carbon footprint.

#### [Choose Miles or Kilometers for Air and Ground Travel Records](#)

In Energy Use Records, now you can use the Segment Distance Unit picklist to input air travel distance segments in miles or kilometers. You can also define the flight length of short, medium, and long-haul flights in passenger-miles or passenger-kilometers for air travel record types in Emissions Factors - Scope 3.

#### [Delineate Your Renewable Energy Sources](#)

Available renewable energy types include hydroelectric sources. Renewable energy contributions to total electricity use now show hydroelectricity included and excluded from the calculation. Renewable energy calculations prioritize market-based factors from the available records.

## Track Your Carbon Footprint with Einstein Analytics Dashboards

Get a snapshot of your company's energy usage and carbon emissions with three Einstein Analytics dashboards. The Climate Action Dashboard and the Business Travel Impact dashboard use data from Sustainability Cloud to visualize key performance indicators. The Audit Dashboard uses your company's sustainability data to provide visualizations of your records.

**Where:** This change applies to Lightning Experience and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

**Who:** Sustainability Cloud dashboards are available to users with the Einstein Analytics for Sales Cloud permission set. To configure the dashboards, you must have the Customize Application, Manage Profiles and Permission Sets, Assign Permission Sets, Manage Internal Users, and Manage Analytics Templated Apps user permissions.

**How:** In Salesforce, open Analytics Studio and create an app from the Sustainability template. Then set up a dataflow to automatically update your dashboards. Add either or both dashboards to your Home tab for easy viewing.

#### SEE ALSO:

[Salesforce Help: Configure the Einstein Analytics Dashboard](#)

[Salesforce Help: Gain Insights from Your Carbon Inventory Data with Einstein Analytics](#)

## Install and Run Sustainability Cloud in Government Cloud Orgs

The Sustainability Cloud app is supported in Government Cloud.

**Where:** This change is available to Government Cloud customers and applies to Lightning Experience and all versions of the mobile app in Enterprise, Performance, and Unlimited editions.

## Change the Language for Sustainability Cloud

All 18 standard Salesforce languages are available in Sustainability Cloud. You can now use Sustainability Cloud in English (en\_US), French (fr), German (de), Japanese (ja), Spanish (es), Spanish (Mexico) (es\_MX), and more.

**Where:** This change applies to Lightning Experience and all versions of the mobile app in Performance, Enterprise, and Unlimited editions.

**How:** Administrators can change language settings in Setup and add these languages to the list of available languages. Users can choose a personal language from this list.

#### SEE ALSO:

[Salesforce Help: Select Languages for Your Org](#)

## Enter Energy Use and Emissions Data in SI Units

Now you can use the International System of Units (SI) throughout Sustainability Cloud. You can now change the picklist value of units fields to enter data without converting to US customary units. Many calculated fields show values in SI units.

**Where:** This change applies to Lightning Experience and all versions of the mobile app in Performance, Enterprise, and Unlimited editions.

**How:** If you upgrade Sustainability Cloud instead of making a fresh installation, administrators must manually add the new units fields to their corresponding page layouts. For more information about the new fields, see the monthly release notes on the [Trailblazer Community: Sustainability Cloud](#) or [Partner Community: Sustainability Cloud](#).

## Get More Reference Data

Sustainability Cloud is now preloaded with electricity grid reference data from the International Energy Agency (IEA) and electricityMap. Reference data from these sources is included and loaded during installation.

**Where:** This change applies to Lightning Experience and all versions of the mobile app in Performance, Enterprise, and Unlimited editions.

**Who:** Sustainability Cloud is available to users with a Sustainability Cloud license.

SEE ALSO:

[Salesforce Help: Included Reference Data](#)

## Calculate Your Captured Data

If you enter the distance you traveled and the fuel you used, Salesforce calculates the fuel efficiency. You can always use vendor-provided emissions if you have them. If you have your own custom carbon calculations, enter them on an Energy Use Record to calculate them with the rest of your carbon footprint.

**Where:** This change applies to Lightning Experience and all versions of the mobile app in Performance, Enterprise, and Unlimited editions.

**Who:** Sustainability Cloud is available to users with a Sustainability Cloud license.

**How:** Enter your custom calculations data in the following fields to add the data to your carbon footprint:

- Supplemental Scope 1 Emissions
- Supplemental Scope 2 Market Emissions
- Supplemental Scope 2 Location Emissions
- Supplemental Scope 3 Emissions

Data entered in these fields must be in tCO<sub>2</sub> equivalents (tCO<sub>2</sub>e).

## Choose Miles or Kilometers for Air and Ground Travel Records

In Energy Use Records, now you can use the Segment Distance Unit picklist to input air travel distance segments in miles or kilometers. You can also define the flight length of short, medium, and long-haul flights in passenger-miles or passenger-kilometers for air travel record types in Emissions Factors - Scope 3.

**Where:** This change applies to Lightning Experience and all versions of the mobile app in Performance, Enterprise, and Unlimited editions.

**Who:** Sustainability Cloud is available to users with a Sustainability Cloud license.

SEE ALSO:

[Salesforce Help: Energy Use Record Types](#)

## Delineate Your Renewable Energy Sources

Available renewable energy types include hydroelectric sources. Renewable energy contributions to total electricity use now show hydroelectricity included and excluded from the calculation. Renewable energy calculations prioritize market-based factors from the available records.

**Where:** This change applies to Lightning Experience and all versions of the mobile app in Performance, Enterprise, and Unlimited editions.

**Who:** Sustainability cloud is available to users with a Sustainability Cloud license.

**Why:** Total Renewable Energy in kWh or as a percentage of generated electricity includes biomass, geothermal, solar, wind, and hydroelectricity sources. Renewable energy calculations use market-based factors to properly account for any allocated renewables on an energy use record. Location-based renewables aren't present in energy use records.

## myTrailhead: Enhance Your Company's Branding with Customized Navigation Settings

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Choose the pages to direct your users to when they click the help icon or log out of myTrailhead. Create custom links for your myTrailhead page footer. Delete filters that you don't need from the Products category on the Modules and Trails pages. We removed Salesforce branding elements from myTrailhead so they don't confuse your users.

### IN THIS SECTION:

#### [Customize the URLs for the Help and Logout Landing Pages](#)

Direct your myTrailhead users to your help site when they're stuck, instead of to Salesforce Help. Send them to a page that you choose—such as your myTrailhead home page—when they log out of myTrailhead. You can customize these URLs on the Navigation page in Trailmaker Settings.

#### [Customize the Footer Links on myTrailhead](#)

Put links that are relevant to your company and your users in the page footer on myTrailhead. Include links to your company's community page, privacy statement, terms of service—whatever you like. On the Navigation page in Trailmaker Settings, you can designate up to three custom links, and each link can appear in up to six languages.

#### [Salesforce and Trailhead Branding Elements No Longer Appear on myTrailhead](#)

Astro, Codey, and friends are welcome companions on Salesforce Trailhead. But they can confuse myTrailhead users, who aren't always familiar with Salesforce branding. We removed images of Trailhead characters and other Salesforce-specific brand elements from myTrailhead.

#### [Delete Filters from the Products List on myTrailhead](#)

Filters help your myTrailhead users zero in on the content that's most relevant to them. For example, the filters in the Products category can guide your users to the content that covers Sales Cloud, Service Cloud, or other products. You can delete filters from the Products category to narrow the list down to those products that are relevant to your company.

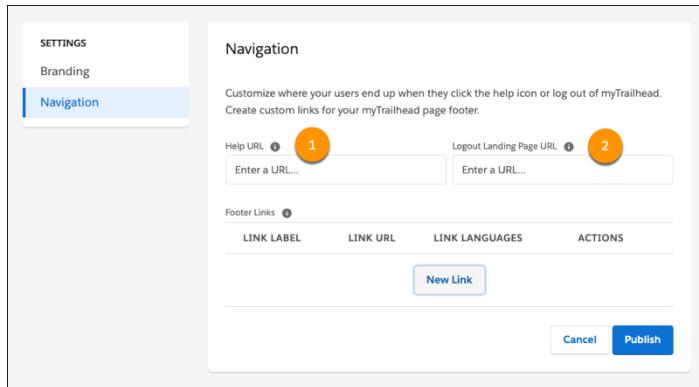
## Customize the URLs for the Help and Logout Landing Pages

Direct your myTrailhead users to your help site when they're stuck, instead of to Salesforce Help. Send them to a page that you choose—such as your myTrailhead home page—when they log out of myTrailhead. You can customize these URLs on the Navigation page in Trailmaker Settings.

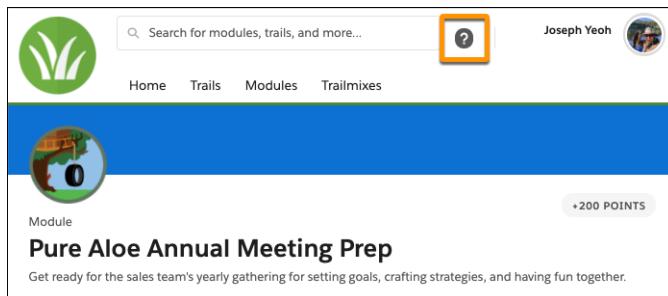
**Where:** myTrailhead is available to customers with Enterprise, Performance, or Unlimited editions for an extra cost.

**Who:** Users with the myTrailhead Content Access and myTrailhead Branding Management permissions can log in to their company's myTrailhead site and access Trailmaker Settings.

**How:** On the Navigation page in Trailmaker Settings, enter the web addresses of your choice for Help URL (1) and Logout Landing Page URL (2).



When myTrailhead users log out or click the help icon, they land on the pages that you designated.



#### SEE ALSO:

[Salesforce Help: Customize the URLs for the Help and Logout Landing Pages](#) (can be outdated or unavailable during release preview)

## Customize the Footer Links on myTrailhead

Put links that are relevant to your company and your users in the page footer on myTrailhead. Include links to your company's community page, privacy statement, terms of service—whatever you like. On the Navigation page in Trailmaker Settings, you can designate up to three custom links, and each link can appear in up to six languages.

**Where:** myTrailhead is available to customers with Enterprise, Performance, or Unlimited editions for an extra cost.

**Who:** Users with the myTrailhead Content Access and myTrailhead Branding Management permissions can log in to their company's myTrailhead site and access Trailmaker Settings.

**How:** On the Navigation page in Trailmaker Settings, click **New Link**.

The screenshot shows the 'Navigation' section of the Trailhead settings. It includes fields for 'Help URL' and 'Logout Landing Page URL'. Below these are two rows in a table for 'Footer Links'. The first row has a link labeled 'Pure Aloe Community' with columns for 'LINK LABEL', 'LINK URL', 'LINK LANGUAGES' (EN, ES, FR), and 'ACTIONS'. The second row has a link labeled 'Terms of Service' with similar columns. At the bottom of the table is a blue 'New Link' button, which is highlighted with an orange box.

Enter the link label (1) and the link URL (2), and select the language of the content on the linked page (3). To make the link available in another language, click **New Language**.

The screenshot shows the 'New footer link' dialog. It has three main input fields: 'Link Label' containing 'Privacy Statement' (marked with a red circle 1), 'Link URL' containing 'Declaração de privacidad' (marked with a red circle 2), and 'Link Language' showing 'English' and 'Spanish (Mexico)' (marked with a red circle 3). At the bottom is a blue 'New Language' button, which is highlighted with an orange box.

Users see the footer links in whichever language they select from the language picklist on myTrailhead.

The screenshot shows the myTrailhead footer with two language buttons: 'Privacy Statement' and 'Terms of Use'. Below them is a language picklist with 'English' selected, which is highlighted with an orange box.

The screenshot shows the myTrailhead footer with two language buttons: 'Declaração de privacidad' and 'Condiciones de uso'. Below them is a language picklist with 'Español (México)' selected, which is highlighted with an orange box.

## SEE ALSO:

[Salesforce Help: Customize the Links in the myTrailhead Page Footer](#) (can be outdated or unavailable during release preview)

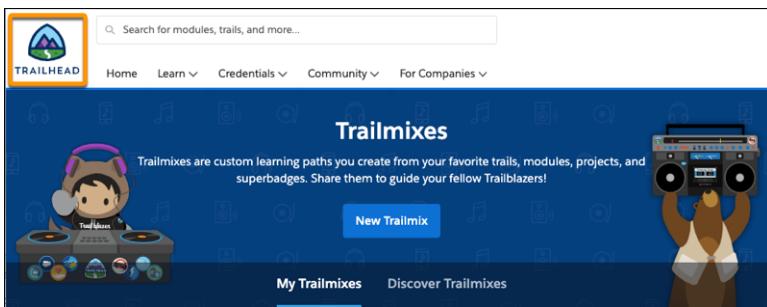
## Salesforce and Trailhead Branding Elements No Longer Appear on myTrailhead

Astro, Codey, and friends are welcome companions on Salesforce Trailhead. But they can confuse myTrailhead users, who aren't always familiar with Salesforce branding. We removed images of Trailhead characters and other Salesforce-specific brand elements from myTrailhead.

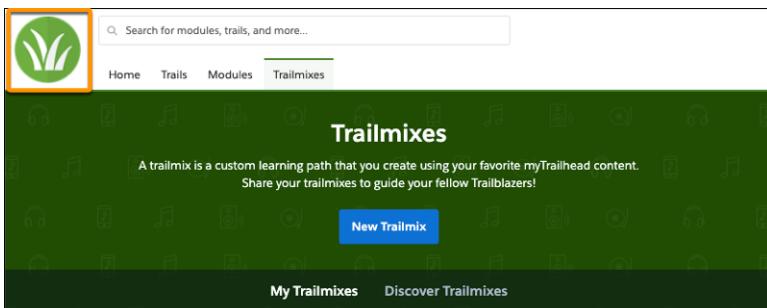
**Where:** myTrailhead is available to customers with Enterprise, Performance, or Unlimited editions for an extra cost.

**Who:** Users with the myTrailhead Content Access permission can log in to their company's myTrailhead site.

**Why:** For example, the Trailmixes page on Salesforce Trailhead shows the Salesforce characters Astro and Codey.



The Trailmixes page on myTrailhead does not.



## Delete Filters from the Products List on myTrailhead

Filters help your myTrailhead users zero in on the content that's most relevant to them. For example, the filters in the Products category can guide your users to the content that covers Sales Cloud, Service Cloud, or other products. You can delete filters from the Products category to narrow the list down to those products that are relevant to your company.

**Where:** myTrailhead is available to customers with Enterprise, Performance, or Unlimited editions for an extra cost.

**Who:** Users with the myTrailhead Content Access and Branding Management permissions can log in to their company's myTrailhead site and access Trailmaker Settings.

**How:** On the Filters page in Trailmaker Settings, click the Actions menu for the filter that you want to remove, and select **Delete**.

The screenshot shows the 'Filters' section of the Trailhead interface. On the left, there's a sidebar with 'SETTINGS', 'Branding', 'Navigation', and 'Filters' (which is currently selected). The main area is titled 'Filters' with the sub-section 'Products'. It lists various filters: 'Einstein Analytics' (selected and highlighted with an orange border), 'Commerce Cloud', 'Community Cloud', 'Einstein', 'Financial Services Cloud', 'General', 'Health Cloud', 'Salesforce IoT', and 'Lightning'. Each filter has a dropdown arrow and a 'Delete' button. At the bottom, there's a 'Show More' button.

The filter no longer appears in the Products category on myTrailhead.

The screenshot shows the 'Modules' section of the Trailhead interface. At the top, there's a search bar, a user profile for 'Marisol Aguilar', and navigation links for 'Home', 'Trails', 'Modules' (which is currently selected), and 'Trailmixes'. Below that, it says 'Modules: dive into specific topics' with a sub-instruction 'Then test yourself with interactive challenges.' On the left, there's a sidebar with 'Find the right modules for you' and 'Clear filters'. It shows 'Your role' (Admin, Business User, Developer) and 'Your level' (Beginner, Intermediate, Advanced). In the center, there's a grid of modules. One module, 'Products', is highlighted with an orange border. The grid also includes 'Community Cloud', 'Education Cloud', 'Einstein', 'Nonprofit Cloud', 'Pardot', 'Philanthropy Cloud', 'Apex', 'App Lifecycle', 'App Logic', 'Heroku', 'Industries', and 'Integration'.

#### SEE ALSO:

[Salesforce Help: Delete Filters from the Products Category](#) (can be outdated or unavailable during release preview)

## Work.com: Introducing Emergency Response Management, Workplace Command Center, Shift Management, and Trail Tracker

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.

For the latest updates, see [Salesforce Help: Work.com Release Notes](#).

#### EDITIONS

Available in: **Enterprise** and **Unlimited** Editions

## IN THIS SECTION:

### [Achieve Mission Success When Disaster Strikes](#)

Use Emergency Response Management products and solutions to serve residents, communities, and agencies when they need it most. Provide access to emergency information, deliver care to those affected, and allocate resources and services with more speed and efficacy than ever before.

### [Manage Your Return to Work in One Place with Workplace Command Center](#)

Workplace Command Center helps you monitor return-to-work readiness and decide when to safely bring people back to the workplace. When employees return to work, keep everyone safe by monitoring employee health and location readiness. Workplace Command Center comes with Employee Wellness Check components, Operations Feed, and Global COVID-19 Tracker.

### [Invite People Back to Work with Shift Management](#)

You want to get your teams back to work, but have to do it carefully. Shift Management for Work.com helps you schedule employees to come back to their respective workplaces. Create facility plans and use wellness survey responses to schedule your transition through the COVID-19 crisis. Get insights into your workplace and employee utilization on Workplace Command Center's home page.

### [Ensure Workforce Readiness with Trail Tracker for Work.com](#)

Track myTrailhead badge completion trends at specific workplace locations or across your whole company—right in your Workplace Command Center. Use that information to determine workplace readiness and to see how quickly your employees earn all your back-to-work badges on myTrailhead.

### [Manage the Contact Tracing Process for Employees](#)

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.

## SEE ALSO:

### [Salesforce Work.com Overview](#)

### [Salesforce Help: Return to the Workplace with Work.com](#)

## Achieve Mission Success When Disaster Strikes

Use Emergency Response Management products and solutions to serve residents, communities, and agencies when they need it most. Provide access to emergency information, deliver care to those affected, and allocate resources and services with more speed and efficacy than ever before.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Emergency Management for Public Sector or Emergency Response Management for Public Health is enabled.

**Who:** Salesforce Emergency Response Management for Public Health and Salesforce Emergency Response Management for Public Sector customers.

**How:** See [Introducing Emergency Response Management for Public Sector](#) and [Introducing Emergency Response Management for Public Health](#).

## Manage Your Return to Work in One Place with Workplace Command Center

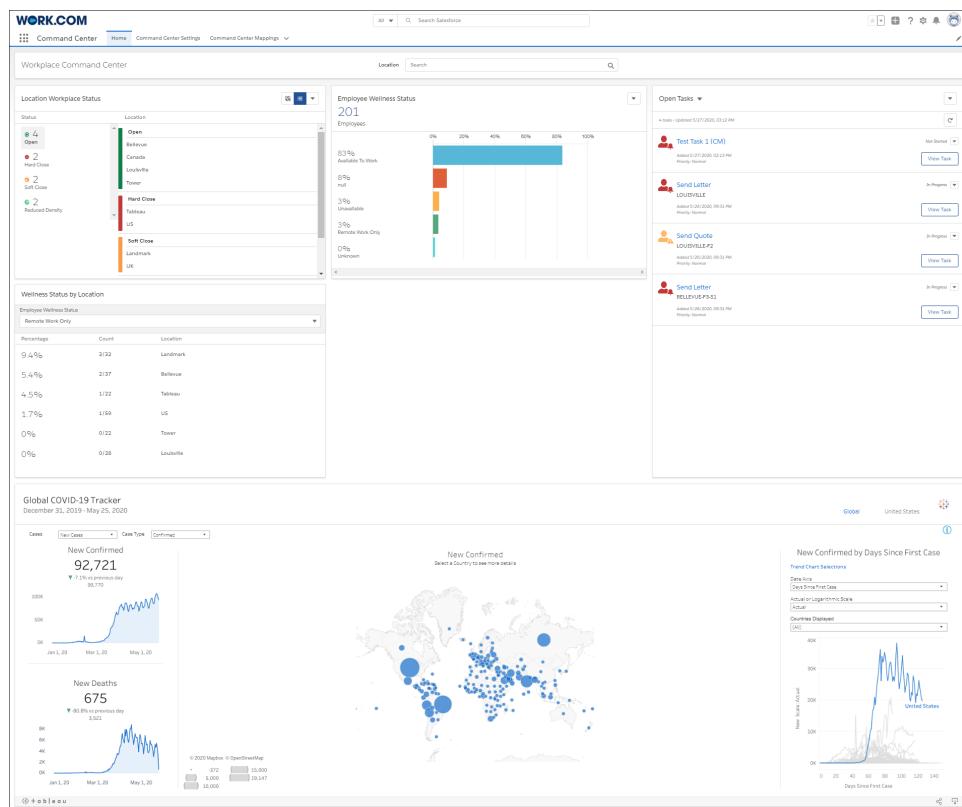
Workplace Command Center helps you monitor return-to-work readiness and decide when to safely bring people back to the workplace. When employees return to work, keep everyone safe by monitoring employee health and location readiness. Workplace Command Center comes with Employee Wellness Check components, Operations Feed, and Global COVID-19 Tracker.

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

**Who:** Executives, business operations managers, and admins looking for a single view of their employees' readiness to work and the company's readiness to support workers.

**Why:** Workplace Command Center is your company's operations hub as you reopen your workplaces after a major event, like the spread of COVID-19. Monitor the status of your facilities by sublocation, such as the floor of a building. Assess the health of your employees through customizable wellness surveys designed using guidance from experts such as the Centers for Disease Control. And thanks to Work.com's robust data model, you can incorporate data from other sources. Use this combined data to monitor the worldwide status of the event to evaluate any impact on your reopening.

**How:** Workplace Command Center is part of the Work.com solution, which includes Shift Management, Emergency Response Management, and more. It shows who's available to work remotely or at a specific location. The accumulated survey data from Employee Wellness Check helps ensure that workplaces stay safe as it processes wellness data and maps it to the Work.com data model for components and other apps to use.



## Invite People Back to Work with Shift Management

You want to get your teams back to work, but have to do it carefully. Shift Management for Work.com helps you schedule employees to come back to their respective workplaces. Create facility plans and use wellness survey responses to schedule your transition through the COVID-19 crisis. Get insights into your workplace and employee utilization on Workplace Command Center's home page.

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

**How:** Using the location data, operations and workplace managers can define the buildings, floors, and zones that they use to group employees. Workplace managers create a facility plan that sets the reduced density and occupancy limits for each location. Team planners

create open shifts and ask employees to fill the shifts based on their wellness check status and personal availability. Planners can then create optimized schedules to match available employees to available space.

Your employees manage their availability and shifts in the Salesforce mobile app. You can stagger arrival times to avoid crowds in lobbies and elevators. And when your doors are open, speed up security checks with arrival passes in the mobile app that show each employee's designated arrival time.

SEE ALSO:

[Salesforce Help: Shift Management for Work.com](#)

## Ensure Workforce Readiness with Trail Tracker for Work.com

Track myTrailhead badge completion trends at specific workplace locations or across your whole company—right in your Workplace Command Center. Use that information to determine workplace readiness and to see how quickly your employees earn all your back-to-work badges on myTrailhead.

**Where:** Trail Tracker for Work.com is available to Work.com customers with Enterprise and Unlimited Editions who have installed Trail Tracker.

**Who:** Workplace operations people and executives who are responsible for coordinating and implementing their company's back-to-work plans.

SEE ALSO:

[Knowledge Article: Getting Started with myTrailhead](#)

[AppExchange: Trail Tracker](#)

[AppExchange: Trail Tracker for Work.com](#)

## Manage the Contact Tracing Process for Employees

With Contact Tracing for Employees, your company can manage the manual contact tracing process and track the spread of disease while caring for your employees.



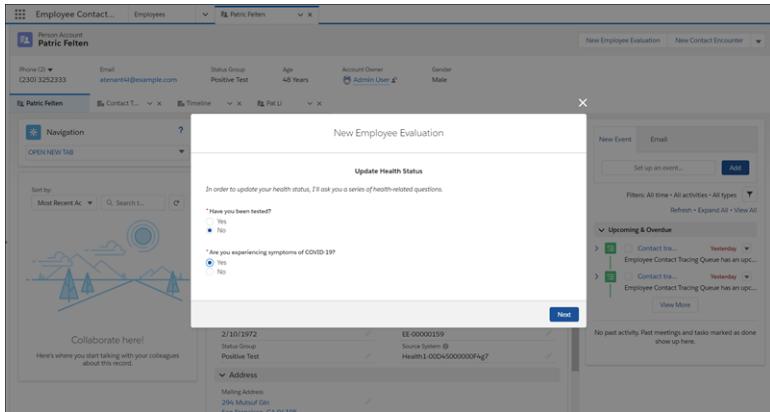
**Note:** Contact Tracing for Employees is available in the Spring '20 release. We include it in the Summer '20 release notes for extra visibility.

**Where:** This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions where Contact Tracing for Employees is enabled.

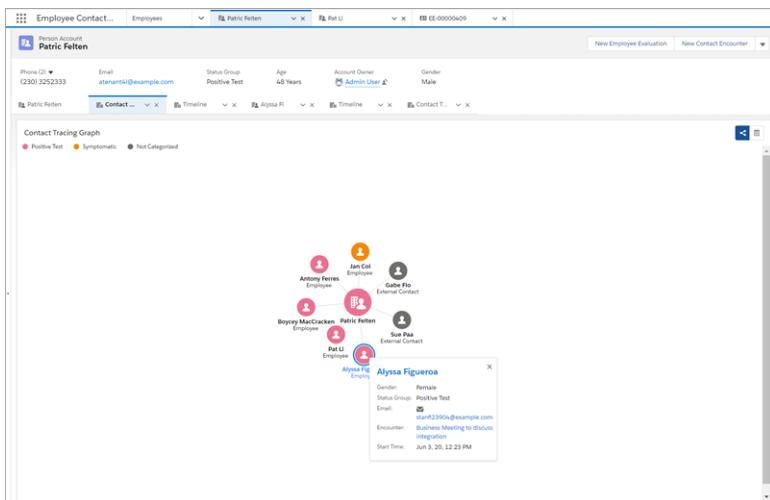
**Who:** To use Contact Tracing for Employees, you must have the Health Cloud and the Health Cloud Platform permission set licenses provisioned in Salesforce. To use Contact Tracing for Employees in Work.com, you must also have the Workplace Command Center permission set license provisioned.

**Why:** Salesforce Contact Tracing for Employees helps you to monitor your employees, their contacts, and the events that were a source of potential infection.

Tracing and contacting people who were possibly exposed to an infected person is one of the most efficient ways to fight widespread community infection. Tracers pick up tasks to evaluate employees, gather details about potentially exposed contacts, and enroll employees in care programs. You have the employee's status, a map of exposed contacts, and information on the person's condition consolidated in one place.



The employee evaluation flow gathers crucial information about a person's condition, so that you can enroll affected employees into a care program and monitor their health.



The Contact Tracing Graph gives you a comprehensive view of employees and external contacts so that you can trace infection by people, places, or events. Follow up, assessment, and triage can happen without having to leave the console.

Salesforce recommends that you make contact tracing functionality available only to users who are trained in privacy best practices. We recommend that you share contact tracing data only as needed.

## Customization: Lightning Flow Enhancements, Einstein Prediction Builder Improvements, and Lightning App Builder Updates

Build, configure, report on, and debug flows more easily with enhancements to Flow Builder and flow management. Improve predictions and efficiently manage them in Einstein Prediction Builder. Design and navigate your Lightning pages in new ways in the Lightning App Builder.

**IN THIS SECTION:**[Lightning Flow: Trigger on Record Changes and Events, Debug Options, Improved Flow Analytics, and Custom UIs for Screen Components and Invocable Actions Enhancement \(Beta\)](#)

Trigger flows when records are saved or when platform events are received. Debug more types of flows more easily. Analyze the time spent in screen flows by using a prebuilt report. Configure screen components and invocable actions more easily when developers build them with custom property editors (beta).

[Einstein Prediction Builder: Define Your Prediction Set, Run Reports, and Enable Predictions from the Scorecard](#)

Make your prediction results more relevant by choosing which records you want Einstein to score. Run reports so you can explore the data being used in your prediction. Save time when you enable or disable predictions directly from the prediction scorecard. Use Data Checker for even more field and record types.

[Lightning App Builder: Dynamic Forms \(Non-GA Preview\), Dynamic Actions \(Beta\), and Accessibility Enhancements](#)

Put fields and sections from your record details anywhere on a record page with Dynamic Forms. Use the Lightning App Builder instead of the page layout editor to choose which actions appear in the Highlights Panel on custom object record pages. Easily navigate the component palette with your keyboard using the Tab and Arrow keys.

[Globalization: Data Translation, Plus New and Changed Locale Formats](#)

Translate data stored in the Product and Product Category records with B2B Commerce. Enable new and improved formats for international dates and times via a release update. We also changed the name of the Maori (New Zealand) language and the address format for the Welsh, Welsh (United Kingdom), and English (United Kingdom) locales.

[Sharing: Guest User Sharing Settings](#)

To safeguard your Salesforce org's data, we're enabling the Secure guest user record access setting. Previously, to create guest user sharing rules, you enabled this setting first.

[Approvals: Corrected Values for Merge Fields and Programmatic Ordering of Approvals](#)

Get the correct values for merge fields in approval email alerts. Use Metadata API, change sets, and unlocked packages to control the order in which approval processes are evaluated.

[General Setup: Record Page Full View Is Generally Available, a New User Profile, and Lightning Page Tab Translation](#)

Display all details and related lists on the same page with the record page Full view, now generally available. Give your users the minimum permissions they need with the new Minimum Access - Salesforce profile. Add translations for Lightning pages using Setup instead of Metadata API.

## Lightning Flow: Trigger on Record Changes and Events, Debug Options, Improved Flow Analytics, and Custom UIs for Screen Components and Invocable Actions Enhancement (Beta)

Trigger flows when records are saved or when platform events are received. Debug more types of flows more easily. Analyze the time spent in screen flows by using a prebuilt report. Configure screen components and invocable actions more easily when developers build them with custom property editors (beta).

**IN THIS SECTION:**[Flow Builder: Platform Event–Triggered Flows, Record-Triggered Flows That Run After Save, More Debug Options, and System Context for Running Flows](#)

Build platform event–triggered flows instead of event processes. Run record-triggered flows after each record is saved to the database. Debug scheduled flows, pass values into record variables, and roll back debug runs of autolaunched flows. Configure flows to run in system context without sharing.

**EDITIONS**

Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### [Lightning Flow Management: Prebuilt Report for Screen Flows, Emails from the Automated Process User, Resource Consumption in \(Beta\)](#)

### [Debug Logs, Flow Error Emails for Platform Events, and Second Generation Packaging Improvements](#)

Run a prebuilt report to analyze the time users spend in screen flow interviews. Let the Automated Process User send emails for event processes and autolaunched flows with triggers. Use debug logs to see how finished flow interviews count toward per-transaction limits. Get notified when a platform event message fails to launch or resume a flow. Delete earlier flow versions from unlocked packages and second-generation packages.

### [Lightning Flow Extensions: Custom UIs for Screen Components and Invocable Actions \(Beta\), Input and Output Access for Apex-Defined Variables, and Multi-Object Screen Components \(Beta\)](#)

Developers can use Lightning web components to provide engaging UIs when you add their screen components and invocable actions to your flows (beta). Make Apex-defined variables available outside the flow. Developers can build screen components that work for any object you choose (beta).

### [Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions](#)

Let processes evaluate the original values of record fields. Improve the behaviors and effects of failed invocable actions. Enforce the running user's data access when executing flow merge fields. Respect the public access modifiers for legacy Apex actions. Cancel the "Require User Access to Apex Classes Invoked by Flow" update.

## Flow Builder: Platform Event–Triggered Flows, Record-Triggered Flows That Run After Save, More Debug Options, and System Context for Running Flows

Build platform event–triggered flows instead of event processes. Run record-triggered flows after each record is saved to the database. Debug scheduled flows, pass values into record variables, and roll back debug runs of autolaunched flows. Configure flows to run in system context without sharing.

### IN THIS SECTION:

#### [Trigger a Flow to Run After a Record Is Saved](#)

Creating or updating a record can now trigger a richer flow to run *after* that record is saved to the database. Previously, a record-triggered flow could only run *before* the record was saved, and the flow could only make updates to that new or updated record. After-save record-triggered flows can access other records, perform actions, and use more types of flow elements. These flows can even replace most workflow rules and record-change processes that are built in Process Builder.

#### [Trigger a Flow to Run When a Platform Event Message Is Received](#)

With platform event–triggered flows, you can do all your automation in one place. Previously, platform event–driven automation required you to use Process Builder and Flow Builder. Unlike event processes, platform event–triggered flows don't require an associated Salesforce object and can access all available records.

#### [Debug More Flows Faster](#)

When you debug an autolaunched flow that saves changes to the database such as create records, you don't have to revert those changes manually anymore. In Flow Builder, use rollback mode and let it save you the hassle. You can now use the debug option in Flow Builder for schedule-triggered flows. And the debug option includes the Lookup screen component so that you can set record variables more easily.

#### [Create Flows with the Enhanced New Flow Window and Start Element](#)

We streamlined the process for creating autolaunched flows with triggers. You now see the options to create a record-, schedule-, or platform event–triggered flow upon clicking **New Flow** in Setup. We also added trigger information and configuration options to the Start element in the canvas to make triggered flows easier than ever to build.

#### [Configure Subflow Elements Without Assigning Output Values](#)

When you add a Subflow element to a flow, we automatically store the output values. You're no longer required to create and assign variables, but you can still opt to do so. This change doesn't affect Subflow elements created before Summer '20.

[Configure Loop Elements Without Creating Loop Variables](#)

When you add a Loop element to a flow, we create the loop variable for you. The loop variable temporarily stores the current item as the flow iterates over the collection variable's items. This change doesn't affect Loop elements created before Summer '20.

[Take Some Tips from Guidance for Flow Builder](#)

Get tips on how to improve your flows as you build them. Guidance for Flow Builder tells you, for example, that you forgot to close a loop. Or perhaps your flow invokes Apex code that uses the legacy `Process.Plugin` interface instead of the recommended `@InvocableMethod` annotation. You can show and hide these tips from the new Help Menu in Flow Builder.

[Pass In the Record When Launching a Flow from a Lightning Page or a Quick Action](#)

It's now much easier to pass records into your flows. Each quick action automatically passes the record into the flow's record variable named "recordId". In Lightning App Builder, a simple checkbox lets the Lightning page pass the record into a record variable in the flow.

[Access Nested Fields of Apex-Defined Data Types in Flows](#)

Data access limitations for Apex-defined data types are removed, so now you can access nested fields of record and Apex-defined data types. For example, access `{ !MyApexClassOne.MyApexClassTwo.MyField }` or `{ !MyApexClass.Account.BillingCity }`. Previously, you were limited to a single level of field access for example `{ !MyApexClassTwo.MyField }`.

[Run Flows That Bypass User Permissions](#)

Allow guest users to create or edit records they don't have direct access to by setting your flow to run in system context without sharing. Flows running with this setting ignore object-level security, field-level security, org-wide default settings, role hierarchies, sharing rules, manual sharing, teams, and territories.

[Updated Text Format Options for Text Template Flow Resource](#)

Flow Builder now has updated menu option names for the Text Template flow resource for viewing text.

[See Increased Screen Real Estate for Other Configuration Settings in Property Editors](#)

Now your users can more easily see some configuration settings in property editors. We reduced the amount of space taken up by the Label, API Name, and Description fields when you edit an element or flow properties.

[Let Flow Users Search for Records by Any Searchable Field](#)

Now flow users can search by any searchable field and choose from more than five records. Previously, the flow lookup component only supported instant search results. Users could search only by the name field, and the results were capped at five records.

[Flow Builder Toolbar Improvements](#)

Now flow users can view a flow's version number, its active or inactive status, and the last modified time. The toolbar also shows hover text that gives the version number and flow status.

## Trigger a Flow to Run After a Record Is Saved

Creating or updating a record can now trigger a richer flow to run *after* that record is saved to the database. Previously, a record-triggered flow could only run *before* the record was saved, and the flow could only make updates to that new or updated record. After-save record-triggered flows can access other records, perform actions, and use more types of flow elements. These flows can even replace most workflow rules and record-change processes that are built in Process Builder.

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

**Who:** To activate a record-triggered flow that runs after the record is saved, you need the View All Data permission.

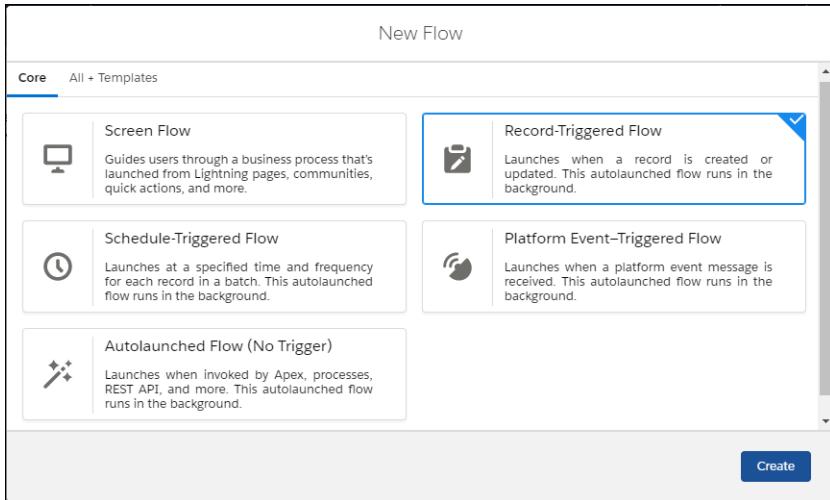
**Why:** Perhaps you're familiar with Process Builder and using a record-change process to execute actions, such as sending email every time a new account is created. An after-save record-triggered flow can accomplish that same goal, but with these added benefits.

## Lightning Flow: Trigger on Record Changes and Events, Debug Options, Improved Flow Analytics, and Custom UIs for Screen Components and Invocable Actions Enhancement

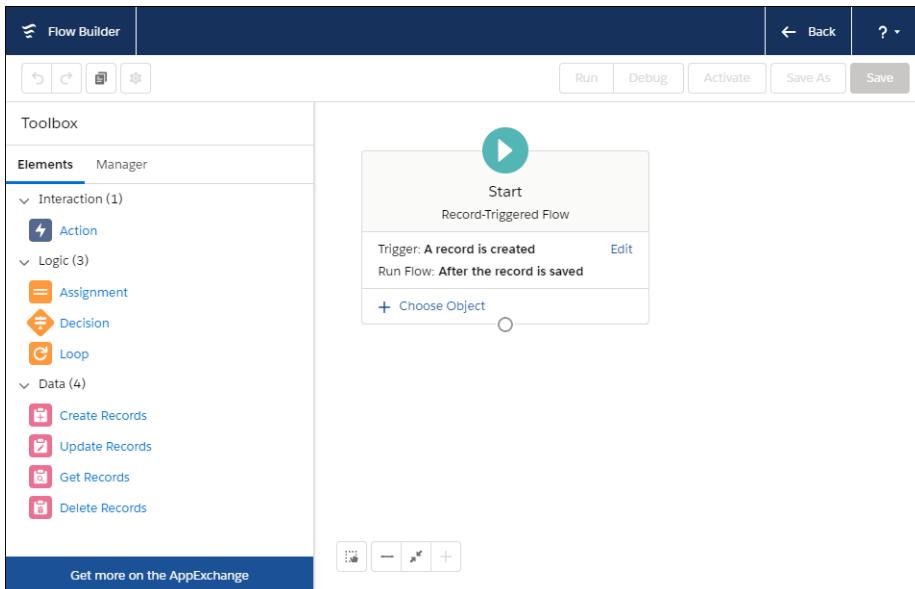
- You can choose to trigger the flow to run only when records are updated. This option isn't available for record-change processes. (Beta)
- Unlike processes built in Process Builder, flows have a standard list view, so you can organize and adjust your view to your liking.
- You can access other objects' records and execute loops.

If you're familiar with Apex triggers, an after-save record-triggered flow is similar to an Apex `after` trigger. In a save procedure, after-save record-triggered flows are executed after entitlement rules and before roll-up summary field updates.

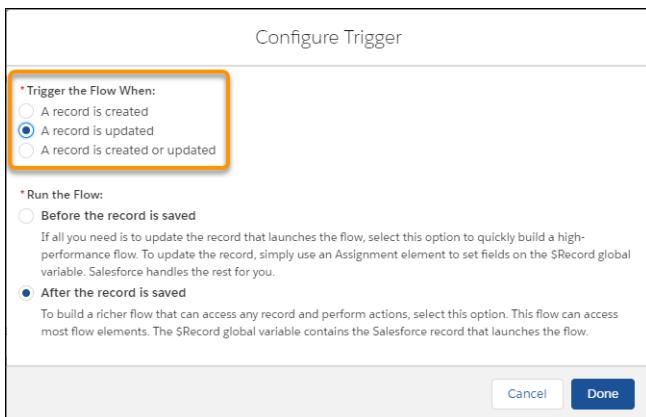
**How:** When creating a flow, select **Record-Triggered Flow**.



By default, new record-triggered flows are configured to run when a record is created and after the record is saved. You can check this configuration on the Start element in the canvas. Also from the Start element, choose the object whose records trigger the flow to run.



To trigger the flow to run when a record is updated, click **Edit** on the Start element.



In an after-save record-triggered flow, the `$Record` global variable contains the Salesforce record that launches the flow. You can update that record by using an Assignment element to set the fields on the `$Record` global variable. However, unlike before-save record-triggered flows, an Update Records element is required to save those changes to the database.

Configure the Update Records element to use the ID and all field values from the `$Record` global variable. But be sure to enable `Filter inaccessible fields from flow requests` in your org's process automation settings. Otherwise, the flow fails because the Update Records element tries to set the values for system fields and other read-only fields.

#### SEE ALSO:

[IdeaExchange: Process Builder: Fire Only on Update](#)

[Salesforce Help: Flow Element: Update Records \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Flow Resource: Global Variables \(can be outdated or unavailable during release preview\)](#)

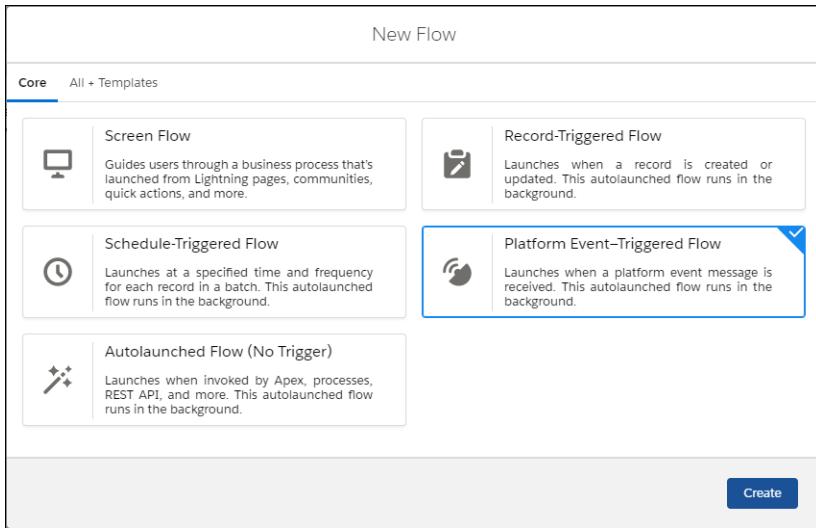
## Trigger a Flow to Run When a Platform Event Message Is Received

With platform event–triggered flows, you can do all your automation in one place. Previously, platform event–driven automation required you to use Process Builder and Flow Builder. Unlike event processes, platform event–triggered flows don't require an associated Salesforce object and can access all available records.

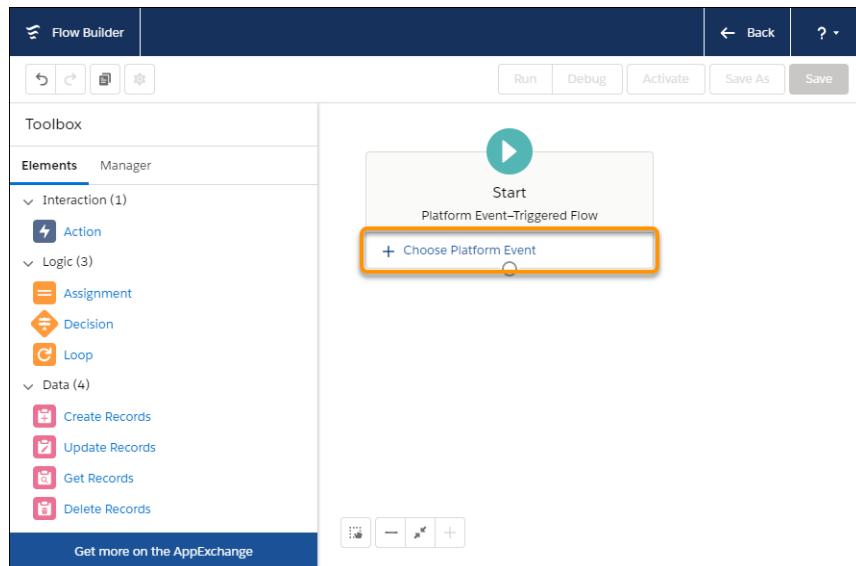
**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

**Who:** To activate a platform event–triggered flow, you need the View All Data permission.

**How:** When you create the flow, select **Platform Event–Triggered Flow**.



From the Start element, choose the platform event whose event messages trigger the flow to run.



In a platform event-triggered flow, the `$Record` global variable contains the field values from the platform event message. You can use those values throughout the flow.

#### SEE ALSO:

[IdeaExchange: Launch a Flow Direct from Platform Event](#)

[IdeaExchange: Allow Platform Events to Launch a Flow](#)

## Debug More Flows Faster

When you debug an autolaunched flow that saves changes to the database such as create records, you don't have to revert those changes manually anymore. In Flow Builder, use rollback mode and let it save you the hassle. You can now use the debug option in Flow Builder for schedule-triggered flows. And the debug option includes the Lookup screen component so that you can set record variables more easily.

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

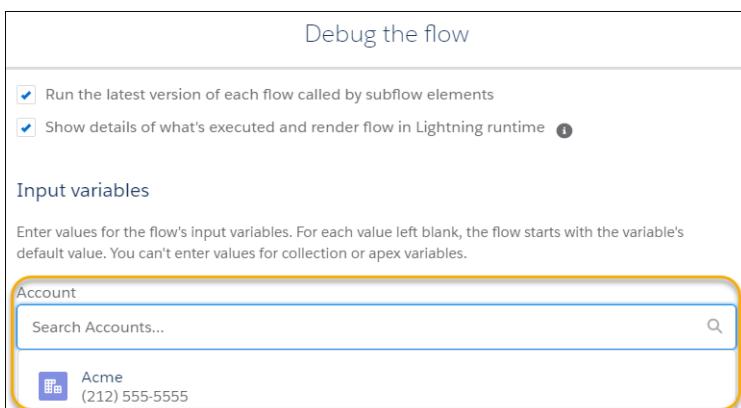
**Why:** If you use rollback mode when you debug a flow, Flow Builder rolls back changes that the flow makes to the database after the flow finishes. Flow Builder rolls back indirect database changes too. For example, a flow updates a child record that causes an Apex trigger to fire and to update the parent record. The update to the parent record is also rolled back.

Considerations for rollback mode:

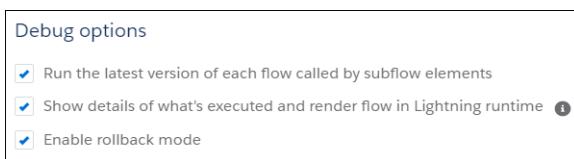
- Available for autolaunched flows.
- Non-DML statements, such as HTTP requests, are executed and are not rolled back.
- Asynchronous actions and asynchronous DML statements are not rolled back.
- The Pause element and some actions don't support rollback mode. If you debug a flow with one of those elements or actions, the flow stops before executing the element or action. All DML statements that executed before the element or action are rolled back.

When you debug a schedule-triggered flow that runs for a batch of records, Flow Builder uses the oldest record that matches the filter conditions.

The Lookup component makes it easy to set values for record variables.



**How:** To use rollback mode when you debug an autolaunched flow, click **Enable rollback mode**.



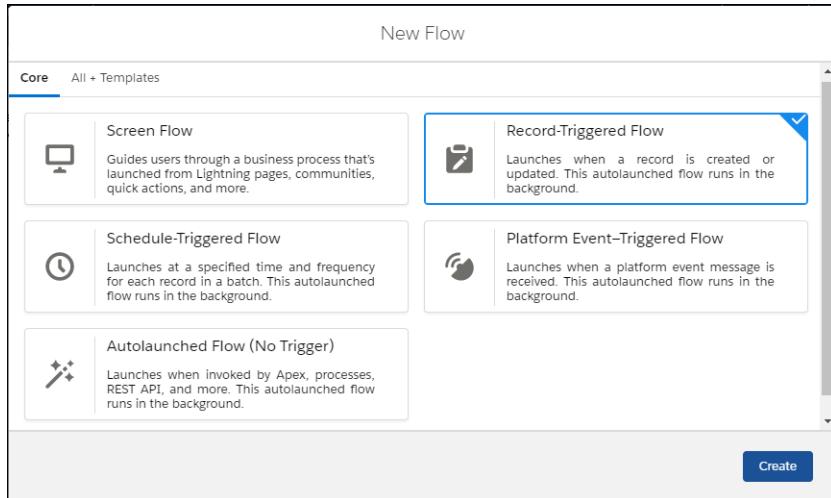
## Create Flows with the Enhanced New Flow Window and Start Element

We streamlined the process for creating autolaunched flows with triggers. You now see the options to create a record-, schedule-, or platform event-triggered flow upon clicking **New Flow** in Setup. We also added trigger information and configuration options to the Start element in the canvas to make triggered flows easier than ever to build.

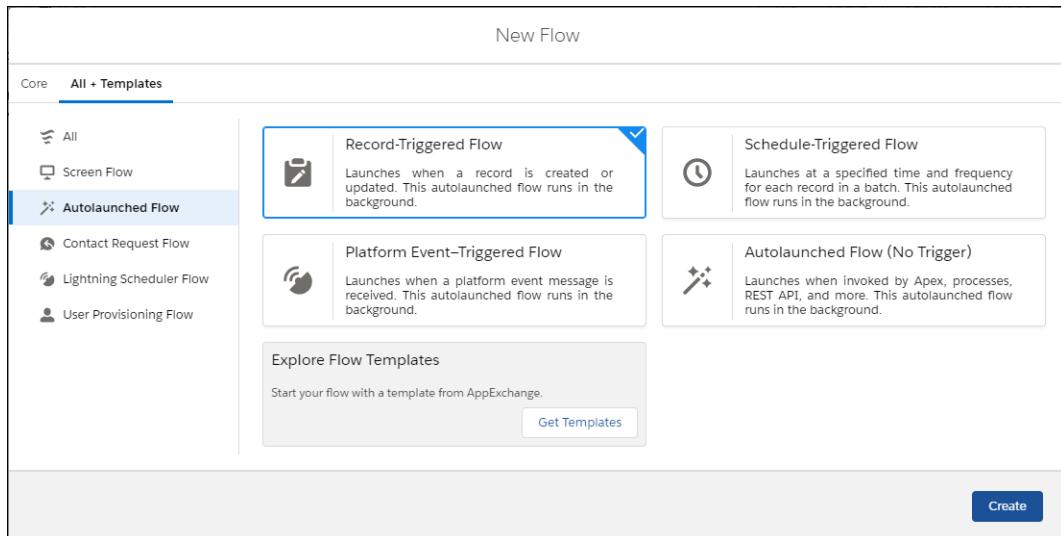
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

## Lightning Flow: Trigger on Record Changes and Events, Debug Options, Improved Flow Analytics, and Custom UIs for Screen Components and Invocable Actions Enhancement

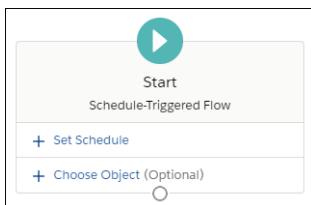
**Why:** Previously, it wasn't obvious how to add a trigger to an autolaunched flow. You had to know to open the Start element and add (Beta) the trigger there. Also, it was easy to introduce errors by adding trigger-incompatible elements to the flow before adding the trigger. By choosing the trigger before opening Flow Builder, you avoid unsupported elements because they don't appear in the builder as available options.



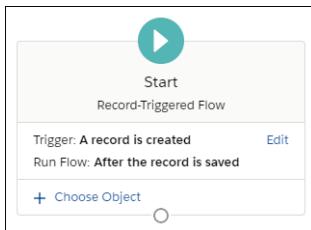
From the All + Templates tab, you can choose from all available flow types or build your flow from a template. You can filter the options by flow type.



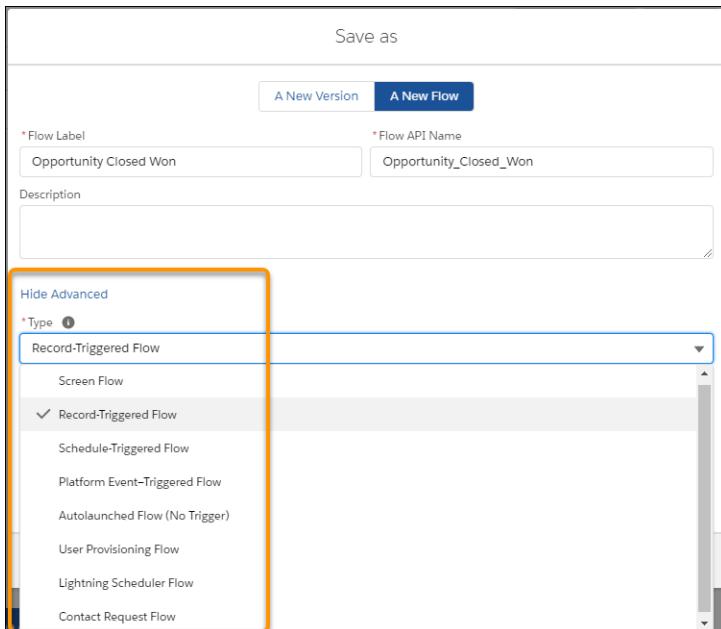
When you create an autolaunched flow with a trigger, the Start element on the canvas now shows the trigger information and configuration options. If you're already familiar with schedule-triggered flows, notice that we separated the required schedule configuration from the optional configuration of the object and records.



Similarly, for record-triggered flows, we separated the configurations for when to run the flow and the object whose records can trigger the flow to run.



If you're required to change a flow's trigger type, save it as a new flow. Click **Show Advanced** to display the Type field, and select the new type.



#### SEE ALSO:

[Trigger a Flow to Run After a Record Is Saved](#)

[Trigger a Flow to Run When a Platform Event Message Is Received](#)

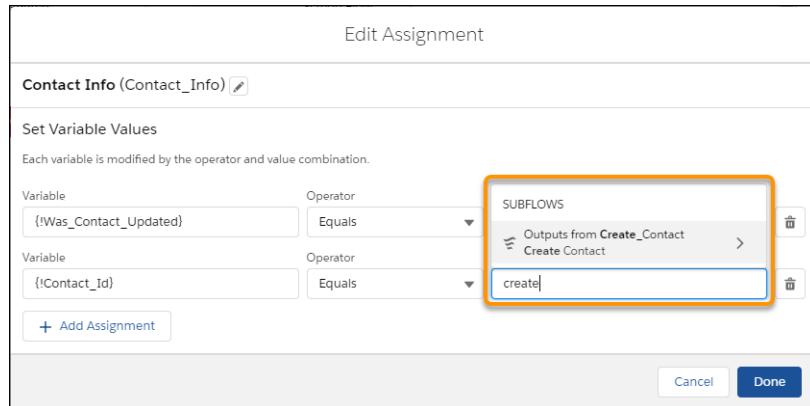
## Configure Subflow Elements Without Assigning Output Values

When you add a Subflow element to a flow, we automatically store the output values. You're no longer required to create and assign variables, but you can still opt to do so. This change doesn't affect Subflow elements created before Summer '20.

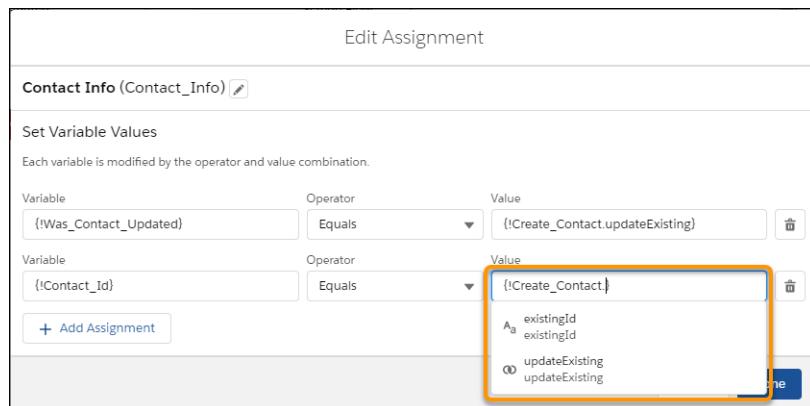
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**How:** When you set a field that supports variables, automatically stored outputs show up as available options just like other variables in the flow.

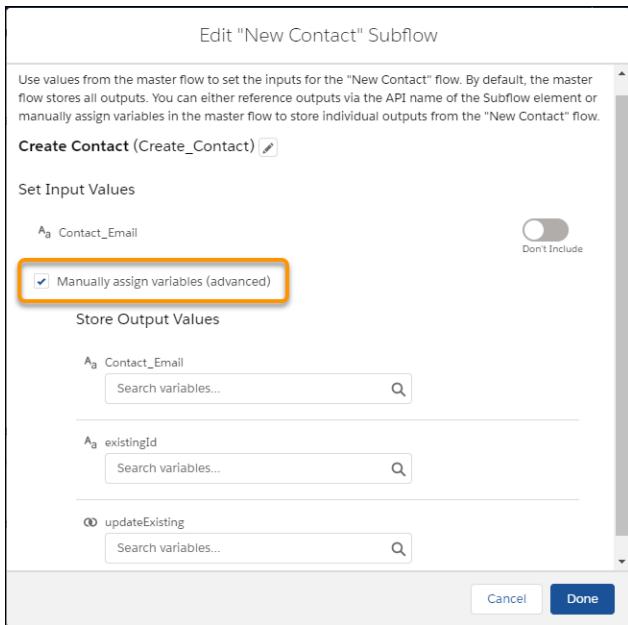
To access a Subflow element's output values, start typing the API name of the Subflow element.



Then select the specific output value.



If you don't want the flow to automatically store outputs for the Subflow element, select **Manually assign variables (advanced)**.

**SEE ALSO:**

[IdeaExchange: Flow Builder: Automatic Output Handling for Subflows](#)

## Configure Loop Elements Without Creating Loop Variables

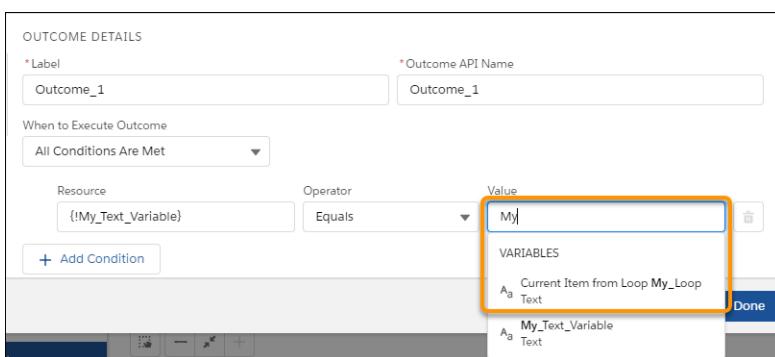
When you add a Loop element to a flow, we create the loop variable for you. The loop variable temporarily stores the current item as the flow iterates over the collection variable's items. This change doesn't affect Loop elements created before Summer '20.

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

**How:** For any element in the loop path, when you set a field that supports variables, the current item shows up as an available option just like other variables in the flow.

To use the current item in other elements in the loop, start typing the API name of the Loop element.

In this example, when you start typing in the Value field, you see available variables in the flow, including the loop variable for the My\_Loop element.



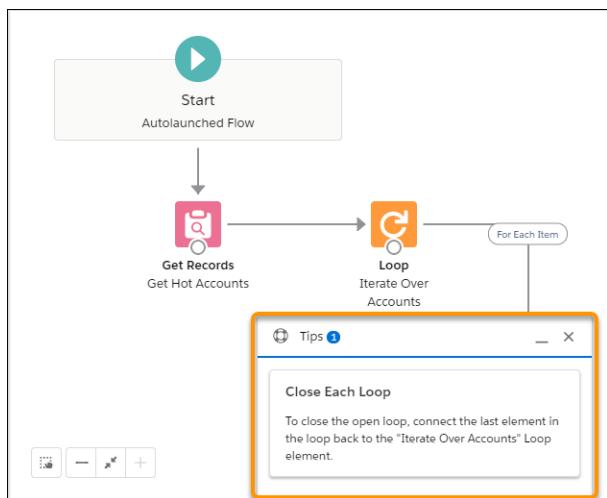
 **Note:** A loop variable is intended for use only within its loop. Its value is set at run time as the flow executes the Loop element. (Beta)

## Take Some Tips from Guidance for Flow Builder

Get tips on how to improve your flows as you build them. Guidance for Flow Builder tells you, for example, that you forgot to close a loop. Or perhaps your flow invokes Apex code that uses the legacy `Process.Plugin` interface instead of the recommended `@InvocableMethod` annotation. You can show and hide these tips from the new Help Menu in Flow Builder.

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

**How:** If there are tips for your flow, a docked prompt shows the number of tips at the bottom of the Flow Builder canvas. Expand the docked prompt to read the tips. After you fix the related issue, the tip disappears.



If you close the docked prompt, you can reopen it by clicking **View Tips** from the Help Menu. The Help Menu also has a **Mute Tips** option for when you don't want tips to appear.

The 'Help' menu is open, showing the following options:

- Flow Builder Help
- Keyboard Help
- Trailhead
- Trailblazer Community
- View Tips** (highlighted with an orange box)
- Mute Tips

Notice the other options available in the new Help Menu. You can display available keyboard shortcuts, open Flow Builder content in Salesforce Help or Trailhead, and jump to the Salesforce Automation Trailblazer Community.

## Pass In the Record When Launching a Flow from a Lightning Page or a Quick Action

It's now much easier to pass records into your flows. Each quick action automatically passes the record into the flow's record variable named "recordId". In Lightning App Builder, a simple checkbox lets the Lightning page pass the record into a record variable in the flow.

**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.

**Why:** Previously, passing records into a flow from a Lightning page or a quick action required extra configuration steps. For a quick action, you created a text variable named "recordId" and added a Get Records element to your flow. For a Lightning page, you created a text variable, configured Lightning App Builder to set that variable, and used a Get Records element. Now Lightning Flow does most of the work for you.

**How:** For a quick action, all you do now is create a record variable in your flow named "recordId" and ensure that it's available for input.

New Resource

\* Resource Type: Variable

\* API Name: recordId

Description:

\* Data Type: Record

Allow multiple values (collection)

\* Object: Opportunity

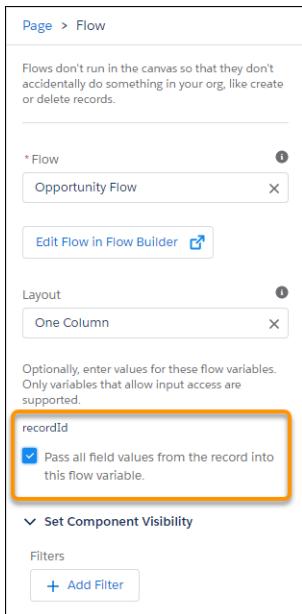
Availability Outside the Flow

Available for input

Available for output

Cancel Done

For a Lightning page, simply select **Pass all field values from the record into this flow variable** in Lightning App Builder.



#### SEE ALSO:

[Salesforce Help: Distribute Flows to Users in Your Org](#) (can be outdated or unavailable during release preview)

## Access Nested Fields of Apex-Defined Data Types in Flows

Data access limitations for Apex-defined data types are removed, so now you can access nested fields of record and Apex-defined data types. For example, access `{ !MyApexClassOne.MyApexClassTwo.MyField }` or `{ !MyApexClass.Account.BillingCity }`. Previously, you were limited to a single level of field access for example `{ !MyApexClassTwo.MyField }`.

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

#### SEE ALSO:

[Salesforce Help: Considerations for the Apex-Defined Data Type](#)

## Run Flows That Bypass User Permissions

Allow guest users to create or edit records they don't have direct access to by setting your flow to run in system context without sharing. Flows running with this setting ignore object-level security, field-level security, org-wide default settings, role hierarchies, sharing rules, manual sharing, teams, and territories.

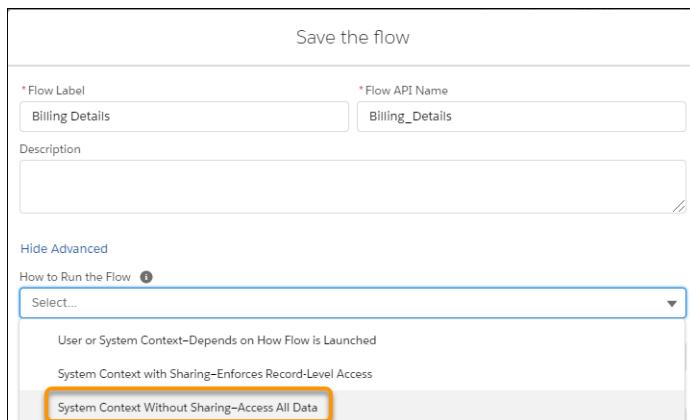
**Where:** This change applies to Lightning Experience and Salesforce Classic in Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions.

**Why:** Normally, how a flow is launched determines whether the flow runs in the context of the user or the system. In a previous release, we added the ability to bypass the running user's permissions by setting a flow to run in system context with sharing. While these flows ignore object- and field-level security, they still respect org-wide default settings, role hierarchies, sharing rules, manual sharing, teams, and territories.

Now you can set your flow to run in system context without sharing. Use this mode when you want to escalate a user's privileges as they move through, but not outside of, a flow. For example, allow guest users to edit records that don't belong to them, but only when they follow the steps defined in the flow.

When you run a flow in system mode without sharing, a limited set of actions and operations still run in user mode. For example, the Post to Chatter standard action continues to run in user mode.

**How:** When you're saving a new flow, click **Show Advanced**. For How to Run the Flow, select *System Context Without Sharing—Access All Data*.



To select the same option for an existing flow version, click the  icon.

#### SEE ALSO:

[Metadata API](#)

[Tooling API New and Changed Objects](#)

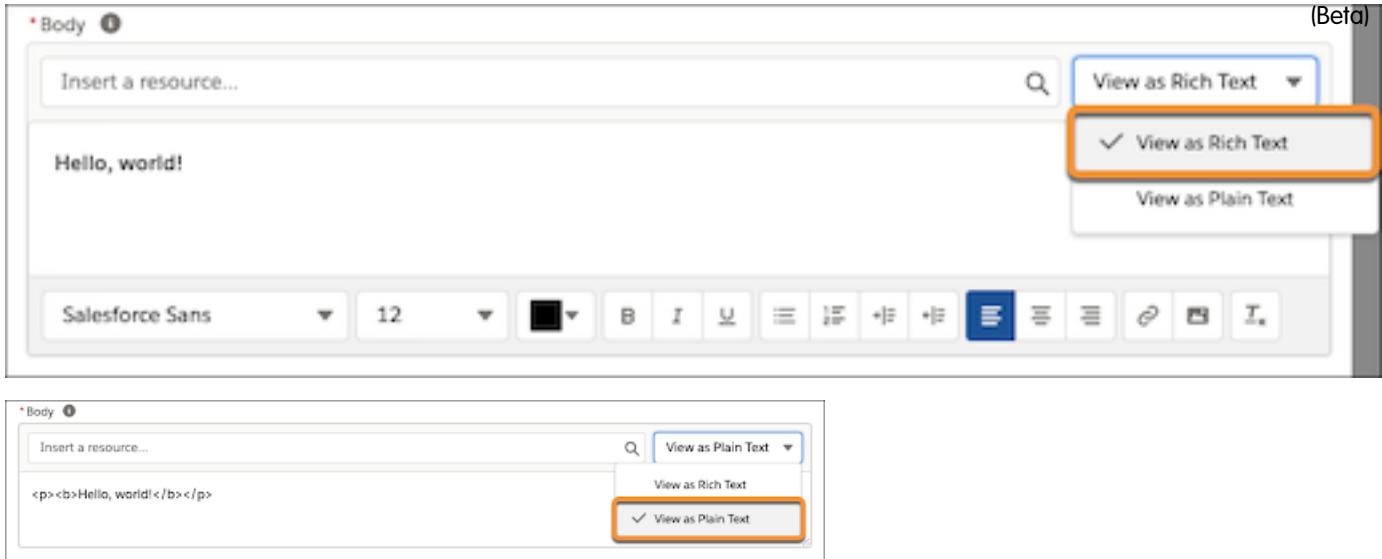
## Updated Text Format Options for Text Template Flow Resource

Flow Builder now has updated menu option names for the Text Template flow resource for viewing text.

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

**How:** Choose View as Rich Text and apply rich text formatting, or View as Plain Text to display the text field and add HTML tags. When you switch options, changing the option doesn't affect the text format. If you apply rich text formatting first and switch to plain text, Flow Builder converts the format style to HTML style tags. If you want plain text without any styles applied, remove the HTML style tags.

**Why:** Previously, Flow Builder displayed Rich Text and Plain Text in the Text Template flow resource. Because these options do not apply or remove text formatting, admins thought that choosing an option applies text formatting. The underlying behavior of the Text Template flow resource is to store all text formatting as rich text. The Summer '20 release shows updated names to clarify the menu options.



#### SEE ALSO:

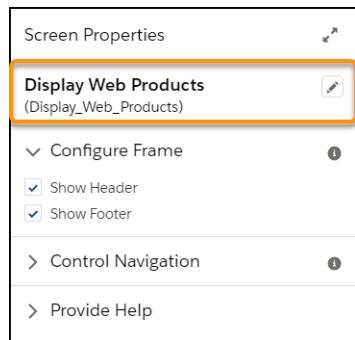
[Salesforce Help: Flow Resource: Text Template](#)

### See Increased Screen Real Estate for Other Configuration Settings in Property Editors

Now your users can more easily see some configuration settings in property editors. We reduced the amount of space taken up by the Label, API Name, and Description fields when you edit an element or flow properties.

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

**Why:** When you first drag a new element onto the canvas, the Label, API Name, and Description fields remain unchanged and are easily seen and editable. But when you edit an existing element, the amount of space that these fields take up is minimized. The API name appears in parentheses. The Description field doesn't appear unless it contains a value. If the description is longer than three lines, then we truncate it to three lines and follow it with an ellipsis (...). Click the pencil icon () to edit the label, API name, and description values.



After you click the pencil icon, the fields don't collapse again in edit mode until you close and reopen the element for editing.

## Let Flow Users Search for Records by Any Searchable Field

(Beta)

Now flow users can now search by any searchable field and choose from more than five records. Previously, the flow lookup component only supported instant search results. Users could search only by the name field, and the results were capped at five records.

**Where:** This change applies to Lightning Experience and Salesforce Classic and all versions of the mobile app in Enterprise, Performance, Unlimited, and Developer editions. Lookup screen components are supported only in the Lightning flow runtime.

**Why:** Now that full lookup search is enabled, there are fewer barriers between flow users and the specific record they're looking for. Instant search results are still limited to five, like in the lookup field on a record.

Let's say you want to search for a contact by their email address instead of their name. Click Show All Results for "...", and the full lookup modal opens.



You can search by any field – as long as that field has been enabled for search. And notice that the result set isn't limited to the first five records.

The screenshot shows a Salesforce Lightning Flow component titled "Contact". At the top, there is a search bar with the query "uog.com" and a search icon. Below the search bar is a dropdown menu with the placeholder "Q "uog.com" in Contacts". A message indicates "7 Results • Sorted by Relevance ▾". The main area displays a table with the following columns: NAME, ACCOUNT NAME, ACCOUNT SITE, PHONE, EMAIL, and CONTACT OWNER ALIAS. The data rows are:

NAME	ACCOUNT NAME	ACCOUNT SITE	PHONE	EMAIL	CONTACT OWNER ALIAS
Avi Green	United Oil & Gas Corp.		(212) 842-5500	agreen@uog.com	SReyn
Liz D'Cruz	United Oil & Gas, Singapore		(650) 450-8810	ldcruz@uog.com	SReyn
Tom Ripley	United Oil & Gas, Singapore		(650) 450-8810	tripley@uog.com	SReyn
Ashley James	United Oil & Gas, UK		+44 191 4956203	ajames@uog.com	SReyn
Arthur Song	United Oil & Gas Corp.		(212) 842-5500	asong@uog.com	SReyn
Lauren Boyle	United Oil & Gas Corp.		(212) 842-5500	lboyle@uog.com	SReyn
Stella Pavlova	United Oil & Gas Corp.		(212) 842-5500	spavlova@uog.com	SReyn

In the bottom right corner of the flow component, there is a "Cancel" button.

**SEE ALSO:**

[IdeaExchange: Unable to see full search results in Flow Lookup component, only 5 records](#)

[IdeaExchange: Search by Secondary Field in Flow Lookup Component](#)

**Flow Builder Toolbar Improvements**

Now flow users can view a flow's version number, its active or inactive status, and the last modified time. The toolbar also shows hover text that gives the version number and flow status.

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

**Why:** The Flow Builder toolbar status message didn't clearly indicate when the admin modified the flow for the current version. The status was "Saved a few seconds ago" even though admins saved changes to the current flow version a while ago. The status message now provides the flow version number. When the flow is modified instead of saved, Flow Builder more accurately notifies the admin of the flow's elapsed time since the last modification.

## Lightning Flow Management: Prebuilt Report for Screen Flows, Emails from the Automated Process User, Resource Consumption in Debug Logs, Flow Error Emails for Platform Events, and Second Generation Packaging Improvements (Beta)

Run a prebuilt report to analyze the time users spend in screen flow interviews. Let the Automated Process User send emails for event processes and autolaunched flows with triggers. Use debug logs to see how finished flow interviews count toward per-transaction limits. Get notified when a platform event message fails to launch or resume a flow. Delete earlier flow versions from unlocked packages and second-generation packages.

### IN THIS SECTION:

#### [Analyze Screen Flow Usage](#)

We set up a new Sample Flow Report: Screen Flows custom report type and report for you. See who's running the screen flows you build. Discover flow interview execution counts and screen duration times. Review the status of a flow interview. No configuration on your part is needed.

#### [Track Your Flows' Usage of Limited Resources](#)

Debug logs can now track the resource consumption of each finished flow interview. Suppose that your org frequently reaches per-transaction limits, such as those for SOQL queries or DML statements. To check your flows' usage toward those limits, use debug logs to track Workflow events at the FINER level.

#### [Get Notified When a Platform Event Message Doesn't Start or Resume a Subscribed Flow or Process](#)

On rare occasions, after a platform event message is published, something happens that prevents the event message from starting or resuming a subscribed flow or process. Now you can receive an error email if this issue occurs in your org.

#### [Emails from the Automated Process User](#)

The flow email actions Simple Email and Email alerts now specify the sender with the email address used for "Automated Process User" in Settings. Use your organization-wide email address for "Automated Process User" so that recipients receive emails of flow actions that invoke autolaunched flows with triggers and event processes.

#### [Second-Generation Packaging Improvements: Delete Earlier Flows from Packages](#)

Now, Flows that you removed from earlier unlocked package versions are deleted when you install and upgrade unlocked packages in Salesforce. And you can delete earlier Flow versions from second-generation managed packages.

## Analyze Screen Flow Usage

We set up a new Sample Flow Report: Screen Flows custom report type and report for you. See who's running the screen flows you build. Discover flow interview execution counts and screen duration times. Review the status of a flow interview. No configuration on your part is needed.

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

**Who:** By default, the Sample Flow Report: Screen Flows report is visible for all users. However, each user can only see information for the flows for which they're the running user. The report uses data from the new Flow Interview Logs and Flow Interview Log Entries primary objects. By default, only users with the View All Data permission can see other users' flow log data. To give users the ability to view information about flows run by other users, set up sharing settings for the Flow Interview Logs object. To restrict view access to the report, move it to a different folder.

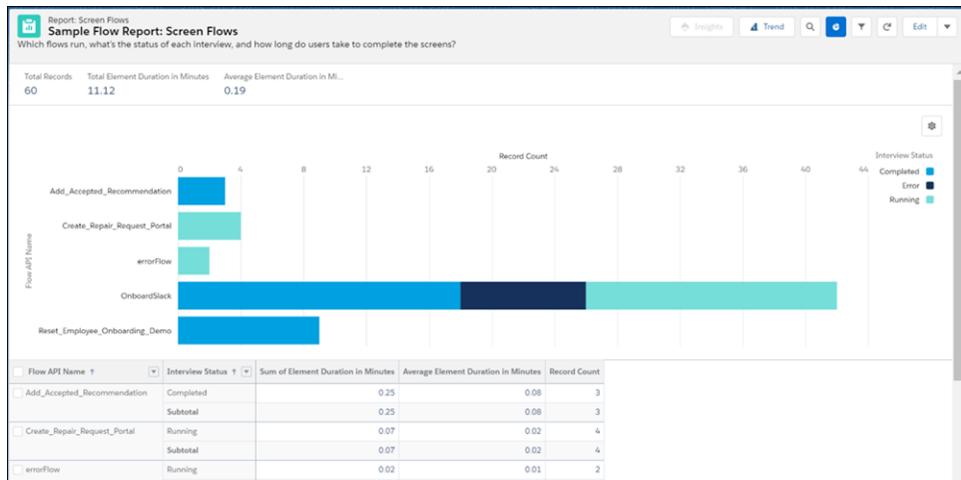
**Why:** We heard your feedback that you want a more efficient and time-saving way to find out runtime details about the flows you build. Now you can use the new Screen Flows custom report to discover information about your screen flows. For example, you can see who's running a flow you created, and get a better understanding of its adoption. And service managers can see how fast their teams complete their tasks with flows versus without. These metrics provide insights about whether the business could benefit from more process automation or less.

## Lightning Flow: Trigger on Record Changes and Events, Debug Options, Improved Flow Analytics, and Custom UIs for Screen Components and Invocable Actions Enhancement

Salesforce automatically adds the Screen Flows custom report type and report to orgs that haven't reached their org limit for the number (**Beta**) of custom report types. Orgs that already have a custom report type with the same API name as the Screen Flows custom report type ("screen\_flows\_prebuilt\_crt") do not receive the Screen Flows custom report type. Orgs that already have a report with the same report type name ("flow\_screen\_prebuilt\_report") do not receive the Sample Flow Report: Screen Flows report. If your org doesn't receive the report, you can create a custom report type using the Flow Interview Logs and Flow Interview Log Entries objects. Users then can create custom reports using the custom report type.

The Flow Interview Log Entries object generates a log record for each screen flow that's active in the last 31 days. The limit for the Flow Interview Log Entries object is 7 million log records a month, for the previous 31 days. Orgs rarely reach this limit. But when the limit is reached, Salesforce stops logging metrics for new flows. After 7 million records in 31 days, no new flow executions are counted. However, if a flow interview is in progress when this limit is reached, Salesforce continues to track metrics for the flow interview. Salesforce automatically deletes all logs that are older than 31 days, even for orgs that haven't reached the 7 million-records limit.

**How:** From the App Launcher, enter report, click Reports, and then Public Folders. Find and select Sample Flow Report: Screen Flow. If you don't see the report, that means we couldn't automatically add it. Either your org is at its maximum custom report type limit or your org already has a report with the same report type name.



The report displays flow interviews that ran within a specified date range for the Flow Interview Logs and Flow Interview Log Entries objects. By default, the results are sorted by flow API name and interview status. The results include the total time and the average time that users spent on a flow screen, and the number of flow interview log records generated for a flow within the reporting period. To change how the report is sorted or to report on different fields, edit the report.

The default date range is the last 7 days. If you don't see all of your flows, change the date filter to a wider range. The maximum range is the last 31 days.

Remember that the data in the report is for screen flows only. The report includes data for screen flows that users started, paused, and finished, and screen flows in which users clicked Next. Autolaunched flows and flows that don't require user interaction are not logged.

Typically, reports measure completed work. However, the Screen Flows report tracks active flows that are still in progress, in addition to completed flows.

### SEE ALSO:

[Salesforce Help: Report Limits, Limitations, and Allocations](#) (can be outdated or unavailable during release preview)

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

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

[New and Changed Objects](#)

## Track Your Flows' Usage of Limited Resources

Debug logs can now track the resource consumption of each finished flow interview. Suppose that your org frequently reaches per-transaction limits, such as those for SOQL queries or DML statements. To check your flows' usage toward those limits, use debug logs to track Workflow events at the `FINER` level.

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

**Why:** Creating or updating a record can trigger multiple automations in the same transaction, including autolaunched flows, Apex triggers, and record-change processes. All of these automations consume shared resources that are limited. When a limit is reached, the transaction fails.

Now you can use debug logs to determine whether or how flows contribute to each transaction's resource consumption. The information logged in these new events can help you focus your efforts on optimizing the right flows and flow element types.

This example shows that a flow interview issued 75 DML statements. Such a high number could indicate that a loop in the flow contains an element that creates, updates, or deletes records. Instead of having the loop repeatedly execute that element, move the element outside the loop so it executes only once and acts on a collection.

```
08:45:05.127
(4741320574) | FLOW_INTERVIEW_FINISHED | 31428290809e63dc5961431e12c7171c0d7b8fe-4c02 | MyFlow
08:45:05.127 (4741384571) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | SOQL queries: 1 out of 100
08:45:05.127 (4741396008) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | SOQL query rows: 75 out of 50000
08:45:05.127 (4741404708) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | SOSL queries: 0 out of 20
08:45:05.127 (4741413424) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | DML statements: 75 out of 150
08:45:05.127 (4741421017) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | DML rows: 75 out of 1000000
08:45:05.127 (4741457291) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | Heap size in bytes: 1043 out of 6000000
08:45:05.127 (4741465282) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | Callouts: 0 out of 100
08:45:05.127 (4741471652) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | Email invocations: 0 out of 10
08:45:05.127 (4741477919) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | Future calls: 0 out of 50
08:45:05.127 (4741484005) | FLOW_INTERVIEW_FINISHED_LIMIT_USAGE | Jobs in queue: 0 out of 50
```

### SEE ALSO:

[Salesforce Help: Debug Log Levels](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Per-Transaction Flow Limits](#) (can be outdated or unavailable during release preview)

[Apex Developer Guide: Execution Governors and Limits](#)

## Get Notified When a Platform Event Message Doesn't Start or Resume a Subscribed Flow or Process

On rare occasions, after a platform event message is published, something happens that prevents the event message from starting or resuming a subscribed flow or process. Now you can receive an error email if this issue occurs in your org.

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

**How:** The new error emails are already enabled for flows and processes that subscribed to platform events in the Spring '20 release or later. If any of your flows or processes subscribed to a platform event before the Spring '20 release, deactivate and reactivate them to enable these error emails.

The new error emails are sent to the same recipients as other process and flow error emails, which you can control from the process (Beta) automation settings.

**SEE ALSO:**

[Salesforce Help: Control Who Receives Flow and Process Error Emails](#) (can be outdated or unavailable during release preview)

[Platform Events Developer Guide: Subscribe to Platform Event Messages with Processes](#)

[Platform Events Developer Guide: Subscribe to Platform Event Messages with Flows](#)

## Emails from the Automated Process User

The flow email actions Simple Email and Email alerts now specify the sender with the email address used for “Automated Process User” in Settings. Use your organization-wide email address for “Automated Process User” so that recipients receive emails of flow actions that invoke autolaunched flows with triggers and event processes.

**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.

**Why:** For Scheduled Flows, if Send Email core action has “Automated Process User” as the sender for the From email address field, the flow silently fails. “Automated Process User” does not have a valid “From” email address as the running flow user. As a result, users would not get notified of any actions that occurred.

**How:** In Setup, go to **Process Automation Settings** and provide the organization-wide email address for Automated Process User.

**SEE ALSO:**

[Salesforce Help: Modify Process Automation Settings](#) (can be outdated or unavailable during release preview)

## Second-Generation Packaging Improvements: Delete Earlier Flows from Packages

Now, Flows that you removed from earlier unlocked package versions are deleted when you install and upgrade unlocked packages in Salesforce. And you can delete earlier Flow versions from second-generation managed packages.

**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.

**Why:** Previously, you couldn’t delete Flows from orgs where installed packages had the Flow. Upgrading packages on these orgs didn’t delete the Flows.



**Note:** Deleting earlier Flow versions from first-generation unmanaged and managed packages and from second-generation managed packages isn’t supported for Summer ‘20.

**SEE ALSO:**

[Salesforce Help: Install a Package](#) (can be outdated or unavailable during release preview)

## Lightning Flow Extensions: Custom UIs for Screen Components and Invocable Actions (Beta), Input and Output Access for Apex-Defined Variables, and Multi-Object Screen Components (Beta)

Developers can use Lightning web components to provide engaging UIs when you add their screen components and invocable actions to your flows (beta). Make Apex-defined variables available outside the flow. Developers can build screen components that work for any object you choose (beta).

## IN THIS SECTION:

[Configure Custom Flow Screen Components More Easily \(Beta\)](#)

Developers can create custom property editors that make it a snap for you to configure flow screen components in Flow Builder. A custom property editor is simply a Lightning web component.

[Configure Invocable Actions in Flow Builder More Easily \(Beta\)](#)

Developers can create custom property editors that make it a snap for you to configure custom invocable actions in Flow Builder. A custom property editor is simply a Lightning web component.

[Create Flow Screen Components That Work for Multiple Objects \(Beta\)](#)

Now developers can create reusable screen components that use the generic `sObject` and `sObject[]` data types. They can build one component that works for multiple objects, rather than one component for each individual object. For example, they can build a data table component that works with any collection of records, from accounts and contacts to custom objects.

[Access Apex-Defined Variables from Outside Flows](#)

Now you can pass values into Apex-defined variables when you launch a flow from a Subflow element, from a Visualforce page, or as an action. You can also access the values of Apex-defined variables as the flow runs or when it finishes. Previously, you could access only variables of other data types from outside flows.

[Use Salesforce Anywhere Chat and Alerts in Your Processes and Flows \(Beta\)](#)

Lightning Flow now includes standard Salesforce Anywhere actions, so you can easily create chats, add users to existing chats, and send messages to existing chats. And to help your users track their work, you can send them Salesforce Anywhere alerts.

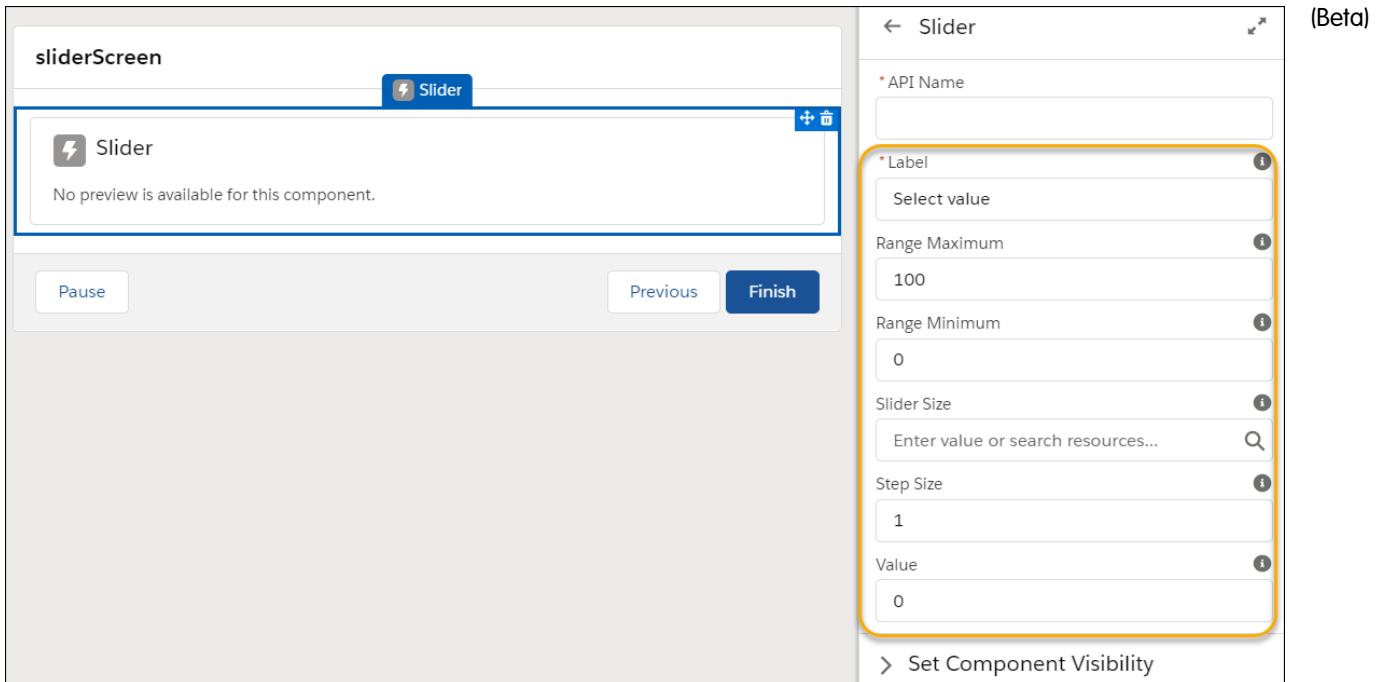
## Configure Custom Flow Screen Components More Easily (Beta)

Developers can create custom property editors that make it a snap for you to configure flow screen components in Flow Builder. A custom property editor is simply a Lightning web component.

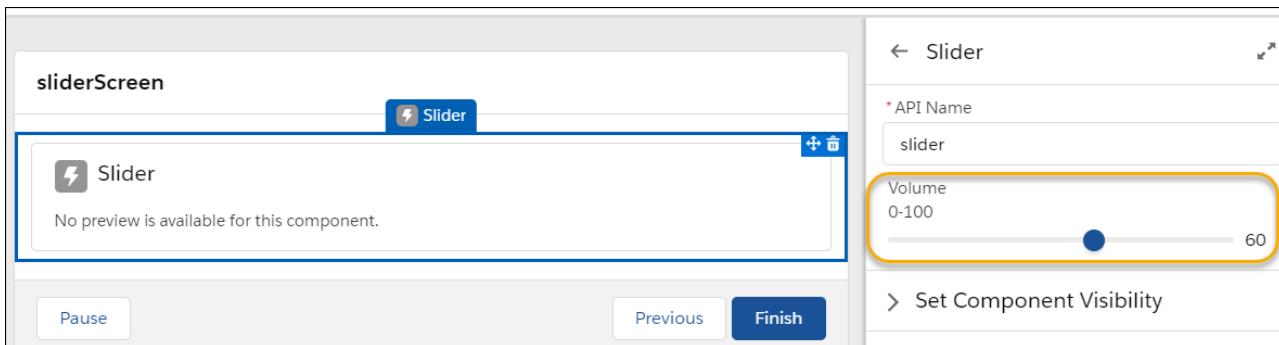
**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions.

As a beta feature, the support of custom property editors for flow screen components is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for custom property editors for flow screen components in the [Trailblazer Community](#).

**Why:** Previously, when you configured a custom flow screen component, the UI was composed of combo boxes. The developer who built the component had no control over the property editor UI.



Now, developers can create a custom Lightning web component that provides a clean, simple experience for you when you configure a flow screen component.



#### SEE ALSO:

[Create Custom Property Editors for Lightning Web Components \(Beta\)](#)

### Configure Invocable Actions in Flow Builder More Easily (Beta)

Developers can create custom property editors that make it a snap for you to configure custom invocable actions in Flow Builder. A custom property editor is simply a Lightning web component.

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

As a beta feature, the support of custom property editors for custom invocable actions is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content

apply equally to your use of this feature. You can provide feedback and suggestions for custom property editors for custom invocable actions in the [Trailblazer Community](#).

**Why:** Previously, when you configured a custom action, the UI was composed of text boxes and combo boxes. The developer who built the action had no control over the property editor UI.

**Send HTML Email (Send\_HTML\_Email)** 

**Set Input Values**

Aa \* Body

Aa \* Subject

Aa Email Addresses (collection)  
    
Include

Aa Email Addresses (comma-separated)  
    
Include

Aa Sender Address  
    
Include

Now, developers can create a custom action that provides a clean, simple experience for you when you configure it.

**Send HTML Email (Send\_HTML\_Email) **

### Sender Information

Sender Name  
Enter sender name here...

\* Reply-To Email Address  
jsmith@example.com

### Recipient Information

Recipient Name  
Enter recipient name here...

\* Send-To Email Address  
rsmith@example.com

### Subject and Body

Subject  
Welcome

HTML Body  
Welcome to the team!

## SEE ALSO:

[Create Custom Property Editors for Invocable Actions \(Beta\)](#)

## Create Flow Screen Components That Work for Multiple Objects (Beta)

Now developers can create reusable screen components that use the generic `sObject` and `sObject[]` data types. They can build one component that works for multiple objects, rather than one component for each individual object. For example, they can build a data table component that works with any collection of records, from accounts and contacts to custom objects.

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



**Note:** As a beta feature, the support of the generic `sObject` data type in custom flow screen components is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the support of the generic `sObject` data type in custom flow screen components in the [Trailblazer Community](#).

**How:** Create a custom flow screen Lightning web component, or edit an existing one. In its configuration file, a flow screen component has the target `lightning__FlowScreen`.

1. Define a type that extends the generic `sObject` data type by defining a `<propertyType>`.

2. For each property that maps to the same object, set the property's `type` attribute to `{propertyTypeName}`. If the attribute (Beta) expects a collection of that object, set the `type` attribute to `{propertyTypeName[]}`. For example, if `propertyTypeName` is `T`, use `{T}` or `{T[]}`.

You can reference the same property type for single and collection properties. To set the `type` attribute for single or collection variable properties, see the comments in the code example.

```
<!-- myComponent.js-meta.xml -->
<targetConfigs>
    <targetConfig targets="lightning__FlowScreen">

        <!-- Declare a property type that extends SObject for single and collection variable properties.-->
        <propertyType name="T" extends="SObject" label="Object" description="Select an object." />

        <!--To use a collection of the SObject data type, use the braces in this syntax, type="{T[]}".-->
        <property name="tableData" label="Records to Display" type="{T[]}" role="inputOnly" required="true"
            description="REQUIRED: Record Collection variable containing the records to display in the data table. Make sure to select a variable that matches the selected object." />

        <property name="preSelectedRows" label="Preselected Rows" type="{T[]}" role="inputOnly"
            description="Which records should be selected by default when the table renders? Select a Record Collection variable that contains those records." />

        <property name="outputSelectedRows" label="User-Selected Rows" type="{T[]}" role="outputOnly"
            description="Which records were selected by the user at runtime? This value should be stored in a record collection variable." />

    </targetConfig>
</targetConfigs>
```

Previously, the example component was tied to one object, such as Account, Contact, or myCustomObject\_\_c. But now developers create one component, and the Flow Builder admin chooses the object each time they use that component.

Data Table Flow			
	Full Name	Title	Department
<input type="checkbox"/>	Rose Gonzalez	SVP, Procurement	Procurement
<input type="checkbox"/>	Sean Forbes	CFO	Finance
<input type="checkbox"/>	Andy Young	SVP, Operations	Internal Operations
			Lead Source
			Trade Show
			Trade Show
			Purchased List

For this beta feature, when a flow screen component defines a generic sObject data type, custom objects that the flow references aren't **(Beta)** included in the package automatically. To deploy the package successfully, manually add those referenced custom objects to the package.

#### SEE ALSO:

[Lightning Web Components Developer Guide](#)

[IdeaExchange: Allow Generic sObject Collections as Input Parameters for Flow Screen Components](#)

[Metadata API](#)

## Access Apex-Defined Variables from Outside Flows

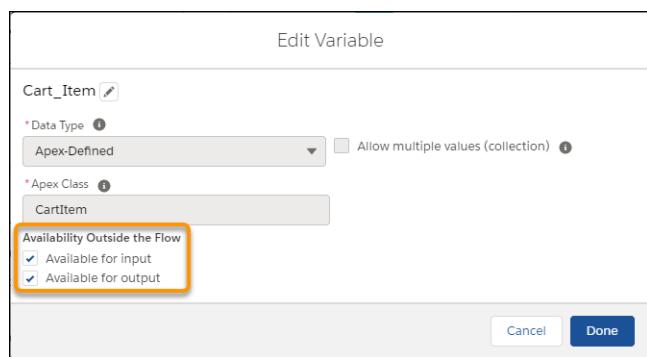
Now you can pass values into Apex-defined variables when you launch a flow from a Subflow element, from a Visualforce page, or as an action. You can also access the values of Apex-defined variables as the flow runs or when it finishes. Previously, you could access only variables of other data types from outside flows.

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

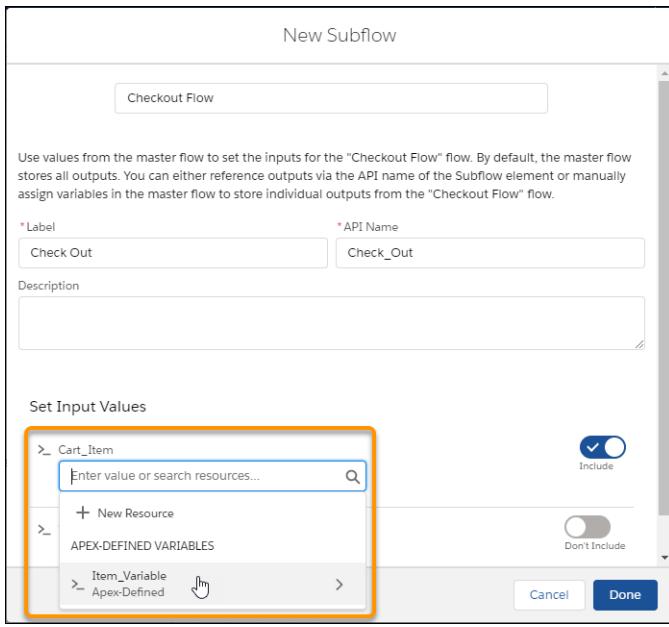
**Why:** The Apex-defined data type lets you represent complex data that doesn't fit well in Salesforce objects. For example, you can set up External Services to access external web objects. To work with those web objects in flows, set up flow variables that use the Apex-defined data type.

When used with Subflow elements, you can better organize and manage your Flow implementations. Suppose you have a complex, multi-step business process that revolves around an Apex-defined data type. Now you can use a master flow that passes complex data among other flows when running them via Subflow elements. This implementation lets you improve specific steps in the process without affecting other steps in the process.

**How:** Configure each Apex-defined variable that you want to access from outside the flow as available for input, output, or both. This example shows an Apex-defined variable named "Cart\_Item" that is available for input and output.



Then you can access the Apex-defined variable from outside the flow. This example shows how a Subflow element in another flow can set the value of the "Cart\_Item" Apex-defined variable.



 **Note:** Some user interfaces outside of Flow Builder can't pass values into Apex-defined variables in flows. For example, Lightning App Builder lets you select an Apex-defined variable in the flow, but you can't select a compatible value to pass into it.

#### SEE ALSO:

[Salesforce Help: Considerations for the Apex-Defined Data Type](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Flow Resource: Variable](#) (can be outdated or unavailable during release preview)

## Use Salesforce Anywhere Chat and Alerts in Your Processes and Flows (Beta)

Lightning Flow now includes standard Salesforce Anywhere actions, so you can easily create chats, add users to existing chats, and send messages to existing chats. And to help your users track their work, you can send them Salesforce Anywhere alerts.

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

 **Note:** Salesforce Anywhere is a Non-GA Service and not a "Service" or part of the "Services", as defined in the Master Subscription Agreement ("MSA") with Salesforce. Such Non-GA Service is subject to the terms and conditions of the [Universal Pilot Research Agreement](#) ("UPRA"), including the [Data Processing Addendum](#) to the UPRA. Use of this Non-GA Service is at your sole discretion, and any purchase decisions should be made only on the basis of Salesforce generally available products and features. Automatic availability of Salesforce Anywhere depends on your MSA with Salesforce and the type of Services you have purchased. If you do not see Salesforce Anywhere in Setup, contact your Account Executive to get access to Salesforce Anywhere.

**When:** Salesforce Anywhere will become available on a rolling basis from July 13, 2020 to July 20, 2020.

**How:** Create a process and add an action. For Action Type, select **Salesforce Anywhere** and choose an action.

Create a flow and drag an Action element to the canvas. Enter *Salesforce Anywhere* and select an action.

## Lightning Flow Release Updates: Process Builder, Invocable Actions, Flow Merge Fields, and Apex Actions (Beta)

Let processes evaluate the original values of record fields. Improve the behaviors and effects of failed invocable actions. Enforce the running user's data access when executing flow merge fields. Respect the public access modifiers for legacy Apex actions. Cancel the "Require User Access to Apex Classes Invoked by Flow" update.

### IN THIS SECTION:

#### [Evaluate Criteria Based on Original Record Values in Process Builder \(Update, Postponed\)](#)

This release update is postponed to Winter '22. It was originally scheduled for auto-activation (enforcement) in Summer '20 and then postponed to Winter '21. This release update ensures that a process with multiple criteria and a record update evaluates the *original* value of the field that began the process with a value of null. This release update was first made available in Summer '19.

#### [Enable Partial Save for Invocable Actions \(Update, Postponed\)](#)

This release update is postponed to Spring '21. It was originally scheduled for auto-activation (enforcement) in Spring '20 and then postponed to Winter '21. This release update improves the behaviors and effects of failed invocable actions. It only affects external REST API calls to invocable actions done in bulk. With this update, when invoking a set of actions in a single request, a single failed invocable action no longer causes the entire transaction to fail. Without this update, if a single invocable action fails, other invocable actions within the transaction are rolled back and the entire transaction fails.

#### [Enforce Data Access in Flow Formulas \(Update, Postponed\)](#)

This release update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update enforces the running user's data access when Flow Builder uses a merge field to access a field on a related record.

#### [Make Flows Respect Access Modifiers for Legacy Apex Actions \(Update, Postponed\)](#)

This release update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Summer '20. With this release update enabled, developers can trust that their legacy Apex actions are properly protected and available only to other components in their managed packages. This update makes a flow fail if it contains a public legacy Apex action.

#### [Disable Rules for Enforcing Explicit Access to Apex Classes \(Update, Postponed\)](#)

The Require User Access to Apex Classes Invoked by Flow update has been retired. The Disable Rules for Enforcing Explicit Access to Apex Classes release update, originally announced in Summer '20, is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Spring '21. The Disable Rules for Enforcing Explicit Access to Apex Classes update returns orgs to their original state – where users only need access to the flow to be able to run a flow that includes Apex actions.

#### [Return Null Values in Process and Flow Formulas \(Update, Postponed\)](#)

The Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas release update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Spring '20. **Note:** This update has already been enabled in Salesforce orgs that received Summer '20 prior to July 10, 2020. If this is the case for your org, you may disable the update if you wish until Spring '21. This update enables process and flow formulas to return null values when the calculations involve a null record variable or null lookup relationship field.

#### [Require User Access to Apex Classes Invoked by Flow \(Update, Retired\)](#)

This update, released in Summer '19 and postponed to Spring '21, has been retired. The update was previously called "Improve Security by Requiring User Access to Apex Classes Invoked by Flow."

### **Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)**

This release update is postponed to Winter '22. It was originally scheduled for auto-activation (enforcement) in Summer '20 and then postponed to Winter '21. This release update ensures that a process with multiple criteria and a record update evaluates the *original* value of the field that began the process with a value of null. This release update was first made available in Summer '19.

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

**When:** This update is enforced in the Winter '22 release. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**How:** To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**. For Evaluate Criteria Based on Original Record Values in Process Builder, follow the testing and activation steps.

If you have a process with the **Do you want to execute the actions only when specified changes are made to the record?** option selected, or it uses the *ISCHANGED()* function in your criteria, this update could cause the process to behave differently.

#### SEE ALSO:

[Release Updates \(Beta\)](#)

## Enable Partial Save for Invocable Actions (Update, Postponed)

This release update is postponed to Spring '21. It was originally scheduled for auto-activation (enforcement) in Spring '20 and then postponed to Winter '21. This release update improves the behaviors and effects of failed invocable actions. It only affects external REST API calls to invocable actions done in bulk. With this update, when invoking a set of actions in a single request, a single failed invocable action no longer causes the entire transaction to fail. Without this update, if a single invocable action fails, other invocable actions within the transaction are rolled back and the entire transaction fails.

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

**Why:** Without this release update, if one invocable action fails, other invocable actions in the same transaction are rolled back. With this release update, Salesforce tries three times to execute the invocable actions that run successfully and rolls back only the invocable actions that fail to execute. This functionality is called "partial save."

Most invocable action types that are invoked via REST API are enabled with the partial save functionality. However, even with this release update, the following action types don't support partial save functionality:

- Cancel Fulfillment Order
- Cancellation Orders
- Capture Funds
- Content Workspaces
- Create Fulfillment Order
- Create Invoice from Fulfillment Order
- Create Service Report
- External Services
- Generate Work Orders
- Invocable Apex
- Skills-based Routing
- Submit Digital Form Response

Partial save can cause an external callout to occur multiple times, and external callouts can't be rolled back. Repeated external callouts **(Beta)** can occur only when a flow is launched from a process or invoked from REST API, and that flow makes multiple attempts to execute the action that's making the external callouts.

Because partial save can make multiple attempts to execute an action, the transaction can take longer than expected. This can cause your org to reach some limits sooner than expected.

**When:** This update is enforced in the Spring '21 release. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab. Before enforcement, or before you activate this release update in your production org, we recommend that you test it in a sandbox or Developer Edition org to make sure that your invocable actions work correctly. If you must work in your production org, do so during off-peak hours.

**How:** To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**. For Enable Partial Save for Invocable Actions, follow the testing and activation steps.

Review any API integrations that use invocable actions to ensure they properly accommodate partial-save behavior.

#### SEE ALSO:

[Release Updates \(Beta\)](#)

## Enforce Data Access in Flow Formulas (Update, Postponed)

This release update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update enforces the running user's data access when Flow Builder uses a merge field to access a field on a related record.

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

**When:** This update is enforced in the Spring '21 release. 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 enabled, a flow merge field that accesses a related record respects the running user's object permissions, field-level access, and record-level access such as sharing rules.

For example, consider an org that makes contacts private unless the contact owner shares the contact explicitly with other users.

Without this update, when a user who isn't the contact owner runs a flow that uses a merge field to access a field on the contact via the Contact ID field on the case, the flow interview ignores record-level security and accesses the field.

```
{ !caseRecord.Contact.LastName }
```

With this update enabled, the running user's record-level access is enforced, so that flow interview can't access the field.

**How:** We recommend that you test this update in a sandbox before enabling it in your production org. Test all flow paths that use merge fields to access fields on related records that have object-level security, field-level security, or record-level security. For example, test flows that use merge fields to access fields on related records that aren't shared with the running user of the flow.

To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, and select **Release Updates**. For Enforce Data Access in Flow Formulas, follow the testing and activation steps.

If you experience issues, contact Salesforce Customer Support.

#### SEE ALSO:

[Release Updates \(Beta\)](#)

## Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Postponed)

(Beta)

This release update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Summer '20. With this release update enabled, developers can trust that their legacy Apex actions are properly protected and available only to other components in their managed packages. This update makes a flow fail if it contains a public legacy Apex action.

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

**Why:** This update resolves an issue where flows don't respect the public access modifiers for legacy Apex actions. The issue affects only legacy Apex actions that reference Apex classes installed from managed packages.

Legacy Apex actions were formerly known as Apex plug-ins. When you define an Apex class that implements the `Process.Plugin` interface in your org, it's available in Flow Builder as a legacy Apex action.

 **Note:** For new Apex integrations, we recommend using the `InvocableMethod` annotation instead of the `Process.Plugin` interface. This update doesn't affect invocable Apex methods.

With this update enabled:

- Flows fail when they execute public legacy Apex actions.
- Public legacy Apex actions aren't available in Flow Builder.
- Global legacy Apex actions with public `describe` or `invoke` methods are unavailable to flows in a different namespace.

Without this update, you can add public legacy Apex actions to flows even though they're not supported. Also, global legacy Apex actions with public `describe` or `invoke` methods are available to flows in a different namespace.

**When:** This update is enforced in the Spring '21 release. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**How:** We recommend that you test this update in a sandbox or developer org before activating the update in production. If you must work in your production org, do so during off-peak hours. Test all paths that contain legacy Apex action elements and make sure your flows work correctly. If a legacy Apex action is important for a business process but isn't supported with this update, contact the package developer. The developer can consider making a legacy Apex action global, or rebuilding the functionality in a new Apex class.

To apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and select **Release Updates**. For Make Flows Respect Access Modifiers for Legacy Apex Actions, follow the testing and activation steps.

### SEE ALSO:

[Release Updates \(Beta\)](#)

## Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

The Require User Access to Apex Classes Invoked by Flow update has been retired. The Disable Rules for Enforcing Explicit Access to Apex Classes release update, originally announced in Summer '20, is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Spring '21. The Disable Rules for Enforcing Explicit Access to Apex Classes update returns orgs to their original state – where users only need access to the flow to be able to run a flow that includes Apex actions.

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

**When:** This update is enforced in the Summer '21 release. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Who:** This new update is available only for orgs that have the Require User Access to Apex Classes Invoked by Flow update enabled. If you don't see the Disable Rules for Enforcing Explicit Access to Apex Classes update, you have nothing to do to comply.

**How:** To apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and select **Release Updates**. For Disable Rules for Enforcing Explicit Access to Apex Classes, click **Activate**. Because we're removing a requirement, enabling this update won't

affect any of your existing customizations. We recommend that admins review permissions, to ensure that users who require access to [\(Beta\)](#) Apex classes for other reasons still have access to them.

**SEE ALSO:**

- [Release Updates \(Beta\)](#)
- [Require User Access to Apex Classes Invoked by Flow \(Update, Retired\)](#)
- [How Does Flow Security Work?](#)

## Return Null Values in Process and Flow Formulas (Update, Postponed)

The Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas release update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Spring '20. **Note:** This update has already been enabled in Salesforce orgs that received Summer '20 prior to July 10, 2020. If this is the case for your org, you may disable the update if you wish until Spring '21. This update enables process and flow formulas to return null values when the calculations involve a null record variable or null lookup relationship field.

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

**Why:** In processes and flows, a formula can reference a record's field via a record variable or lookup relationship field. At run-time, when the record variable or lookup relationship field is null, the formula sometimes returns null. Otherwise, it returns an unhandled exception. With this update, the formula always returns a null value when the record variable or lookup relationship field is null. This update doesn't affect merge fields.

For example, when you update an account, a process starts and checks the criteria before it performs actions. The criteria includes a formula that references the parent account's name via the account's Parent Account field. The Parent Account field is a lookup relationship field: `[Account].Parent.Name`.

If the value of the lookup relationship field is null, the formula returns null. Without this update, the formula sometimes returns an unhandled exception instead of null.

**When:** This update is enforced in the Spring '21 release. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab..

**How:** To test this critical update, we recommend working in a sandbox. Test all process and flow formulas that reference lookup relationship fields or record variable fields. Processes have formulas in criteria and in actions. Flows have formulas in resources and in validation of input components. To apply this update, from Setup, in the Quick Find box, enter `Release Updates`, and select **Release Updates**. For Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas, follow the testing and activation steps.

**SEE ALSO:**

- [Release Updates \(Beta\)](#)

## Require User Access to Apex Classes Invoked by Flow (Update, Retired)

This update, released in Summer '19 and postponed to Spring '21, has been retired. The update was previously called "Improve Security by Requiring User Access to Apex Classes Invoked by Flow."

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

**When:** This update has been retired and no longer appears in the Critical Update console and the Release Update settings page after your org upgrades to Summer '20. Ignore the auto-activation date that appears in the Setup UI for Summer '20, because the update won't be automatically applied for any org.

**Why:** Previously, guest users needed the "Run Flows" user permission to run any flow, which granted them access to run all flows, even ones that need not be run by a guest user. The release update made sure that guest users can't execute Apex code that they shouldn't by accidentally running a different flow. With the update enabled, if a flow invokes Apex code, the running flow user is required to have explicit access to that Apex class via their profile or permission sets.

Since then we've delivered functionality that lets you grant permission to flows on an individual basis. That functionality is the preferred way to protect your org.

If this update was enabled in your org, you'll see the "Disable Rules for Enforcing Explicit Access to Apex Classes" update. The new update, once activated, returns orgs to their original state – where users only need access to the flow to be able to run a flow that includes Apex actions.

**Important:** We highly recommend removing the "Run Flows" user permission from your guest user profiles. To secure your org, grant guest users access to only the specific flows that they must run.

#### SEE ALSO:

[Disable Rules for Enforcing Explicit Access to Apex Classes \(Update, Postponed\)](#)

[How Does Flow Security Work?](#)

## Einstein Prediction Builder: Define Your Prediction Set, Run Reports, and Enable Predictions from the Scorecard

Make your prediction results more relevant by choosing which records you want Einstein to score. Run reports so you can explore the data being used in your prediction. Save time when you enable or disable predictions directly from the prediction scorecard. Use Data Checker for even more field and record types.

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#### IN THIS SECTION:

[Define Your Prediction Set in Einstein Prediction Builder](#)

Choose which records you want Einstein to score when you build a prediction. Now you can define not only your segment and example set, but your prediction set as well. Define your prediction set to include only records that aren't in your example set, only records that are in your example set, or records that you choose using filters.

[Run Reports from Einstein Prediction Builder](#)

Get all the facts about your data while you're building a prediction. Run a report from Data Checker as you build so you can fix problems in your dataset or change prediction settings as needed.

[Enable Einstein Predictions from the Scorecard](#)

After you review your prediction's scorecard in Einstein Prediction Builder and everything looks good, no need to travel back to the list view. Enable it on the spot, right from the scorecard. With the time you save, dream up new things to predict.

[Check Data for More Field Types in Einstein Prediction Builder](#)

Data Checker now supports field-to-field comparisons, and long text fields that use the "Starts with" or "Contains" operator. Predictions that include any of these field types in their filter conditions can now benefit from the Data Checker. Previously, Data Checker prompted you to remove such fields from your filter conditions to check your data, then add them back to build your prediction. No need to bother with that now.

### [Read the Scorecard More Easily in Einstein Prediction Builder](#)

Read and interpret your prediction's scorecard more easily with new labels in a few areas.

#### SEE ALSO:

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

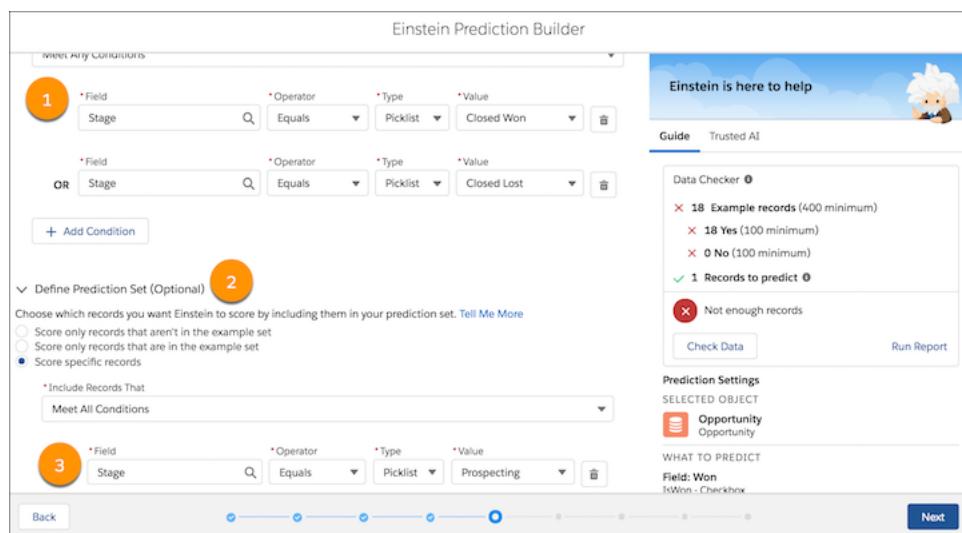
## Define Your Prediction Set in Einstein Prediction Builder

Choose which records you want Einstein to score when you build a prediction. Now you can define not only your segment and example set, but your prediction set as well. Define your prediction set to include only records that aren't in your example set, only records that are in your example set, or records that you choose using filters.

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

**Who:** This feature is available to admins with the Einstein Analytics Plus, Einstein Predictions, or EinsteinBuilderFree license.

**How:** As you build your prediction, on the page where you select a field to predict, expand the Define Prediction Set (Optional) section. Choose which records to include in your prediction set. Einstein provides scores only for these records.



For example, you want to predict Closed/Won opportunities. Your example set (1) includes opportunities with a stage of Closed/Won or Closed/Lost, and you define your prediction set (2) as opportunities in the Prospecting stage (3). Other stages aren't included, so Einstein learns only from examples of closed opportunities, and makes predictions only for new opportunities.

## Run Reports from Einstein Prediction Builder

Get all the facts about your data while you're building a prediction. Run a report from Data Checker as you build so you can fix problems in your dataset or change prediction settings as needed.

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

**Who:** This feature is available to admins with the Einstein Analytics Plus, Einstein Predictions, or EinsteinBuilderFree license.

**How:** Anywhere you see Data Checker, you can run a report on your prediction data. Run it when you select an object to predict. Run it when you select a field to predict or when you define examples on your filter-based prediction. Run it one more time when you review

your prediction settings. Use the Run Report link in Data Checker. You're prompted to choose a report type, and your report opens in a new tab or window.

The screenshot shows the Einstein Prediction Builder interface. On the left, there's a search bar for 'Medical Appointment' and a section for defining a segment. Below that, there's a condition builder for 'HeartDisease' set to 'Equals' 'Boolean' 'False'. On the right, there's a summary of 'Data Checker' (40633 Total records) and a 'Run Report' button which is highlighted with a red box. A sidebar on the right says 'Let's choose an object' and shows 'Medical\_Appointment\_\_c' as the selected object.

## Enable Einstein Predictions from the Scorecard

After you review your prediction's scorecard in Einstein Prediction Builder and everything looks good, no need to travel back to the list view. Enable it on the spot, right from the scorecard. With the time you save, dream up new things to predict.

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

**Who:** This feature is available to admins with the Einstein Analytics Plus, Einstein Predictions, or EinsteinBuilderFree license.

**How:** Review your prediction's scorecard. Ready to enable? On the Overview page, enable your prediction.

The screenshot shows the b2 Scorecard Overview page. It includes sections for 'Prediction Quality' (Good, 73), 'Top Predictors' (Within24Hrs: 1.0, DaysDiff: 0.6, ScheduledDay: 0.6, SMS Received: 0.28, Age Bracket: 0.18), and 'About Your Prediction' (Predicted Object: Medical\_Appointment\_\_c, What to Predict: Medical\_Appointment\_\_c.No\_Show\_\_c, Save to Field: pcf\_b2\_\_c). The 'Enable' button is highlighted with a red box.

## Check Data for More Field Types in Einstein Prediction Builder

Data Checker now supports field-to-field comparisons, and long text fields that use the “Starts with” or “Contains” operator. Predictions that include any of these field types in their filter conditions can now benefit from the Data Checker. Previously, Data Checker prompted you to remove such fields from your filter conditions to check your data, then add them back to build your prediction. No need to bother with that now.

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

**Who:** This feature is available to admins with the Einstein Analytics Plus, Einstein Predictions, or EinsteinBuilderFree license.

**How:** Let’s say your example set has a condition to include only opportunities with an Amount that’s greater than the Expected Revenue. That’s a field-to-field comparison. You chose Comparison as the Type, and used Build Comparison to select the Expected Revenue field. Now you want to check your data to make sure you have enough records. You can do it!

The screenshot shows the 'Include Records That' section of the Einstein Prediction Builder. It includes a dropdown menu 'Meet All Conditions' and a detailed filter configuration. The filter consists of four fields: 'Field' (Amount), 'Operator' (Greater than), 'Type' (Comparison), and 'Value' (Expected Revenue). A search icon is also present next to the 'Amount' field. Below the filter fields is a '+ Add Condition' button.

Suppose that your segment includes a filter condition to include accounts with a Description field that starts with or contains “Western Foods Trade Show”. The Description field contains more than 256 characters. No problem! Data Checker can handle it.

The screenshot shows the 'Select an object to predict' section of the Einstein Prediction Builder. It includes a search bar with 'Account' selected. Below it is a 'Define Segment (Optional)' section with two radio button options: 'No segment (use data from all records on the selected object)' and 'Yes, focus on a segment (Advanced)'. The 'Advanced' option is selected. The 'Include Records That' section is identical to the one in the previous screenshot, with 'Field' (Description), 'Operator' (Starts with), 'Type' (String), and 'Value' (Western Foods Trade Show).

## Read the Scorecard More Easily in Einstein Prediction Builder

Read and interpret your prediction’s scorecard more easily with new labels in a few areas.

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

**Who:** This feature is available to admins with the Einstein Analytics Plus, Einstein Predictions, or EinsteinBuilderFree license.

**How:** The Details tab is now called Predictors (1), and the former Predictors tab is now called Fields (1). These two tabs have also switched places so you get the most important information first. The Importance/Weight column is no longer displayed in the scorecard, but you can get this information by downloading a CSV file of the scorecard data.

NoShow Scorecard																																																																									
Overview		Predictors	Fields	Settings																																																																					
Selected Fields	18	Total Predictors	38	Predictive Model Type	Random Forest																																																																				
<table border="1"> <thead> <tr> <th>Field Label</th> <th>Predictor</th> <th>Impact ↑</th> <th>Correlation</th> </tr> </thead> <tbody> <tr><td>Within24Hrs</td><td>Yes</td><td>1</td><td>-0.268</td></tr> <tr><td>DaysDiff</td><td>(Number)</td><td>0.497</td><td>0.178</td></tr> <tr><td>ScheduledDay</td><td>Day of Year</td><td>0.331</td><td>0.161</td></tr> <tr><td>SMS Received</td><td>(Number)</td><td>0.301</td><td>0.132</td></tr> <tr><td>Age</td><td>(Number)</td><td>0.295</td><td>-0.077</td></tr> <tr><td>Age Bracket</td><td>65</td><td>0.278</td><td>-0.078</td></tr> <tr><td>ScheduledDay</td><td>Days between Present and Date</td><td>0.235</td><td>0.158</td></tr> <tr><td>Previous No Shows</td><td>(Number)</td><td>0.21</td><td>0.082</td></tr> <tr><td>ScheduledDay</td><td>Hour of Day</td><td>0.109</td><td>-0.049</td></tr> <tr><td>ScheduledDay</td><td>Day of Month</td><td>0.097</td><td>-0.033</td></tr> <tr><td>AppointmentDay</td><td>Day of Year</td><td>0.078</td><td>0.024</td></tr> <tr><td>AppointmentDay</td><td>Day of Month</td><td>0.078</td><td>0.004</td></tr> <tr><td>AppointmentDay</td><td>Days between Present and Date</td><td>0.066</td><td>0.022</td></tr> <tr><td>ScheduledDay</td><td>Day of Week</td><td>0.045</td><td>-0.003</td></tr> <tr><td>ApptNameLastDigit</td><td>(Number)</td><td>0.039</td><td>0.001</td></tr> <tr><td>Age Bracket</td><td>1524</td><td>0.032</td><td>0.05</td></tr> </tbody> </table>						Field Label	Predictor	Impact ↑	Correlation	Within24Hrs	Yes	1	-0.268	DaysDiff	(Number)	0.497	0.178	ScheduledDay	Day of Year	0.331	0.161	SMS Received	(Number)	0.301	0.132	Age	(Number)	0.295	-0.077	Age Bracket	65	0.278	-0.078	ScheduledDay	Days between Present and Date	0.235	0.158	Previous No Shows	(Number)	0.21	0.082	ScheduledDay	Hour of Day	0.109	-0.049	ScheduledDay	Day of Month	0.097	-0.033	AppointmentDay	Day of Year	0.078	0.024	AppointmentDay	Day of Month	0.078	0.004	AppointmentDay	Days between Present and Date	0.066	0.022	ScheduledDay	Day of Week	0.045	-0.003	ApptNameLastDigit	(Number)	0.039	0.001	Age Bracket	1524	0.032	0.05
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The labels in the Field Values column for number, date, and text fields used to be rather cryptic. Now they're more descriptive. Labels for number (1) and text (3) fields use parentheses to indicate that they're a type of value as opposed to a specific value. Labels for date (2) fields are more specific.

NoShow Scorecard			
Within24Hrs	Yes	0.516	-0.27
ScheduledDay	Days between Present and Date	0.408	0.16
SMS Received	(Number)	0.321	0.133
Age Bracket	65	0.184	-0.081
Age	(Number)	0.177	-0.078
app_date_shifted	Days between Present and Date	0.066	0.017
Previous No Shows	(Number)	0.057	0.081
AppointmentDay	Days between Present and Date	0.052	0.023
ApptNameLastDigit	(Number)	0.043	0.003
Neighbourhood	(Text)	0.023	-0.026
Gender	F	0.017	-0.001
Gender	M	0.016	0.001
SocialBenefit?	Yes	0.016	0.025
Hypertension?	Yes	0.016	-0.045
Age Bracket	1524	0.014	0.052
Age Bracket	4554	0.013	-0.016
formAT#	False	0.011	-0.039
Appointment ID	(Text)	0.01	-0.007
Age Bracket	514	0.009	0.041
formAT#	is null	0.008	0.039
Patient Id	(Text)	0.007	-0.009
Age Bracket	3544	0.007	0.012
Medical Appointment Name	(Text)	0.006	-0.005

# Lightning App Builder: Dynamic Forms (Non-GA Preview), Dynamic Actions (Beta), and Accessibility Enhancements

Put fields and sections from your record details anywhere on a record page with Dynamic Forms. Use the Lightning App Builder instead of the page layout editor to choose which actions appear in the Highlights Panel on custom object record pages. Easily navigate the component palette with your keyboard using the Tab and Arrow keys.

## IN THIS SECTION:

### [Break Up Your Record Details with Dynamic Forms \(Non-GA Preview\)](#)

Dynamic Forms is the next step in the evolution of Lightning record pages. It adds the ability to configure record detail fields and sections inside the Lightning App Builder.

### [Add Dynamic Actions to the Highlights Panel for Custom Objects \(Beta\)](#)

For custom objects, you can use the Lightning App Builder instead of the page layout editor to choose which actions appear in the Highlights Panel on the object's record page. Control visibility for each action based on factors that you specify.

### [Use Tab and Arrow Keys to Navigate the Component Palette](#)

The Lightning App Builder component palette is now more accessible. You can press Tab to access the first item in the list and then use the Tab or arrow keys to navigate the rest of the list.

### [Add the C360 Global Profiles Component to More Page Layouts](#)

Give your users more visibility into global profile data wherever they access it. The C360 Global Profiles component is now available as a standard component on contact, lead, and individual record pages in addition to account record pages.

## Break Up Your Record Details with Dynamic Forms (Non-GA Preview)

Dynamic Forms is the next step in the evolution of Lightning record pages. It adds the ability to configure record detail fields and sections inside the Lightning App Builder.

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

 **Note:** As a Non-GA Preview feature, Dynamic Forms is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Dynamic Forms in the [Dynamic Forms Trailblazer Community](#). For information on enabling this feature in your org, see [Get Started with Dynamic Forms \(Non-GA Preview\)](#).

Any use of this Non-GA Preview is subject to the Beta Services terms at <https://www.salesforce.com/company/legal/agreements.jsp>.

**Why:** The more fields on your page layout, the more that the Record Detail component becomes a monolithic block of fields that you can't customize. With Dynamic Forms, you can migrate the fields and sections from your page layout as individual components into the Lightning App Builder. Then, you can configure them just like the rest of the components on the page, and give users only the fields and sections that they need.

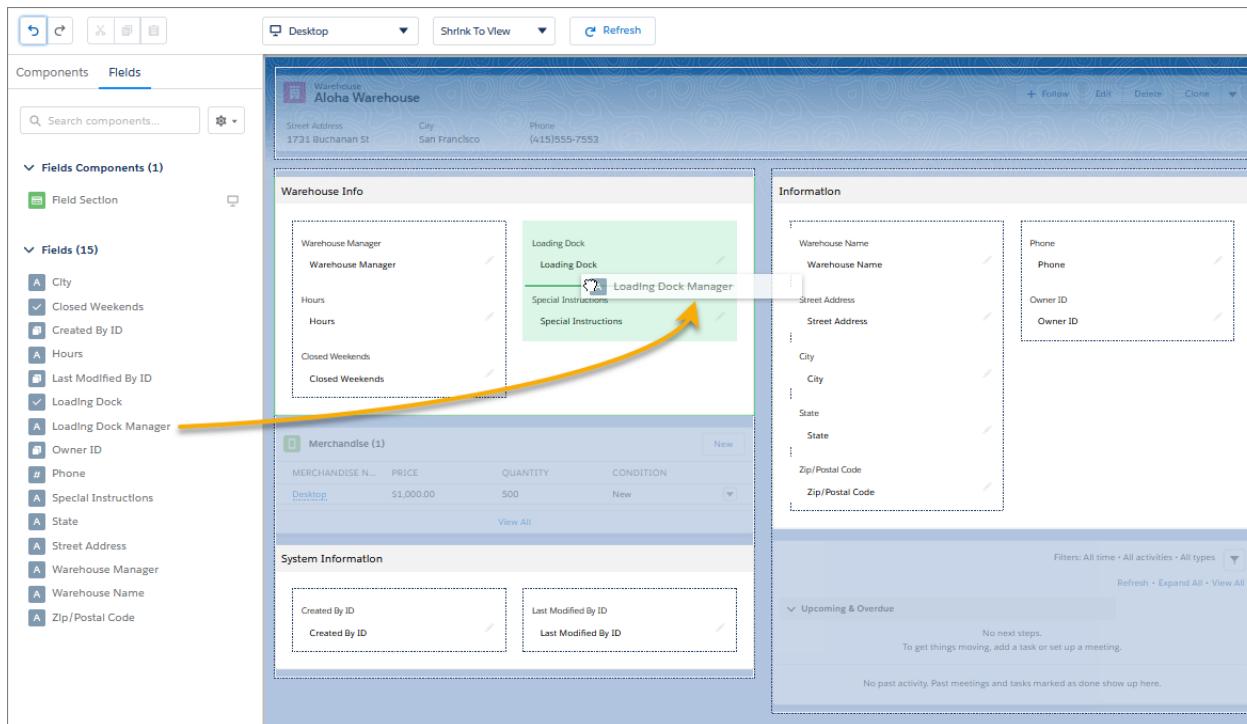
Dynamic Forms benefits you in these ways.

- An instant upgrade from page layouts: Place fields and sections wherever you want.
- Better page performance: Put fields and sections into accordion components or tabs to significantly improve page load times.



**Note:** Programmatic versions of the accordion component don't provide the same functionality as their App Builder counterparts. For example, `lightning-accordion` and `lightning:accordion` base Lightning components don't currently support lazy loading.

- Dynamic layouts: Use visibility rules to show and hide fields and sections.
- Simpler layout management:
  - Manage the fields and sections on your pages in the Lightning App Builder without touching the page layout editor.
  - Reduce the number of page layouts you need with component visibility rules.
  - Take advantage of a single assignment model for the Lightning page instead of the dual model of assigning a Lightning page and a page layout.



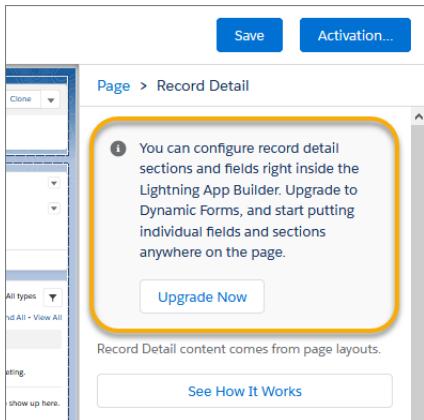
**How:** To enable Dynamic Forms in your org, from Setup, enter *Record* in the Quick Find box, and then click **Record Page Settings**. In the Dynamic Forms section, flip the switch to **On**.



**Note:** Dynamic Forms is a Non-GA Preview and has limitations. We recommend that you read all the information in the Dynamic Forms section of the Record Page Settings page before you enable this feature.

After you enable Dynamic Forms, new features appear in the Lightning App Builder. A new Fields tab in the component palette contains Field and Field Section components, which are the building blocks for Dynamic Forms.

How do you get started? Open an existing record page in the Lightning App Builder, then click **Upgrade Now** from the Record Detail properties pane to launch the Dynamic Forms migration wizard. With only a few clicks, the wizard adds fields and field sections to the page for you.



Migration isn't the only path. You can also build your pages from scratch. Create a fresh Lightning record page, and start dragging fields and sections anywhere you want onto the page. And as you configure fields and sections, you get help from new in-app tips, created just for Dynamic Forms-driven pages.

 **Note:** Dynamic Forms is supported on record pages for custom objects only.

#### SEE ALSO:

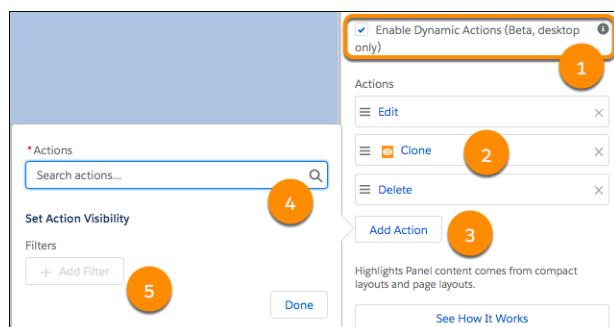
[Salesforce Help: Break Up Your Record Details with Dynamic Forms \(Non-GA Preview\)](#) (can be outdated or unavailable during release preview)

## Add Dynamic Actions to the Highlights Panel for Custom Objects (Beta)

For custom objects, you can use the Lightning App Builder instead of the page layout editor to choose which actions appear in the Highlights Panel on the object's record page. Control visibility for each action based on factors that you specify.

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

**How:** In the Lightning App Builder, add the Highlights Panel to a custom object's record page. In the properties pane, select **Enable Dynamic Actions (Beta, desktop only)** (1). Actions that you add are listed in the properties pane. An eye icon  next to an action's name indicates that visibility rules are applied (2).



To add an action, click **Add Action** (3). In the Actions modal, choose an action (4) and click **Add Filter** (5) to assign visibility rules. You can specify action visibility based on record field, device type, and other filters, to control which actions appear for which users.

## Use Tab and Arrow Keys to Navigate the Component Palette

The Lightning App Builder component palette is now more accessible. You can press Tab to access the first item in the list and then use the Tab or arrow keys to navigate the rest of the list.

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

## Add the C360 Global Profiles Component to More Page Layouts

Give your users more visibility into global profile data wherever they access it. The C360 Global Profiles component is now available as a standard component on contact, lead, and individual record pages in addition to account record pages.

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

**Who:** Users with a Customer 360 Data Manager add-on subscription.

### SEE ALSO:

[Create More Records from Global Profiles](#)

[Salesforce Help: Create Records Using Customer 360 Data Manager Data](#)

[Salesforce Help: Standard Lightning Page Components](#)

[Salesforce Help: Lightning Service Console](#)

## Globalization: Data Translation, Plus New and Changed Locale Formats

Translate data stored in the Product and Product Category records with B2B Commerce. Enable new and improved formats for international dates and times via a release update. We also changed the name of the Maori (New Zealand) language and the address format for the Welsh, Welsh (United Kingdom), and English (United Kingdom) locales.

### IN THIS SECTION:

[Translate Product Details with Data Translation](#)

To connect with your customers in their language, use data translation for B2B Commerce. Data translation allows you to translate the data stored in the Product and Product Category objects' Name and Description fields. You can also enable data translation for URL fields and some custom text fields on those objects.

[Enable ICU Locale Formats \(Previously Released Update\)](#)

To help you do business wherever you are, we're adopting the International Components for Unicode (ICU) formats for dates and times. ICU sets the international standard for these formats for all locales. The new formats provide a consistent experience across the Salesforce platform and improve integration with ICU-compliant applications across the globe. The ICU formats replace Oracle's Java 8 Development Kit (JDK8) formats. This update was first made available in Winter '20.

[Maori Language Label and United Kingdom Locale Formats Were Updated](#)

We changed the name of the Maori (New Zealand) platform-only language to Te reo (New Zealand). The address format changed for the Welsh, Welsh (United Kingdom), and English (United Kingdom) locales.

[Improved Translation Documentation](#)

To help you better manage your translations, we updated the Translation Workbench documentation in Salesforce Help.

## Translate Product Details with Data Translation

To connect with your customers in their language, use data translation for B2B Commerce. Data translation allows you to translate the data stored in the Product and Product Category objects' Name and Description fields. You can also enable data translation for URL fields and some custom text fields on those objects.

**Where:** This change applies to B2B Commerce in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

SEE ALSO:

[Salesforce B2B Commerce: Design, Build, and Launch a Business-to-Business Commerce Solution](#)

[Salesforce Help: Manage Your Translations](#) (can be outdated or unavailable during release preview)

## Enable ICU Locale Formats (Previously Released Update)

To help you do business wherever you are, we're adopting the International Components for Unicode (ICU) formats for dates and times. ICU sets the international standard for these formats for all locales. The new formats provide a consistent experience across the Salesforce platform and improve integration with ICU-compliant applications across the globe. The ICU formats replace Oracle's Java 8 Development Kit (JDK8) formats. This update was first made available in Winter '20.

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

**When:** This update is applied automatically on January 30, 2022. Salesforce orgs created in Winter '20 or later have ICU locale formats enabled by default.

**How:** Before applying this update in production, check with your package providers to make sure that all your installed packages are compatible with the ICU formats. Then evaluate the new locales' impact to your Salesforce org. Use this SOQL query to find the locales in use in your org and a user count for each locale:

```
SELECT toLabel(LocaleSidKey) LocaleName, LocaleSidKey, Count(id) UserCount FROM User WHERE IsActive=true GROUP BY LocaleSidKey
```

See the documentation for recommended areas of testing and details on the changes for each locale.

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

The English (Canada) locale (en\_CA) requires separate activation. In the Quick Find box, enter *User Interface*, then select **User Interface**. Select **Enable ICU formats for en\_CA locale** and click **Save**.

 **Note:** Applying this update displays the new locale formats in the UI. The ICU formats are available in API version 45.0 and later.

SEE ALSO:

[Salesforce Help: Go Global with New International Locale Formats](#) (can be outdated or unavailable during release preview)

[Winter '20 Release Note: Enable ICU Locale Formats \(Release Update\)](#)

[Release Updates \(Beta\)](#)

## Maori Language Label and United Kingdom Locale Formats Were Updated

We changed the name of the Maori (New Zealand) platform-only language to Te reo (New Zealand). The address format changed for the Welsh, Welsh (United Kingdom), and English (United Kingdom) locales.

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

**Why:** For the Welsh, Welsh (United Kingdom), and English (United Kingdom) locales, the order of the state and ZIP code is swapped.

Spring '20 Address Format	Summer '20 Address Format
Address Line 1,	Address Line 1,
Address Line 2	Address Line 2
City	City
ZIP Code	State
State	ZIP Code
Country	Country

#### SEE ALSO:

[Salesforce Help: Supported Languages](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Locales Overview](#) (can be outdated or unavailable during release preview)

## Improved Translation Documentation

To help you better manage your translations, we updated the Translation Workbench documentation in Salesforce Help.

**Where:** Metadata translation is available in Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions. Data translation is available for B2B Commerce in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

#### SEE ALSO:

[Take a Deeper Dive into Translation](#)

## Sharing: Guest User Sharing Settings

To safeguard your Salesforce org's data, we're enabling the Secure guest user record access setting. Previously, to create guest user sharing rules, you enabled this setting first.

#### IN THIS SECTION:

[Secure Guest Users' Org-Wide Defaults and Sharing Model Are Enforced](#)

To safeguard your Salesforce org's data, we're enabling the Secure guest user record access setting. This setting enforces private org-wide defaults for guest users and restricts the sharing mechanisms that you can use to grant record access to guest users. To prepare, follow the instructions in the Secure Guest Users' Org-Wide Defaults and Sharing Model security alert on reviewing guest user sharing settings and creating guest user sharing rules.

[Create Guest User Sharing Rules by Default](#)

Guest user sharing rules are enabled by default in all Salesforce orgs with communities or sites. Previously, you first enabled the Secure guest user record access setting on the Sharing Settings Setup page to create guest user sharing rules. A guest user sharing rule is a type of criteria-based sharing rule that can grant Read Only access to guest users.

## Secure Guest Users' Org-Wide Defaults and Sharing Model Are Enforced

To safeguard your Salesforce org's data, we're enabling the Secure guest user record access setting. This setting enforces private org-wide defaults for guest users and restricts the sharing mechanisms that you can use to grant record access to guest users. To prepare, follow the instructions in the Secure Guest Users' Org-Wide Defaults and Sharing Model security alert on reviewing guest user sharing settings and creating guest user sharing rules.

**Where:** This change applies to orgs with active communities and sites in Enterprise, Essentials, Unlimited, Performance, and Developer editions.

**When:** The timelines for the rollout and enforcement of this setting are published in [Guest User Security Policies and Timelines](#).

### SEE ALSO:

[Secure Guest Users' Org-Wide Defaults and Sharing Model \(Previously Released Security Alert, Enforced\)](#)

[Opt Out of Guest User Security Policies Before Summer '20 \(Previously Released Update\)](#)

[Salesforce Help: Secure Guest Users' Sharing Settings and Record Access](#) (can be outdated or unavailable during release preview)

## Create Guest User Sharing Rules by Default

Guest user sharing rules are enabled by default in all Salesforce orgs with communities or sites. Previously, you first enabled the Secure guest user record access setting on the Sharing Settings Setup page to create guest user sharing rules. A guest user sharing rule is a type of criteria-based sharing rule that can grant Read Only access to guest users.

**Where:** This change applies to all communities accessed through Lightning Experience and Salesforce Classic in Essentials, Enterprise, Performance, Unlimited, and Developer editions.

**When:** Before the Secure guest user record access setting is enabled, we recommend that you create guest user sharing rules that replace the sharing mechanisms that you previously used to grant access to guest users. When this setting is enabled, you can grant guest users access to records only through guest user sharing rules. The timelines for the rollout and enforcement of this setting are published in [Guest User Security Policies and Timelines](#).

**How:** From Setup, in the Quick Find box, enter *Sharing Settings*, then select **Sharing Settings**. In the Sharing Rules related list for the object, click **New** and select the **Guest user access, based on criteria** rule type.

### SEE ALSO:

[Guest User: Security Policies Enforced](#)

[Salesforce Help: Secure Guest Users' Sharing Settings and Record Access](#)

[Salesforce Help: Create Sharing Rules](#)

## Approvals: Corrected Values for Merge Fields and Programmatic Ordering of Approvals

Get the correct values for merge fields in approval email alerts. Use Metadata API, change sets, and unlocked packages to control the order in which approval processes are evaluated.

### Editions

Available in: **Enterprise**,  
**Performance**, **Unlimited**,  
and **Developer** Editions

## IN THIS SECTION:

[Update Email Alerts That Use Corrected Approval Merge Fields](#)

Approval merge fields now provide the correct values in email alerts for approval actions, rejection actions, final approval actions, final rejection actions, and recall actions. If you previously customized your email templates to work around the incorrect values in approval merge fields, update those email templates to accommodate the corrected values. New email templates for approvals are now easier to set up because merge fields in email alerts contain the values that you expect them to.

[Control the Order of Active Approval Processes Programmatically](#)

Now you can control the order of your active approval processes by using Metadata API, change sets, and unlocked packages. When you deploy via Metadata API, use the `processOrder` field on the `ApprovalProcess` metadata type to control the order. Previously, you controlled the order only from Setup.

## Update Email Alerts That Use Corrected Approval Merge Fields

Approval merge fields now provide the correct values in email alerts for approval actions, rejection actions, final approval actions, final rejection actions, and recall actions. If you previously customized your email templates to work around the incorrect values in approval merge fields, update those email templates to accommodate the corrected values. New email templates for approvals are now easier to set up because merge fields in email alerts contain the values that you expect them to.

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

**How:** In each approval process, check for email alerts in the approval actions, rejection actions, final approval actions, final rejection actions, and recall actions.

For each email alert, check whether the email template contains any updated merge fields, such as `{ !ApprovalRequest.Status }` or `{ !ApprovalRequest.Process_Approver }`. Update the email templates as needed to accommodate the corrected values. This table lists the corrected merge fields.

Merge Field	Incorrect Value	Correct Value
Approval Process Step Name <code>{ !ApprovalRequest.Process_Step_Name }</code>	"ApproveEnd" or "RemovedEnd".	Name of the current step.
Approval Step Approver <code>{ !ApprovalRequest.Process_Approver }</code>	Approver from the previous step.	Approver from the current step.
Approval Step Approver ID <code>{ !ApprovalRequest.Process_Approver_Id }</code>	User ID of the approver from the previous step.	User ID of the approver from the current step.
Approval Step Assignee <code>{ !ApprovalRequest.Process_Assignee }</code>	Assigned approver from the previous step.	Assigned approver from the previous step.
Approval Step Assignee ID <code>{ !ApprovalRequest.Process_Assignee_Id }</code>	User ID of the assigned approver from the previous step.	User ID of the assigned approver from the current step.
Approval Step Comments <code>{ !ApprovalRequest.Comments }</code>	When left blank, comments are from the previous step.	When left blank, comments are blank.
Approval Step Response Date <code>{ !ApprovalRequest.Response_Date }</code>	Date when the previous step was acted upon.	Date when the current step was acted upon.
Approval Step Status <code>{ !ApprovalRequest.Status }</code>	Approval status after the previous step.	Approval status after the current step.

#### SEE ALSO:

[Known Issue: Approval Merge Fields Have Wrong Value for Approval Related Emails](#)

[Salesforce Help: Merge Fields for Approvals](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Email Alert Actions](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Email Templates](#) (can be outdated or unavailable during release preview)

## Control the Order of Active Approval Processes Programmatically

Now you can control the order of your active approval processes by using Metadata API, change sets, and unlocked packages. When you deploy via Metadata API, use the `processOrder` field on the `ApprovalProcess` metadata type to control the order. Previously, you controlled the order only from Setup.

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

**Why:** When you have more than one approval process that meets the criteria for an object, you can control the order for evaluating the approval processes. With the `processOrder` field, you can control the order via Metadata API.

**How:** To control the order of approval processes via Metadata API, activate them and then in a separate operation use the `processOrder` field. The maximum value you can define for `processOrder` is 2,000.

## General Setup: Record Page Full View Is Generally Available, a New User Profile, and Lightning Page Tab Translation

Display all details and related lists on the same page with the record page Full view, now generally available. Give your users the minimum permissions they need with the new Minimum Access - Salesforce profile. Add translations for Lightning pages using Setup instead of Metadata API.

### IN THIS SECTION:

#### [View Records Using Full View \(Generally Available\)](#)

Now you have two record page view default options. Choose between the current view—now called Grouped view—and the new Full view. Full view displays all details and related lists on the same page. If you’re transitioning to Lightning Experience, this view is similar to Salesforce Classic. This feature, which is generally available, includes the same functionality as the beta release and is available to qualifying Salesforce orgs.

#### [Use the New Minimum Access User Profile](#)

Now you can assign a least-privilege profile to a user, and then add more permissions via permission sets and permission set groups. The Minimum Access - Salesforce profile includes Access Activities, Chatter Internal User, Lightning Console User, and View Help Link permissions.

#### [Translate Lightning Page Tab Labels in Setup](#)

You can now use the Translation Workbench to translate tab labels for Lightning pages. Previously, Lightning page tab label translations could only be done via Metadata API.

#### [Salesforce IoT Explorer Edition Is Being Retired](#)

Lightning Flow has replaced Salesforce IoT Explorer Edition. Salesforce IoT Explorer Edition is available only in Salesforce orgs that have an active IoT Explorer subscription. IoT Explorer subscriptions won’t be renewed. We recommend using Lightning Flow instead because Lightning Flow offers more streamlined and powerful IoT capabilities with fewer limits than Salesforce IoT Explorer Edition. For more information, see [IoT Explorer Retirement](#).

#### [See Automatically Updated Entity Permissions in Setup Audit Trail](#)

A profile or a permission set can have an entity, such as Account, with a master-detail relationship. A broken permission dependency exists if the child entity has permissions that the parent should have. Salesforce updates the parent entity for a broken permission dependency on the first save action for the profile or permission set.

#### [Push Notification Limits Have Increased](#)

You can send up to 20,000 iOS and 10,000 Android push notifications per hour per org.

#### [Require Permission to View Record Names in Lookup Fields \(Update, Postponed\)](#)

To better protect your Salesforce org’s data, we restricted who can view record names in lookup fields. Users must have read access to these records or the View All Lookup Record Names permission to view this data. This update also applies to system fields, such as Created By and Last Modified By. This update, released in Spring '20, was scheduled for auto-activation (enforcement) in Winter '21, but was postponed in August 2020 to Spring '21.

#### [Permission Changes for Customization Features](#)

Review access changes to Customization features that take effect with the Summer '20 release.

## View Records Using Full View (Generally Available)

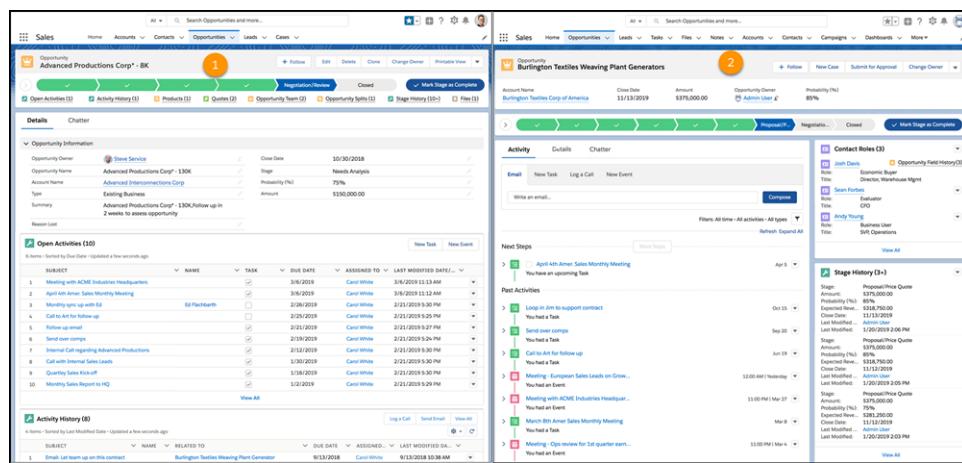
Now you have two record page view default options. Choose between the current view—now called Grouped view—and the new Full view. Full view displays all details and related lists on the same page. If you're transitioning to Lightning Experience, this view is similar to Salesforce Classic. This feature, which is generally available, includes the same functionality as the beta release and is available to qualifying Salesforce orgs.

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

**Who:** To maintain performance quality, Full view isn't available for all org configurations. To access Full view your page layout must have:

- No more than 50 fields
- No more than 12 related lists
- No inline Visualforce components

**Why:** We're giving you more out-of-the-box options so that you can choose a view that fits your users' business needs and preferences. In addition to the view that currently exists, we've added Full view, an alternative view. Full view (1) displays all details and related lists on the same page. Grouped view (2), the original Lightning Experience record view, focuses on specifics by grouping information across tabs and columns.



**How:** If you're already using Lightning Experience, you can change your org's default record view in Setup. If you turn on Lightning Experience after Summer '20, you configure these settings in the Lightning Experience Transition Assistant before you enable Lightning Experience, or in Setup after enabling Lightning Experience.

In Setup, enter *Record Page Settings* in the Quick Find box, and select **Record Page Settings**.

### SEE ALSO:

[Salesforce Help: Lightning Experience Record Page Views](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Create and Configure Lightning Experience Record Pages](#) (can be outdated or unavailable during release preview)

## Use the New Minimum Access User Profile

Now you can assign a least-privilege profile to a user, and then add more permissions via permission sets and permission set groups. The Minimum Access - Salesforce profile includes Access Activities, Chatter Internal User, Lightning Console User, and View Help Link permissions.

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

**How:** In Setup, enter *Profiles* in the Quick Find box, and click **Profiles** to see the new profile.

## Translate Lightning Page Tab Labels in Setup

You can now use the Translation Workbench to translate tab labels for Lightning pages. Previously, Lightning page tab label translations could only be done via Metadata API.

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

**How:** In Setup, enter *Translate* in the Quick Find box, and click **Translate**. Select a language, and then select **Web Tab** from the Setup Component dropdown. The list of tabs available for translation now includes Lightning page tabs.

## Salesforce IoT Explorer Edition Is Being Retired

Lightning Flow has replaced Salesforce IoT Explorer Edition. Salesforce IoT Explorer Edition is available only in Salesforce orgs that have an active IoT Explorer subscription. IoT Explorer subscriptions won't be renewed. We recommend using Lightning Flow instead because Lightning Flow offers more streamlined and powerful IoT capabilities with fewer limits than Salesforce IoT Explorer Edition. For more information, see [IoT Explorer Retirement](#).

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

**Why:** Lightning Flow and the Lightning Platform offer better IoT capabilities than Salesforce IoT Explorer Edition. Scale up your implementations with our high-performance workflow engine, which executes more than 10 billion processes every day. Lightning Flow provides easy-to-use tools to take action on your device signals such as creating a case or work order.

### SEE ALSO:

[Salesforce Help: Salesforce IoT](#) (can be outdated or unavailable during release preview)

## See Automatically Updated Entity Permissions in Setup Audit Trail

A profile or a permission set can have an entity, such as Account, with a master-detail relationship. A broken permission dependency exists if the child entity has permissions that the parent should have. Salesforce updates the parent entity for a broken permission dependency on the first save action for the profile or permission set.

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

## Push Notification Limits Have Increased

You can send up to 20,000 iOS and 10,000 Android push notifications per hour per org.

**Where:** This change applies to mobile apps installed from the AppExchange that send push notifications. Packages can be installed in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer editions.

### SEE ALSO:

[Send More Push Notifications with Increased Limits](#)

## Require Permission to View Record Names in Lookup Fields (Update, Postponed)

To better protect your Salesforce org's data, we restricted who can view record names in lookup fields. Users must have read access to these records or the View All Lookup Record Names permission to view this data. This update also applies to system fields, such as Created By and Last Modified By. This update, released in Spring '20, was scheduled for auto-activation (enforcement) in Winter '21, but was postponed in August 2020 to Spring '21.

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

**When:** Salesforce enforces this update in the Spring '21 release. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Why:** Admins have more control over what users see on records. Currently, users can view record names in lookup fields without read access to those records.

The screenshot shows an Account record for "Edge Communications". The "Details" tab is selected. Key fields include:

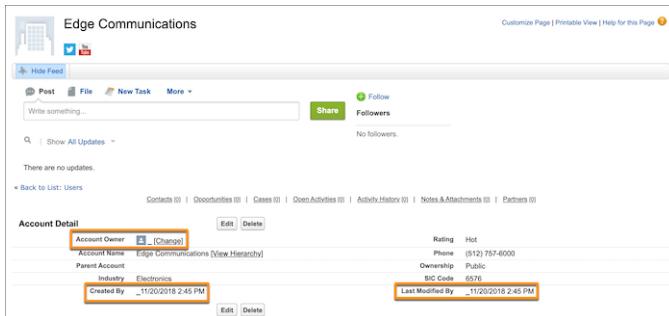
- Type: Customer - Direct
- Phone: (512) 757-6000
- Website: <http://edgecomm.com>
- Account Owner: Eric Miller (highlighted with an orange border)
- Rating: Hot
- Phone: (512) 757-6000
- Ownership: Public
- SIC Code: 6576
- Industry: Electronics
- Created By: Eric Miller, 5/22/2017 7:16 PM (highlighted with an orange border)
- Last Modified By: Eric Miller, 5/22/2017 7:16 PM (highlighted with an orange border)

After this update is enforced, in Lightning Experience, users who don't have read access or the View All Lookup Record Names permission see the lookup field labels, but not the data in the fields.

The screenshot shows the same Account record for "Edge Communications" in Lightning Experience. The "Details" tab is selected. Key fields include:

- Type: Customer - Direct
- Phone: (512) 757-6000
- Website: <http://edgecomm.com>
- Account Owner: (highlighted with an orange border)
- Rating: Hot
- Phone: (512) 757-6000
- Ownership: Public
- SIC Code: 6576
- Industry: Electronics
- Created By: (highlighted with an orange border)
- Last Modified By: (highlighted with an orange border)

In Salesforce Classic, users who don't have read access or the View All Lookup Record Names permission see an underscore in system user lookup fields and the record ID in custom user lookup and non-user lookup fields.



**How:** Admins can enable the View All Lookup Record Name permission in custom profiles or permission sets. Only enable this permission for users who must see record names in all lookup and system fields, regardless of sharing settings. This permission only applies to lookup record names in list views and record detail pages.

We recommend that you test this update in a sandbox or Developer Edition org before enabling it in your production org.

To apply this update, from Setup, in the Quick Find box, enter *Release Updates*, then select **Release Updates**. For Require Permission to View Record Names in Lookup Fields, click **View Details** or **Get Started**.

#### SEE ALSO:

- [Spring '20 Release Note: Require Permission to View Record Names in Lookup Fields \(Critical Update\)](#)
- [Release Updates \(Beta\)](#)

## Permission Changes for Customization Features

Review access changes to Customization features that take effect with the Summer '20 release.

### Muting Permission Sets

Access to muting permission sets is limited to authenticated users with the View Setup and Configuration, Manage Session Permission Set Activations, or Assign Permission Sets permission.

### Object Settings, Assignments, and Permissions

Users must have the View Setup and Configuration permission to access the following settings, assignments, and permissions for standard and custom objects in a specified profile or permission set:

- Client settings
- Field permissions
- Layout assignments
- Object permissions
- Permission dependencies
- Permission set tab settings
- Permission set group components
- Record types

### Permission Dependencies

Access to permission dependencies through the API is limited to authenticated users with the View Setup and Configuration permission.

**Permission Set License Assignments**

Users must have the View Setup and Configuration or the Assign Permission Sets permission to access permission set license assignments through the API.

**Profile Layouts and Record Visibility**

Users must have the View Setup and Configuration permission to access profile layouts, profile layout assignments, and the visibility of record types for users assigned to a profile.

**Share Objects**

Access to sharing entries on the Account, Campaign, Case, Contact, Lead, Opportunity, and Order objects is limited to users with access to the object itself. Access to sharing entries on the User object is limited to standard users and users with the Customize Application permission.

**User Roles**

Access to user roles is available for users with the View Roles and Role Hierarchy permission. Editing user roles is available for users with the Manage Roles permission.

## SEE ALSO:

[Knowledge Article: User Profile Permission Descriptions](#)

## Security, Privacy, and Identity: Security Command Center (Beta), Authentication Enhancements, OCSP Stapling, and Real-Time Event Monitoring Threat Detection (Generally Available)

The new Security Command Center (Beta) makes monitoring security settings for multiple tenants easy. You can review all your tenants' security settings, activity, and Health Check scores in one place. We updated two-factor authentication and delegated authentication. HTTPS connects faster with OCSP stapling. Real-Time Event Monitoring Threat Detection is generally available, and you can choose to receive alerts to threats by app, email, or SMS.

## IN THIS SECTION:

[Authentication and Identity: Enhanced Two-Factor Authentication, Federation IDs, and Delegated Authentication Enablement](#)

You can initiate two-factor authentication with two new Apex methods and enable it for external identity with a user permission. In addition, API-only users can register for two-factor authentication in the Salesforce UI. For easier integration with third-party identity providers, turn off case-sensitivity of Federation IDs for your Salesforce org. And stop your users from signing in to external identity providers with their Salesforce credentials, even when single sign-on is configured, by enabling delegated authentication through a Salesforce org preference.

[Domains: OCSP Stapling, Salesforce Edge, and Shorter URLs](#)

We enabled Online Certificate Status Protocol (OCSP) stapling to allow HTTPS to connect faster while ensuring that sensitive data remains private. For customers with a My Domain, we're accelerating domain requests with Salesforce Edge and removing instance names from My Domain URLs through release updates.

### [Salesforce Shield: Real-Time Event Monitoring Threat Detection \(Generally Available\) and More Shield Platform Encryption Features in Scratch Orgs](#)

Real-Time Event Monitoring Threat Detection is generally available, offering new events to help you detect credential stuffing, anomalous report usage, and session hijacking activity. View threat events in the new Threat Detection app or create Transaction Security policies to notify you via email or SMS when threat events occur. More Shield Platform Encryption features are available in scratch orgs, making testing and app development easier. An improved Event Bus encryption flow in Metadata API helps you avoid Shield Platform Encryption configurations that block change data capture events and platform events. Finally, the new Shield Learning Map offers a friendly, convenient portal for Shield learning resources and documentation.

### [Data Protection and Privacy: Customer Consent Channels and Consent API Calls](#)

We added features to improve how your users manage customer contact preferences. Use the contact point address field to record customer mailing address information and consent. Store consent records for new contact point channels, or create your own, with the Engagement Channel field. Use the Policy option for Consent Read API calls to require explicit consent for contact channels in an object.

### [Other Security Changes: Private Connect \(Generally Available\), Security Command Center \(Beta\), Stricter Security with Salesforce Sites, and Stronger Algorithms with Apex Crypto Class](#)

Private Connect (generally available) creates a secure connection with Amazon Web Services to protect your cross-cloud traffic from outside threats. Use the new Security Command Center (beta) to monitor security, privacy, and governance policies across multiple tenants. Choose a default owner for records created by a Salesforce Sites guest user. And the Crypto class supports more hashing algorithms for more secure key material.

## Authentication and Identity: Enhanced Two-Factor Authentication, Federation IDs, and Delegated Authentication Enablement

You can initiate two-factor authentication with two new Apex methods and enable it for external identity with a user permission. In addition, API-only users can register for two-factor authentication in the Salesforce UI. For easier integration with third-party identity providers, turn off case-sensitivity of Federation IDs for your Salesforce org. And stop your users from signing in to external identity providers with their Salesforce credentials, even when single sign-on is configured, by enabling delegated authentication through a Salesforce org preference.

### IN THIS SECTION:

#### [We Updated Terms for the Identity Only License](#)

Purchase the Identity Only license when you need extra licenses for employees to access only identity services, such as single sign-on (SSO). This license provides access to the same identity services that are included with your other paid licenses in the Enterprise, Unlimited, Performance, and Developer editions. But each Identity Only licensed-user is now limited to 10 custom objects.

#### [Initiate Two-Factor Authentication with Apex](#)

Initiate your two-factor authentication process with two new Apex methods in the `System.UserManagement` class. To verify a user's identity with email, phone (SMS), or Salesforce Authenticator verification, pair the methods—one to initiate a verification service and one to complete the verification service. For password or time-based one-time password (TOTP) verification, you can use the second method alone to provide a complete verification service.

#### [Enable Two-Factor Authentication for External Users](#)

We added the Two-Factor Authentication for User Interface Logins user permission to the External Identity license. So now you can enable two-factor authentication for your external users, just like you do for your internal users. Simply enable this user permission on an external identity user profile or assign a permission set with this user permission to external identity users.

### [API Only Users Can Register for Two-Factor Authentication in the Salesforce UI](#)

We now allow API only users access to the Salesforce UI to register for two-factor authentication. After a successful authentication, API only users are restricted from accessing the UI.

### [Allow Highly Trusted Users to Skip Identity Verification](#)

Allow highly trusted users to log in to your Salesforce org from a new device without verifying their identity with a second factor, such as an SMS code. Because of security risks, we don't recommend enabling this permission except for cases in which the user is highly trusted. For example, enable this permission if Salesforce Customer Support must log in to your org to troubleshoot an issue.

### [Apply Delegated Authentication to Your Salesforce Org](#)

To improve your Salesforce org's security, enable Delegated Authentication for your entire org, and manage this setting for your users at the permission level. Delegated Authentication redirects your users to an authentication provider of your choice, preventing users from logging in with their Salesforce credentials. Use this feature to prevent former employees from accessing your org with their Salesforce credentials, which are different from the credentials they use with the authentication provider. Previously, you contacted Salesforce Customer Support to enable this feature.

### [Seamlessly Integrate Federation IDs with Identity Providers](#)

For easier integration with third-party identity providers, you can turn off case-sensitivity of Federation IDs for your entire Salesforce org. Previously, it was possible to create two unique users with similar Federation IDs because Salesforce recognized case-sensitivity; for example, ssmith and SSmith. Because some external identity providers don't consistently recognize case-sensitivity, this created authentication issues.

### [Customize Your Embedded Login Page Type](#)

Give your customers a better login experience. Configure Embedded Login to use the discoverable login page type or any other custom login page type already set up for your community.

### [Improve SSO with Custom Community URLs](#)

Improve the login experience for your community users and reduce HTTP redirects by using optional community-specific URLs for single sign-on.

### [Discover Login Page Attributes with New JSON Response Fields](#)

Use two new JSON response fields to discover login page attributes. The new LoginPageType field determines whether the type of page assigned to communities is discoverable, custom, or standard, or if Salesforce org pages are discoverable or standard. The new LoginPageTypeConfigs field defines whether the login prompt displays a preconfigured localized message for discoverable login page types. For custom login pages, it includes the custom login page URL and defines if the login page type is Designer or VisualForce. The LoginPageTypeConfigs field also displays whether the discoverable or custom login page type assigned to the community is assigned to the Embedded Login configuration.

### [Simplify Configuring Sign-In with Apple](#)

Let your users log in to your domain with an Apple ID by creating and registering a Services ID for your Salesforce org. Then configure Sign in with Apple for the Services ID and associate your domain to it. Previously, Apple required you to download a file to verify that you owned the domain.

### [Access Pardot API Services with Connected Apps](#)

You can configure a connected app to access your Pardot API services. With this configuration, a client (represented by the connected app) accesses the Pardot services on behalf of the user. Manage the full extent of accessible services in Pardot.

### [Filter Login History by Application and Login Types](#)

You can now filter Login History reports and list views by the type of application a user logged in from, such as a mobile device. You can also filter by the type of login, such as Outlook integration logins. These filters apply to login data captured over the past 6 months.

## We Updated Terms for the Identity Only License

Purchase the Identity Only license when you need extra licenses for employees to access only identity services, such as single sign-on (SSO). This license provides access to the same identity services that are included with your other paid licenses in the Enterprise, Unlimited, Performance, and Developer editions. But each Identity Only licensed-user is now limited to 10 custom objects.

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

**When:** This change takes effect on August 26, 2020.

**Why:** For example, some of your employees don't need access to all the solutions included with a Salesforce license. But you want these employees to be able to sign in to a custom Your Benefits web app directly from your Salesforce org using SSO. You can purchase the Identity Only license for them.

**How:** This limitation is contractual and not technically enforced. You must review each user's usage of the Identity Only license and enforce the limit on the number of custom objects. At any time, we may review your use of the Identity Only license through the service.

## Initiate Two-Factor Authentication with Apex

Initiate your two-factor authentication process with two new Apex methods in the `System.UserManagement` class. To verify a user's identity with email, phone (SMS), or Salesforce Authenticator verification, pair the methods—one to initiate a verification service and one to complete the verification service. For password or time-based one-time password (TOTP) verification, you can use the second method alone to provide a complete verification service.

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

**How:** Depending on the type of verification, use one or both of these Apex methods.

- `System.UserManagement.initVerificationMethod`
- `System.UserManagement.verifyVerificationMethod`

### SEE ALSO:

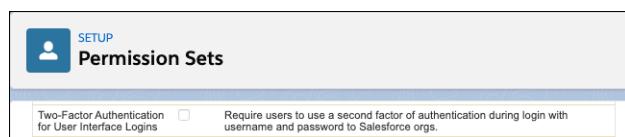
[Salesforce Summer '20 Release Notes: Apex: New and Changed Items](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Implement Two-Factor Authentication with Apex](#) (can be outdated or unavailable during release preview)

## Enable Two-Factor Authentication for External Users

We added the Two-Factor Authentication for User Interface Logins user permission to the External Identity license. So now you can enable two-factor authentication for your external users, just like you do for your internal users. Simply enable this user permission on an external identity user profile or assign a permission set with this user permission to external identity users.

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



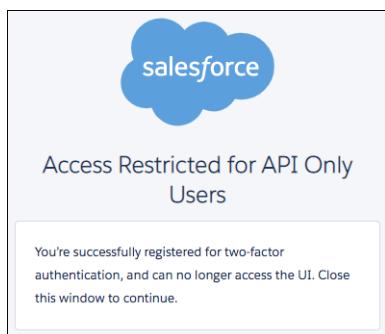
## SEE ALSO:

[Salesforce Help: User Permissions](#) (can be outdated or unavailable during release preview)

## API Only Users Can Register for Two-Factor Authentication in the Salesforce UI

We now allow API only users access to the Salesforce UI to register for two-factor authentication. After a successful authentication, API only users are restricted from accessing the UI.

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



## SEE ALSO:

[Salesforce Help: Two-Factor Authentication](#) (can be outdated or unavailable during release preview)

## Allow Highly Trusted Users to Skip Identity Verification

Allow highly trusted users to log in to your Salesforce org from a new device without verifying their identity with a second factor, such as an SMS code. Because of security risks, we don't recommend enabling this permission except for cases in which the user is highly trusted. For example, enable this permission if Salesforce Customer Support must log in to your org to troubleshoot an issue.

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

**How:** Assign the Skip Identity Confirmation at Login permission to a user profile. Then assign this user profile to the highly trusted user who you are allowing to log in without identity confirmation.

## SEE ALSO:

[Salesforce Help: User Permissions](#) (can be outdated or unavailable during release preview)

## Apply Delegated Authentication to Your Salesforce Org

To improve your Salesforce org's security, enable Delegated Authentication for your entire org, and manage this setting for your users at the permission level. Delegated Authentication redirects your users to an authentication provider of your choice, preventing users from logging in with their Salesforce credentials. Use this feature to prevent former employees from accessing your org with their Salesforce credentials, which are different from the credentials they use with the authentication provider. Previously, you contacted Salesforce Customer Support to enable this feature.

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

**How:** First, enable Delegated Authentication for your org. Go to Setup, then Single Sign-On Settings. Under Delegated Authentication, select **Disable login with Salesforce credentials**, and click **Save**. Then enable the Is Single Sign On Enabled permission on a user profile to prevent the user from logging in with their Salesforce credentials. If you enabled this feature before Summer '20, and you want to disable it before July 27, 2020, contact Salesforce Customer Support.

SEE ALSO:

[Salesforce Help: Configure Salesforce for Delegated Authentication](#) (can be outdated or unavailable during release preview)

## Seamlessly Integrate Federation IDs with Identity Providers

For easier integration with third-party identity providers, you can turn off case-sensitivity of Federation IDs for your entire Salesforce org. Previously, it was possible to create two unique users with similar Federation IDs because Salesforce recognized case-sensitivity; for example, ssmith and SSmith. Because some external identity providers don't consistently recognize case-sensitivity, this created authentication issues.

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

**How:** To use Federation IDs without case-sensitivity, go to Setup, then Single Sign-On Settings. Under Federated Single Sign-On, select **Make Federation ID case-insensitive**.

SEE ALSO:

[IdeaExchange: Case Insensitive validation on Federation Id for SSO implementation](#)

[Salesforce Help: Configure SAML Settings for Single Sign-On](#) (can be outdated or unavailable during release preview)

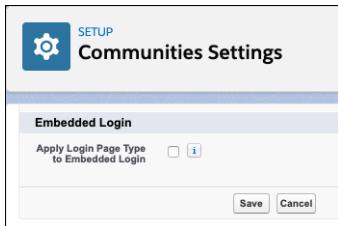
[Salesforce Help: Configure SSO to Salesforce Using Microsoft AD FS as the Identity Provider](#) (can be outdated or unavailable during release preview)

## Customize Your Embedded Login Page Type

Give your customers a better login experience. Configure Embedded Login to use the discoverable login page type or any other custom login page type already set up for your community.

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

**How:** Select **Apply Login Page Type to Embedded Login** on the Communities Settings page. If you don't want to apply your community login page type, the default login page type for Embedded Login is username and password.



## SEE ALSO:

[Salesforce External Identity Implementation Guide: Embedded Login: Allow Visitors to Log In to Your Web Pages](#) (can be outdated or unavailable during release preview)

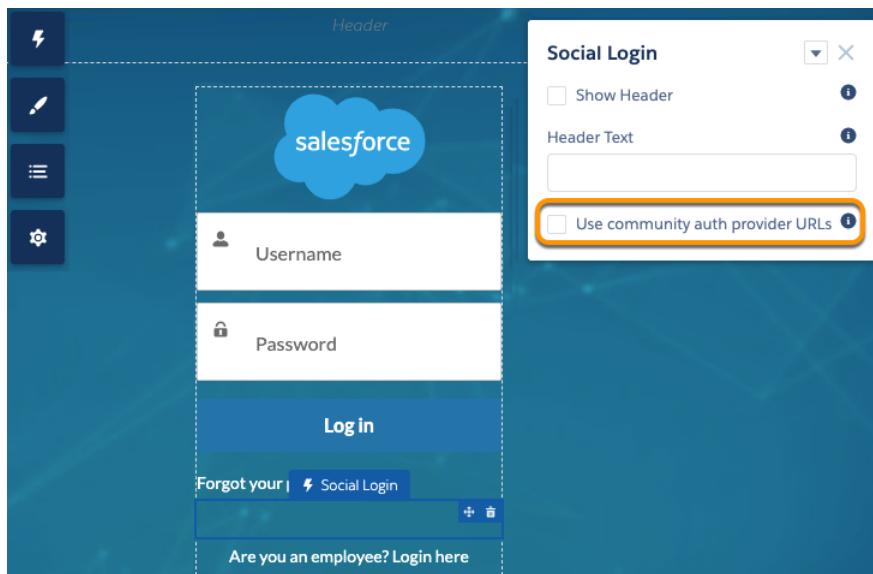
[Salesforce External Identity Implementation Guide: Choose a Login Page Type](#) (can be outdated or unavailable during release preview)

## Improve SSO with Custom Community URLs

Improve the login experience for your community users and reduce HTTP redirects by using optional community-specific URLs for single sign-on.

**Where:** This change applies to Lightning communities accessed through Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**How:** In Experience Builder, open the login page that includes the Social Login component. Select the component, and then select the **Use community auth provider URLs** property.



After you enable this property, all authentication providers for the community use community-specific URLs that are found in the auth provider details. If you don't select this property, Salesforce continues to use `login.salesforce.com` or `test.salesforce.com` to redirect to your community during SSO, which can result in decreased performance.

Make sure you update the community callback URLs in your identity providers. To find the community callback URLs, from Setup, in the Quick Find box, enter `Auth. Providers`, and then select **Auth. Providers**. Next, click the name of an auth provider whose callback

URL you want to copy, and go to the Salesforce Configuration section. Copy the callback URL, and add it to your identity provider setup. If you have more than one identity provider for your community, such as Apple, Facebook, and Google, remember to update each one.

#### SEE ALSO:

[Salesforce Help: Social Login Component](#) (can be outdated or unavailable during release preview)

## Discover Login Page Attributes with New JSON Response Fields

Use two new JSON response fields to discover login page attributes. The new LoginPageType field determines whether the type of page assigned to communities is discoverable, custom, or standard, or if Salesforce org pages are discoverable or standard. The new LoginPageTypeConfigs field defines whether the login prompt displays a preconfigured localized message for discoverable login page types. For custom login pages, it includes the custom login page URL and defines if the login page type is Designer or VisualForce. The LoginPageTypeConfigs field also displays whether the discoverable or custom login page type assigned to the community is assigned to the Embedded Login configuration.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

**How:** Post a request to the .well-known/auth-configuration endpoint. The JSON response includes the new login page type fields, as shown in this example:

GET `https://<community or custom URL>/.well-known/auth-configuration`

```
{  
  "LoginPageType": "discoverable",  
  "LoginPageTypeConfigs": {  
    "LoginPrompt": "Username",  
    "ApplyToEmbeddedLogin": false  
  }  
}
```

#### SEE ALSO:

[Salesforce Help: Query SAML Authentication Settings](#) (can be outdated or unavailable during release preview)

## Simplify Configuring Sign-In with Apple

Let your users log in to your domain with an Apple ID by creating and registering a Services ID for your Salesforce org. Then configure Sign in with Apple for the Services ID and associate your domain to it. Previously, Apple required you to download a file to verify that you owned the domain.

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

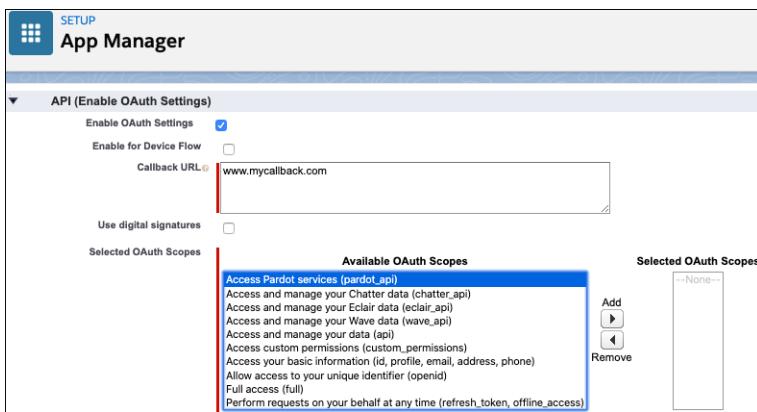
**How:** Visit the Apple Developer Account Help site for more information: <https://help.apple.com/developer-account/#/dev1c0e25352>

## Access Pardot API Services with Connected Apps

You can configure a connected app to access your Pardot API services. With this configuration, a client (represented by the connected app) accesses the Pardot services on behalf of the user. Manage the full extent of accessible services in Pardot.

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

**How:** Apply the new Access Pardot services OAuth scope to a new or existing connected app.

**SEE ALSO:**

[Pardot API: New and Changed Items](#)

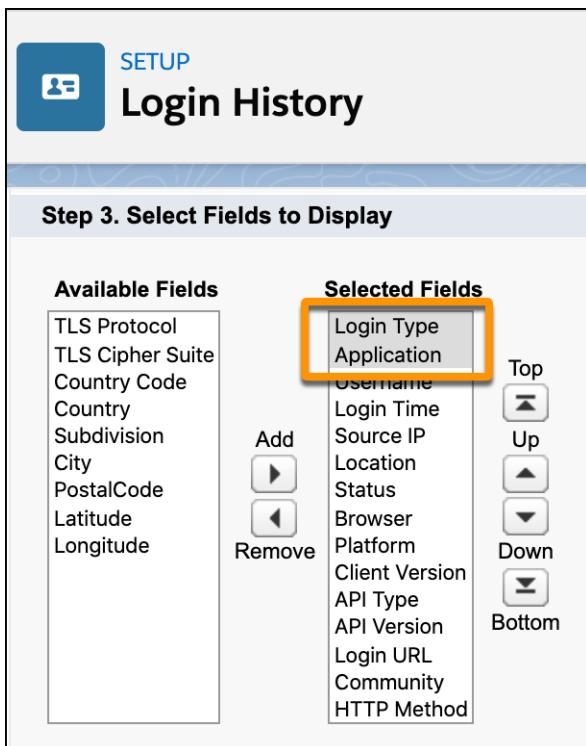
[Salesforce Help: Enable OAuth Settings for API Integration](#) (can be outdated or unavailable during release preview)

## Filter Login History by Application and Login Types

You can now filter Login History reports and list views by the type of application a user logged in from, such as a mobile device. You can also filter by the type of login, such as Outlook integration logins. These filters apply to login data captured over the past 6 months.

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

**How:** Create a Login History list view with the **Application** and **Login Type** fields selected.



## SEE ALSO:

[Salesforce Help: Monitor Login History](#) (can be outdated or unavailable during release preview)

## Domains: OCSP Stapling, Salesforce Edge, and Shorter URLs

We enabled Online Certificate Status Protocol (OCSP) stapling to allow HTTPS to connect faster while ensuring that sensitive data remains private. For customers with a My Domain, we're accelerating domain requests with Salesforce Edge and removing instance names from My Domain URLs through release updates.

## IN THIS SECTION:

[Streamline External Certificate Verification with OCSP Stapling](#)

To keep your information secure while improving performance, we implemented Online Certificate Status Protocol (OCSP) stapling. OCSP stapling allows HTTPS to connect faster and ensures that sensitive data remains private. When the application calls out to an external HTTPS encrypted website with OCSP stapling enabled, that website attaches—or “staples”—a verification of their HTTPS certificate to their response. The verification contains digitally signed and timestamped information from their Certificate Authority vendor, proving that the certificate is valid and current.

[Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files \(Update, Postponed\)](#)

We’re removing the instance names from Visualforce, Experience Builder, Site.com Studio, and content file URLs. An instance name identifies where your Salesforce org is hosted. Instanceless domains are cleaner and easier for users to remember. This update applies to orgs that have a deployed My Domain. After this update is activated, a URL that includes the instance name, such as a bookmark, automatically redirects to the new hostname. Released in Spring '18, this update was scheduled for automatic activation on July 11, 2020 and has been postponed to Summer '21.

### [Stabilize the Hostname for My Domain URLs in Sandboxes \(Update, Enforced\)](#)

We're removing instance names from MyDomain URLs for sandboxes. The instance name identifies where your Salesforce sandbox org is hosted. Removing the instance name makes the URL cleaner and easier for users to remember. For example, `MyDomain--SandboxName.my.salesforce.com` replaces `MyDomain--SandboxName.cs5.my.salesforce.com`. This update was first made available in Summer '18 and is enforced in Summer '20.

### [Route My Domains Through Salesforce Edge \(Update, Enforced\)](#)

With this update, we accelerate domain requests for My Domains. You can keep the same My Domain address, but requests go through Salesforce Edge. Salesforce Edge uses machine-learning technology to improve connectivity and performance. This update was first available in Winter '20 and is enforced in Summer '20.

### [My Domain Name Length Requirement Was Changed](#)

To meet iOS requirements, new My Domain names must be at least 3 characters long. If your existing My Domain name has only 2 characters, you can experience an inability to access Lightning Experience when accessing your sandbox My Domain URL using iOS. To resolve this issue, rename your My Domain.

## Streamline External Certificate Verification with OCSP Stapling

To keep your information secure while improving performance, we implemented Online Certificate Status Protocol (OCSP) stapling. OCSP stapling allows HTTPS to connect faster and ensures that sensitive data remains private. When the application calls out to an external HTTPS encrypted website with OCSP stapling enabled, that website attaches—or “staples”—a verification of their HTTPS certificate to their response. The verification contains digitally signed and timestamped information from their Certificate Authority vendor, proving that the certificate is valid and current.

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

**How:** OCSP stapling is transparent to the end user. To get the full benefit of the streamlined verification process, OCSP stapling must also be enabled on the target external HTTPS encrypted website. A web server with stapling enabled makes periodic calls to their Certificate Authority vendor to obtain the required verification to send during TLS handshakes.

If OCSP stapling is not enabled on the external website, Salesforce still verifies the certificate, but the process requires two calls: one to the external website and one to their Certificate Authority vendor. If you experience longer connection times when calling an external HTTPS encrypted site, ask the endpoint server's owner to turn on OCSP stapling as part of your troubleshooting.

## Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)

We're removing the instance names from Visualforce, Experience Builder, Site.com Studio, and content file URLs. An instance name identifies where your Salesforce org is hosted. Instanceless domains are cleaner and easier for users to remember. This update applies to orgs that have a deployed My Domain. After this update is activated, a URL that includes the instance name, such as a bookmark, automatically redirects to the new hostname. Released in Spring '18, this update was scheduled for automatic activation on July 11, 2020 and has been postponed to Summer '21.

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

**When:** This update is applied automatically to sandbox orgs when they are created or refreshed. It is applied to all orgs in Summer '21.

**Why:** When we remove the instance name from your URLs, your hostnames change. For example:

- `mydomain--c.visualforce.com` replaces `mydomain--c.na1.visual.force.com`
- `mydomain--c.documentforce.com` replaces `mydomain--c.na1.content.force.com`

All \*.content.force.com URLs are replaced with \*.documentforce.com.

**How:** We recommend that you test this update in a sandbox to ensure that the new URLs work with firewalls and proxy servers in the network path between your users and Salesforce. Firewalls and proxy servers that filter by hostname must also trust the following:

- \*.visualforce.com
- \*.documentforce.com
- \*.salesforce-communities.com

If your users access Salesforce using the Apple® Safari® browser version 13.1 or later, Visualforce pages can fail to display when this update is activated. We recommend instructing your users to use a different supported browser.

To apply this update, from Setup, enter *Release Updates* in the Quick Find Box, and select **Release Updates**. For Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files, follow the testing and activation steps.

 **Note:** This update can log out users who are accessing Visualforce, Experience Builder, Site.com Studio, and content file URLs. To minimize disruption, consider applying this update during off-peak hours.

#### SEE ALSO:

- [Spring '18 Release Notes: Remove Instance Names from URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files \(Critical Update\)](#)
- [Salesforce Help: Supported Browsers \(can be outdated or unavailable during release preview\)](#)
- [Release Updates \(Beta\)](#)

## Stabilize the Hostname for My Domain URLs in Sandboxes (Update, Enforced)

We're removing instance names from MyDomain URLs for sandboxes. The instance name identifies where your Salesforce sandbox org is hosted. Removing the instance name makes the URL cleaner and easier for users to remember. For example,

MyDomain--SandboxName.my.salesforce.com replaces MyDomain--SandboxName.cs5.my.salesforce.com. This update was first made available in Summer '18 and is enforced in Summer '20.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Database.com editions.

**When:** This update is applied automatically in sandbox orgs when they are created or refreshed. It is applied automatically to existing sandboxes on Summer '20 and all production orgs on July 11, 2020. In existing sandboxes upgraded after July 11, 2020, the update is applied with the Summer '20 release.

**How:** We recommend that you test this update in a sandbox to ensure that the new URL works with firewalls and proxy servers in the network path between your users and Salesforce.

To activate this update, from Setup, in the Quick Find box, enter *Critical Updates*, and select **Critical Updates**. For Stabilize the Hostname for My Domain URLs in Sandboxes, click **Activate**.

If you use service provider (SP) initiated SAML to log into your sandbox, work with your identity provider (IdP) to use the sandbox's stabilized My Domain hostname.

If you have existing sandbox orgs, activate the update in those sandbox orgs. Activating this update in a production org applies the update to new and refreshed sandbox orgs.

#### SEE ALSO:

- [Summer '18 Release Notes: Stabilize the Hostname for My Domain URLs in Sandboxes \(Critical Update\)](#)
- [Release Updates \(Beta\)](#)

## Route My Domains Through Salesforce Edge (Update, Enforced)

With this update, we accelerate domain requests for My Domains. You can keep the same My Domain address, but requests go through Salesforce Edge. Salesforce Edge uses machine-learning technology to improve connectivity and performance. This update was first available in Winter '20 and is enforced in Summer '20.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Database.com editions.

**When:** This update is enforced in Summer '20. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Who:** Only customers with a My Domain or Custom Domain. Public Cloud and Salesforce Government Cloud orgs are currently excluded from the move to Salesforce Edge.

**Why:** This update informed customers with a deployed My Domain or Custom Domain of the upcoming change and allowed them to enroll in the pilot.

SEE ALSO:

[Knowledge Article: What Is Salesforce Edge?](#)

[Winter '20 Release Notes: Route My Domains Through Salesforce Edge \(Critical Update\)](#)

[Release Updates \(Beta\)](#)

## My Domain Name Length Requirement Was Changed

To meet iOS requirements, new My Domain names must be at least 3 characters long. If your existing My Domain name has only 2 characters, you can experience an inability to access Lightning Experience when accessing your sandbox My Domain URL using iOS. To resolve this issue, rename your My Domain.

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

SEE ALSO:

[Salesforce Help: My Domain \(can be outdated or unavailable during release preview\)](#)

## Salesforce Shield: Real-Time Event Monitoring Threat Detection (Generally Available) and More Shield Platform Encryption Features in Scratch Orgs

Real-Time Event Monitoring Threat Detection is generally available, offering new events to help you detect credential stuffing, anomalous report usage, and session hijacking activity. View threat events in the new Threat Detection app or create Transaction Security policies to notify you via email or SMS when threat events occur. More Shield Platform Encryption features are available in scratch orgs, making testing and app development easier. An improved Event Bus encryption flow in Metadata API helps you avoid Shield Platform Encryption configurations that block change data capture events and platform events. Finally, the new Shield Learning Map offers a friendly, convenient portal for Shield learning resources and documentation.

**IN THIS SECTION:**[Platform Encryption: Scratch Org Features for Testing, and Goodbye to Blocked Events](#)

For a better testing and development experience, we added Cache Only Keys, key rotation, background encryption, and encryption statistics compatibility with scratch orgs. Avoid blocked change data capture and platform events with new Event Bus tenant secret checks prevent encryption. And if you haven't already, activate the update that removes the Manage Encryption Keys permission from system admin profile.

[Event Monitoring: General Availability of Threat Detection Real-Time Events, Transaction Security Support for Threat Detection Events, Legacy Transaction Security Retiring](#)

Detect threats to your Salesforce org with three new Real-Time Event Monitoring events, which are now generally available. These threats include anomalies in how users run reports, session hijacking, and credential stuffing. Create notification-only transaction security policies on these events and view them in the Salesforce UI with the Threat Detection app. Detect errors when an org exceeds the concurrent long-running Apex limit. Customize transaction security policy Block messages. We are retiring the legacy transaction security framework, so migrate your existing policies to the enhanced framework.

[Find the Right Resources with the Shield Learning Map](#)

The new Shield Learning Map is a friendly, convenient resource for learning how to use Shield. The map organizes all of the Shield learning, developer, and admin content into handy sequences that guide you through planning, set up, and customization flows. No matter which Shield product you use, the learning map offers a clear path toward security success.

## Platform Encryption: Scratch Org Features for Testing, and Goodbye to Blocked Events

For a better testing and development experience, we added Cache Only Keys, key rotation, background encryption, and encryption statistics compatibility with scratch orgs. Avoid blocked change data capture and platform events with new Event Bus tenant secret checks prevent encryption. And if you haven't already, activate the update that removes the Manage Encryption Keys permission from system admin profile.

**IN THIS SECTION:**[Encrypt Fields for Emergency Response Management and More](#)

Shield Platform Encryption is here to add an extra layer of security to sensitive user data, no matter how users interact with your Salesforce implementation. You can now encrypt dozens of fields on objects used by Health Cloud, insurance solutions, Emergency Response Management for Public Cloud, and more.

[Test More Shield Platform Encryption Functionality in Scratch Orgs](#)

Shield Platform Encryption offers more configurable features in scratch orgs, giving developers a better testing and app development experience. You can now manually set how often you want to rotate key material, gather statistics on encrypted data, and synchronize data with active keys. Shorter key rotation and management cycles help you test and debug automated processes, especially processes that depend on SOQL queries. Finally, customers who have purchased the Cache Only Key service can now enable Cache Only Keys in scratch orgs for testing their external key service setup.

[Avoid Blocked Events When Encrypting Through Metadata API](#)

You now need an existing Event Bus type tenant secret before using the enableEventBusEncryption Metadata API setting. If you don't have the right tenant secret, you get a friendly error. This change helps you avoid Shield Platform Encryption configurations that block change data capture events and platform events.

[Remove the Manage Encryption Keys Permission from the System Admin Profile \(Previously Released Update\)](#)

Admins must actively assign the ability to perform key management roles. The Manage Encryption Keys permission is revoked for the standard admin profile when you apply this release update. Custom profiles that include the Manage Encryption Keys permission are not affected. Any user who has the permission through a custom profile or permission still has the permission. This release update was first made available in Spring '16 and applies only to customers who enabled Shield Platform Encryption before the Spring '16 release.

### [Encrypt Data Associated with the Employee Object](#)

If you track employee information in work.com apps such as Wellness Check, Shift Management, or the Command Center, you can use Shield Platform Encryption to encrypt personal data contained in records based on the Employee object.

## Encrypt Fields for Emergency Response Management and More

Shield Platform Encryption is here to add an extra layer of security to sensitive user data, no matter how users interact with your Salesforce implementation. You can now encrypt dozens of fields on objects used by Health Cloud, insurance solutions, Emergency Response Management for Public Cloud, and more.

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

**Who:** These objects are used in multiple Salesforce products. Access to the objects can require specific licenses, packages, or permissions.

**Why:** You can now encrypt user information at rest in fields on the following objects.

- Business License
- Business License Application
- Business Profile
- Course Offering
- Public Complaint
- Regulatory Code Violation
- Training Course
- Violation Enforcement Action

For a complete list of supported fields, see [Which Standard Fields Can I Encrypt?](#) in Salesforce Help.

**How:** On the Encryption Policy page in Setup, click **Encrypt Fields**. Then click **Edit** and select a field. You can apply either the probabilistic or deterministic encryption scheme to most fields.

SEE ALSO:

[Encrypt Emergency Service Application Request Information](#)

## Test More Shield Platform Encryption Functionality in Scratch Orgs

Shield Platform Encryption offers more configurable features in scratch orgs, giving developers a better testing and app development experience. You can now manually set how often you want to rotate key material, gather statistics on encrypted data, and synchronize data with active keys. Shorter key rotation and management cycles help you test and debug automated processes, especially processes that depend on SOQL queries. Finally, customers who have purchased the Cache Only Key service can now enable Cache Only Keys in scratch orgs for testing their external key service setup.

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

**How:** Add one or more of these features to your scratch org's org definition file.

- **CacheOnlyKeys**—Enables the Cache Only Keys service, which applies key material stored outside of Salesforce to data stored at-rest in Salesforce. Requires the Cache-Only Key Service add-on subscription.
- **MinKeyRotationInterval**—Sets the encryption key material rotation interval at once per 60 seconds. The default (false) sets the interval at once per 604800 seconds for Search Index key material and once per 86400 seconds for all other key material. Applies to orgs with the Shield Platform Encryption add-on subscription.

- EncryptionStatisticsInterval:<value>—Defines the interval between encryption statistics gathering processes, up to 604800 seconds (7 days). The default is once per 86400 seconds (24 hours). Indicate a value, in seconds, between 0 and 604800. Applies to orgs with the Shield Platform Encryption add-on subscription.
- EncryptionSyncInterval:<value>—Defines how frequently the org can synchronize data with the active key material. The default value is one sync per 604800 seconds. Indicate a value, in seconds, equal to or larger than 0. Applies to orgs with the Shield Platform Encryption add-on subscription.

For example,

```
"features": ["CacheOnlyKeys", "MinKeyRotationInterval", "EncryptionSyncInterval:0"]
```

#### SEE ALSO:

[Salesforce DX Developer Guide: Scratch Org Definition Configuration Values](#) (can be outdated or unavailable during release preview)

## Avoid Blocked Events When Encrypting Through Metadata API

You now need an existing Event Bus type tenant secret before using the enableEventBusEncryption Metadata API setting. If you don't have the right tenant secret, you get a friendly error. This change helps you avoid Shield Platform Encryption configurations that block change data capture events and platform events.

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

For more information, see [Enabling Event Encryption Through Metadata API Requires an Event Bus Tenant Secret](#).

## Remove the Manage Encryption Keys Permission from the System Admin Profile (Previously Released Update)

Admins must actively assign the ability to perform key management roles. The Manage Encryption Keys permission is revoked for the standard admin profile when you apply this release update. Custom profiles that include the Manage Encryption Keys permission are not affected. Any user who has the permission through a custom profile or permission still has the permission. This release update was first made available in Spring '16 and applies only to customers who enabled Shield Platform Encryption before the Spring '16 release.

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

**Who:** This release update is for customers who enabled Shield Platform Encryption before the Spring '16 release. Customers who enabled Shield Platform Encryption after the Spring '16 release are unaffected.

**When:** This release update is automatically applied in Spring '29. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

#### SEE ALSO:

[Salesforce Spring '16 Release Notes: Critical Updates](#)

## Encrypt Data Associated with the Employee Object

If you track employee information in work.com apps such as Wellness Check, Shift Management, or the Command Center, you can use Shield Platform Encryption to encrypt personal data contained in records based on the Employee object.

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

**How:** Ensure that Shield Platform Encryption is enabled in your work.com org, and then contact Salesforce Customer Support to enable encryption on the Employee object.

After encryption for employees is enabled for your org, locate the Encryption Policy page in Setup, click **Edit** and select a field. You can apply the deterministic encryption scheme to most fields.

## Event Monitoring: General Availability of Threat Detection Real-Time Events, Transaction Security Support for Threat Detection Events, Legacy Transaction Security Retiring

Detect threats to your Salesforce org with three new Real-Time Event Monitoring events, which are now generally available. These threats include anomalies in how users run reports, session hijacking, and credential stuffing. Create notification-only transaction security policies on these events and view them in the Salesforce UI with the Threat Detection app. Detect errors when an org exceeds the concurrent long-running Apex limit. Customize transaction security policy Block messages. We are retiring the legacy transaction security framework, so migrate your existing policies to the enhanced framework.

### IN THIS SECTION:

#### [Detect Threats to Your Salesforce Org \(Generally Available\)](#)

Track threats to your org's security with three new Real-Time Event Monitoring events. Salesforce generates these events, aided by machine-learning algorithms, to identify anomalies in your users' behavior and unauthorized access to your org.

#### [Get Notified About a Detected Threat](#)

Create Transaction Security policies on the three Threat Detection storage events so you can receive notifications when a threat to your org is detected. The three events are ReportAnomalyEventStore, SessionHijackingEventStore, and CredentialStuffingEventStore.

#### [View Threat Detection Events and Provide Feedback](#)

Launch the new Threat Detection app and view all the detected threats that occurred in your Salesforce org. Threats include anomalies in how users run reports, session hijacking attempts, and credential stuffing. Use the same app to easily provide feedback about the severity of a specific threat.

#### [Detect Errors When an Org Exceeds the Concurrent Long-Running Apex Limit](#)

Track errors with the new ConcurLongRunApexErrEvent event in Real-Time Event Monitoring. Use this event to get notified whenever a new Apex request fails to start because your org has exceeded the concurrent long-running Apex request limit.

#### [Note the Renamed User Permission for Real-Time Event Monitoring](#)

We renamed the user permission to view and manage Real-Time events to View Real-Time Event Monitoring Data. Previously, it was View Data Leakage Detection Events. The new name better reflects the feature functionality.

#### [Save Space with the Improved Event Monitoring Analytics App](#)

You're less likely to reach your Einstein Analytics row storage limit when using the Event Monitoring Analytics app because we reduced duplicate datasets. When we load data from your Salesforce org into the app, we often join multiple related datasets to create a single richer dataset. In previous releases, the related duplicate dataset counted toward your Salesforce space limit.

#### [Customize Transaction Security Block Messages](#)

When a transaction security policy blocks users, they receive a brief message that explains the Block action and points them towards next steps. Previously, a standard message accompanied all Block actions. Now you have the option to customize each message during policy setup to provide information that's org-specific or policy-specific. You can also retroactively add custom block messages to active policies that use the enhanced transaction security framework.

#### [Write Transaction Security Policies Easily with Improved Condition Builder Interface](#)

The user interface for Condition Builder now makes it easier for you to build effective transaction security policies. Condition Builder is the default option over Apex. Switch seamlessly between event types before you commit to policy changes. Navigate to event type documentation via direct links in the Setup wizard to easily consult reference material during policy setup.

### [Changed User Permission Requirements for Transaction Security Policy Notification Recipients](#)

When you create a transaction security policy, you specify the Salesforce org user who gets in-app or email notifications when a policy is triggered. In previous releases, the recipient of these notifications needed Modify All Data and View Setup permissions, restricting Transaction Security access to admins and developers. Now the recipient no longer needs any permissions, allowing all users to receive policy notifications and monitor events.

### [Migrate Legacy Policies to the Enhanced Transaction Security Framework \(Previously Released Update\)](#)

With the Enhanced Transaction Security Policy framework, you can create transaction security policies that execute actions on any standard or custom object. Now that the new framework is generally available, we no longer allow users to create or modify legacy transaction security policies. We're retiring the legacy framework in the Winter '21 release. To prepare for this retirement and take advantage of the new features, migrate your legacy transaction security policies to the new framework as soon as possible. This update was first made available in Winter '20.

### [Integrate Data Smoothly with the Improved Event Monitoring Analytics App](#)

We improved the performance of integrating data into the Event Monitoring Analytics app by processing some datasets in parallel. We also increased the size of dataset chunks to be processed. And we ensured that new Event Monitoring Analytics apps always use the most current API version. As a result, new Event Monitoring Analytics apps don't incur costly operations during dataset imports such as comparing the dataset metadata with the app metadata and transforming the metadata if necessary.

## Detect Threats to Your Salesforce Org (Generally Available)

Track threats to your org's security with three new Real-Time Event Monitoring events. Salesforce generates these events, aided by machine-learning algorithms, to identify anomalies in your users' behavior and unauthorized access to your org.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who purchase Salesforce Shield or Event Monitoring add-on subscriptions.

**How:** Use these new Real-Time Event Monitoring platform events to detect common threats to your org:

- CredentialStuffingEvent: Tracks when a user successfully logs into Salesforce during an identified credential stuffing attack. Credential stuffing refers to large-scale automated login requests using stolen user credentials. CredentialStuffingEventStore stores the streaming data for up to 6 months.
- ReportAnomalyEvent: Tracks anomalies in how users run or export reports. ReportAnomalyEventStore stores the streaming data for up to 6 months.
- SessionHijackingEvent: Tracks when unauthorized users gain ownership of a Salesforce user's session with a stolen session identifier. SessionHijackingEventStore stores the streaming data for up to 6 months.

Since the beta in Spring '20, we added more features to Threat Detection. You can now:

- View the three Threat Detection storage events in the Salesforce UI using the new Threat Detection app. You can also provide feedback about a particular Threat Detection event.
- Create notification-only Transaction Security policies on the three Threat Detection storage events.
- Read a brief summary of the detected threat with the new Summary field of each event.
- View the full set of browser fingerprint features that triggered a session hijacking event with the new `SecurityEventData` field of SessionHijackingEvent.
- Create reports on the three events by creating a custom report type that uses one of the three Threat Detection events as its primary object.
- View the posts and feed-tracked changes to the three Threat Detection storage events and the new ThreatDetectionFeedback object.

- Create Einstein Analytics reports and dashboards on the three Threat Detection events.

#### SEE ALSO:

[Get Notified About a Detected Threat](#)

[View Threat Detection Events and Provide Feedback](#)

[Salesforce Help: Threat Detection \(can be outdated or unavailable during release preview\)](#)

## Get Notified About a Detected Threat

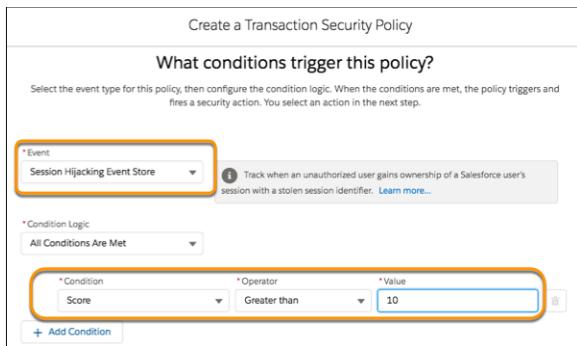
Create Transaction Security policies on the three Threat Detection storage events so you can receive notifications when a threat to your org is detected. The three events are ReportAnomalyEventStore, SessionHijackingEventStore, and CredentialStuffingEventStore.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who purchase Salesforce Shield or Event Monitoring add-on subscriptions.

**Why:** Receive an email, in-app notification, or both when a threat detection event in your org has occurred. Threat detection events include anomalies in the way a user runs a report, a credential stuffing attempt, or a session hijacking attempt.

**How:** Use Condition Builder or write an Apex class to create a Transaction Security policy on one of the events.



#### SEE ALSO:

[Salesforce Help: Threat Detection \(can be outdated or unavailable during release preview\)](#)

[Salesforce Help: Enhanced Transaction Security \(can be outdated or unavailable during release preview\)](#)

## View Threat Detection Events and Provide Feedback

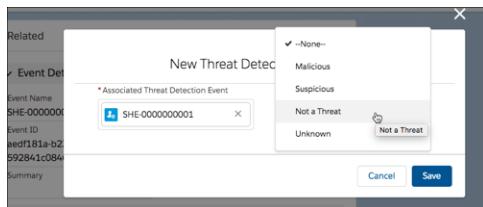
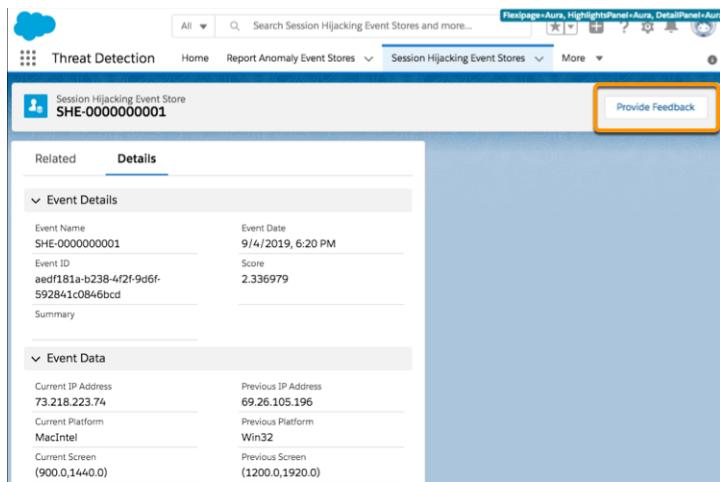
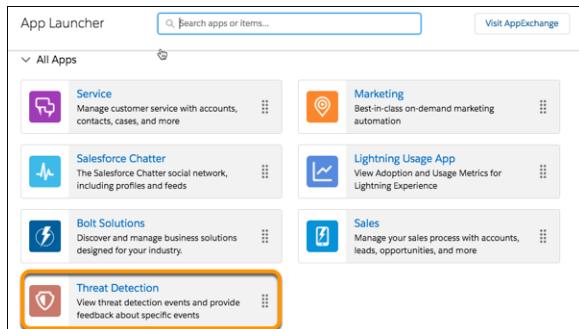
Launch the new Threat Detection app and view all the detected threats that occurred in your Salesforce org. Threats include anomalies in how users run reports, session hijacking attempts, and credential stuffing. Use the same app to easily provide feedback about the severity of a specific threat.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who purchase Salesforce Shield or Event Monitoring add-on subscriptions.

**Why:** Not all detected threats are real threats. Use the feedback feature to specify the severity of a particular detected threat.

**How:** In Setup, make the Threat Detection app visible in App Launcher. Then launch the app to view the threat detection events that occurred in your org. Navigate to a specific event, click **Provide Feedback**, and then specify whether the threat was Malicious, Suspicious, Unknown, or Not a Threat.



#### SEE ALSO:

[Salesforce Help: Threat Detection](#) (can be outdated or unavailable during release preview)

## Detect Errors When an Org Exceeds the Concurrent Long-Running Apex Limit

Track errors with the new ConcurLongRunApexErrEvent event in Real-Time Event Monitoring. Use this event to get notified whenever a new Apex request fails to start because your org has exceeded the concurrent long-running Apex request limit.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who purchase Salesforce Shield or Event Monitoring add-on subscriptions.

SEE ALSO:

[Platform Events Developer Guide: ConcurLongRunApexErrEvent](#) (can be outdated or unavailable during release preview)

[IdeaExchange: Event Monitoring Real-Time Alerts](#)

## Note the Renamed User Permission for Real-Time Event Monitoring

We renamed the user permission to view and manage Real-Time events to View Real-Time Event Monitoring Data. Previously, it was View Data Leakage Detection Events. The new name better reflects the feature functionality.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who already purchased Salesforce Shield or Event Monitoring add-on subscriptions.

SEE ALSO:

[Salesforce Help: Enable Access to the Real-Time Event Monitoring](#) (can be outdated or unavailable during release preview)

## Save Space with the Improved Event Monitoring Analytics App

You're less likely to reach your Einstein Analytics row storage limit when using the Event Monitoring Analytics app because we reduced duplicate datasets. When we load data from your Salesforce org into the app, we often join multiple related datasets to create a single richer dataset. In previous releases, the related duplicate dataset counted toward your Salesforce space limit.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who purchase Salesforce Shield or Event Monitoring add-on subscriptions.

**How:** Upgrade your Event Monitoring Analytics App to take advantage of the improvements.

SEE ALSO:

[Salesforce Help: Event Monitoring Analytics App](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Upgrade the Event Monitoring Analytics App](#) (can be outdated or unavailable during release preview)

## Customize Transaction Security Block Messages

When a transaction security policy blocks users, they receive a brief message that explains the Block action and points them towards next steps. Previously, a standard message accompanied all Block actions. Now you have the option to customize each message during policy setup to provide information that's org-specific or policy-specific. You can also retroactively add custom block messages to active policies that use the enhanced transaction security framework.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Event Monitoring is enabled. Custom block messages are available only for ApiEvent, ListViewEvent, and ReportEvent policies.

**Who:** Event Monitoring is available to customers who purchase Salesforce Shield or Event Monitoring add-on subscriptions.

**How:** If you create a policy for ApiEvent, ListViewEvent, or ReportEvent in the Setup wizard that includes a Block or Two-Factor Authentication action, you're prompted to choose the default message or the custom block message. If you create a policy via the API,

you use the new `BlockMessage` API field in the `TransactionSecurityPolicy` object to specify a custom block message. If you leave the `BlockMessage` field blank, the policy sends the default message.

SEE ALSO:

[Salesforce Developer Documentation: TransactionSecurityPolicy](#) (can be outdated or unavailable during release preview)

[IdeaExchange: Make Transaction Security Policy messages customizable](#)

## Write Transaction Security Policies Easily with Improved Condition Builder Interface

The user interface for Condition Builder now makes it easier for you to build effective transaction security policies. Condition Builder is the default option over Apex. Switch seamlessly between event types before you commit to policy changes. Navigate to event type documentation via direct links in the Setup wizard to easily consult reference material during policy setup.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who purchase Salesforce Shield or Event Monitoring add-on subscriptions.

SEE ALSO:

[Salesforce Help: Build a Transaction Security Policy with Condition Builder](#)(can be outdated or unavailable during release preview)

## Changed User Permission Requirements for Transaction Security Policy Notification Recipients

When you create a transaction security policy, you specify the Salesforce org user who gets in-app or email notifications when a policy is triggered. In previous releases, the recipient of these notifications needed `Modify All Data` and `View Setup` permissions, restricting Transaction Security access to admins and developers. Now the recipient no longer needs any permissions, allowing all users to receive policy notifications and monitor events.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who already purchased Salesforce Shield or Event Monitoring add-on subscriptions.

SEE ALSO:

[Salesforce Help: Enhanced Transaction Security Actions and Notifications](#) (can be outdated or unavailable during release preview)

## Migrate Legacy Policies to the Enhanced Transaction Security Framework (Previously Released Update)

With the Enhanced Transaction Security Policy framework, you can create transaction security policies that execute actions on any standard or custom object. Now that the new framework is generally available, we no longer allow users to create or modify legacy transaction security policies. We're retiring the legacy framework in the Winter '21 release. To prepare for this retirement and take advantage of the new features, migrate your legacy transaction security policies to the new framework as soon as possible. This update was first made available in Winter '20.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Professional, Unlimited, and Developer editions where Event Monitoring is enabled.

**When:** After we retire the legacy framework in the Winter '21 release, the legacy policies will be permanently disabled and you won't be able to update them. Your legacy policies continue to work correctly until the Winter '21 release, but you can no longer create or modify them.

**Who:** Event Monitoring is available to customers who purchased Salesforce Shield or Event Monitoring add-on subscriptions.

**How:** To determine if your security policies are using the legacy framework, check their associated Apex classes. Legacy policies implement the `TxnSecurity.PolicyCondition` interface.

To migrate a legacy policy, create a policy in the new enhanced framework that mimics the behavior of the legacy policy. Although a legacy policy can't run in the new framework, it's still visible, so you can examine its logic to reproduce it in the new policy.

If you like using a point-and-click tool, Condition Builder provides most of the functionality to create a policy in the new framework. If you prefer to code or require more functionality than Condition Builder provides, implement the Apex class with the new `TxnSecurity.EventCondition` interface.

We welcome feedback about the migration and any issues that you encounter so that we can improve the transition for all Event Monitoring customers. You can provide feedback and suggestions for this feature in the [Salesforce Official: Shield group in the Trailblazer Community](#).

#### SEE ALSO:

[Critical Updates and Security Alerts](#)

[Salesforce Help: Migrate Legacy Policies to the Enhanced Transaction Security Framework](#) (can be outdated or unavailable during release preview)

## Integrate Data Smoothly with the Improved Event Monitoring Analytics App

We improved the performance of integrating data into the Event Monitoring Analytics app by processing some datasets in parallel. We also increased the size of dataset chunks to be processed. And we ensured that new Event Monitoring Analytics apps always use the most current API version. As a result, new Event Monitoring Analytics apps don't incur costly operations during dataset imports such as comparing the dataset metadata with the app metadata and transforming the metadata if necessary.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Performance, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who purchased a Salesforce Shield or Event Monitoring add-on subscription.

#### SEE ALSO:

[Salesforce Help: Event Monitoring Analytics App](#) (can be outdated or unavailable during release preview)

## Find the Right Resources with the Shield Learning Map

The new Shield Learning Map is a friendly, convenient resource for learning how to use Shield. The map organizes all of the Shield learning, developer, and admin content into handy sequences that guide you through planning, set up, and customization flows. No matter which Shield product you use, the learning map offers a clear path toward security success.

**Who:** Salesforce Shield is available as an add-on subscription.

**How:** Find links to the Shield Learning Map from Shield product documentation, or go directly to <https://shieldlearningmap.com>.



Then click each point on the trail to see resources:

- Get to know Shield and how customers use this powerful suite of security products
- Meet your auditing and compliance requirements
- Encrypt data and managing key material with Shield Platform Encryption
- Check in or your data and who's using it with Real-Time Event Monitoring
- Measure feature adoption and performance

## Data Protection and Privacy: Customer Consent Channels and Consent API Calls

We added features to improve how your users manage customer contact preferences. Use the contact point address field to record customer mailing address information and consent. Store consent records for new contact point channels, or create your own, with the Engagement Channel field. Use the Policy option for Consent Read API calls to require explicit consent for contact channels in an object.

### IN THIS SECTION:

#### [Store a New Contact Point and Customer Consent Information](#)

To help you store more information about customers, you can now specify multiple addresses for an individual or person account. Use the Contact Point Address field to specify multiple mailing addresses, and add details about a customer's contact preferences. You can also reference these records from a contact point consent record to store a customer's consent to being contacted this way.

#### [Customize and Store More Customer Consent Channels](#)

To help your org better communicate with customers, you can use the Engagement Channel field to manage consent records for more contact point channels. For example, you can use the Engagement Channel Type field to specify a customer's consent to be contacted through SMS or fax, when previously you could only indicate the contact point type phone. Even better, you can create your own Engagement Channel type to meet customers' unique needs.

#### [Improve the Accuracy of Consent API Calls](#)

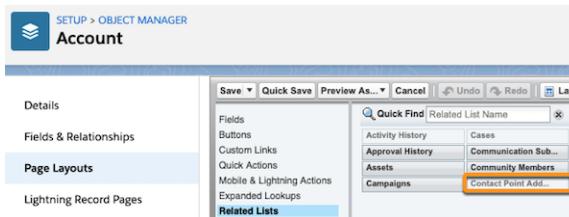
Use a new value on the Policy parameter to require explicit consent for any object where explicit consent can be recorded. With the new value on the Policy parameter, the API returns an infoNotFound response when consent for a contact point isn't specified. Consent is only returned in the API response when your customers specify that they opt in to a contact point channel.

## Store a New Contact Point and Customer Consent Information

To help you store more information about customers, you can now specify multiple addresses for an individual or person account. Use the Contact Point Address field to specify multiple mailing addresses, and add details about a customer's contact preferences. You can also reference these records from a contact point consent record to store a customer's consent to being contacted this way.

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

**How:** The Contact Point Address field is displayed on the Individual object's related list layout by default. Add it to the Account object's related list layout in Object Manager.



### SEE ALSO:

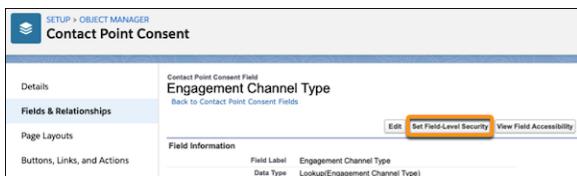
[Salesforce Developer Documentation: ContactPointAddress](#) (can be outdated or unavailable during release preview)

## Customize and Store More Customer Consent Channels

To help your org better communicate with customers, you can use the Engagement Channel field to manage consent records for more contact point channels. For example, you can use the Engagement Channel Type field to specify a customer's consent to be contacted through SMS or fax, when previously you could only indicate the contact point type phone. Even better, you can create your own Engagement Channel type to meet customers' unique needs.

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

**How:** For new orgs, Engagement Channel Type is displayed on the Contact Point Consent or Contact Point Type Consent object's layout by default. For existing orgs, from the Contact Point Consent or Contact Point Type Consent object, select the Engagement Channel Type field, then click **Set Field-Level Security**. Set Engagement Channel Type to **Visible**, then add it to the object's layout in the Object Manager. From the Object Manager, change Contact Point Type to optional, or remove Contact Point Type in the layout editor.



### SEE ALSO:

[Salesforce Developer Documentation: ContactPointConsent](#) (can be outdated or unavailable during release preview)

[Salesforce Developer Documentation: ContactPointTypeConsent](#) (can be outdated or unavailable during release preview)

## Improve the Accuracy of Consent API Calls

Use a new value on the Policy parameter to require explicit consent for any object where explicit consent can be recorded. With the new value on the Policy parameter, the API returns an infoNotFound response when consent for a contact point isn't specified. Consent is only returned in the API response when your customers specify that they opt in to a contact point channel.

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

**How:** To use the policy, add the parameter `policy=requireExplicitConsent` to your Consent API calls.

SEE ALSO:

[Salesforce Developer Documentation: Consent \(can be outdated or unavailable during release preview\)](#)

## Other Security Changes: Private Connect (Generally Available), Security Command Center (Beta), Stricter Security with Salesforce Sites, and Stronger Algorithms with Apex Crypto Class

Private Connect (generally available) creates a secure connection with Amazon Web Services to protect your cross-cloud traffic from outside threats. Use the new Security Command Center (beta) to monitor security, privacy, and governance policies across multiple tenants. Choose a default owner for records created by a Salesforce Sites guest user. And the Crypto class supports more hashing algorithms for more secure key material.

IN THIS SECTION:

[Secure Your Cross-Cloud Integrations with Private Connect \(Generally Available\)](#)

When you integrate your Salesforce org with applications hosted on third-party cloud services, it's essential to be able to send and receive HTTP/s traffic securely. With Private Connect, you can increase security on your Amazon Web Services (AWS) integrations by setting up a fully managed network connection between your Salesforce org and your AWS Virtual Private Cloud (VPC). Route your cross-cloud traffic through the connection instead of over the public internet to reduce exposure to outsider security threats.

[Take Charge of Your Security with Security Command Center \(Beta\)](#)

Maintaining security, privacy, and governance policies across multiple tenants is critical and often time-intensive work. Enter Security Command Center, a tool for monitoring all of your tenants' security settings in one app. Use Security Command Center to see who's logging in with which authentication protocols, review permission assignment changes, and more. You can even review average and per-tenant health check scores without going to each tenants' Health Check page.

[Use Stronger Hashing Algorithms with Apex Crypto Class](#)

The Crypto class now supports RSA-SHA384 and RSA-SHA512 hashing standards, giving you more options for generating cryptographically strong key material. You can pass RSA-SHA384 and RSA-SHA512 values into the algorithmName parameter for Crypto.sign, Crypto.signWithCertificate, Crypto.signXML(), and Crypto.verify() methods. Use a third-party application or the Crypto.generateAesKey method to generate this key for you.

[Assign New Records Created by Salesforce Sites Guest Users to a Default Owner](#)

To increase the security of your Salesforce data, Salesforce Sites guest users are no longer automatically the owner of records they create. Instead, when a Salesforce Sites guest user creates a record, the record is assigned to a default record owner that you choose.

[Permission Changes for Security Features](#)

Review access changes to Security features that take effect with the Summer '20 release.

## Secure Your Cross-Cloud Integrations with Private Connect (Generally Available)

When you integrate your Salesforce org with applications hosted on third-party cloud services, it's essential to be able to send and receive HTTP/s traffic securely. With Private Connect, you can increase security on your Amazon Web Services (AWS) integrations by setting up a fully managed network connection between your Salesforce org and your AWS Virtual Private Cloud (VPC). Route your cross-cloud traffic through the connection instead of over the public internet to reduce exposure to outsider security threats.

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

**Why:** Cloud adoption is on the rise as more Salesforce customers run business-critical enterprise applications in cloud services. But sending cross-cloud traffic over the public internet can pose a major security threat because the internet presents a large attack surface. Private Connect keeps your communications secure by routing your traffic over a private, fully managed link instead of over the public internet. Private Connect is also bi-directional: you can initiate both inbound and outbound traffic. With inbound connections, you can send traffic into Salesforce using the standard APIs. And with outbound connections, you can send traffic out of Salesforce via features like Apex callouts, External Services, and External objects.

**How:** Private Connect setup takes place in Salesforce and in AWS. Navigate to the new Private Connect Setup page in Salesforce to begin the process. If you have access to AWS, you switch between the setup page and the VPC Dashboard in AWS to configure each connection. If you don't have access to AWS, communicate with your AWS representative. My Domain is a prerequisite for inbound connections, and Named Credentials are a prerequisite for outbound connections.

The screenshot shows the Private Connect Setup page in Salesforce. At the top, there's a header with a gear icon labeled "SETUP" and "Private Connect". Below the header, there's a section titled "AWS Regions" with a dropdown menu. Underneath, there are two tables: one for "Inbound Connections" and one for "Outbound Connections".

**AWS Regions:**

Region	IAM Role	Service Name
us-east-1	Region information is temporarily unavailable	Region information is temporarily unavailable
us-west-2	arn:aws:iam::325178561262:role/us-west-2-private-connect	com.amazonaws.vpce.us-west-2.vpce-svc-051704a4147764fc3

**Inbound Connections:**

Private Connection Name	Description	Region	VPC Endpoint Id	Private Connection Status	Actions
inbound		us-west-2	vpce-0bb9a8b61c3ae460e	Unprovisioned	<button>Create Inbound Connection</button>

**Outbound Connections:**

Private Connection Name	Description	Region	VPC Endpoint Id	Service Name	Private Connection Status	Actions
Outbound		us-west-2	vpce-00dee9a0bc4a4abee	com.amazonaws.vpce.us-west-...	Ready	<button>Create Outbound Connection</button>

### SEE ALSO:

[Salesforce Help: Secure Cross-Cloud Integrations with Private Connect](#) (can be outdated or unavailable during release preview)

[Salesforce Release Notes: New and Changed Connect REST API Resources](#)

[Salesforce Release Notes: Metadata API](#)

## Take Charge of Your Security with Security Command Center (Beta)

Maintaining security, privacy, and governance policies across multiple tenants is critical and often time-intensive work. Enter Security Command Center, a tool for monitoring all of your tenants' security settings in one app. Use Security Command Center to see who's logging in with which authentication protocols, review permission assignment changes, and more. You can even review average and per-tenant health check scores without going to each tenants' Health Check page.

**Where:** This feature is available in all editions.

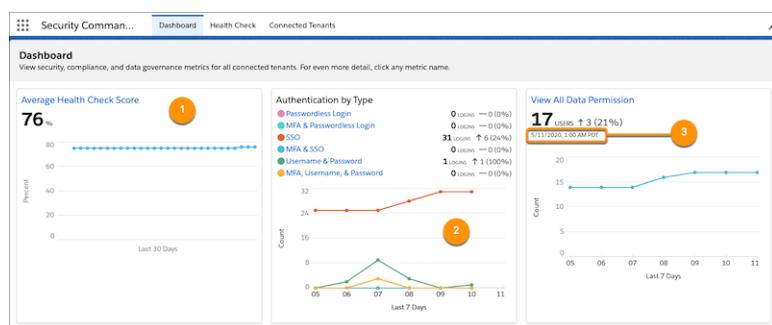
 **Note:** As a beta feature, Security Command Center is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. For information on enabling this feature in your org, contact Salesforce.

**Who:** Security Command Center is available as an add-on subscription. To view the dashboard and metric pages, assign the View Security Command Center Pages permission. To manage connected tenants, assign the Manage Security Command Center permission.

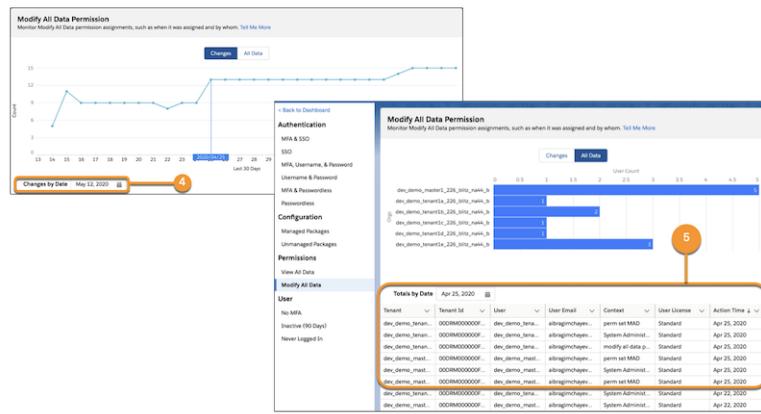
**Why:** When you know how your tenants are performing, you can limit risks and shorten security review processes. Security Command Center gives you clear insights into how you're meeting your security goals so that you can respond proactively to suspicious conditions. And during periods of growth or change, Security Command Center can help you monitor changes that touch sensitive customer data.

**How:** Contact Salesforce to enable Security Command Center. Salesforce works with you to add the app to a tenant of your choice. After it's enabled, log in to that tenant and select **Security Command Center** from the App Launcher. You control which of your tenants feed data into the Security Command Center app. Security Command Center gathers updates from all connected orgs once per day.

The dashboard shows aggregate data from all connected tenants. You can see average health check scores for all connected orgs (1) and day-to-day changes for all supported metrics in connected orgs (2). Each metric includes a timestamp of when the app last updated (3). Want to see what's happened on a specific day? Click a metric name.



The metric detail view shows a daily snapshot of changes for each metric. The Changes view shows day-over-day changes, while the All Data view displays all data broken down by tenant. See something of interest? Choose a date from the picker (4). The lower half of the screen lists details that give you critical context for settings, actions, and events of interest (5). And because Security Command Center stores details for 6 months, you can monitor changes to user behavior over time during periods of change.



#### SEE ALSO:

[Salesforce Help: Take Charge of Your Security Goals with Security Command Center \(Beta\)](#) (can be outdated or unavailable during release preview)

## Use Stronger Hashing Algorithms with Apex Crypto Class

The Crypto class now supports RSA-SHA384 and RSA-SHA512 hashing standards, giving you more options for generating cryptographically strong key material. You can pass RSA-SHA384 and RSA-SHA512 values into the algorithmName parameter for Crypto.sign, Crypto.signWithCertificate, Crypto.signXML(), and Crypto.verify() methods. Use a third-party application or the Crypto.generateAesKey method to generate this key for you.

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

**How:** For information about generating and using key material, see the [Crypto Class](#) in the Apex Developer Guide.

## Assign New Records Created by Salesforce Sites Guest Users to a Default Owner

To increase the security of your Salesforce data, Salesforce Sites guest users are no longer automatically the owner of records they create. Instead, when a Salesforce Sites guest user creates a record, the record is assigned to a default record owner that you choose.

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

**When:** This change applies to Salesforce orgs created in Summer '20 or later. It applies to existing orgs unless the Opt Out of Guest User Security Policies Before Summer '20 critical update has been activated and to all orgs in Winter '21.

**Why:** Having an internal org user be the owner of records created by guest users is a Salesforce security best practice. If you activated the Opt Out of Guest User Security Policies Before Summer '20 critical update, make sure you apply and test this change before Winter '21, when it's applied to all orgs.

**How:** The Salesforce Site owner is the default owner for records created by a Salesforce Sites guest user. To select a different default record owner for your Site, enter `Sites` in the Quick Find box, then select **Sites**. When creating a Site or editing an existing Site, select a user in the **Default Record Owner** lookup. Click **Save**.

If the Opt Out of Guest User Security Policies Before Summer '20 critical update is active in your org, you must manually activate the Site setting before selecting default record owners. From Setup, in the Quick Find box, enter `Sites`, then select **Sites**. Select **Assign new records created by Salesforce Sites guest users to a default owner** and click **Save**.



**Note:** Your communities are also listed on the Sites Setup page. To assign a default record owner to a community, the **Assign new records created by guest users to the default owner** setting must be active. That setting is also automatically activated in Summer '20 unless the Opt Out of Guest User Security Policies Before Summer '20 critical update is active in your org.

#### SEE ALSO:

[Opt Out of Guest User Security Policies Before Summer '20 \(Previously Released Update\)](#)

[Salesforce Help: Best Practices and Considerations When Working with the Site User Record \(can be outdated or unavailable during release preview\)](#)

## Permission Changes for Security Features

Review access changes to Security features that take effect with the Summer '20 release.

### Logout Event Triggers

Users must have the Customize Application permission to access the LogoutEventStream object.

### SAML Single Sign-On Configuration

Access to configuring SAML settings for single sign-on through the API is limited to users with the View Setup and Configuration permission or users with both the Customize Application and Modify All Data permissions.

#### SEE ALSO:

[Knowledge Article: User Profile Permission Descriptions](#)

## Deployment: New Change Set Components

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New change set components are available.

#### IN THIS SECTION:

[New and Changed Components for Change Sets](#)

The components available for a change set vary by edition. These components are now available for change sets.

## New and Changed Components for Change Sets

The components available for a change set vary by edition. These components are now available for change sets.

### Bot

Represents a definition of an Einstein Bot configuration that can have one or more versions. Only one version can be active.

### Custom NotificationType

Represents the metadata associated with a custom notification type. Custom notification types allow you to send a custom desktop or mobile notification via a process or invocable API call.

### Inbound Network Connection

Represents the entity used to store information about private connections between a third-party data service and a Salesforce org. The connection is inbound because the callouts are coming *into* Salesforce.

### Outbound Network Connection

Represents the entity used to store information about private outbound connections between a Salesforce org and a third-party data service. The connection is outbound because the callouts are going *out of* Salesforce.

### Transaction Security Policy

Represents a set of conditions used to evaluate user activity and the real-time actions (Notify, Block, Two-Factor Authentication) that are triggered when the conditions are met.

## Development: Create Your Own Salesforce App

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

### IN THIS SECTION:

#### [Lightning Components: Share CSS Style Rules Among Lightning Web Components, Delete Components from Managed Packages](#)

Create a consistent look and feel by using a common CSS module to style Lightning web components. Delete a Lightning component from a managed package if it's no longer needed. We also postponed several release updates to give you more time to prepare for them.

#### [Einstein Platform Services: Image Recognition and Natural Language Processing](#)

Not a data scientist or machine-learning expert, but still want to integrate AI into your apps? Use the Einstein Platform Services APIs to easily AI-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train custom classifiers to solve a vast array of image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind the text. Make your apps smarter and look like a genius at the same time.

#### [Visualforce: Lightning Message Service \(Generally Available\), Date Picker Gets A New Look in Android](#)

Communicate across Visualforce, Aura, and Lightning Web Components with Lightning message service. The date picker in the Salesforce mobile app for Android now has the native Android display.

#### [Packaging: Push Upgrades Available for Unlocked and Second-Generation Managed Packages \(Beta\), Try Org-Dependent Unlocked Packages \(Beta\)](#)

We extended the push upgrade API to enable you to schedule and push upgrades to unlocked and second-generation managed packages. Use org-dependent unlocked packages when untangling your org's metadata is difficult. Explore an early preview of first-generation managed package conversion.

#### [Apex](#)

The new `@JsonAccess` annotation controls how to serialize and deserialize Apex types. The new `ConcurLongRunApexErrEvent` standard platform event for Real-Time Event Monitoring detects concurrent long-running Apex errors. The release update "Enable Improved Caching of Org Schema" now has its auto-activation date advanced to August 12, 2020 from August 9, 2021. Two release updates require that users have the "View Setup and Configuration" permission to access `AsyncApexJob`, `ApexTestResult` and several other objects. The Transaction Finalizers feature (introduced in Spring '20) is enhanced with the `FinalizerContext.getRequestId()` method, which returns the request ID of the Finalizer execution.

#### [API](#)

In API version 49.0, use Bulk API 2.0 to query the dependency relationships between metadata components in your Salesforce org. The concurrent API request limit for sandboxes has been fixed to match the documentation.

#### [Custom Metadata Types: Use CLI for Custom Metadata Types and Create Relationships to Elements of a Field](#)

Use Salesforce CLI commands to create and manage custom metadata types. Declaratively define a custom metadata type relationship field that references an entity particle.

[Scratch Orgs: New Features](#)

A scratch org is a dedicated and configurable Salesforce environment that you can quickly spin up for many different purposes. It can be your own personal development environment, or you can create a headless scratch org for automated tests. You can create scratch orgs if you turned on Dev Hub in your production org or a Developer Edition org, or have a Dev Hub trial org. We continually add support for new features.

[Sandboxes: Powerful New Ways to Secure your Data using Data Mask and Automatically Track Changes in Your Local Workspace \(Beta\)](#)

Use new tools to secure personally identifiable information and other sensitive data in a sandbox. Enable source tracking for Developer and Developer Pro sandboxes (Beta). Salesforce CLI commands for sandbox operations are now generally available.

[Lightning Design System: Mobile and Touch Support Grows Along with Other Component Enhancements](#)

The Salesforce Lightning Design System (SLDS) includes the resources to create user interfaces consistent with the Salesforce Lightning principles, design language, and best practices. In this release, we focused on expanding the user experience for mobile and touch devices.

[AppExchange Partners: AppExchange App Analytics for Lightning Apps and Pages](#)

Learn how subscribers use your Lightning apps and pages by exploring AppExchange App Analytics data.

[Change Data Capture: Event Enrichment \(Beta\) and Other Changes](#)

Enrich your change event messages with fields, such as external ID fields, and take advantage of other enhancements.

[Platform Events: Publish Status Events \(Pilot\)](#)

Get notified of the status of platform event publish operations through Publish Status Events.

[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.

[Develop Solutions for Workplace Command Center for Work.com](#)

Workplace Command Center helps you monitor return-to-work readiness and decide when to safely bring people back to the workplace. As employees return, keep everyone safe by monitoring employee health and location readiness. Workplace Command Center includes Employee Wellness Check components, Operations Feed, and Global COVID-19 Tracker.

## Lightning Components: Share CSS Style Rules Among Lightning Web Components, Delete Components from Managed Packages

Create a consistent look and feel by using a common CSS module to style Lightning web components. Delete a Lightning component from a managed package if it's no longer needed. We also postponed several release updates to give you more time to prepare for them.



**Note:** Looking for [new and changed Lightning web components, Aura components, and Aura component interfaces](#)? We've consolidated the lists of new and changed items at the end of the Development section.

### IN THIS SECTION:

[Communicate Across Salesforce UI Technologies with Lightning Message Service \(Generally Available\)](#)

Use Lightning message service to communicate across the DOM—between Visualforce pages, Aura components, and Lightning web components, including components in a utility bar. You can use it to communicate between components within a single Lightning page or across multiple pages. If you're switching from Salesforce Classic to Lightning Experience, you can now build Lightning web components that can communicate with existing Visualforce pages and Aura components. You can also use Lightning message service to communicate with softphones via Open CTI.

### [Share CSS Styles Among Lightning Web Components](#)

Create a consistent look and feel for Lightning web components by using a common CSS module. Define styles in the CSS module, and import the module into the components that share those styles.

### [Delete Lightning Components from Managed Packages](#)

You can delete an Aura or Lightning web component from a managed package after it's released. This change enables you to refactor a package and delete any components that are no longer needed.

### [Develop Flow Screen Components That Work for Multiple Objects \(Beta\)](#)

Now you can create reusable flow screen components that use the generic `sObject` and `sObject[]` data types. Build one component that works for multiple objects, rather than one for each individual object. For example, you can build a data table component that works with any collection of records, from accounts and contacts to custom objects.

### [Create Custom Property Editors for Lightning Web Components \(Beta\)](#)

Create a custom property editor that makes it a snap for an admin to configure a flow screen component in Flow Builder. The custom property editor is simply a Lightning web component.

### [Scan a Barcode in a Lightning Web Component \(Beta\)](#)

Use the BarcodeScanner API to add barcode scanning to your Lightning web components. Scan UPC, QR, and other standard barcode types from Lightning web components running on a mobile device. Look up product details, record inventory scans, save contact details from a conference badge—your code, your way!

### [Aura Components in the ui Namespace Are Being Deprecated](#)

We plan to end support for the deprecated components on May 1, 2021.

### [Check User Permissions for Lightning Web Components](#)

Customize a component's behavior based on whether the current user has a specific permission. To check a user's permission assignment, import Salesforce permissions from the `@salesforce/userPermission` and `@salesforce/customPermission` scoped modules.

### [Get Information About the Current Lightning Community](#)

Use the `@salesforce/community` scoped module to import information about the current community context when developing Lightning web components for Lightning communities.

### [Check Whether a Lightning Web Component Is Connected to the DOM](#)

Use a property, `isConnected`, to check whether a component is connected to the Document Object Model (DOM).

### [Set an Uppercase JavaScript Property Via an HTML Attribute](#)

Lightning Web Components provides special syntax to allow you to set an uppercase JavaScript property via an HTML attribute. Previously, you couldn't set an uppercase JavaScript property via an HTML attribute.

### [Get Child Elements by Tag or Class Name in Lightning Web Components](#)

The `Element.getElementsByTagName()` and `Element.getElementsByClassName()` APIs are now supported in the `LightningElement` base class for Lightning web components. A parent element can use `getElementsByTagName()` to get a list of its child elements with a specified tag. A parent element can use `getElementsByClassName()` to get a list of its child elements with a specified class.

### [DOM API Changes May Require UI Test Updates](#)

The content and structure of HTML, CSS, and the DOM can change at any time and can't be considered a stable API. Automated UI tests that use tools like Selenium WebDriver to reach into component internals require your ongoing maintenance. We're here to help you adapt your automated UI tests for this release.

### [Lightning Components Use Native Android Date Picker](#)

We've changed the display of the date picker in the Salesforce mobile app for Android from a custom Android calendar to the native Android one. No updates are necessary.

### [Lightning Web Components in Custom Tabs Are Reactive](#)

Before Summer '20, when a Lightning web component in a custom tab updated its query parameters, the framework recreated the component. Now, a component in a custom tab is reactive. When the component updates its query parameters, the component is rerendered and no longer recreated.

### [Update Jest Dependencies to v25.5.4 If You Update sfdx-lwc-jest to v0.9.0](#)

We updated our Jest dependency in `sfdx-lwc-jest` v0.9.0 to Jest v25.5.4. To make sure that your tests still run successfully after you update `sfdx-lwc-jest`, update your dependencies.

### [Blob Schema Blocked for iframes](#)

The `frame-src` directive of the Content Security Policy prevents access to a blob URL from an iframe. This change was introduced in the Spring '20 release, but wasn't documented until now.

### [Release Updates \(Formerly Critical Updates\): Postponed Updates](#)

We postponed several updates to give you more time to prepare for them.

### [Security Alerts: Restricted Access to @AuraEnabled Apex Methods Based on User Profile](#)

We have a few security alerts.

#### SEE ALSO:

[Lightning Web Components Developer Guide](#)

[Lightning Aura Components Developer Guide](#)

## Communicate Across Salesforce UI Technologies with Lightning Message Service (Generally Available)

Use Lightning message service to communicate across the DOM—between Visualforce pages, Aura components, and Lightning web components, including components in a utility bar. You can use it to communicate between components within a single Lightning page or across multiple pages. If you're switching from Salesforce Classic to Lightning Experience, you can now build Lightning web components that can communicate with existing Visualforce pages and Aura components. You can also use Lightning message service to communicate with softphones via Open CTI.

**Where:** This feature is available in Lightning Experience. To create a Lightning message channel, use Enterprise, Performance, Unlimited, and Developer editions.

**How:** Components and pages communicate over Lightning message channels. In this example, a Visualforce page subscribes to a message channel on which a Lightning web component publishes.

```
// publisherComponent.js
import { LightningElement, wire } from 'lwc';
import { publish, MessageContext } from 'lightning/messageService';
import SAMPLEMC from "@salesforce/messageChannel/SampleMessageChannel__c";

export default class PublisherComponent extends LightningElement {
    @wire(MessageContext)
    messageContext;

    handleClick() {
        const message = {
            recordId: "001xx000003NGSFAA4",
            recordData: {
                value: "Burlington Textiles Corp of America"
            }
        }
        this.messageContext.publish(message);
    }
}
```

```

        } ;
        publish(this.messageContext, SAMPLEMC, message);
    }
}

```

The Visualforce page subscribes to the same message channel.

```

<apex:page>
    <div>
        <p>Subscribe to SampleMessageChannel</p>
        <button onclick="subscribeMC()">Subscribe</button>
        <p>Unsubscribe from SampleMessageChannel</p>
        <button onclick="unsubscribeMC()">Unsubscribe</button>
        <br/>
        <br/>
        <p>Received message:</p>
        <textarea id="MCMensajeTextArea" rows="10"
style="disabled:true;resize:none;width:100%;"/>
    </div>
    <script>
        // Load the MessageChannel token in a variable
        var SAMPLEMC = "{!$MessageChannel.SampleMessageChannel__c}";
        var subscriptionToMC;
        // Display message in the textarea field
        function onMCPublished(message) {
            var textArea = document.querySelector("#MCMensajeTextArea");
            textArea.innerHTML = message ? JSON.stringify(message, null, '\t') : 'no message
payload';
        }

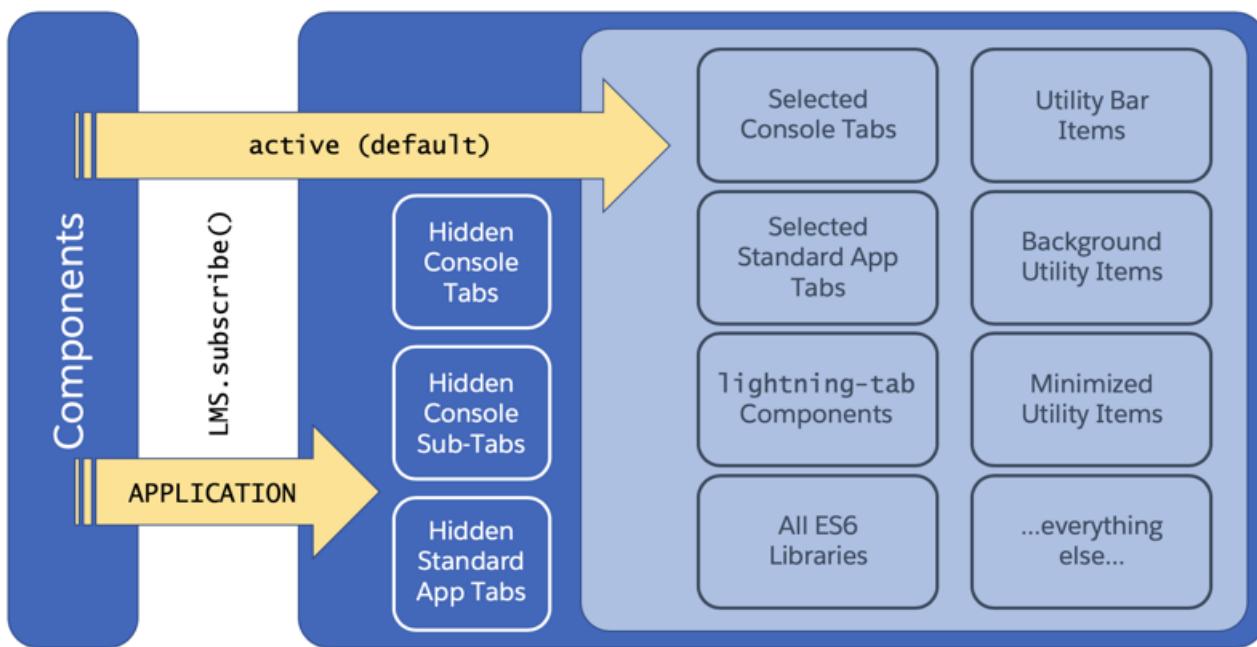
        function subscribeMC() {
            if (!subscriptionToMC) {
                subscriptionToMC = sforce.one.subscribe(SAMPLEMC, onMCPublished);
            }
        }

        function unsubscribeMC() {
            if (subscriptionToMC) {
                sforce.one.unsubscribe(subscriptionToMC);
                subscriptionToMC = null;
            }
        }
    </script>
</apex:page>

```

**!** **Important:** If you worked with Lightning message service in beta, note the following change for the GA release. In the beta release, the `subscribe()` method included a `scope` parameter, with a single default value of "APPLICATION". Scope defines where subscribing components receive messages in your application. The Lightning message service now lets you limit

scope to the active area only (default) or include the entire application.



To specify active scope, you don't need to include the `scope` parameter, since it's the default behavior. To specify scope for the entire application, continue to use the `scope` parameter with a value of "APPLICATION". When using the active scope, a message channel is limited to communication between components in an active navigation tab, an active navigation item, or a utility item. Utility items are always active. A navigation tab or item is active when it's selected. Navigation tabs and items include:

- Standard navigation tabs
- Console navigation workspace tabs
- Console navigation subtabs
- Console navigation items

#### SEE ALSO:

[Component Reference: lightning/messageService](#)

[Lightning Web Components Developer Guide](#) (can be outdated or unavailable during release preview)

[Lightning Aura Components Developer Guide](#) (can be outdated or unavailable during release preview)

[Visualforce Developer Guide](#) (can be outdated or unavailable during release preview)

[Salesforce Help: Using Pop-Out Utilities](#)

[Open CTI Developer Guide](#)

## Share CSS Styles Among Lightning Web Components

Create a consistent look and feel for Lightning web components by using a common CSS module. Define styles in the CSS module, and import the module into the components that share those styles.

**Where:** This change applies to Lightning web components in Lightning Experience and all versions of the Salesforce app.

**How:**

1. Create a component that contains a CSS file and a configuration file. The folder and filenames must be identical. This component is your CSS module.

```
cssLibrary
└── cssLibrary.css
└── cssLibrary.js-meta.xml
```

2. In the CSS file, define the style rules to share.

```
/* cssLibrary.css */
h1 {
    font-size: xx-large;
}
```

3. The configuration file needs only these tags.

```
<!-- cssLibrary.js-meta.xml -->
<?xml version="1.0" encoding="UTF-8" ?>
<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
    <apiVersion>49.0</apiVersion>
    <isExposed>false</isExposed>
</LightningComponentBundle>
```

4. In the CSS file of a Lightning web component, import the module.

```
myComponent
└── myComponent.html
└── myComponent.js
└── myComponent.js-meta.xml
└── myComponent.css
```

```
/* myComponent.css */
@import 'c/cssLibrary';

/* Define other style rules for myComponent here */
```

You can import one or more CSS modules.

```
/* Syntax */
@import 'namespace/moduleName';
```

**Important:** For more information about `@import`, see [MDN web docs: @import](#). MDN lists two syntax styles: `@import url` and `@import url list-of-media-queries`. LWC doesn't honor the `list-of-media-queries`.

5. Imported style rules are applied to the template just like non-imported style rules. All style rules cascade. In the `myComponent.html` template, the text in the `<h1>` tag uses the `xx-large` style defined in `cssLibrary.css`.

```
<!-- myComponent.html -->

<template>
    <h1>Words to the Wise</h1>
    <p>An apple a day keeps the doctor away</p>
</template>
```

**Tip:** You can play with the code in a playground at [lwc.dev/guide/css](https://lwc.dev/guide/css).

## Delete Lightning Components from Managed Packages

You can delete an Aura or Lightning web component from a managed package after it's released. This change enables you to refactor a package and delete any components that are no longer needed.

**Where:** This change applies to Aura and Lightning web components in managed packages in Lightning Experience and Salesforce Classic.

**How:** To enable component deletion in your packaging org, log a case in the [Partner Community](#).

To delete an Aura or Lightning web component:

1. From Setup, enter *Lightning Components* in the Quick Find box.
2. Select **Lightning Components**.
3. Click **Del** for the component that you want to delete.

Action	Name ↑	Label	Type	Namespace Prefix	Api Version
<b>Del</b>	yeOldeAuraComponent	yeOldeAuraComponent	Aura		49.0

You can delete an Aura component from the Developer Console also.

**Note:** When a developer removes an Aura or Lightning web component from a package, the component remains in a subscriber's org after they install the upgraded package. The administrator of the subscriber's org can delete the component, if desired. This behavior is the same for a Lightning web component or an Aura component with a `public` or `global` access value.

The `access` attribute on the `aura:component` tag can be set to `public` or `global` to control whether the component can be used outside of the component's namespace. Allow a Lightning web component to be used in Lightning App Builder or Experience Builder by setting `isExposed` to `true` in the component's configuration file.

We recommend a two-stage process to package developers when you delete an Aura component with `global` access or a Lightning web component with an `isExposed` value of `true`. This process ensures that a global component that you delete from the package has no dependencies on the other items in the package.

1. Stage one: Remove references
  - a. Edit the global component that you want to delete to remove all references to other Lightning components.
  - b. Upload your new package version.
  - c. Push the stage-one upgrade to your subscribers.
2. Stage two: Delete your obsolete component
  - a. Delete the global Lightning component from the package.
  - b. Optionally, delete other related components and classes.

- c. Upload your new package version.
- d. Push the stage-two upgrade to your subscribers.

## SEE ALSO:

[Lightning Aura Components Developer Guide: Component Access Control](#)

[Lightning Web Components Developer Guide: Configuration File Tags](#)

[ISVforce Guide: Delete Components in Managed Packages](#)

## Develop Flow Screen Components That Work for Multiple Objects (Beta)

Now you can create reusable flow screen components that use the generic `sObject` and `sObject[]` data types. Build one component that works for multiple objects, rather than one for each individual object. For example, you can build a data table component that works with any collection of records, from accounts and contacts to custom objects.

**Where:** This change applies to Lightning web components in Lightning Experience.

 **Note:** As a beta feature, the support of the generic `sObject` data type in custom flow screen components is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the support of the generic `sObject` data type in custom flow screen components in the [Trailblazer Community](#).

## SEE ALSO:

[Create Flow Screen Components That Work for Multiple Objects \(Beta\)](#)

## Create Custom Property Editors for Lightning Web Components (Beta)

Create a custom property editor that makes it a snap for an admin to configure a flow screen component in Flow Builder. The custom property editor is simply a Lightning web component.

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

As a beta feature, the support of custom property editors for flow screen components is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for custom property editors for flow screen components in the [Trailblazer Community](#).

**How:** See *Develop Custom Property Editors for Flow Builder (Beta)* in [Lightning Web Components Developer Guide](#).

#### SEE ALSO:

[Configure Custom Flow Screen Components More Easily \(Beta\)](#)

[Lightning Web Components Developer Guide: Flows](#)

[Configure Custom Flow Screen Components More Easily \(Beta\)](#)

## Scan a Barcode in a Lightning Web Component (Beta)

Use the BarcodeScanner API to add barcode scanning to your Lightning web components. Scan UPC, QR, and other standard barcode types from Lightning web components running on a mobile device. Look up product details, record inventory scans, save contact details from a conference badge—your code, your way!

**Where:** This feature is available in Lightning web components when they're running in the Salesforce mobile app or Mobile Publisher.

 **Note:** As a beta feature, BarcodeScanner is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time.

This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide [feedback and suggestions for BarcodeScanner in the IdeaExchange](#).

**How:** See *Scan Barcodes with BarcodeScanner (Beta)* in the [Lightning Web Components Developer Guide](#).

## Aura Components in the `ui` Namespace Are Being Deprecated

We plan to end support for the deprecated components on May 1, 2021.

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

**When:** Salesforce plans to end support for Aura components in the `ui` namespace on May 1, 2021. You can continue to use these components beyond May 1, 2021, but we won't accept support cases for them after that date.

**Why:** Retiring our legacy components enables us to focus on components that match the latest web standards in performance, accessibility, user experience, and internationalization.

**How:** Replace the deprecated components with their counterparts in the `lightning` namespace. These components are faster, more efficient, and they implement Lightning Design System styling out-of-the-box.

 **Note:** Components in the `lightning` namespace are available in two versions—as Aura components and Lightning web components. We recommend using Lightning web components whenever possible. Lightning web components are custom HTML elements built using HTML and modern JavaScript. Lightning web components and Aura components can coexist and interoperate on a page. To admins and end users, they both appear as Lightning components. See the [Lightning Web Components Developer Guide](#) for more information.

The deprecated Aura components and their recommended alternatives are listed as follows.

### `ui:actionMenuItem`

Use `lightning:menuItem` with `lightning:buttonMenu` instead.

**ui:button**

Use lightning:button, lightning:buttonIcon, or lightning:buttonIconStateful. For button groups, use lightning:buttonGroup.

**ui:checkboxMenuItem**

Use lightning:menuItem with lightning:buttonMenu instead.

**ui:inputCheckbox**

Use lightning:input with checkbox, toggle, or checkbox-button type instead. For checkbox groups, use lightning:checkboxGroup.

**ui:inputCurrency**

Use lightning:input with number type and currency formatter instead.

**ui:inputDate**

Use lightning:input with date type instead.

**ui:inputDateTime**

Use lightning:input with datetime type instead.

**ui:inputDefaultError**

Use lightning:input with built-in field validation instead.

**ui:inputEmail**

Use lightning:input with email type instead.

**ui:inputNumber**

Use lightning:input with number type instead.

**ui:inputPhone**

Use lightning:input with phone type instead.

**ui:inputRadio**

Use lightning:input with radio type instead. For radio groups, use lightning:radioGroup.

**ui:inputRichText**

Use lightning:inputRichText instead.

**ui:inputSecret**

Use lightning:input with password type instead.

**ui:inputSelect**

Use lightning:select or lightning:combobox instead.

**ui:inputSelectOption**

Use lightning:select or lightning:combobox instead.

**ui:inputText**

Use lightning:input with text type instead.

**ui:inputTextArea**

Use lightning:textarea instead.

**ui:inputURL**

Use lightning:input with url type instead.

**ui:menu**

Use lightning:buttonMenu instead.

**ui:menuItem**

Use lightning:menuItem with lightning:buttonMenu instead.

**ui:menuItemSeparator**

Use lightning:menuDivider with lightning:buttonMenu instead.

**ui:menuList**

Use lightning:buttonMenu instead.

**ui:menuTrigger**

Use lightning:buttonMenu instead.

**ui:menuTriggerLink**

Use lightning:buttonMenu instead.

**ui:message**

Use lightning:notificationsLibrary instead.

**ui:outputCheckbox**

Use lightning:input with checkbox type and set readonly to true.

**ui:outputCurrency**

Use lightning:formattedNumber with style set to currency.

**ui:outputDate**

Use lightning:formattedDateTime instead.

**ui:outputDateTime**

Use lightning:formattedDateTime or lightning:formattedTime instead.

**ui:outputEmail**

Use lightning:formattedEmail instead.

**ui:outputNumber**

Use lightning:formattedNumber instead.

**ui:outputPhone**

Use lightning:formattedPhone instead.

**ui:outputRichText**

Use lightning:formattedRichText instead.

**ui:outputText**

Use lightning:formattedText instead.

**ui:outputTextArea**

Use lightning:formattedText instead.

**ui:outputURL**

Use lightning:formattedUrl instead.

**ui:radioMenuItem**

Use lightning:menuItem with lightning:buttonMenu instead.

**ui:spinner**

Use lightning:spinner instead.

## Check User Permissions for Lightning Web Components

Customize a component's behavior based on whether the current user has a specific permission. To check a user's permission assignment, import Salesforce permissions from the @salesforce/userPermission and @salesforce/customPermission scoped modules.

**Where:** This change applies to Lightning web components in Lightning Experience and all versions of the Salesforce app.

**Why:** Permissions are a standard way to control access and behavior in a Salesforce org. Develop Lightning web components to behave a certain way based on the current user's permissions.

**How:** To check whether a user has a permission, import a static reference to the permission and evaluate whether it's `true` or `undefined`.

```
import hasPermission from '@salesforce/userPermission/PermissionName';
```

Custom permissions can include a namespace. Orgs use namespaces as unique identifiers for their own customization and packages. If the custom permission was installed from a managed package, prepend the namespace followed by `_` to the permission name.

```
import hasPermission from '@salesforce/customPermission/PermissionName';
import hasPermission from '@salesforce/customPermission/namespace__PermissionName';
```

The name of the static reference is your choice. We chose the format `hasPermission` to indicate that the reference contains a Boolean.

This sample checks whether the current user has the `ViewSetup` standard permission.

```
// app.js
import { LightningElement } from 'lwc';
import hasViewSetup from '@salesforce/userPermission/ViewSetup';

export default class App extends LightningElement {
    get isSetupEnabled() {
        return hasViewSetup;
    }

    openSetup(e) {...}
}
```

If the user has the permission, the component enables a button.

```
<!-- app.html -->

<template>
    <setup-panel-group>
        <setup-button disabled={isSetupEnabled} onclick={openSetup}></setup-button>
    </setup-panel-group>
</template>
```

This sample checks whether the current user has the `ViewReport` custom permission installed from a managed package with the `acme` namespace.

```
// app.js
import { LightningElement } from 'lwc';
import hasViewReport from '@salesforce/customPermission/acme__ViewReport';

export default class App extends LightningElement {
    get isReportVisible() {
        return hasViewReport;
    }
}
```

If the user has the permission, the component displays the `expense-report` component.

```
<!-- app.html -->

<template>
  <common-view></common-view>

  <template if:true={isReportVisible}>
    <c-expense-report></c-expense-report>
  </template>
</template>
```

## Get Information About the Current Lightning Community

Use the `@salesforce/community` scoped module to import information about the current community context when developing Lightning web components for Lightning communities.

**Where:** This change applies to Lightning web components in Lightning communities in Enterprise, Performance, Unlimited, and Developer editions.

**How:** Use `@salesforce/community/Id` to import the ID of the current community—for example, when your component must pass the community ID as a parameter to an API.

```
import communityId from '@salesforce/community/Id';
```

Use `@salesforce/community/basePath` to import the base URL of your community and then dynamically construct the full URL—for example, when building a link component that works across several communities.

```
import communityBasePath from '@salesforce/community/basePath';
```

The base URL is the section of the community's URL that comes after the domain. So if your community domain name is `UniversalTelco.force.com` and `myPartnerCommunity` was the URL value added when you created the community, the community's URL is `UniversalTelco.force.com/myPartnerCommunity/s`. In this case, `myPartnerCommunity/s` is the base URL.

**!** **Important:** You can use `@salesforce/community` when targeting a Lightning community page only. If a component imports `@salesforce/community`, it can't be used in any other Salesforce experience.

## Check Whether a Lightning Web Component Is Connected to the DOM

Use a property,  `isConnected`, to check whether a component is connected to the Document Object Model (DOM).

**Where:** This change applies to Lightning web components in Lightning Experience and all versions of the Salesforce app.

**Why:** You can already use the `connectedCallback()` and `disconnectedCallback()` lifecycle hooks to react when a component is connected to and disconnected from the DOM. However, using the `Node.isConnected` property is a more ergonomic developer experience.

**How:** Lightning web components now reflect the `Node.isConnected` property, which returns a Boolean indicating whether the component is connected to the DOM. Simply use `this.isConnected` in a component's JavaScript.

```
import { LightningElement } from 'lwc';
export default class MyComponent extends LightningElement {
  someMethod() {
    const cmp = this;
    const aPromise = new Promise(tetherFunction);
```

```
aPromise.then((result) => {
  if (cmp.isConnected) {
    // Update the component with the result.
  } else {
    // Ignore the result and maybe log.
  }
})
}
```

 **Tip:** Lightning web components reflect the properties of other Web APIs as well. For a complete list, see Web API Properties in the [Lightning Web Components Developer Guide](#).

## SEE ALSO:

[MDN web docs: Node.isConnected](#)

## Set an Uppercase JavaScript Property Via an HTML Attribute

Lightning Web Components provides special syntax to allow you to set an uppercase JavaScript property via an HTML attribute. Previously, you couldn't set an uppercase JavaScript property via an HTML attribute.

**Where:** This change applies to Lightning web components in Lightning Experience and all versions of the Salesforce app.

**Why:** HTML attributes in a template can't contain uppercase characters. If a JavaScript property name starts with an uppercase character, this syntax allows you to set the property in HTML without changing the JavaScript code.

**How:** Add a leading hyphen to the HTML attribute. The leading hyphen tells the engine that the first alpha character in the attribute name is declared with an uppercase character in the JavaScript class.

The JavaScript property `Upper` maps to the HTML attribute `-upper`.

```
// child.js
import { LightningElement, api } from 'lwc';

export default class Child extends LightningElement {
  @api Upper;
}

<!-- parent.html -->
<template>
  <c-child -upper="Some Value"></c-child>
</template>
```

In a Lightning web component, camel-case JavaScript property names map to kebab-case HTML attribute names. In JavaScript, `@api firstName` maps to the HTML `<c-child first-name="Pierre"></c-child>`. If a JavaScript property starts with an uppercase alpha character, `@api FirstName`, simply use the same mapping for the first character, `-first-name`.

```
<!-- parent.html -->
<template>
  <c-child -first-name="Pierre"></c-child>
</template>
```

```
// child.js
import { LightningElement, api } from 'lwc';
```

```
export default class Child extends LightningElement {
    @api FirstName;
}

<!-- child.html -->
<template>
    First Name: {FirstName}
</template>
```

## Get Child Elements by Tag or Class Name in Lightning Web Components

The `Element.getElementsByTagName()` and `Element.getElementsByClassName()` APIs are now supported in the `LightningElement` base class for Lightning web components. A parent element can use `getElementsByTagName()` to get a list of its child elements with a specified tag. A parent element can use `getElementsByClassName()` to get a list of its child elements with a specified class.

**Where:** This change applies to Lightning web components in Lightning Experience and all versions of the Salesforce app.

## DOM API Changes May Require UI Test Updates

The content and structure of HTML, CSS, and the DOM can change at any time and can't be considered a stable API. Automated UI tests that use tools like Selenium WebDriver to reach into component internals require your ongoing maintenance. We're here to help you adapt your automated UI tests for this release.

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

**Why:** We're calling out the fragility of these tests due to changes, in particular as Lightning Experience continues to evolve with modern web standards. We understand the value that you gain from automated UI testing and the maintenance burden these changes put on you. Salesforce has never guaranteed backward-compatible HTML, CSS, or DOM.

**How:** If your UI tests from the previous release have issues, see [this knowledge article](#), which includes steps and a custom tool to help you fix them.

### SEE ALSO:

[Salesforce Developers Blog: Test Automation](#)

## Lightning Components Use Native Android Date Picker

We've changed the display of the date picker in the Salesforce mobile app for Android from a custom Android calendar to the native Android one. No updates are necessary.

**Where:** This change applies to Lightning components in the Salesforce mobile app on Android devices.

**How:** The following components have an updated look and feel depending on your version of the Android OS.

Aura components:

- `<lightning:input type="date">`
- `<lightning:input type="datetime">`
- `<lightning:select>`
- `<lightning:input type="time">`

Lightning web components:

- lightning-input-field
- lightning-input type="date"
- lightning-input type="datetime"
- lightning-input type="time"

 **Note:** The updated Android interface depends on the version of Android OS that you're running.

## Lightning Web Components in Custom Tabs Are Reactive

Before Summer '20, when a Lightning web component in a custom tab updated its query parameters, the framework recreated the component. Now, a component in a custom tab is reactive. When the component updates its query parameters, the component is rerendered and no longer recreated.

**Where:** This change applies to Lightning web components in Lightning Experience and all versions of the Salesforce app.

**Why:** Lightning web components are designed to reactively track updates to query parameters, but were not reactive when used in custom tabs. Now, when components are used in custom tabs, they are aligned with the reactive design of other Lightning web components.

**How:** When using a Lightning Web Component with a custom tab to update the `pageReference.state` query parameters on the current page, you must track the query parameters. Track query parameters by declaring the `currentPageReference` variable in your component before getting a reference to the current page with `@wire(CurrentPageReference)`. If you don't declare the `currentPageReference` variable, query parameters aren't tracked, so they aren't updated and maintain their present value.

To update your code, add the `currentPageReference` variable to your component's class.

```
export default class PageStateChangeExample extends NavigationMixin(LightningElement) {
    // Declare the currentPageReference variable in order to track it
    currentPageReference;

    @wire(CurrentPageReference)
    setCurrentPageReference(currentPageReference) {
        this.currentPageReference = currentPageReference;
```

SEE ALSO:

[Lightning Web Components Developer Guide: Reactivity](#)

## Update Jest Dependencies to v25.5.4 If You Update `sfdx-lwc-jest` to v0.9.0

We updated our Jest dependency in `sfdx-lwc-jest` v0.9.0 to Jest v25.5.4. To make sure that your tests still run successfully after you update `sfdx-lwc-jest`, update your dependencies.

**Where:** This change applies to Lightning web components in Lightning Experience and all versions of the Salesforce app.

SEE ALSO:

[Lightning Web Components Developer Guide: Test Lightning Web Components](#)

[Jest 25: Laying foundations for the future](#)

## Blob Schema Blocked for iframes

The `frame-src` directive of the Content Security Policy prevents access to a blob URL from an iframe. This change was introduced in the Spring '20 release, but wasn't documented until now.

**Where:** This change applies to Lightning Experience and all versions of the Salesforce app.

**Why:** This restriction prevents an attacker from injecting arbitrary content into an iframe in a clickjacking attempt.

**How:** Use a regular link to a blob URL and open the content in a new tab or window instead of using an iframe.

SEE ALSO:

[Lightning Aura Components Developer Guide: Content Security Policy Overview](#)

## Release Updates (Formerly Critical Updates): Postponed Updates

We postponed several updates to give you more time to prepare for them.

IN THIS SECTION:

[Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile \(Update, Postponed\)](#)

This update is postponed to Winter '21. It was scheduled for auto-activation (enforcement) in Spring '20. This update gives you more control over which guest, portal, or community users can access Apex classes containing `@AuraEnabled` methods. Add guest user profile access to any `@AuraEnabled` Apex class used by a community or portal. When this update is activated, a guest, portal, or community user can access an `@AuraEnabled` Apex method only when the user's profile or an assigned permission set allows access to the Apex class.

[Prevent Creation of Function Expressions in Dynamically Created Aura Components \(Update, Postponed\)](#)

This update is postponed to Winter '21. It was scheduled for auto-activation (enforcement) in Summer '20. To improve security and stability, this update prevents attribute values passed to `$A.createComponent()` or `$A.createComponents()` from being interpreted as Aura function expressions.

[Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile \(Update, Postponed\)](#)

This update is postponed to Winter '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update gives you more control over which authenticated users can access Apex classes containing `@AuraEnabled` methods. When this update is activated, an authenticated user can access an `@AuraEnabled` Apex method only when the user's profile or an assigned permission set allows access to the Apex class.

[Enable Dependency Access Checks In Lightning Components \(Update, Postponed\)](#)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update enforces the permission required to access component dependencies. A Salesforce-provided Lightning component can require an org or user permission to access the component. A dependency is any resource used within a top-level component. For example, a component can use or extend another component in its markup or implement an interface. This update has no effect and is unrelated to the access checks for Aura's `access` attribute on the `<aura:component>` tag.

[Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing \(Update, Postponed\)](#)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Spring '20. This update changes the behavior of `@AuraEnabled` Apex controllers that don't specify `with sharing` or `without sharing` to default to `with sharing`. This update applies only to orgs created after Spring '18 or orgs that activated the retired "Use `without sharing` for `@AuraEnabled` Apex Controllers with Implicit Sharing" update that had the opposite effect and set the default to `without sharing`. Orgs created before Spring '18 already default to `with sharing`. Those orgs don't see the update unless they enabled the now retired `without sharing` update.

[Disable Access to Non-global Controller Methods in Managed Packages \(Update, Postponed\)](#)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Winter '20. This update corrects access controls on Apex controller methods in managed packages. When this update is enabled, only methods marked with the `global` access modifier are accessible by Aura components from outside the package namespace. These access controls prevent you from using unsupported API methods that the package author didn't intend for global access.

[Enforce Access Modifiers on Apex Properties in Lightning Component Markup \(Update, Postponed\)](#)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update makes Lightning components consistent with the use of Apex properties in other contexts. For example, a markup expression can no longer access an Apex property with a private Apex getter.

## Restrict Access to `@AuraEnabled` Apex Methods for Guest and Portal Users Based on User Profile (Update, Postponed)

This update is postponed to Winter '21. It was scheduled for auto-activation (enforcement) in Spring '20. This update gives you more control over which guest, portal, or community users can access Apex classes containing `@AuraEnabled` methods. Add guest user profile access to any `@AuraEnabled` Apex class used by a community or portal. When this update is activated, a guest, portal, or community user can access an `@AuraEnabled` Apex method only when the user's profile or an assigned permission set allows access to the Apex class.

**Where:** This change applies to Aura components, Lightning web components, and flows in Lightning communities, portals, and Salesforce Sites.

**When:** This update is enforced when a sandbox or production org is upgraded to Winter '21. Enforcement starts for some sandboxes on August 9, 2020. 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 this update is activated, a guest, portal, or community user can access an `@AuraEnabled` Apex method only when the user's profile or a permission set allows access to the Apex class. This update enforces user profile and permission set restrictions for Apex classes used by Aura and Lightning web components.



**Note:** To enable access to a `public` Apex controller that's part of a managed package, a subscriber org must use a permission set. You can't enable access to a `public` Apex controller from a managed package using a user profile.

**How:** To test this update, we recommend working in a sandbox. After August 12, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Winter '21. After August 9, you can no longer activate or deactivate the update from Critical Updates in Setup.

1. From Setup, enter *Release Updates* in the Quick Find box.
2. Select **Release Updates (Beta)**.
3. Find "Restrict Access to `@AuraEnabled` Apex Methods for Guest and Portal Users Based on User Profile" and click **View Details** or click **Get Started**.
4. Test that custom Aura components, Lightning web components, and flows that you've developed are working correctly for guest, portal, and community users.



**Note:** The Guest User Access Report available in [this managed package](#) can help you to identify guest user access to Apex classes.

#### SEE ALSO:

[Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile \(Update, Postponed\)](#)  
[Apex Developer Guide: Class Security](#)  
[Salesforce Help: Configure the Guest User Profile](#)  
[Release Updates \(Beta\)](#)

## Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Postponed)

This update is postponed to Winter '21. It was scheduled for auto-activation (enforcement) in Summer '20. To improve security and stability, this update prevents attribute values passed to `$A.createComponent()` or `$A.createComponents()` from being interpreted as Aura function expressions.

**Where:** This change applies to orgs with Lightning components in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

**When:** This update was created in Summer '19 and is enforced when a sandbox or production org is upgraded to Winter '21. Enforcement starts for some sandboxes on August 9, 2020. 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 update is activated, using the key-value pair `{"exprType": "FUNCTION"}` in an object passed as an attribute value to `$A.createComponent()` or `$A.createComponents()` throws an error instead of triggering unpredictable behavior.

#### SEE ALSO:

[Lightning Aura Components Developer Guide: Dynamically Creating Components](#)  
[Release Updates \(Beta\)](#)

## Restrict Access to `@AuraEnabled` Apex Methods for Authenticated Users Based on User Profile (Update, Postponed)

This update is postponed to Winter '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update gives you more control over which authenticated users can access Apex classes containing `@AuraEnabled` methods. When this update is activated, an authenticated user can access an `@AuraEnabled` Apex method only when the user's profile or an assigned permission set allows access to the Apex class.

**Where:** This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

**When:** This update was created in Winter '20 and is enforced when a sandbox or production org is upgraded to Winter '21. Enforcement starts for some sandboxes on August 9, 2020. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Why:** This update enforces user profile and permission set restrictions for Apex classes used by Aura and Lightning web components.



**Note:** To enable access to a `public` Apex controller that's part of a managed package, a subscriber org must use a permission set. You can't enable access to a `public` Apex controller from a managed package using a user profile.

**How:** To test this update, we recommend working in a sandbox. After August 12, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Winter '21. After August 9, you can no longer activate or deactivate the update from Critical Updates in Setup.

1. From Setup, enter *Release Updates* in the Quick Find box.
2. Select **Release Updates (Beta)**.
3. Find "Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile" and click **View Details** or click **Get Started**.
4. Test that custom Aura or Lightning web components that you've developed are working correctly for authenticated users.



**Note:** The AuraEnabled Scanner open-source tool lists all the Apex classes in your org that contain one or more @AuraEnabled methods. The tool also identifies classes with no access granted to a profile or permission set. For more information, see this [GitHub repo](#).

#### SEE ALSO:

- [New Permission Set: Aura-Enabled Apex Class Access](#)
- [Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile \(Update, Postponed\)](#)
- [Apex Developer Guide: Class Security](#)
- [Disable Access to Non-global Controller Methods in Managed Packages \(Update, Postponed\)](#)
- [Release Updates \(Beta\)](#)

## Enable Dependency Access Checks In Lightning Components (Update, Postponed)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update enforces the permission required to access component dependencies. A Salesforce-provided Lightning component can require an org or user permission to access the component. A dependency is any resource used within a top-level component. For example, a component can use or extend another component in its markup or implement an interface. This update has no effect and is unrelated to the access checks for Aura's `access` attribute on the `<aura:component>` tag.

**Where:** This change applies to Aura components and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

**When:** This update is enforced when a sandbox or production org is upgraded to Spring '21. Enforcement starts for some sandboxes on November 29, 2020. 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 update is activated, you see an access error if you don't have the permission required for a component dependency. When the update isn't activated, if a custom component references a Salesforce-provided component that requires a permission, the permission check isn't enforced for component dependencies. Only a limited number of Salesforce-provided components require a permission.

If you don't see any impact, you are either not using a Salesforce-provided component that requires a permission, or you have the required permission. If you see any impact, contact Salesforce to request the permission for the Salesforce-provided component.

**How:** To test this update, we recommend working in a sandbox. After November 29, 2020, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Spring '21.

1. From Setup, enter *Release Updates* in the Quick Find box.
2. Select **Release Updates (Beta)**.
3. Find "Enable Dependency Access Checks in Lightning Components" and click **View Details** or click **Get Started**.

4. Test that your custom Lightning components are working correctly.
5. If you installed any packages that contain a Lightning component, the easiest way to test this change is to upgrade a package to the same version. Upgrading to the same version sounds counter-intuitive but the upgrade process reports any access issues and is easier than discovering the issues at runtime. If you encounter an error when you upgrade to the same version, look for a later version of the package. It's possible that the package developer released a later version that resolves any issues.

## SEE ALSO:

[Lightning Aura Components Developer Guide: Controlling Access](#)  
[Release Updates \(Beta\)](#)

**Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Postponed)**

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Spring '20. This update changes the behavior of @AuraEnabled Apex controllers that don't specify `with sharing` or `without sharing` to default to `with sharing`. This update applies only to orgs created after Spring '18 or orgs that activated the retired "Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing" update that had the opposite effect and set the default to `without sharing`. Orgs created before Spring '18 already default to `with sharing`. Those orgs don't see the update unless they enabled the now retired `without sharing` update.

**Where:** This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

**When:** This update is enforced when a sandbox or production org is upgraded to Spring '21. Enforcement starts for some sandboxes on November 29, 2020. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Why:** An @AuraEnabled Apex class that doesn't explicitly set `with sharing` or `without sharing` uses a default or implicit value of `with sharing`. The purpose of the retired "Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing" update was to make Apex controllers for Aura components default to `without sharing`. This behavior made Apex controllers consistent in Aura components and Visualforce pages.

After further consideration, we decided to ensure that Lightning components are secure by default. So we created this new update that defaults to `with sharing` for @AuraEnabled Apex classes used by Aura components or Lightning web components.

Apex classes generally run in system mode. Consequently, the current user's credentials aren't used to execute Apex logic, and the user's permissions and field-level security aren't automatically applied.

You can choose whether an Apex class enforces sharing rules by using the `with sharing` or `without sharing` keywords. Enforcing sharing rules by using the `with sharing` keyword doesn't enforce the user's permissions and field-level security. You must manually enforce CRUD permissions and field-level security separately in your Apex classes.

**How:** The best way to prepare for this update is to ensure that all your @AuraEnabled Apex code explicitly controls sharing behavior using the `with sharing` or `without sharing` keywords. If all your @AuraEnabled code explicitly sets sharing behavior, this update has no effect.

To test this update, we recommend working in a sandbox. After November 29, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Spring '21.

1. From Setup, enter `Release Updates` in the Quick Find box.
2. Select **Release Updates (Beta)**.
3. Find "Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing" and click **View Details** or click **Get Started**.

4. Test the behavior of components that use Apex classes that don't include the `with sharing` or `without sharing` keywords.

SEE ALSO:

[Apex Developer Guide: Enforcing Sharing Rules](#)

[Winter '20 Release Notes: Use without sharing for @AuraEnabled Apex Controllers with Implicit Sharing \(Critical Update, Retired\)](#)  
[Release Updates \(Beta\)](#)

## Disable Access to Non-`global` Controller Methods in Managed Packages (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Winter '20. This update corrects access controls on Apex controller methods in managed packages. When this update is enabled, only methods marked with the `global` access modifier are accessible by Aura components from outside the package namespace. These access controls prevent you from using unsupported API methods that the package author didn't intend for global access.

**Where:** This change applies to orgs with Aura components in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app.

**When:** This update was created in Summer '17 and is enforced when a sandbox or production org is upgraded to Summer '21. Enforcement starts for some sandboxes on April 4, 2021. 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 added to a managed package, only Apex controller methods marked `global` are accessible by Aura components outside of that managed package's namespace. Methods marked `public` in their Apex definitions are accessible only to Aura components included in the package's namespace. When this update is enabled, these rules are enforced.

Prior to this update, Aura components outside of the package namespace could access non-`global` methods (Apex controller methods not marked with the `global` access modifier).

When this update is enabled, if your code incorrectly depends on non-`global` Apex methods in a managed package, server actions that call those methods fail. Update your code to use only the supported API methods provided by the package as `global` methods.

 **Note:** An Aura component outside the package can access a public Apex method installed from a non-namespaced unlocked package. The Aura component can be installed from another package or created in the org. For accessing Apex methods, a non-namespaced unlocked package is treated the same as an unmanaged package.

**How:** To test this update, we recommend working in a sandbox. After April 4, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Summer '21.

1. From Setup, enter `Release Updates` in the Quick Find box.
2. Select **Release Updates (Beta)**.
3. Find "Disable Access to Non-`global` Controller Methods in Managed Packages" and click **View Details** or click **Get Started**.
4. Test that your custom Aura components are working correctly.

SEE ALSO:

[Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile \(Update, Postponed\)](#)

[Release Updates \(Beta\)](#)

## Enforce Access Modifiers on Apex Properties in Lightning Component Markup (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update makes Lightning components consistent with the use of Apex properties in other contexts. For example, a markup expression can no longer access an Apex property with a private Apex getter.

**Where:** This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

**When:** This update is enforced when a sandbox or production org is upgraded to Summer '21. Enforcement starts for some sandboxes on April 4, 2021. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Why:** Let's look at an example for an Apex class with a private getter for a `counter` class property.

```
public class EnforcePrivateGetter {
    @AuraEnabled

    public Integer counter { private get; set; }

    @AuraEnabled
    public static EnforcePrivateGetter GetRepro2()
    {
        EnforcePrivateGetter result = new EnforcePrivateGetter();
        result.counter = 2;
        return result;
    }
}
```

With the update enabled, this Aura component can't access the `private` getter with the `{ !v.apexObject.counter }` expression. The same restriction applies for a Lightning web component.

```
<aura:component controller="EnforcePrivateGetter" access="global">
    <aura:handler name="init" value="{!this}" action=" {!c.doInit} "/>

    <aura:attribute type="EnforcePrivateGetter" name="apexObject" />

    counter = { !v.apexObject.counter } <br></br>
</aura:component>
```

Here's the JavaScript controller.

```
({
    doInit : function(cmp, ev) {
        var action = cmp.get("c.GetRepro2");

        action.setCallback(this, function(response) {
            var state = response.getState();
            if (state === "SUCCESS") {
                cmp.set('v.apexObject', response.getReturnValue());
            }
            else if (state === "ERROR") {
                console.log('Error : ' + JSON.stringify(errors));
            }
        });
        $A.enqueueAction(action);
    }
});
```

```
    }  
})
```

With the update enabled, the fix is to remove the `private` access modifier on the getter and change the class variable definition to:

```
public Integer counter { get; set; }
```

To make an Apex property readable outside the Apex class, the property can't have a `private` or `protected` access modifier.

**How:** To test this update, we recommend working in a sandbox. After April 4, you can continue to activate or deactivate the update from Release Updates in Setup until the update is automatically enforced when your org is upgraded to Summer '21.

1. From Setup, enter `Release Updates` in the Quick Find box.
2. Select **Release Updates (Beta)**.
3. Find "Enforce Access Modifiers on Apex Properties in Lightning Component Markup" and click **View Details** or click **Get Started**.
4. Test the behavior of components that use Apex classes with `private` or `protected` access modifiers on getters.

#### SEE ALSO:

[Release Updates \(Beta\)](#)

## Security Alerts: Restricted Access to `@AuraEnabled` Apex Methods Based on User Profile

We have a few security alerts.

#### IN THIS SECTION:

[Restrict Access to `@AuraEnabled` Apex Methods for Guest and Portal Users Based on User Profile \(Security Alert\)](#)

This security alert is related to an update that gives you more control over which guest, portal, and community users can access Apex classes with `@AuraEnabled` methods in Aura and Lightning web components.

[Restrict Access to `@AuraEnabled` Apex Methods for Authenticated Users Based on User Profile \(Security Alert\)](#)

This security alert is related to an update that gives you more control over which authenticated users can access Apex classes with `@AuraEnabled` methods in Aura and Lightning web components.

### Restrict Access to `@AuraEnabled` Apex Methods for Guest and Portal Users Based on User Profile (Security Alert)

This security alert is related to an update that gives you more control over which guest, portal, and community users can access Apex classes with `@AuraEnabled` methods in Aura and Lightning web components.

**Where:** This change applies to Aura and Lightning web components in Lightning communities, portals, and Salesforce Sites.

**Why:** When the associated update is activated, a guest, portal, or community user can access an `@AuraEnabled` Apex method only when the user's profile allows access to the Apex class. The update enforces user profile restrictions for Apex classes used by Aura and Lightning web components.

**How:** To view the security alert and see recommendations for your org, enter *Security Alerts* in the Quick Find box in Setup and select **Security Alerts**.

SEE ALSO:

[Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile \(Update, Postponed\)](#)

[Release Updates \(Beta\)](#)

## Restrict Access to `@AuraEnabled` Apex Methods for Authenticated Users Based on User Profile (Security Alert)

This security alert is related to an update that gives you more control over which authenticated users can access Apex classes with `@AuraEnabled` methods in Aura and Lightning web components.

**Where:** This change applies to Aura and Lightning web components in Lightning Experience, Salesforce Classic, Lightning communities, and all versions of the Salesforce app.

**Why:** When the associated update is activated, an authenticated user can access an `@AuraEnabled` Apex method only when the user's profile allows access to the Apex class. This update enforces user profile restrictions for Apex classes used by Aura and Lightning web components.

**How:** To view the security alert and see recommendations for your org, enter *Security Alerts* in the Quick Find box in Setup and select **Security Alerts**.

SEE ALSO:

[Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile \(Update, Postponed\)](#)

[Release Updates \(Beta\)](#)

## Einstein Platform Services: Image Recognition and Natural Language Processing

Not a data scientist or machine-learning expert, but still want to integrate AI into your apps? Use the Einstein Platform Services APIs to easily AI-enable your apps with image recognition and natural language processing. Using the Einstein Vision APIs, you can leverage pre-trained classifiers or train custom classifiers to solve a vast array of image recognition use cases. With the Einstein Language APIs, you can harness the power of natural language processing to analyze text and infer the sentiment or intent behind the text. Make your apps smarter and look like a genius at the same time.

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IN THIS SECTION:

[Einstein Vision: Detect Text in Images with Einstein OCR, Detect Products on Shelves with an Optimized Algorithm](#)

Get optical character recognition (OCR) models that detect alphanumeric text in an image with Einstein OCR. You access the models from a single REST API endpoint. Use the retail algorithm to create a model that's optimized for retail execution scenarios.

[Einstein Language: Build Einstein Intent Models in Multiple Languages, Create Einstein Intent Models That Support Out-of-Domain Text](#)

Einstein Intent datasets and models now support these languages: English (US), English (UK), French, German, Italian, Portuguese, and Spanish. Einstein Intent lets you create a model that handles predictions for unexpected, out-of-domain, text.

## Einstein Vision: Detect Text in Images with Einstein OCR, Detect Products on Shelves with an Optimized Algorithm

Get optical character recognition (OCR) models that detect alphanumeric text in an image with Einstein OCR. You access the models from a single REST API endpoint. Use the retail algorithm to create a model that's optimized for retail execution scenarios.

### IN THIS SECTION:

#### [Detect Text in an Image with Einstein OCR \(Generally Available\)](#)

Get optical character recognition (OCR) models that detect alphanumeric text in an image with Einstein OCR. Access the models from a single REST API endpoint. Each model has specific use cases, such as business card scanning, product lookup, and digitizing documents and tables.

#### [Detect Products on Retail Shelves with an Optimized Algorithm](#)

Improve your retail execution scenarios that identify products on shelves. Now you can use an optimized algorithm to create a model with detection accuracy (mAP) that's better for a retail use case. And it still has the same functionality as a model created using the standard detection algorithm.

### SEE ALSO:

[Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Vision](#)

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## Detect Text in an Image with Einstein OCR (Generally Available)

Get optical character recognition (OCR) models that detect alphanumeric text in an image with Einstein OCR. Access the models from a single REST API endpoint. Each model has specific use cases, such as business card scanning, product lookup, and digitizing documents and tables.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

**How:** When you call the API, you send in an image, and the JSON response contains various elements based on the value of the `task` parameter.

- String of alphanumeric characters that the model predicts.
- Confidence (probability) that the detected bounding box contains text.
- XY coordinates for the location of the character string within the image (also called a bounding box).
- For tabular data, the table row and column in which the text is located.
- For business cards, the entity type of the detected text such as ORG, PERSON, and so on.

Here's what a cURL call to the OCR endpoint looks like.

```
curl -X POST -H "Authorization: Bearer <TOKEN>" -F sampleLocation="https://www.publicdomainpictures.net/pictures/24000/velka/emergency-evacuation-route-signpost.jpg" -F task="text" -F modelId="OCRModel" https://api.einstein.ai/v2/vision/ocr
```



The response JSON returns the text and coordinates of a bounding box (in pixels) for that text.

```
{  
  "task": "text",  
  "probabilities": [  
    {  
      "probability": 0.99937266,  
      "label": "ROUTE",  
      "boundingBox": {  
        "minX": 582,  
        "minY": 685,  
        "maxX": 1151,  
        "maxY": 815  
      }  
    },  
    {  
      "probability": 0.99471515,  
      "label": "EMERGENCY",  
      "boundingBox": {  
        "minX": 361,  
        "minY": 208,  
        "maxX": 1383,  
        "maxY": 346  
      }  
    },  
    {  
      "probability": 0.99469215,  
      "label": "EVACUATION",  
      "boundingBox": {  
        "minX": 331,  
        "minY": 438,  
        "maxX": 1401,  
        "maxY": 570  
      }  
    }]
```

```
        }
    ],
    "object": "predictresponse"
}
```

## SEE ALSO:

[Einstein Platform Services Developer Guide: What is Einstein OCR?](#)

[Einstein Platform Services Developer Guide: Detect Text](#)

## Detect Products on Retail Shelves with an Optimized Algorithm

Improve your retail execution scenarios that identify products on shelves. Now you can use an optimized algorithm to create a model with detection accuracy (mAP) that's better for a retail use case. And it still has the same functionality as a model created using the standard detection algorithm.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

**How:** To use the retail execution algorithm, first create a dataset that has a type of `image-detection`. Then when you train the dataset to create a model, you specify an algorithm of `retail-execution`. The cURL command is as follows.

```
curl -X POST -H "Authorization: <TOKEN>" -H "Cache-Control: no-cache" -H "Content-Type: multipart/form-data" -F "name=Alpine Retail Model" -F "datasetId=<DATASET_ID>" -F "algorithm=retail-execution" https://api.einstein.ai/v2/vision/train
```

These calls take the `algorithm` parameter.

- Train a model—POST /v2/vision/train
- Retrain a model—POST /v2/vision/retrain

## SEE ALSO:

[Einstein Platform Services Developer Guide: Detect Products on Shelves with an Optimized Algorithm](#)

## Einstein Language: Build Einstein Intent Models in Multiple Languages, Create Einstein Intent Models That Support Out-of-Domain Text

Einstein Intent datasets and models now support these languages: English (US), English (UK), French, German, Italian, Portuguese, and Spanish. Einstein Intent lets you create a model that handles predictions for unexpected, out-of-domain, text.

## IN THIS SECTION:

[Einstein Intent Now Supports Multiple Languages](#)

Einstein Intent datasets and models now support these languages: English (US), English (UK), French, German, Italian, Portuguese, Spanish, Chinese (Simplified) (beta), Chinese (Traditional) (beta), and Japanese (beta). You specify the language when you create an intent dataset. When you train that dataset, the model inherits the language of the dataset.

[Create Einstein Intent Models That Support Out-of-Domain Text](#)

Einstein Intent lets you create a model that handles predictions for unexpected, out-of-domain, text. Out-of-domain text is text that doesn't fall into any of the labels in the model.

### [Detect Entities in Text with the Einstein Named Entity Recognition \(NER\) Model \(Beta\)](#)

The Einstein NER model takes unstructured text data and identifies entities within that text. You send text to the NER model via the REST API endpoint and receive a JSON response. The NER model supports these entities: date/time, duration, email, location, money, number, organization, percent, person, phone number, and URL.

#### SEE ALSO:

[Einstein Platform Services Developer Guide: Introduction to Salesforce Einstein Language](#)

[Salesforce Einstein: Better Results in Einstein Search, Detect Text in Images with Einstein OCR, and Better Einstein Discovery Predictions from More Modeling Algorithms](#)

## Einstein Intent Now Supports Multiple Languages

Einstein Intent datasets and models now support these languages: English (US), English (UK), French, German, Italian, Portuguese, Spanish, Chinese (Simplified) (beta), Chinese (Traditional) (beta), and Japanese (beta). You specify the language when you create an intent dataset. When you train that dataset, the model inherits the language of the dataset.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

As a beta feature, Chinese (Simplified), Chinese (Traditional), and Japanese language support is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

**How:** Two new API parameters enable multilanguage support: `language` and `algorithm`. When you create the dataset, you specify the language in the `language` parameter. When you train the dataset to create a model, you pass in the `algorithm` parameter with a value of `multilingual-intent` or `multilingual-intent-ood` (to create a model that handles out-of-domain predictions). These calls take the `language` parameter.

- Create a dataset asynchronously—`POST /v2/language/datasets/upload`
- Create a dataset synchronously—`POST /v2/language/datasets/upload/sync`

These calls take the `algorithm` parameter.

- Train a dataset—`POST /v2/language/train`
- Retrain a dataset—`POST /v2/language/retrain`

#### SEE ALSO:

[Einstein Platform Services Developer Guide: How to Implement Multiple Languages](#)

[Einstein Platform Services Developer Guide: Create a Dataset From a File Asynchronously](#)

[Einstein Platform Services Developer Guide: Create a Dataset Synchronously](#)

[Einstein Platform Services Developer Guide: Train a Dataset](#)

[Einstein Platform Services Developer Guide: Retrain a Dataset](#)

## Create Einstein Intent Models That Support Out-of-Domain Text

Einstein Intent lets you create a model that handles predictions for unexpected, out-of-domain, text. Out-of-domain text is text that doesn't fall into any of the labels in the model.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

**How:** When you train an intent dataset, pass the `algorithm` parameter with a value of `multilingual-intent-ood`. To see how the algorithm works, let's say you have a case routing model with five labels: Billing, Order Change, Password Help, Sales Opportunity, and Shipping Info. The following text comes in for prediction: "What is the weather in Los Angeles?" If the model was created using the standard algorithm, the response looks like this JSON.

```
{
  "probabilities": [
    {
      "label": "Sales Opportunity",
      "probability": 0.9987062
    },
    {
      "label": "Shipping Info",
      "probability": 0.0008089547
    },
    {
      "label": "Order Change",
      "probability": 0.00046194126
    },
    {
      "label": "Billing",
      "probability": 0.000021637188
    },
    {
      "label": "Password Help",
      "probability": 0.0000012197639
    }
  ],
  "object": "predictresponse"
}
```

The text sent for prediction clearly doesn't fall into any of the labels. The model isn't designed to handle predictions that don't match one of the labels, so the model returns the labels with the best probability. If you create the model with the `multilingual-intent-ood` algorithm, and you send the same text for prediction, the response returns an empty `probabilities` array.

```
{
  "probabilities": [ ],
  "object": "predictresponse"
}
```

These calls take the `algorithm` parameter.

- Train a dataset—`POST /v2/language/train`

- Retrain a dataset—POST /v2/language/retrain

**SEE ALSO:**

[Einstein Platform Services Developer Guide: How to Handle Out-of-Domain Text](#)

[Einstein Platform Services Developer Guide: Train a Dataset](#)

[Einstein Platform Services Developer Guide: Retrain a Dataset](#)

## Detect Entities in Text with the Einstein Named Entity Recognition (NER) Model (Beta)

The Einstein NER model takes unstructured text data and identifies entities within that text. You send text to the NER model via the REST API endpoint and receive a JSON response. The NER model supports these entities: date/time, duration, email, location, money, number, organization, percent, person, phone number, and URL.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Group, Professional, Enterprise, Performance, Unlimited, Developer, and Contact Manager editions.

As a beta feature, Einstein NER is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

**How:** Here's what a cURL call to the NER endpoint looks like.

```
curl -X POST -H "Authorization: Bearer <TOKEN>" -F "document=Marc Benioff, the CEO of
Salesforce, gave the keynote speech at the conference in Paris last week."
https://api.einstein.ai/v2/language/entities
```

In the response JSON, you can see that the API detected a person, an organization, a location, and a datetime.

```
{
  "probabilities": [
    {
      "probability": 0.99966216,
      "label": "PERSON",
      "token": "Marc Benioff",
      "span": {
        "start": 0,
        "end": 12
      },
      "normalizedData": [
        {
          "firstName": "Marc",
          "lastName": "Benioff",
          "type": "person"
        }
      ]
    },
    {
      "probability": 0.9469566,
      "label": "ORGANIZATION",
      "token": "Salesforce",
      "span": {
```

```
        "start": 25,
        "end": 35
    },
    "normalizedData": []
},
{
    "probability": 0.9990157,
    "label": "LOCATION",
    "token": "Paris",
    "span": {
        "start": 82,
        "end": 87
    },
    "normalizedData": []
},
{
    "probability": 0.9569175,
    "label": "DATETIME",
    "token": "last week",
    "span": {
        "start": 88,
        "end": 97
    },
    "normalizedData": [
        {
            "value": "2020-07-20T00:00:00.000-07:00",
            "unit": "week",
            "type": "value"
        }
    ]
},
],
"object": "predictresponse"
}
```

## SEE ALSO:

[Einstein Platform Services Developer Guide: What is Einstein NER?](#)

[Einstein Platform Services Developer Guide: Detect Entities in Text](#)

## Visualforce: Lightning Message Service (Generally Available), Date Picker Gets A New Look in Android

Communicate across Visualforce, Aura, and Lightning Web Components with Lightning message service. The date picker in the Salesforce mobile app for Android now has the native Android display.

For more information on features affected by these enhancements, refer to the [Visualforce Developer Guide](#).

## IN THIS SECTION:

### [Communicate Across Salesforce UI Technologies with the Lightning Message Service \(Generally Available\)](#)

Use Lightning message service to communicate across the DOM—between Visualforce pages, Aura components, and Lightning web components, including components in a utility bar. You can use it to communicate between components within a single Lightning page or across multiple pages. If you’re switching from Salesforce Classic to Lightning Experience, you can build Lightning web components that communicate with existing Visualforce pages and Aura components.

### [Shorten Your Visualforce URLs \(Update, Postponed\)](#)

We’re removing the instance names from Visualforce, Experience Builder, Site.com Studio, and content file URLs. Released in Spring '18, the “Remove Instance Names from URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files” update will be activated on July 11, 2020 in sandbox orgs on Summer '20. But, activation in production orgs is postponed to Winter '21.

### [Prevent Consecutive API Navigation Calls in Visualforce Pages \(Update\)](#)

In Visualforce pages, API navigation calls can be fired consecutively, which can lead to unwanted behavior. This release update prevents this API navigation call pattern, firing only the first navigation call.

### [Update sforce.one Object Targeting for Nested iframes](#)

For nested iframes in Visualforce, we changed the `sforce.one` object's targeting from the top frame to the parent. We made this change to improve communication between nested iframes in Visualforce and Lightning UIs.

### [Update Visualforce Pages for Native Android Date Picker](#)

We changed the display of the date picker in the Salesforce mobile app for Android from a custom Android calendar to the native Android one. The date picker no longer shows on Android for components with a `datetime` attribute type.

### [Access Controllers From Visualforce Pages in Different Packages with @namespaceAccessible](#)

To access an Apex controller from a Visualforce page that is in a different package, use the `@namespaceAccessible` Apex annotation. By default, Visualforce pages installed in a second-generation packages can't call a public Apex method from an Apex class in another package.

### [Permission Changes for Visualforce Page Info](#)

Access to `ApexPageInfo` is limited to users who can view the specific Visualforce page, and users with the View Setup and Configuration permission.

### [See Refreshed Data When Editing Records on Visualforce Pages](#)

When you edit a record in Lightning, the user interface is refreshed immediately as needed. Before Summer '20, if you edited a record from a Visualforce page, the record data was updated but not immediately refreshed in the user interface. Now, in certain scenarios, when you edit a record from a Visualforce page, the data refreshes immediately in the user interface.

### [New Attribute on <apex:inputField> Overrides Entity Edit Permissions](#)

The new `ignoreEditPermissionForRendering` attribute on `<apex:inputField>` allows you to override entity edit permissions for users, even when the underlying permission on the object doesn't allow edits.

## Communicate Across Salesforce UI Technologies with the Lightning Message Service (Generally Available)

Use Lightning message service to communicate across the DOM—between Visualforce pages, Aura components, and Lightning web components, including components in a utility bar. You can use it to communicate between components within a single Lightning page or across multiple pages. If you’re switching from Salesforce Classic to Lightning Experience, you can build Lightning web components that communicate with existing Visualforce pages and Aura components.

## SEE ALSO:

[Communicate Across Salesforce UI Technologies with Lightning Message Service \(Generally Available\)](#)

## Shorten Your Visualforce URLs (Update, Postponed)

We're removing the instance names from Visualforce, Experience Builder, Site.com Studio, and content file URLs. Released in Spring '18, the "Remove Instance Names from URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files" update will be activated on July 11, 2020 in sandbox orgs on Summer '20. But, activation in production orgs is postponed to Winter '21.

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

SEE ALSO:

[Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files \(Update, Postponed\)](#)

[Release Updates \(Beta\)](#)

## Prevent Consecutive API Navigation Calls in Visualforce Pages (Update)

In Visualforce pages, API navigation calls can be fired consecutively, which can lead to unwanted behavior. This release update prevents this API navigation call pattern, firing only the first navigation call.

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

**When:** Salesforce enforces this update in Spring '21. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**Why:** Firing consecutive API navigation calls in a Visualforce page can lead to unwanted behavior due to competing API calls. To prevent any issues, with this release update, only the first API navigation call is accepted. This release update ensures predictable and stable behavior in your org.

**How:** Any Visualforce pages that use this API navigation pattern are impacted. Review all affected Visualforce pages. Salesforce will provide a replacement pattern in the future. Alternatively, edit your pages to use Lightning components instead.

SEE ALSO:

[Release Updates \(Beta\)](#)

## Update `sforce.one` Object Targeting for Nested iframes

For nested iframes in Visualforce, we changed the `sforce.one` object's targeting from the top frame to the parent. We made this change to improve communication between nested iframes in Visualforce and Lightning UIs.

**Where:** This change applies to Lightning Experience, Lightning on Mobile, and Lightning Communities.

**How:** If you use `sforce.one` functions in an iframe nested within another Visualforce page, the nested page must ask its parent page to invoke the API on its behalf. Use the browser's `window.parent.postMessage()` API to post to the parent page. Then, use the `window.parent.postMessage()` API again to post to the parent Lightning frame.

SEE ALSO:

[Visualforce Developer Guide: How `sforce.one` Handles API Versions](#)

[Visualforce Developer Guide: Navigation and Messaging with the `sforce.one` Object](#)

## Update Visualforce Pages for Native Android Date Picker

We changed the display of the date picker in the Salesforce mobile app for Android from a custom Android calendar to the native Android one. The date picker no longer shows on Android for components with a `datetime` attribute type.

**Where:** This change applies to Visualforce pages in the Salesforce mobile app on Android devices.

**How:** The following components have an updated look and feel depending on your version of the Android OS.

- `<apex:input type="date">`
- `<apex:input type="datetime">`
- `<apex:input type="datetime-local">`
- `<apex:input type="month">`
- `<apex:selectList>`
- `<apex:input type="time">`
- `<apex:input type="week">`

Replace Visualforce `datetime` inputs like `<apex:input type="datetime">` and `<input type="datetime">` with the type `datetime-local`.

 **Note:** In the Android mobile app, the component `<apex:inputField>` always uses the native Android date picker instead of the Visualforce date picker.

The updated Android interface depends on the version of Android OS that you run.

## Access Controllers From Visualforce Pages in Different Packages with `@namespaceAccessible`

To access an Apex controller from a Visualforce page that is in a different package, use the `@namespaceAccessible` Apex annotation. By default, Visualforce pages installed in a second-generation packages can't call a public Apex method from an Apex class in another package.

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

**How:** Include the `@namespaceAccessible` Apex annotation in your custom controller class so that Visualforce pages can access controllers that are in another package.

SEE ALSO:

[Visualforce Developer Guide: Access Controllers From Visualforce Pages in Different Packages with `@namespaceAccessible`](#)

## Permission Changes for Visualforce Page Info

Access to `ApexPageInfo` is limited to users who can view the specific Visualforce page, and users with the View Setup and Configuration permission.

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

SEE ALSO:

[Knowledge Article: User Profile Permission Descriptions](#)

[Object Reference for Salesforce and Lightning Platform: `ApexPageInfo`](#)

## See Refreshed Data When Editing Records on Visualforce Pages

When you edit a record in Lightning, the user interface is refreshed immediately as needed. Before Summer '20, if you edited a record from a Visualforce page, the record data was updated but not immediately refreshed in the user interface. Now, in certain scenarios, when you edit a record from a Visualforce page, the data refreshes immediately in the user interface.

**Where:** This change applies to Lightning Experience only. It does not apply to Salesforce communities or the Salesforce app.

**When:** This functionality is available on a rolling basis starting with the Summer '20 release. To find out when it's available for your production org, contact your account executive.

**How:** This feature applies only to these scenarios in Lightning Experience:

- When you edit a record—not a related record—from a Visualforce override page.
- When you edit a record—not a related record—from a Visualforce page that's embedded in the record's homepage.

When you edit a record from a Visualforce page in one of these scenarios, the updated data refreshes in the user interface immediately.

## New Attribute on <apex:inputField> Overrides Entity Edit Permissions

The new `ignoreEditPermissionForRendering` attribute on `<apex:inputField>` allows you to override entity edit permissions for users, even when the underlying permission on the object doesn't allow edits.

SEE ALSO:

[Override Entity Permissions When Using <apex:inputField>](#)

## Packaging: Push Upgrades Available for Unlocked and Second-Generation Managed Packages (Beta), Try Org-Dependent Unlocked Packages (Beta)

We extended the push upgrade API to enable you to schedule and push upgrades to unlocked and second-generation managed packages. Use org-dependent unlocked packages when untangling your org's metadata is difficult. Explore an early preview of first-generation managed package conversion.

IN THIS SECTION:

[Schedule and Push Upgrades to Unlocked and Second-Generation Managed Packages \(Beta\)](#)

We extended the `PackagePushRequest` SOAP API object to enable push upgrades to unlocked and second-generation managed packages. You can choose which orgs receive a package upgrade, what version the package is upgraded to, and when you want the upgrade to occur. Query the `PackagePushJob` and `PackagePushError` SOAP API objects to track the status of each job, see which upgrades succeeded, and review any error messages.

[Can't Untangle Your Metadata? Try Org-Dependent Unlocked Packages \(Beta\)](#)

Org-dependent unlocked packages are a variation of unlocked packages that allow you to create packages that depend on unpackaged metadata in the installation org. You can use org-dependent unlocked packages when untangling your production org metadata is a daunting project. When you use org-dependent unlocked packages, metadata validation occurs during package installation, instead of during package version creation.

[Get an Early Look at Converting First-Generation Managed Packages \(Developer Preview\)](#)

This developer preview provides a sneak peek into how we are designing the conversion of first-generation managed packages to second-generation managed packages. The preview allows you to convert a first-generation managed package, and install the newly created second-generation managed package in scratch orgs only. Try it out, and share your experiences with us.

[Get Ready for Unlocked Package Code Coverage Enforcement](#)

Computing code coverage helps validate that the Apex code in your unlocked packages has adequate test coverage. Starting in Winter '21, a minimum 75% code coverage is required for package version promotion. Package versions created in Winter '21 and later, that don't meet this code coverage, can only be installed in scratch orgs and sandboxes.

## Schedule and Push Upgrades to Unlocked and Second-Generation Managed Packages (Beta)

We extended the PackagePushRequest SOAP API object to enable push upgrades to unlocked and second-generation managed packages. You can choose which orgs receive a package upgrade, what version the package is upgraded to, and when you want the upgrade to occur. Query the PackagePushJob and PackagePushError SOAP API objects to track the status of each job, see which upgrades succeeded, and review any error messages.

**Where:** This change applies to installed versions of unlocked and second-generation managed packages.

As a beta feature, Push Upgrades for Unlocked and Second-Generation Managed Packages is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Push Upgrade for Unlocked and Second-Generation Managed Package in the [Unlocked Packages](#) group in the Trailblazer Community or the [Managed Packages](#) group in the Partner Community

**Who:** Users need the System Administrator profile or the Create and Update Second-Generation Packages permission.

**Why:** Owners of unlocked and second-generation managed packages can now push package upgrades without burdening subscribers with that step. This functionality is crucial if you must push a change for a hot bug fix.

### SEE ALSO:

[Salesforce DX Developer Guide: Push a Package Upgrade](#)

[SOAP API Developer Guide: PackagePushRequest](#)

[SOAP API Developer Guide: PackagePushJob](#)

## Can't Untangle Your Metadata? Try Org-Dependent Unlocked Packages (Beta)

Org-dependent unlocked packages are a variation of unlocked packages that allow you to create packages that depend on unpackaged metadata in the installation org. You can use org-dependent unlocked packages when untangling your production org metadata is a daunting project. When you use org-dependent unlocked packages, metadata validation occurs during package installation, instead of during package version creation.

**Where:** This change applies to unlocked packages created using Salesforce CLI.

As a beta feature, Org-Dependent Unlocked Packages is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Org-Dependent Unlocked Packages in the [Trailblazer Community](#).

**Who:** Users need the System Administrator profile or the Create and Update Second-Generation Packages permission.

**Why:** Longstanding and large production orgs often accumulate large amounts of metadata that are difficult to modularize when adopting a package-based Application Lifecycle Management (ALM) approach. With org-dependent unlocked packages, customers with large and complex orgs can now use unlocked packages without being required to resolve all of their metadata dependencies.



**Note:** Org-dependent unlocked packages are a variation of unlocked packages, and not a separate package type. They follow the same [package development steps](#), and use the same supported [metadata types](#) as unlocked packages.

**How:** To enable packaging, first enable Dev Hub. From Setup, enter *Dev Hub* in the Quick Find box, and select **Dev Hub**. Then select **Enable Dev Hub**, and select **Enable Unlocked Packages and Second-Generation Managed Packages**.

Use the `orgdependent` CLI parameter on the `package:create` CLI command.

Then consider using Source Tracking in Sandboxes (Beta), to develop your org-dependent unlocked package.

## Get an Early Look at Converting First-Generation Managed Packages (Developer Preview)

This developer preview provides a sneak peek into how we are designing the conversion of first-generation managed packages to second-generation managed packages. The preview allows you to convert a first-generation managed package, and install the newly created second-generation managed package in scratch orgs only. Try it out, and share your experiences with us.

**Where:** This change applies to managed package versions created using Salesforce CLI or Tooling API.

First-Generation Managed Package Conversion is available as a developer preview. It isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. All commands, parameters, and other features are subject to change or deprecation at any time, with or without notice. Don't implement functionality developed with these commands or tools.

**How:** For details on participating in this developer preview, watch for a post in the [Managed Packages](#) group in the Partner Community.

## Get Ready for Unlocked Package Code Coverage Enforcement

Computing code coverage helps validate that the Apex code in your unlocked packages has adequate test coverage. Starting in Winter '21, a minimum 75% code coverage is required for package version promotion. Package versions created in Winter '21 and later, that don't meet this code coverage, can only be installed in scratch orgs and sandboxes.

**Where:** This change applies to unlocked package versions created using Salesforce CLI or Tooling API.

**When:** This change takes effect in Winter '21. Unlocked package versions that are promoted to the released state before Winter '21 won't be subject to code coverage requirements.

**How:** You can use the `CalculateCodeCoverage` field in the `Package2VersionCreateRequest` object or the `codecoverage` CLI parameter on the `force:package:version:create` when you create a package version.

### SEE ALSO:

[Salesforce DX Developer Guide: Code Coverage for Unlocked Packages](#)

## Apex

The new `@JsonAccess` annotation controls how to serialize and deserialize Apex types. The new `ConcurLongRunApexErrEvent` standard platform event for Real-Time Event Monitoring detects concurrent long-running Apex errors. The release update “Enable Improved Caching of Org Schema” now has its auto-activation date advanced to August 12, 2020 from August 9, 2021. Two release updates require that users have the “View Setup and Configuration” permission to access `AsyncApexJob`, `ApexTestResult` and several other objects. The Transaction Finalizers feature (introduced in Spring '20) is enhanced with the `FinalizerContext.getRequestId()` method, which returns the request ID of the Finalizer execution.

For more information on these enhancements, refer to the [Apex Developer Guide](#).

### IN THIS SECTION:

#### [Control How to Serialize and Deserialize Apex Types](#)

The new `@JsonAccess` annotation defined at Apex class level controls whether instances of the class can be serialized or deserialized. If the annotation restricts JSON serialization and deserialization, a runtime `JSONException` exception is thrown.

#### [Detect Errors When an Org Exceeds the Concurrent Long-Running Apex Limit](#)

Track errors with the new `ConcurLongRunApexErrEvent` Real-Time Event Monitoring event. Use this event to get notified whenever a new Apex request fails to start because your org has exceeded the concurrent long-running Apex request limit. If a high volume of these events occur concurrently in an org, we may rate limit the events based on resource availability. In such cases, refer to [Apex-related EventLogFile events](#) for a complete list of events.

#### [Enable Improved Caching of Org Schema \(Previously Released Update\)](#)

Improved caching of org schema resolves known issues with version-specific object and field handling. The auto-activation (enforcement) date is now advanced, by almost a year, to August 12, 2020 from August 9, 2021. Sandbox orgs that are upgraded to Summer '20 have this update enabled by default. You can manually disable the update until it is auto-activated.

#### [Require View Setup Permission to Enqueue Async Apex Jobs \(Update\)](#)

Improve security for your Salesforce org with this update. Users must have the “View Setup and Configuration” permission to access the `AsyncApexJob` and `FlexQueueItem` objects in SOAP API when this update is enabled.

#### [Require View Setup Permission to Access Apex Test Data \(Update\)](#)

Improve security for your Salesforce org with this update. When this update is enabled, users must have the “View Setup and Configuration” permission to access these SObjects: `ApexTestQueueItem`, `ApexTestResult`, `ApexTestResultLimits`, `ApexTestRunResult`, `ApexTestSuite`, and `TestSuiteMembership`.

#### [Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers \(Pilot\)](#)

With Summer '20, we enhance the Transaction Finalizers feature with a `FinalizerContext.getRequestId()` method, which returns the request ID of the Finalizer execution.

#### [Delete up to 2,000 Big Object Records in Batch](#)

The `deleteImmediate()` method now supports batch deletes of up to 2,000 big object records at a time, which is consistent with the SOAP API limits for the `deleteByExample()` method.

#### [Push Notification Limits Have Increased](#)

You can send up to 20,000 iOS and 10,000 Android push notifications per hour per org.

#### [Create Custom Property Editors for Invocable Actions \(Beta\)](#)

Create a custom property editor that makes it a snap for an admin to configure a custom invocable action in Flow Builder. The custom property editor is simply a Lightning web component..

### SEE ALSO:

#### [Apex: New and Changed Items](#)

## Control How to Serialize and Deserialize Apex Types

The new `@JsonAccess` annotation defined at Apex class level controls whether instances of the class can be serialized or deserialized. If the annotation restricts JSON serialization and deserialization, a runtime `JSONException` exception is thrown.

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

**How:** The `Serializable` and `Deserializable` parameters of the `@JsonAccess` annotation enforce the contexts in which Apex allows serialization and deserialization. You can specify one or both parameters, but you can't specify the annotation with no parameters. The valid values for the parameters to indicate whether serialization and deserialization are allowed:

- `never`: never allowed
- `sameNamespace`: allowed only for Apex code in the same namespace
- `samePackage`: allowed only for Apex code in the same package (impacts only second-generation packages)
- `always`: always allowed for any Apex code

In versions 48.0 and earlier, the default access for deserialization is `always` and the default access for serialization is `sameNamespace` to preserve the existing behavior. From version 49.0 onwards, the default access for both serialization and deserialization is `sameNamespace`.

This example code shows an Apex class marked with the `@JsonAccess` annotation.

```
@JsonAccess(serializable='never' deserializable='sameNamespace')
public class Foo {}
```

## Detect Errors When an Org Exceeds the Concurrent Long-Running Apex Limit

Track errors with the new `ConcurLongRunApexErrEvent` Real-Time Event Monitoring event. Use this event to get notified whenever a new Apex request fails to start because your org has exceeded the concurrent long-running Apex request limit. If a high volume of these events occur concurrently in an org, we may rate limit the events based on resource availability. In such cases, refer to [Apex-related EventLogFile events](#) for a complete list of events.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Enterprise, Unlimited, and Developer editions where Event Monitoring is enabled.

**Who:** Event Monitoring is available to customers who purchase Salesforce Shield or Event Monitoring add-on subscriptions.

SEE ALSO:

[Platform Events Developer Guide: ConcurLongRunApexErrEvent](#) (can be outdated or unavailable during release preview)

## Enable Improved Caching of Org Schema (Previously Released Update)

Improved caching of org schema resolves known issues with version-specific object and field handling. The auto-activation (enforcement) date is now advanced, by almost a year, to August 12, 2020 from August 9, 2021. Sandbox orgs that are upgraded to Summer '20 have this update enabled by default. You can manually disable the update until it is auto-activated.

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

**When:** This update is automatically enforced on August 12, 2020 and has been available for activation since Spring '20.

 **Note:** The auto-activation (enforcement) date is now advanced, by almost a year, to August 12, 2020 from August 9, 2021. Sandbox orgs that are upgraded to Summer '20 have this update enabled by default. You can manually disable the update until the automatic enforcement date. To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

**How:** To apply this update, from Setup, in the Quick Find box, enter Release Updates, and select **Release Updates**. Then select this Release Update.

**Why:** This update fixes known bugs by improving internal systems that define and cache org schema, including standard objects, custom objects, and their fields. The documented behavior of your org's schema remains unchanged. The update fixes bugs where the documentation doesn't match the known behavior. This update also resolves rare, intermittent cases where undocumented object types are visible in Apex describe result methods or where version-specific schema details are improperly reused.

SEE ALSO:

[Knowledge Article: Auto-activation date for "Enable Improved Caching of Org Schema" Critical Update is August 12, 2020](#)  
[Release Updates \(Beta\)](#)

## Require View Setup Permission to Enqueue Async Apex Jobs (Update)

Improve security for your Salesforce org with this update. Users must have the "View Setup and Configuration" permission to access the AsyncApexJob and FlexQueueItem objects in SOAP API when this update is enabled.

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

**When:** This update is automatically enforced on August 07, 2020.

**How:** To apply this update, from Setup, in the Quick Find box, enter Release Updates, and select **Release Updates**. Then select this Release Update.

Anonymous Apex used to enqueue Batch Apex, @future methods, Queueable methods, or Scheduled Apex jobs must be executed as users having the "View Setup and Configuration" permission.



**Note:** This update does not impact Apex classes and triggers, or other features running in system mode.

SEE ALSO:

[Release Updates \(Beta\)](#)

## Require View Setup Permission to Access Apex Test Data (Update)

Improve security for your Salesforce org with this update. When this update is enabled, users must have the "View Setup and Configuration" permission to access these SObjects: ApexTestQueueItem, ApexTestResult, ApexTestResultLimits, ApexTestRunResult, ApexTestSuite, and TestSuiteMembership.

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

**When:** This update is automatically enforced on August 07, 2020.

**How:** To apply this update, from Setup, in the Quick Find box, enter Release Updates, and select **Release Updates**. Then select this Release Update.

Anonymous Apex or the API to enqueue Apex tests or access data related to Apex tests must be executed as users having the "View Setup and Configuration" permission.



**Note:** This update does not impact Apex classes and triggers, or other features running in system mode.

SEE ALSO:

[Release Updates \(Beta\)](#)

## Attach Actions to Asynchronous Apex Jobs Using Transaction Finalizers (Pilot)

With Summer '20, we enhance the Transaction Finalizers feature with a `FinalizerContext.getRequestId()` method, which returns the request ID of the Finalizer execution.

**Where:** This change applies to Lightning Experience and Salesforce Classic only in scratch orgs that have enabled the feature during org creation. Because finalizers are currently in pilot and are available only in scratch orgs, do not attempt to package finalizers.

 **Note:** The TransactionFinalizers feature is available as a pilot program only in scratch orgs that have enabled the feature during org creation. The functionality of this feature is subject to change, and is not available for production organizations while in pilot. Pilot programs are subject to change. This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the [TransactionFinalizers](#) group in the [Trailblazer Community](#).

### How:

The `System.FinalizerContext` interface contains four methods.

- `getAsyncApexJobId` method: Returns the ID of the queueable job for which this finalizer is defined.
- `getRequestId` method: Returns the request ID shared by both the finalizer execution and the Queueable job to which the finalizer is attached. This shared ID helps in filtering logs of a Queueable job and its attached finalizer.
- `getResult` method: Returns the `System.ParentJobResult` enum, which represents the result of the parent asynchronous Apex queueable job to which the finalizer is attached. The enum takes these values: `SUCCESS`, `UNHANDLED_EXCEPTION`.
- `getException` method: Returns the exception with which the queueable job failed when `getResult` is `UNHANDLED_EXCEPTION`, null otherwise.

To attach actions to your queueable jobs, implement the `FinalizerContext` interface as follows.

1. Define a class that implements the `System.FinalizerContext` interface.
2. Attach a finalizer within a queueable job's `execute` method. To attach the finalizer, invoke the `System.attachFinalizer` method, using as argument the instantiated class that implements the `System.FinalizerContext` interface.

 **Note:** Only one finalizer instance can be attached to any queueable job. You can enqueue a single asynchronous Apex job (queueable, future, or batch) in the finalizer's implementation of the `execute` method. Callouts are allowed in finalizer implementations.

For more information on Transaction Finalizers, including examples, see [Transaction Finalizers \(Pilot\)](#) in *Apex Developer Guide*.

## Delete up to 2,000 Big Object Records in Batch

The `deleteImmediate()` method now supports batch deletes of up to 2,000 big object records at a time, which is consistent with the SOAP API limits for the `deleteByExample()` method.

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

## Push Notification Limits Have Increased

You can send up to 20,000 iOS and 10,000 Android push notifications per hour per org.

**Where:** This change applies to custom connected mobile apps that send push notifications via Apex code.

### SEE ALSO:

[Send More Push Notifications with Increased Limits](#)

## Create Custom Property Editors for Invocable Actions (Beta)

Create a custom property editor that makes it a snap for an admin to configure a custom invocable action in Flow Builder. The custom property editor is simply a Lightning web component..

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

As a beta feature, the support of custom property editors for custom invocable actions is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for custom property editors for custom invocable actions in the [Trailblazer Community](#).

**How:** See *Develop Custom Property Editors for Flow Builder (Beta)* in [Lightning Web Components Developer Guide](#).

### SEE ALSO:

[Configure Invocable Actions in Flow Builder More Easily \(Beta\)](#)

[Lightning Web Components Developer Guide: Flows](#)

## API

In API version 49.0, use Bulk API 2.0 to query the dependency relationships between metadata components in your Salesforce org. The concurrent API request limit for sandboxes has been fixed to match the documentation.



**Note:** Looking for [new and changed Einstein Analytics REST APIs](#)? In this release, we added the Einstein Analytics API updates with the other new and change items for APIs near the end of the Development section. We're still covering all the changes that you want to know about. Organizing all of the Salesforce API content in one place makes it easier to for developers to find. Let us know what you think. Use the feedback form on release note topics or tweet us at [@salesforcedocs](#).

### IN THIS SECTION:

[Understand Dependencies Between Metadata Components in Your Org Using the MetadataComponentDependency Object in Bulk API 2.0 \(Beta\)](#)

Use new Tooling API endpoints in Bulk API 2.0 to query the dependency relationships between metadata components in your Salesforce org. Understanding relationships helps you in different ways, such as finding unused custom fields and evaluating dependency relationships before making edits. Using these endpoints to query the `MetadataComponentDependency` object, you can retrieve up to 100,000 records in a single query.

[Corrected Concurrent API Request Limit for Sandboxes](#)

An issue that resulted in an allowed limit higher than what was documented has been fixed.

## Understand Dependencies Between Metadata Components in Your Org Using the `MetadataComponentDependency` Object in Bulk API 2.0 (Beta)

Use new Tooling API endpoints in Bulk API 2.0 to query the dependency relationships between metadata components in your Salesforce org. Understanding relationships helps you in different ways, such as finding unused custom fields and evaluating dependency relationships before making edits. Using these endpoints to query the `MetadataComponentDependency` object, you can retrieve up to 100,000 records in a single query.

**Where:** This feature is currently available only in sandboxes. To use Bulk API 2.0, the *API Enabled* permission must be enabled.



**Note:** As a beta feature, querying the MetadataComponentDependency Tooling API object using Bulk API 2.0 is a preview and not part of the “Services” under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn’t guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It’s offered as is and isn’t supported. Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for MetadataComponentDependency in the [Dependency API / Field Usage \(Beta\)](#) group in the Trailblazer Community.

**Why:** Salesforce orgs can get messy due to unchecked growth of inefficient customization and integrations, resulting in an org that is cluttered and unscalable. Finding the relationships between metadata components in your org can help you reduce complexity and unclutter your Salesforce org.

**How:** In previous releases, this type of query was accessible using Tooling API only. You can now query the MetadataComponentDependency object using Tooling API endpoints in Bulk API 2.0. To create a query job, issue a REST API POST request and include your SOQL query statement in the body of the request. For example,

URI:

```
/services/data/v49.0/tooling/jobs/query HTTP/1.1
```

Request Body:

```
{
  "operation": "query",
  "query": "select MetadataComponentType FROM MetadataComponentDependency"
}
```

- Only queries against the `MetadataComponentDependency` object are supported using the `/services/data/vXX.X/tooling` endpoint in Bulk API 2.0.
- Requests are returned in CSV format.
- You can also filter your query by adding a `WHERE` clause to narrow the results.

The following table lists the URLs and methods supported by Bulk API 2.0 for `MetadataComponentDependency` queries.

Description	URI	HTTP Method
Creates a query job.	<code>/services/data/vXX.X/tooling/jobs/query</code>	POST
Gets information about all query jobs in the org.	<code>/services/data/vXX.X/tooling/jobs/query</code>	GET
Gets information about one query job.	<code>/services/data/vXX.X/tooling/jobs/query/<b>queryJobId</b></code>	GET
Gets the results for a query job.	<code>/services/data/vXX.X/tooling/jobs/query/<b>queryJobId</b>/results</code>	GET
Aborts a query job.	<code>/services/data/vXX.X/tooling/jobs/query/<b>queryJobId</b></code>	PATCH
Deletes a query job.	<code>/services/data/vXX.X/tooling/jobs/query/<b>queryJobId</b></code>	DELETE

The following SOQL queries are not supported.

- SOQL ORDER BY clause
- SOQL SELECT clause—`count()` function
- SOQL `queryMore()`
- SOQL WHERE clause—Any type of filter with `MetadataComponentName`
- SOQL WHERE clause—Any type of filter with `RefMetadataComponentName`
- SOQL WHERE clause—Contains operators other than `=`, `!=`, AND, or OR
- SOQL WHERE clause—Filter by `(RefMetadataComponentType = 'StandardEntity')`
- SOQL WHERE clause—Use of the `LIKE` operator with either the `MetadataComponentType` field or `RefMetadataComponentType` field
- SOQL OFFSET clause

SEE ALSO:

[Tooling API: MetadataComponentDependency \(Beta\)](#)

## Corrected Concurrent API Request Limit for Sandboxes

An issue that resulted in an allowed limit higher than what was documented has been fixed.

**Where:** This change applies to the Enterprise Edition, Professional Edition with API access enabled, Unlimited Edition, and Performance Edition.

## Custom Metadata Types: Use CLI for Custom Metadata Types and Create Relationships to Elements of a Field

Use Salesforce CLI commands to create and manage custom metadata types. Declaratively define a custom metadata type relationship field that references an entity particle.

IN THIS SECTION:

[Create Relationships to Entity Particles from Custom Metadata Types](#)

Custom metadata types now support relationships to entity particles, which are compound elements of a field. For example, you can create a relationship to `Zip/Postal Code`, which is a compound element of the standard field `Address`.

[Custom Metadata Types CLI Commands](#)

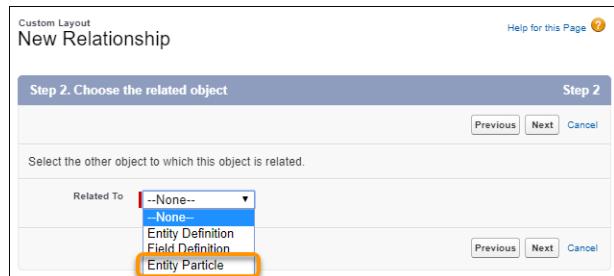
Salesforce CLI commands for custom metadata types are now generally available. These new commands simplify development and help you build automation and synchronize your source from scratch orgs when working with custom metadata types.

## Create Relationships to Entity Particles from Custom Metadata Types

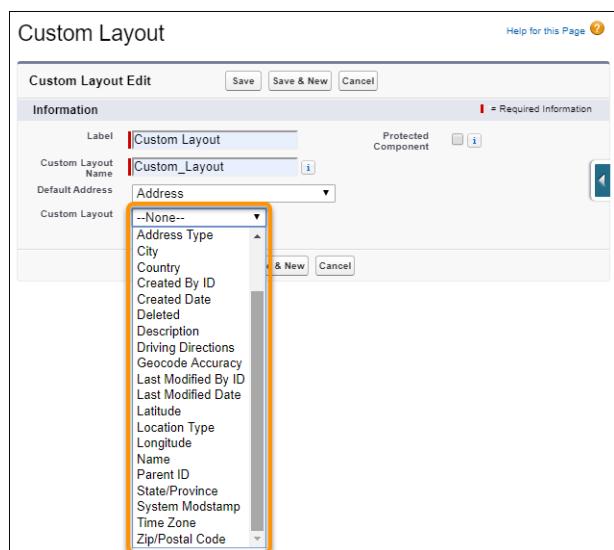
Custom metadata types now support relationships to entity particles, which are compound elements of a field. For example, you can create a relationship to `Zip/Postal Code`, which is a compound element of the standard field `Address`.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, Developer, and Database.com editions. Professional Edition orgs can create, edit, and delete custom metadata records only from types in installed packages.

**How:** To create a custom metadata relationship to an entity particle, first create an entity definition relationship field, then create an entity particle relationship field.



Now when you create a record for the custom metadata type, you can drill down and select a compound element for the relationship. For example, you can select *Zip/Postal Code* or *Time Zone*, which are compound elements of *Address*.



#### SEE ALSO:

[Custom Metadata Relationships](#)

## Custom Metadata Types CLI Commands

Salesforce CLI commands for custom metadata types are now generally available. These new commands simplify development and help you build automation and synchronize your source from scratch orgs when working with custom metadata types.

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

**When:** The Salesforce CLI custom metadata types commands are available in v49.0.

**How:** Use the `sfdx force:cmdt:create` command to create new custom metadata types, generate fields, create records, create records from a CSV file, and generate custom metadata types from an sObject.

- `sfdx force:cmdt:create` Creates a new custom metadata type in the current project.

- `sfdx force:cmdt:field:create` Generates a custom metadata field based on the field type provided.
- `sfdx force:cmdt:generate` Generates a custom metadata type and all its records for the provided sObject.
- `sfdx force:cmdt:record:create` Creates a new record for a given custom metadata type in the current project.
- `sfdx force:cmdt:record:insert` Creates new custom metadata type records from a CSV file.

For parameters and usage information, use the help parameter. For example, `sfdx force:cmdt:record:insert -h`.

#### SEE ALSO:

[Create and Manage Custom Metadata Types Using CLI Commands](#)

## Scratch Orgs: New Features

A scratch org is a dedicated and configurable Salesforce environment that you can quickly spin up for many different purposes. It can be your own personal development environment, or you can create a headless scratch org for automated tests. You can create scratch orgs if you turned on Dev Hub in your production org or a Developer Edition org, or have a Dev Hub trial org. We continually add support for new features.

For more information, see [Scratch Orgs](#) in the [Salesforce DX Developer Guide](#).

#### IN THIS SECTION:

[Create Scratch Orgs with More Features](#)

We're providing more configurable features for scratch orgs.

## Create Scratch Orgs with More Features

We're providing more configurable features for scratch orgs.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the Salesforce app in Developer, Enterprise, Group, and Professional editions.

**How:** Add the features to your scratch org definition file.

- CacheOnlyKeys
- EncryptionStatisticsInterval
- EncryptionSyncInterval
- MinKeyRotationInterval
- NonprofitCloudCaseManagementUser
- SFDOLinksDataIntegrityUser

## Deprecated Scratch Org Features

These scratch org features were deprecated in Summer '20. If your scratch org definition file specifies one of these features, delete the feature from the file. Scratch org creation fails if the definition file specifies a deprecated feature.

- DensityValue
- ExternalSharing (Enabled by default)

- ListCustomSettingCreation (Use SchemaSettings.enableListCustomSettingCreation Metadata API)

SEE ALSO:

[Salesforce DX Developer Guide: Scratch Org Definition Configuration Values](#)

## Sandboxes: Powerful New Ways to Secure your Data using Data Mask and Automatically Track Changes in Your Local Workspace (Beta)

Use new tools to secure personally identifiable information and other sensitive data in a sandbox. Enable source tracking for Developer and Developer Pro sandboxes (Beta). Salesforce CLI commands for sandbox operations are now generally available.

IN THIS SECTION:

[Powerful New Ways to Secure your Data using Data Mask](#)

Enhanced features give you powerful new ways to secure all your sensitive data. Admins can use Data Mask to automatically mask the data in a sandbox.

[Track Source Changes in Sandboxes Automatically \(Beta\)](#)

When source tracking is enabled in a Developer or Developer Pro sandbox, the sandbox automatically tracks changes between the sandbox and the local workspace. When you pull sandbox changes into your project or push project changes to the sandbox, only the changed source is synched back.

## Powerful New Ways to Secure your Data using Data Mask

Enhanced features give you powerful new ways to secure all your sensitive data. Admins can use Data Mask to automatically mask the data in a sandbox.

### Where:

This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions.

### Who:

Users with the System Administrator profile can install or update Data Mask.

### Why:

These enhancements are available in Data Mask:

- Data Mask doesn't post notifications of changes made to records on Chatter feeds during the masking process, even if feed tracking is enabled for an object.
- A new configuration called Unique on text and text area field types appends more characters from the record ID to library words or random characters to make them unique. This configuration is useful for objects that have duplicate rules defined.
- A new configuration option called Run in Serial Mode prevents errors caused by the presence of master detail and lookup relationships.
- Chatter and Enhanced Email aren't prerequisites for installing Data Mask.
- You don't have to keep the browser window open after clicking Run Now on a data mask configuration.
- Data masking makes all email addresses unique. Emails are the most used field in duplicate rules. This change ensures that no records are skipped during masking because of duplicate email addresses.
- New libraries for Canadian postal codes and SSN with and without dashes are available when you set up masking rules.
- You can replace sensitive data with data generated using a pattern of your choice.

- A new search option quickly finds objects and fields to mask.
- You can stop an in-progress data masking job and re-enable deactivated automations.
- You can clone existing masking configurations to quickly create ones.

**How:**

Data Mask is a managed package that you install and execute in a production org. You then run the masking process in any sandbox created from the production org.

## SEE ALSO:

[Salesforce Help: Secure Your Sandbox Data with Salesforce Data Mask](#)

## Track Source Changes in Sandboxes Automatically (Beta)

When source tracking is enabled in a Developer or Developer Pro sandbox, the sandbox automatically tracks changes between the sandbox and the local workspace. When you pull sandbox changes into your project or push project changes to the sandbox, only the changed source is synched back.

**Where:**

This change applies to Lightning Experience in Enterprise, Performance, and Unlimited editions. Note that source tracking is available for Developer and Developer Pro sandboxes only. Partial and Full sandboxes are not supported.

As a beta feature, Source Tracking in Sandboxes is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for the Source Tracking in Sandboxes feature by posting in Collaboration or Ideas in the [Trailblazer Community](#).

**Who:**

Users with the System Administrator profile can enable the Source Tracking in Sandboxes feature.

**How:**

For setup instructions, see the [Salesforce DX Setup Guide](#). For information about how to use source tracking in sandboxes, see the [Salesforce DX Developer Guide](#).

## Lightning Design System: Mobile and Touch Support Grows Along with Other Component Enhancements

The Salesforce Lightning Design System (SLDS) includes the resources to create user interfaces consistent with the Salesforce Lightning principles, design language, and best practices. In this release, we focused on expanding the user experience for mobile and touch devices.

We frequently update the existing component behavior and fix bugs. For the latest changes, see [What's New in the Lightning Design System documentation](#). That page lists the changes by the date we completed the change. Those changes are rolled up into the next major Salesforce release. Here are some highlights for Summer '20.

## IN THIS SECTION:

### [Improve Your App's Mobile and Touch User Interface](#)

Use SLDS to provide users with a more consistent experience on mobile and touch devices.

### [Lightning Design System Component Updates](#)

Get more out of SLDS components and utilities with these enhancements and bug fixes.

## Improve Your App's Mobile and Touch User Interface

Use SLDS to provide users with a more consistent experience on mobile and touch devices.

**When:** We improve SLDS frequently. For the latest changes, see [What's New in the Lightning Design System documentation](#). That page lists the changes by the date we completed the change. Those changes are rolled up into the next major Salesforce release. The following changes are in Summer '20.

**How:** Use the new documentation and examples for these SLDS components to see how they behave in a mobile or touch UI context.

- Button Icons
- Cards
- Checkbox
- Checkbox Button
- Checkbox Button Group
- Checkbox Toggle
- Combobox
- Form Element
- Input
- Map
- Menus
- Modals
- Path
- Pills
- Popovers
- Progress Indicator
- Radio Button Group
- Radio Group
- Slider
- Text Utility

## Lightning Design System Component Updates

Get more out of SLDS components and utilities with these enhancements and bug fixes.

**When:** We improve SLDS frequently. For the latest changes, see [What's New in the Lightning Design System documentation](#). That page lists the changes by the date we completed the change. Those changes are rolled up into the next major Salesforce release. The following changes are in Summer '20.

**How:** Improve your UI with these recent updates to SLDS components.

## Buttons

The disabled inverse button text color has 50% opacity.

## Input

Date-related input aligns better for Chrome on Android.

## Popovers

Fixed a bug related to text color in form inputs for the Walkthrough variation.

## Progress Ring

Resolved an IE11 issue with positioning of the `.slds-progress-ring__progress` element by setting more explicit position settings.

The blueprint recommendation uses a `<circle>` element instead of a `<path>` element when the completion of the progress circle is 100%. This change resolves an IE11 rendering issue with completed rings.

## Visual Picker

Added a `Small` variant to the visual picker.

## Line Clamp

Added an `x-Small` modifier that truncates text after two lines.

# AppExchange Partners: AppExchange App Analytics for Lightning Apps and Pages

Learn how subscribers use your Lightning apps and pages by exploring AppExchange App Analytics data.

## IN THIS SECTION:

### [Analyze Subscriber Behavior with AppExchange App Analytics](#)

AppExchange App Analytics helps you gain insight into your subscribers' activity. As an AppExchange partner, you can download Subscriber Snapshots that provide point-in-time org, package, and custom entity data. Snapshots are captured daily at 00:00 UTC and are available for immediate download.

## Analyze Subscriber Behavior with AppExchange App Analytics

AppExchange App Analytics helps you gain insight into your subscribers' activity. As an AppExchange partner, you can download Subscriber Snapshots that provide point-in-time org, package, and custom entity data. Snapshots are captured daily at 00:00 UTC and are available for immediate download.

**Where:** This change applies to Lightning Experience and Salesforce Classic in Developer edition.

**Who:** AppExchange App Analytics is available only for managed packages that have passed security review.

**How:** To activate AppExchange App Analytics, log a case in the [Salesforce Partner Community](#).

## Change Data Capture: Event Enrichment (Beta) and Other Changes

Enrich your change event messages with fields, such as external ID fields, and take advantage of other enhancements.

## IN THIS SECTION:

### [Enrich Change Event Messages with Extra Fields \(Beta\)](#)

With Change Data Capture Enrichment, you can select fields to always include in change events, even when unchanged, to aid in processing or replicating data. For example, use enrichment when your replication app needs an external ID field for matching records in an external system. Change Data Capture Enrichment is supported in CometD-based subscribers. Change Data Capture Enrichment was offered last release, and in this release, we added support for compound fields, such as the Lead Name, Address, and geolocation fields.

### [Receive Change Event Notifications for One More Object](#)

With Change Data Capture, you can now receive notifications of record changes for the CommSubscriptionConsent object.

### [Subscribe to the /data/ChangeEvents Channel Even Without All Required Permissions](#)

User permissions are now checked on event delivery for the standard /data/ChangeEvents channel. You receive only the change events associated with entities for which you have permissions and don't receive the remaining change events. Previously, if you didn't have the View All Data and View All Users permissions, you couldn't subscribe to the /data/ChangeEvents channel and you received an error.

### [Enabling Event Encryption Through Metadata API Requires an Event Bus Tenant Secret](#)

With this change, you can't turn on event encryption in a Shield Platform Encryption org through the PlatformEncryptionSettings Metadata API type without an Event Bus tenant secret. Previously, if you did so, change data capture events and platform events were blocked when no tenant secret was available. Now, you get an error when no tenant secret is available.

## Enrich Change Event Messages with Extra Fields (Beta)

With Change Data Capture Enrichment, you can select fields to always include in change events, even when unchanged, to aid in processing or replicating data. For example, use enrichment when your replication app needs an external ID field for matching records in an external system. Change Data Capture Enrichment is supported in CometD-based subscribers. Change Data Capture Enrichment was offered last release, and in this release, we added support for compound fields, such as the Lead Name, Address, and geolocation fields.

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



**Note:** As a beta feature, Change Data Capture Enrichment is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Change Data Capture Enrichment in the [Trailblazer Community](#). *For information on enabling this feature in your org, contact Salesforce.*

**How:** You define enrichment fields on a channel and a member of that channel. The channel can be either a custom channel or the ChangeEvents channel. Enriched change events are delivered only on the channel that is configured for enrichment. To add enrichment fields to a channel member and channel, use the PlatformEventChannelMember object in Tooling API or Metadata API.

This example uses Tooling API to enrich the AccountChangeEvent member on the SalesEvents\_\_chn custom channel. The change event is enriched with two fields: a custom field (External\_Account\_ID\_\_c) and a standard field (Industry). The associated POST request URL is: /services/data/v49.0/tooling/sobjects/PlatformEventChannelMember

### Request Body:

```
{  
  "FullName": "SalesEvents_AccountChangeEvent",  
  "Metadata": {
```

```

    "enrichedFields": [
      {
        "name": "External_Account_ID_c"
      },
      {
        "name": "Industry"
      }
    ],
    "eventChannel": "SalesEvents__chn",
    "selectedEntity": "AccountChangeEvent"
  }
}

```

## SEE ALSO:

[Change Data Capture Developer Guide: Enrich Change Events With Extra Fields When Subscribed with CometD \(Beta\)](#)

## Receive Change Event Notifications for One More Object

With Change Data Capture, you can now receive notifications of record changes for the CommSubscriptionConsent object.

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

**How:** Change Data Capture is available for all custom objects defined in your Salesforce org and a subset of standard objects. Select the objects that you want to get notifications for on the Change Data Capture page in Setup or create a custom channel.

## SEE ALSO:

[Change Data Capture Developer Guide: Select Objects for Change Notifications](#)

[Object Reference for Salesforce and Lightning Platform: CommSubscriptionConsent](#)

## Subscribe to the /data/ChangeEvents Channel Even Without All Required Permissions

User permissions are now checked on event delivery for the standard /data/ChangeEvents channel. You receive only the change events associated with entities for which you have permissions and don't receive the remaining change events. Previously, if you didn't have the View All Data and View All Users permissions, you couldn't subscribe to the /data/ChangeEvents channel and you received an error.

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

**Why:** For example, a user without the View All Data and View All Users permissions but with View All on a specific object, such as Lead, can still subscribe to the /data/ChangeEvents channel. If change events are sent for Account, Lead, and Contact, the user receives events for only the Lead object.

## Enabling Event Encryption Through Metadata API Requires an Event Bus Tenant Secret

With this change, you can't turn on event encryption in a Shield Platform Encryption org through the PlatformEncryptionSettings Metadata API type without an Event Bus tenant secret. Previously, if you did so, change data capture events and platform events were blocked when no tenant secret was available. Now, you get an error when no tenant secret is available.

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



**Warning:** You must create an event bus tenant secret on the Key Management page in Setup before enabling encryption. From Setup, the encryption setting is available only after you create an event bus tenant secret.

## Platform Events: Publish Status Events (Pilot)

Get notified of the status of platform event publish operations through Publish Status Events.

### IN THIS SECTION:

#### [Get the Status of Asynchronous Platform Event Publish Operations \(Pilot\)](#)

Track which high-volume platform events were published successfully and which events failed, and take the necessary actions. To get notified of the status of event publish operations, enable status events on your high-volume platform event. Then subscribe to the PublishStatusEvent standard platform event with Apex triggers or CometD clients.

#### [Use Platform Events to Trigger a Flow](#)

Previously, only running instances of a flow could subscribe to platform event messages. For example, a running instance of a flow paused after it performed some actions. When a platform event message was received, the flow resumed. Now you can trigger a flow when a platform event message is received.

## Get the Status of Asynchronous Platform Event Publish Operations (Pilot)

Track which high-volume platform events were published successfully and which events failed, and take the necessary actions. To get notified of the status of event publish operations, enable status events on your high-volume platform event. Then subscribe to the PublishStatusEvent standard platform event with Apex triggers or CometD clients.



**Note:** We provide Publish Status Events to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Pilot programs are subject to change, and we can't guarantee acceptance. Publish Status Events isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for Publish Status Events in the [Trailblazer Community](#).

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

**Why:** You can get a confirmation of the enqueued publish operation without this pilot feature, but you don't know whether the operation succeeds eventually. A status of success in the returned SaveResult means that the publish operation is queued in Salesforce. The operation is carried out later when system resources are available. Some failures are returned in the immediate SaveResult, such as validation or limit errors, but not the asynchronous errors. In rare cases, enqueued publish operations can fail due to a system error. The benefit of this pilot feature is that you can find out about the eventual status of enqueued publish operations and perform appropriate actions.

**How:** To enable receiving publish status events for your platform event, in Setup, click **Track publish status** on the event's definition page. Or in Metadata API, set the `enablePublishStatusTracking` field on CustomObject to `true`.

Event publish results are batched in a PublishStatusEvent and grouped by the status and topic, which is the event API name. A PublishStatusEvent doesn't necessarily correspond to one publish request. It contains the results of one or more requests that are for the same platform event and have the same publish status. Each PublishStatusEvent includes an array of PublishStatusDetail child objects containing information about each event publish operation.

This example shows the payload for a failed publish status and contains information for two events. The `EventUuid` field is a universally unique identifier (UUID) that identifies the event message and correlates the publish result of each event with the original publish call.

```
{
  "schema": "tk1L37cct1eXnqi_yPIS7w",
  "payload": {
    "Status": "FAILURE",
    "AdditionalInfo": null,
    "CreatedById": "005xx000001x83aAAC",
    "CreatedDate": "2020-04-13T20:20:23.573Z",
    "PublishStatusDetails": [
      {
        "Replay": null,
        "EventUuid": "e981b488-81f3-4fcc-bd6f-f7033c9d7ac3",
        "FailureReason":
          "The platform event message could not be published. Try again later.",
        "StatusCode": "PLATFORM_EVENT_PUBLISH_FAILED"
      },
      {
        "Replay": null,
        "EventUuid": "ed5773c8-6848-4eee-99cf-2d3703cc0da3",
        "FailureReason":
          "The platform event message could not be published. Try again later.",
        "StatusCode": "PLATFORM_EVENT_PUBLISH_FAILED"
      }
    ],
    "Topic": "Order_Event__e"
  }
}
```

Use the `EventUuid` field value to match the status to the event published. If you published the event in Apex, you can obtain the UUID by calling `EventBus.getOperationId(saveResult)`. If you published the event using Salesforce APIs, the `SaveResult` returned contains the UUID in the `Error.message` field. This example contains the save result of an event inserted using a REST API POST request.

```
{
  "id" : "e01xx0000000001AAA",
  "success" : true,
  "errors" : [ {
    "statusCode" : "OPERATION_ENQUEUED",
    "message" : "e981b488-81f3-4fcc-bd6f-f7033c9d7ac3",
    "fields" : [ ]
  } ]
}
```

## SEE ALSO:

[Platform Events Developer Guide: Get the Status of Asynchronous Platform Event Publishes \(Pilot\)](#)

## Use Platform Events to Trigger a Flow

Previously, only running instances of a flow could subscribe to platform event messages. For example, a running instance of a flow paused after it performed some actions. When a platform event message was received, the flow resumed. Now you can trigger a flow when a platform event message is received.

### SEE ALSO:

[Trigger a Flow to Run When a Platform Event Message Is Received](#)

## New and Changed Items for Developers

Here is where you can find new and changed objects, calls, classes, components, commands, and more that help you customize Salesforce features.

### IN THIS SECTION:

[Lightning Components: New and Changed Items](#)

Build UI easily with these new and changed resources.

[Apex: New and Changed Items](#)

These namespaces have new or changed classes, methods, interfaces, enums, or exceptions.

[ConnectAPI \(Connect in Apex\): New and Changed Classes and Enums](#)

Create custom experiences in Salesforce using Connect in Apex. Take advantage of all that B2B Commerce on Lightning has to offer.

Work with carts, externally managed accounts, products, and wishlists.

[API: New and Changed Items](#)

Access more data objects, metadata types, and resources in API version 49.0.

[Salesforce CLI: New and Changed Commands](#)

Use Salesforce CLI to create environments for development and testing, synchronize source code, run tests, and control your application lifecycle. Read the weekly release notes to learn about recent updates to [v49 of the core salesforcedx plug-in](#).

## Lightning Components: New and Changed Items

Build UI easily with these new and changed resources.

### IN THIS SECTION:

[New and Changed Lightning Web Components](#)

Build UI easily with these new and changed components.

[New and Changed Modules for Lightning Web Components](#)

Modules enable you to do more with Lightning web components.

[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

The following components have changed.

### **lightning-badge**

The following attributes are now supported.

- `icon-alternative-text`—The alternative text used to describe the icon, which is displayed as tooltip text.
- `icon-name`—The Lightning Design System name of the icon to display inside the badge. Specify the name in the format `utility:down` where `utility` is the category, and `down` is the specific icon to be displayed.
- `icon-position`—The position for the icon inside the badge. Specify the value `start` to display the icon before the text or `end` to display it after the text. The default is `start`.

### **lightning-breadcrumb**

The following methods are now supported.

- `blur()`—Removes focus on the link.
- `focus()`—Sets focus on the link.

### **lightning-datatatable**

Columns with the `text` data type have changed.

- The Clip text action now shows only the truncated text of the first line. Previously, when content contained newline characters, the table displayed truncated text for each new line. The Wrap text action no longer preserves extra whitespace in the content, and breaks lines and hyphenates words as needed to fit the column.
- Boolean values now display either “true” or “false”. Previously, a column with the `text` data type displayed an empty column for boolean values. We recommend that you use the `boolean` data type to display the `utility:check` icon for a field that returns true.
- Currency values now display as an unformatted number. Previously, a column with the `text` data type displayed an empty column for currency values. We recommend that you use the `currency` data type to format your currency values correctly.

The following 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 based on the width of the column content and the table width. The default is `fixed`.

The following property for the `columns` attribute is new.

- `hideDefaultActions`—Specifies whether the default header actions are available on a column. The default is false.

### **lightning-file-upload**

The following attributes are new.

- `file-field-name`—Specifies the API name of a custom field on the ContentVersion object that can be used to enable guest users to upload files to a record.
- `file-field-value`—Specifies a value for the custom field defined by `file-field-name`.

### **lightning-input**

The input type `color` has changed.

- The `commit` event is supported.

The input type `number` has changed.

- Shortcuts `k`, `K`, `m`, `M`, `b`, `B`, `t`, and `T` are allowed. For example, in the en-US locale, when you enter `1k` the field displays `1,000`. Entering `1m` results in `1,000,000`. When the input field is focused, it displays the multiplied number. For example, entering `1k` results in `1,000` on blur, and `1000` when the input is focused again. You can't use these shortcuts when programmatically assigning input values to the `value` attribute.

The input types `date` and `datetime` have changed.

- On the current month view of the date picker, you can now select a date from the previous and next month. Previously, dates from the previous and next month were disabled on the current month view unless you navigated directly to those months.
- When you specify `min` and `max` values, users can still select a date outside of the min and max range. However, the `blur` event triggers the field to display a validation error message.
- The names for months and weekdays in the date picker now use your Salesforce language setting. Previously, these names used your locale setting.

#### **lightning-input-address**

The default placeholder values have been removed because they duplicate the field labels and were not helpful for screen readers. Adding a placeholder value on address compound fields is currently not supported.

#### **lightning-input-field**

Lookup fields are now supported in the Salesforce mobile app. When using the mobile app, users can do a lookup search for a supported object. The mobile lookup doesn't support creating a new record from the lookup field's dropdown menu.

Name fields now support the Middle Name and Suffix fields on contact, lead, and user records. To display the complete name compound field, specify `field-name="Name"`. Alternatively, display the fields individually by using a separate `lightning-input-field` component for each field. Pass in `FirstName`, `MiddleName`, or `LastName` to the `field-name` attribute for each component.

-  **Note:** To enable the Middle Name and Suffix fields, from Setup enter `User Interface` in the Quick Find box, then select **User Interface**. In Lightning Experience, the **User Interface** page is the last item under the User Interface node. On the User Interface page, select **Enable Middle Names for Person Names** and **Enable Name Suffixes for Person Names**.

The field data types `date` and `datetime` have changed.

- On the current month view of the date picker, you can now select a date from the previous and next month. Previously, dates from the previous and next month were disabled on the current month view unless you navigated directly to those months.
- The names for months and weekdays in the date picker now use your Salesforce language setting. Previously, these names used your locale setting.

The name field type has changed.

- The suffix constituent field is now supported. To enable this field, from Setup enter `User Interface` in the Quick Find box, then select **User Interface**. In Lightning Experience, the **User Interface** page is the last item under the User Interface node. On the User Interface page, select **Enable Name Suffixes for Person Names**.

#### **lightning-map**

The following attribute has changed.

- `map-markers`—HTML tags you include in the `title` property are displayed as unescaped markup in the location list and info window. A subset of HTML tags are supported for use with the `description` property. The tags are: `b`, `br`, `del`, `em`, `h1-h6`, `i`, `ins`, `mark`, `p`, `small`, `strong`, `sub`, and `sup`.

#### **lightning-tabset**

The following method is new.

- `focus`—Apply focus on the tab that's currently selected.

#### **lightning-tree-grid**

The following types are now supported for the first data column in the table.

- `button`—Displays a button using `lightning-button`.

- `button-icon`—Displays a button icon using `lightning-button-icon`.

SEE ALSO:

[Component Library](#)

## New and Changed Modules for Lightning Web Components

Modules enable you to do more with Lightning web components.

### New Modules

The following modules are now available.

#### **`lightningsnapin/baseChatHeader`**

Enables use of a custom chat header component for chat messages in Service Cloud Embedded Service. The custom chat header can be selected from Embedded Service Chat Setup. Your custom component should specify the `lightningSnapin__ChatHeader` target in the `js-meta.xml` configuration file. For more information, see [Enhance Conversations with an Improved Chat Header](#).

#### **`@salesforce/community`**

Import context information about the current community when developing Lightning web components for Lightning communities. For more information, see [Get Information About the Current Lightning Community](#).

#### **`@salesforce/customPermission`**

Customize a component's behavior based on whether the current user has a specific permission. For more information, see [Check User Permissions for Lightning Web Components](#).

### Changed Modules

The following modules have changed.

#### **`@salesforce/i18n`**

The internalization module has two new properties.

- `number.decimalSeparator`—The decimal separator symbol ( . ).
- `number.groupingSeparator`—The grouping separator symbol ( , ).

#### **`lightning/messageService`**

The `subscribe()` method has changed. The **`subscriberOptions`** parameter is now optional. Previously, you had to pass `{scope: APPLICATION_SCOPE}`, and communication over a message channel occurred between components anywhere in the application.

Now, if you don't pass a value, communication over a message channel is limited to components in an active navigation tab, an active navigation item, or a utility item. Utility items are always active. A navigation tab or item is active when it's selected. Navigation tabs and items include:

- Standard navigation tabs
- Console navigation workspace tabs
- Console navigation subtabs
- Console navigation items

## New and Changed Aura Components

Build UI easily with these new and changed components.

### Changed Aura Components

The following components have changed.

#### **lightning:badge**

The following attributes are now supported.

- `iconAlternativeText`—The alternative text used to describe the icon, which is displayed as tooltip text. This attribute is optional since a text label is required on the component.
- `iconName`—The Lightning Design System name of the icon to display inside the badge. Specify the name in the format `utility:down` where `utility` is the category, and `down` is the specific icon to be displayed.
- `iconPosition`—The position for the icon inside the badge. Specify the value `start` to display the icon before the text or `end` to display it after the text. The default is `start`.

#### **lightning:breadcrumb**

The following methods are now supported.

- `blur()`—Removes focus on the link.
- `focus()`—Sets focus on the link.

#### **lightning:datatable**

Columns with the `text` data type have changed.

- The Clip text action now shows only the truncated text of the first line. Previously, when content contained newline characters, the table displayed truncated text for each new line. The Wrap text action no longer preserves extra whitespace in the content, and breaks lines and hyphenates words as needed to fit the column.
- Boolean values now display either “true” or “false”. Previously, a column with the `text` data type displayed an empty column for boolean values. We recommend that you use the `boolean` data type to display the `utility:check` icon for a field that returns true.
- Currency values now display as an unformatted number. Previously, a column with the `text` data type displayed an empty column for currency values. We recommend that you use the `currency` data type to format your currency values correctly.

The following attribute is new.

- `columnWidthsMode`—Specifies how column widths are calculated. Set to `fixed` for columns with equal widths. Set to `auto` for column widths based on the width of the column content and the table width. The default is `fixed`.

The following property for the `columns` attribute is new.

- `hideDefaultActions`—Specifies whether the default header actions are available on a column. The default is false.

#### **lightning:fileUpload**

The following attributes are new.

- `fileFieldName`—Specifies the API name of a custom field on the ContentVersion object that can be used to enable guest users to upload files to a record.
- `fileFieldValue`—Specifies a value for the custom field defined by `fileFieldName`.

#### **lightning:input**

The input type `color` has changed.

- The `commit` event is supported.

The input type `number` has changed.

- Shortcuts `k`, `K`, `m`, `M`, `b`, `B`, `t`, and `T` are allowed. For example, in the en-US locale, when you enter `1k` the field displays `1,000`. Entering `1m` results in `1,000,000`. When the input field is focused, it displays the multiplied number. For example, entering `1k` results in `1,000` on blur, and `1000` when the input is focused again. You can't use these shortcuts when programmatically assigning input values to the `value` attribute.

The input types `date` and `datetime` have changed.

- On the current month view of the date picker, you can now select a date from the previous and next month. Previously, dates from the previous and next month were disabled on the current month view unless you navigated directly to those months.
- When you specify `min` and `max` values, users can still select a date outside of the min and max range. However, the `blur` event triggers the field to display a validation error message.
- The names for months and weekdays in the date picker now use your Salesforce language setting. Previously, these names used your locale setting.

#### **lightning:inputAddress**

The default placeholder values have been removed because they duplicate the field labels and were not helpful for screen readers. Adding a placeholder value on address compound fields is currently not supported.

#### **lightning:inputField**

Lookup fields are now supported in the Salesforce mobile app. When using the mobile app, users can do a lookup search for a supported object. The mobile lookup doesn't support creating a new record from the lookup field's dropdown menu.

Name fields now support the Middle Name and Suffix fields on contact, lead, and user records. To display the complete name compound field, specify `fieldName="Name"`. Alternatively, display the fields individually using a separate `lightning:inputField` component for each field. Pass in `FirstName`, `MiddleName`, or `LastName` to the `fieldName` attribute for each component.



**Note:** To enable the Middle Name and Suffix fields, from Setup enter `User Interface` in the Quick Find box, then select **User Interface**. In Lightning Experience, the **User Interface** page is the last item under the User Interface node. On the User Interface page, select **Enable Middle Names for Person Names** and **Enable Name Suffixes for Person Names**.

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- The names for months and weekdays in the date picker now use your Salesforce language setting. Previously, these names used your locale setting.

#### **lightning:map**

The following attribute has changed.

- `mapMarkers`—HTML tags you include in the `title` property are displayed as unescaped markup in the location list and info window. A subset of HTML tags are supported for use with the `description` property. The tags are: `b`, `br`, `del`, `em`, `h1-h6`, `i`, `ins`, `mark`, `p`, `small`, `strong`, `sub`, and `sup`.

#### **lightning:messageChannel**

The `subscribe()` method has changed. The `scope` attribute is now optional.

Now, if you don't pass a value, communication over a message channel is limited to components in an active navigation tab, an active navigation item, or a utility item. Utility items are always active. A navigation tab or item is active when it's selected. Navigation tabs and items include:

- Standard navigation tabs
- Console navigation workspace tabs
- Console navigation subtabs
- Console navigation items

To receive messages on a message channel from anywhere in the application, set `scope` to "APPLICATION".

#### **lightning:treeGrid**

The following types are now supported for the first data column in the table.

- `button`—Displays a button using `lightning:button`.
- `button-icon`—Displays a button icon using `lightning:buttonIcon`.

SEE ALSO:

[Component Library](#)

## Apex: New and Changed Items

These namespaces have new or changed classes, methods, interfaces, enums, or exceptions.

IN THIS SECTION:

### [AppLauncher Namespace](#)

The AppLauncher namespace has these new methods.

### [Schema Namespace](#)

The Schema namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

### [System Namespace](#)

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

SEE ALSO:

[Apex: New Features](#)

## AppLauncher Namespace

The AppLauncher namespace has these new methods.

### New or Changed Methods in Existing Classes

#### **Get the single sign-on URL for a community subdomain**

Use the new `getCommunityDomainSsoUrl(startUrl, developerName)` method in the `AppLauncher.SocialLoginController` class.

## Schema Namespace

The Schema namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

### New or Changed Methods in Existing Classes

#### **Get the effective describe option used by the system for the SObject**

Use the new `getSObjectDescribeOption` method in the `Schema.DescribeSObjectResult` class.

## System Namespace

The System namespace has these new or changed classes, methods, interfaces, enums, or exceptions.

## New or Changed Methods in Existing Classes

### Initiate a verification service for email, phone (SMS), and the Salesforce Authenticator verification methods

Use the new `initVerificationMethod(method)` in the `System.UserManagement` class.

### Complete the verification service for email, phone (SMS), Salesforce Authenticator, password, or time-based one-time password (TOTP) verification methods

Use the new `verifyVerificationMethod(method)` in the `System.UserManagement` class.

### Use stronger encryption and signing algorithms with Crypto methods

Use the new RSA-SHA384 and RSA-SHA512 values in the `algorithmName` parameter in `Crypto.sign`, `Crypto.signWithCertificate`, `Crypto.signXML()`, and `Crypto.verify()` (methods) in the `System.Crypto` class.

### Enforce Field- and Object-Level Security for Relationship Fields

Use the `stripInaccessible` method in the `System.Security` class.

## ConnectApi (Connect in Apex): New and Changed Classes and Enums

Create custom experiences in Salesforce using Connect in Apex. Take advantage of all that B2B Commerce on Lightning has to offer. Work with carts, externally managed accounts, products, and wishlists.

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. We refer to the `ConnectApi` namespace as *Connect in Apex*.

### IN THIS SECTION:

#### [Chatter in Apex Name Change](#)

We renamed Chatter in Apex to Connect in Apex to better reflect the nature of the methods in the `ConnectApi` namespace.

#### [New and Changed Connect in Apex Classes](#)

These classes are new or have changes.

#### [New and Changed Connect in Apex Input Classes](#)

These input classes are new or have changes.

#### [New and Changed Connect in Apex Output Classes](#)

These output classes are new or have changes.

#### [New and Changed Connect in Apex Enums](#)

These enums are new or have changes.

### SEE ALSO:

#### [Connect REST API](#)

#### [Apex Developer Guide: ConnectApi Namespace](#)

#### [Connect REST API Developer Guide](#)

## Chatter in Apex Name Change

We renamed Chatter in Apex to Connect in Apex to better reflect the nature of the methods in the `ConnectApi` namespace.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in every edition, except Personal.

**Why:** The ConnectApi namespace supports many features outside of Chatter. For example, this release introduces 40 B2B Commerce on Lightning methods and many more non-Chatter classes. We wanted a name that better represents all the non-Chatter methods and classes.

#### SEE ALSO:

[Apex Developer Guide: ConnectApi Namespace](#)

## New and Changed Connect in Apex Classes

These classes are new or have changes.

### B2B Commerce on Lightning

The following methods are in the `ConnectApi.CommerceCart` class.

#### Add a batch of up to 100 items to a cart

- `addItemsToCart(webstoreId, effectiveAccountId, activeCartOrId, cartItems)`

#### Add an item to a cart

- `addItemToCart(webstoreId, effectiveAccountId, activeCartOrId, cartItemInput)`

#### Create a cart

- `createCart(webstoreId, cart)`

#### Delete a cart

- `deleteCart(webstoreId, effectiveAccountId, activeCartOrId)`

#### Delete an item from a cart

- `deleteCartItem(webstoreId, effectiveAccountId, activeCartOrId, cartItemId)`

#### Get cart items

- `getCartItems(webstoreId, effectiveAccountId, activeCartOrId)`
- `getCartItems(webstoreId, effectiveAccountId, activeCartOrId, pageParam)`
- `getCartItems(webstoreId, effectiveAccountId, activeCartOrId, pageParam, sortParam)`
- `getCartItems(webstoreId, effectiveAccountId, activeCartOrId, pageParam, pageSize)`
- `getCartItems(webstoreId, effectiveAccountId, activeCartOrId, pageParam, pageSize, sortParam)`
- `getCartItems(webstoreId, effectiveAccountId, activeCartOrId, productFields, pageParam, pageSize, sortParam)`

#### Get a cart

- `getCartSummary(webstoreId, effectiveAccountId, activeCartOrId)`

#### Get a cart or create an active cart if one doesn't exist

- `getOrCreateActiveCartSummary(webstoreId, effectiveAccountId, activeCartOrId)`

#### Update an item in a cart

- `updateCartItem(webstoreId, effectiveAccountId, activeCartOrId, cartItemId, cartItem)`

The following methods are in the `ConnectApi.CommerceCatalog` class.

### Get a product

- `getProduct(webstoreId, productId, effectiveAccountId, fields, excludeFields, mediaGroups, excludeMedia, excludeEntitlementDetails, excludePrimaryProductCategory)`

### Get a product category

- `getProductCategory(webstoreId, productCategoryId, effectiveAccountId, fields, excludeFields, mediaGroups, excludeMedia)`

### Get the product category path from the root category to the current category

- `getProductCategoryPath(webstoreId, productCategoryId)`

The following methods are in the `ConnectApi.CommerceStorePricing` class.

### Get the list and buyer price for a product

- `getProductPrice(webstoreId, productId, effectiveAccountId)`

### Get the price for multiple products

- `getProductPrices(webstoreId, effectiveAccountId, pricingInput)`

The following methods are in the `ConnectApi.CommerceWishlist` class.

### Add an item to a wishlist

- `addItemToWishlist(webstoreId, wishlistId, wishlistItemInput)`
- `addItemToWishlist(webstoreId, effectiveAccountId, wishlistId, wishlistItemInput)`

### Add a wishlist to a cart

- `addWishlistToCart(webstoreId, wishlistId)`
- `addWishlistToCart(webstoreId, wishlistId, effectiveAccountId)`
- `addWishlistToCartWithCartId(webstoreId, wishlistId, cartId)`
- `addWishlistToCartWithCartId(webstoreId, wishlistId, cartId, effectiveAccountId)`

### Create a wishlist

- `createWishlist(webstoreId, wishlistInput)`
- `createWishlist(webstoreId, effectiveAccountId, wishlistInput)`

### Delete a wishlist

- `deleteWishlist(webstoreId, wishlistId)`

### Get a wishlist

- `getWishlist(webstoreId, wishlistId)`
- `getWishlist(webstoreId, effectiveAccountId, wishlistId)`

### Get wishlist items

- `getWishlistItems(webstoreId, effectiveAccountId, wishlistId)`
- `getWishlistItems(webstoreId, effectiveAccountId, wishlistId, pageParam)`
- `getWishlistItems(webstoreId, effectiveAccountId, wishlistId, pageParam, pageSize)`

### Get wishlist summaries

- `getWishlistSummaries(webstoreId)`
- `getWishlistSummaries(webstoreId, effectiveAccountId, wishlistId, includeDisplayedList)`

- `getWishlistSummaries(webstoreId, effectiveAccountId, includeDisplayedList)`

### Remove a wishlist item

- `removeWishlistItem(webstoreId, effectiveAccountId, wishlistId, wishlistItemId)`

The following method is in the `ConnectApi.ExternalManagedAccount` class.

### Get externally managed accounts

- `getExternalManagedAccounts(webstoreId)`

## Missions

The following method is in the `ConnectApi.Missions` class.

### Purge mission activity for all users

- `purgeUserMissionsActivities(communityId)`

## Order Management

These new methods are in the `OrderSummary` class.

### Preview the expected change order values for a proposed price adjustment action

- `adjustPreview(orderSummaryId, adjustInput)`

### Submit a price adjustment action

- `adjustSubmit(orderSummaryId, adjustInput)`

This changed method is in the `OrderSummaryCreation` class.

### Create an order summary to represent an order that is managed by an external system

- `createOrderSummary(orderSummaryInput)`

## Personalization

The following methods are in the `Personalization` class.

### Create new types of audience targets

- `createTargets(communityId, target)`

### Get target information for a comma-separated list of target IDs

- `getTargetBatch(communityId, targetIds)`

This method was introduced in version 48.0 but was omitted from the documentation.

## New and Changed Connect in Apex Input Classes

These input classes are new or have changes.

### B2B Commerce on Lightning

#### `ConnectApi.CartInput`

This new input class has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the cart.
- `effectiveAccountId`—ID of the account for which the request is made.

- `name`—Name of the cart.
- `type`—Type of cart. Value is `Cart`.

**ConnectApi.CartItemInput**

This new input class has these properties.

- `productId`—ID of the product.
- `quantity`—Quantity of the cart item.
- `type`—Type of item in a cart. Value is `Product`.

**ConnectApi.PricingInput**

This new input class has this property.

- `pricingLineItems`—Line items for pricing.

**ConnectApi.PricingLineItemInput**

This new input class has this property.

- `productId`—ID of the product to price.

**ConnectApi.WishlistInput**

This new input class has these properties.

- `name`—Name of the wishlist.
- `products`—List of products to add to the wishlist.

**ConnectApi.WishlistItemInput**

This new input class has this property.

- `productId`—ID of the product to update or add to the wishlist.

## Order Management

**ConnectApi.AdjustItemInputRepresentation**

This new input class has these properties.

- `adjustmentType`—Describes how the amount is calculated. It can have one of these values:
  - `AmountWithTax`—Value of amount is the adjustment, including tax.
  - `AmountWithoutTax`—Value of amount is the adjustment, not including tax. Tax is calculated on the value and added.
  - `Percentage`—Value of amount is a percentage discount. It is divided by 100, and then multiplied by the `TotalPrice` and `TotalTaxAmount` of the `OrderItemSummary` to determine the adjustment amount.
- `amount`—Value used to calculate the adjustment amount, as described by the `adjustmentType`. It must be a negative value.
- `description`—Description of the adjustment.
- `orderItemSummaryId`—ID of the `OrderItemSummary`.
- `reason`—Reason for the adjustment. The value must match one of the picklist values on the `Reason` field of the `OrderItemSummaryChange` object.

**ConnectApi.AdjustOrderItemSummaryInputRepresentation**

This new input class has this property.

- `adjustItems`—List of price adjustments to `OrderItemSummaries`.

**ConnectApi.EnsureRefundsAsyncInputRepresentation**

This input class has this new property.

- `excessFundsAmount`—Amount of excess funds to refund.

**ConnectApi.OrderSummaryInputRepresentation**

This input class has this new property.

- **orderLifeCycleType**—Specifies whether the order is managed in Salesforce Order Management or by an external system. It can have one of these values:
  - **MANAGED**—Managed in Salesforce Order Management.
  - **UNMANAGED**—Managed by an external system.

## Personalization

**ConnectApi.TargetInput**

This input class has this changed property.

- **targetType**—This property supports these new values.
  - NavigationLinkSet
  - Topic
  - CollaborationGroup
  - KnowledgeArticle
  - ContentDocument
  - ManagedContent
  - Report
  - Dashboard

## New and Changed Connect in Apex Output Classes

These output classes are new or have changes.

### B2B Commerce on Lightning

**ConnectApi.AbstractCartItem**

This new abstract output class is a super class of `ConnectApi.CartItem` and `ConnectApi.CartItemWithoutPrice`. It has these properties.

- **cartId**—ID of the cart.
- **cartItemId**—ID of the item.
- **messagesSummary**—Messages summary for the item.
- **name**—Name of the item.
- **productDetails**—Summary of the product details.
- **productId**—ID of the product.
- **quantity**—Quantity of the item.
- **type**—Type of item in a cart. Values are:
  - **DeliveryCharge**
  - **Product**

**ConnectApi.CartItem**

This new output class is a subclass of `ConnectApi.AbstractCartItem` and has these properties.

- `listPrice`—List price for the item.
- `salesPrice`—Sales price for the item.
- `totalAmount`—Total amount for the item.
- `totalListPrice`—Total list price for the item.
- `totalPrice`—Total price for the item including adjustments but excluding taxes.
- `totalTax`—Total tax for the item.

#### **ConnectApi.CartItemCollection**

This new output class has these properties.

- `cartItems`—Collection of cart item results.
- `cartSummary`—Summary of the cart.
- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Connect REST API URL identifying the current page.
- `hasErrors`—Specifies whether at least one of the results contains an error.
- `nextPageToken`—Token identifying the next page, or `null` if there isn't a next page.
- `nextPageUrl`—Connect REST API URL identifying the next page, or `null` if there isn't a next page.
- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Connect REST API URL identifying the previous page, or `null` if there isn't a previous page.

#### **ConnectApi.CartItemProduct**

This new output class has these properties.

- `fields`—Map of product fields and values.
- `name`—Name of the product.
- `productId`—ID of the product.
- `sku`—SKU of the product.
- `thumbnailImage`—Thumbnail image of the product.

#### **ConnectApi.CartItemResult**

This new output class has these properties.

- `cartItem`—Cart item.
- `message`—Message when the request isn't successful.
- `status`—Status for the request.

#### **ConnectApi.CartItemWithoutPrice**

This new output class is a subclass of `ConnectApi.AbstractCartItem` and has no additional properties.

#### **ConnectApi.CartMessage**

This new output class has these properties.

- `message`—Cart message.
- `messageId`—ID of the object supplying the message.
- `relatedEntityId`—ID of the entity, for example, cart, cart item, or cart tax, associated with the message.
- `severity`—Severity of cart message. Values are:
  - `Error`
  - `Info`
  - `Warning`

- **type**—Type of message. Standard values include `Inventory`, `Taxes`, `Pricing`, `Shipping`, `Entitlement`, `SystemError`, and `Other`.
- **visible**—Specifies whether the message is visible (`true`) or dismissed (`false`).

#### **ConnectApi.CartMessagesSummary**

This new output class has these properties.

- **errorCount**—If the summary is for a single entity, the count of messages with the `Error` severity level.
- **hasErrors**—Specifies whether there are messages related to the entity (`true`) or not (`false`).
- **limitedMessages**—If the summary is for a single entity, a limited list of messages related to the entity. Otherwise, each message can be related to the cart or to another cart-related entity.
- **relatedEntityId**—If the summary is for a single entity, the ID of the related entity. Otherwise, each message can be related to the cart or to another cart-related entity.

#### **ConnectApi.CartSummary**

This new output class has these properties.

- **accountId**—ID of the account for the cart.
- **cartId**—ID of the cart.
- **currencyIsoCode**—Three-letter ISO 4217 currency code associated with the cart.
- **grandTotalAmount**—Grand total amount including shipping and tax for items in the cart, in the currency of the cart.
- **name**—Name of the cart.
- **ownerId**—ID of the owner of the cart.
- **status**—Status of the cart. Values are:
  - `Active`—Cart is active.
  - `Checkout`—Cart is in checkout.
  - `Closed`—Cart is closed.
  - `Processing`—Cart is processing.
- **totalChargeAmount**—Total amount for shipping and other charges in the currency of the cart.
- **totalListPrice**—Total list price for the cart.
- **totalProductAmount**—Total amount including discounts, but excluding shipping and tax, for product items in the cart.
- **totalProductCount**—Total count of items in the cart.
- **totalTaxAmount**—Total tax amount for the cart, including tax on shipping, if applicable.
- **type**—Type of cart. Value is `Cart`.
- **uniqueProductCount**—Total count of unique items, or SKUs, in the cart.
- **webstoreId**—ID of the webstore of the cart.

#### **ConnectApi.ExternalManagedAccountCollectionOutput**

This new output class has these properties.

- **externalManagedAccounts**—Collection of externally managed accounts.
- **totalExternalManagedAccounts**—Total number of externally managed accounts.

#### **ConnectApi.ExternalManagedAccountOutput**

This new output class has these properties.

- **accountId**—ID of the account managed by another account.
- **externalManagedAccountId**—ID of the external managed account record.

**ConnectApi.PriceAdjustmentSchedule**

This new output class has these properties.

- `id`—ID of the price adjustment schedule.
- `priceAdjustmentTiers`—List of price adjustment tiers.

**ConnectApi.PriceAdjustmentTier**

This new output class has these properties.

- `adjustmentType`—Type of price adjustment for the tier. Values are:
  - `AmountBasedAdjustment`—Price is adjusted by a specified amount.
  - `PercentageBasedAdjustment`—Price is adjusted by a specified percentage.
- `adjustmentValue`—Adjustment value of the tier.
- `id`—ID of the price adjustment tier.
- `lowerBound`—Lower limit of the tier.
- `tierUnitPrice`—Unit price of the tier.
- `upperBound`—Upper limit of the tier.

**ConnectApi.PricingResult**

This new output class has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the product.
- `error`—Error code and message.
- `pricingLineItemResults`—Pricing result line items.
- `success`—Specifies whether the execution was successful (`true`) or not (`false`).

**ConnectApi.PricingResultLineItem**

This new output class has these properties.

- `error`—Error code and message.
- `listPrice`—List price for the product.
- `pricebookEntryId`—ID of the pricebook entry.
- `productId`—ID of the product to price.
- `success`—Specifies whether the execution was successful (`true`) or not (`false`).
- `unitPrice`—Unit price for the product.

**ConnectApi.ProductCategoryData**

This new output class has these properties.

- `description`—Description of the category.
- `id`—ID of the category.
- `name`—Name of the category.

**ConnectApi.ProductCategoryDetail**

This new output class has these properties.

- `bannerImage`—Banner image of the product category.
- `fields`—List of fields for the product category.
- `id`—ID of the product category.
- `mediaGroups`—List of media groups of the product category.

- `tileImage`—Tile image of the product category.

#### **ConnectApi.ProductCategoryMedia**

This new output class has these properties.

- `alternateText`—Alternative text for the product category media.
- `contentVersionId`—ID of the latest published content version if the media is stored as a ContentDocument. If the image is a customer-provided external URL, the value is `null`.
- `id`—ID of the product category image.
- `mediaType`—Type of product media. Values are:
  - `Document`
  - `Image`
  - `Video`
- `sortOrder`—Sort order of a media item inside a media group.
- `thumbnailUrl`—URL of the thumbnail for product category media. If a value exists, it should be used for the thumbnail whether the image is natively uploaded or hosted externally.
- `title`—Title of the product category media.
- `url`—URL of the product category media.

#### **ConnectApi.ProductCategoryMediaGroup**

This new output class has these properties.

- `developerName`—API name of the product category media group.
- `id`—ID of the product category media group.
- `mediaItems`—List of media items within a product category media group.
- `name`—Name of the product category media group.
- `usageType`—Usage type of a product media item within a media group. Values are:
  - `Attachment`—Product media group with product documents as attachments.
  - `Banner`—Product category media group with banner images of the product.
  - `Listing`—Product media group with listing images of the product.
  - `Standard`—Product media group with standard images and videos of the product.
  - `Tile`—Product category media group with tile images of the product.

#### **ConnectApi.ProductCategoryPath**

This new output class has this property.

- `path`—List of product categories in a path.

#### **ConnectApi.ProductDetail**

This new output class has these properties.

- `defaultImage`—Default image of the product.
- `entitlement`—Entitlement details for the product.
- `fields`—List of fields for the product.
- `id`—ID of the product.
- `mediaGroups`—List of media groups of the product.
- `primaryProductCategoryPath`—Primary category path of the product.

**ConnectApi.ProductEntitlement**

This new output class has this property.

- `canViewPrice`—Specifies whether the product's price can be viewed (`true`) or not (`false`).

**ConnectApi.ProductMedia**

This new output class has these properties.

- `alternateText`—Alternative text for the product media.
- `contentVersionId`—ID of the latest published content version if the media is stored as a ContentDocument. If the image is a customer-provided external URL, the value is `null`.
- `id`—ID of the product image.
- `mediaType`—Type of product media. Values are:
  - Document
  - Image
  - Video
- `sortOrder`—Sort order of a media item within a media group.
- `thumbnailUrl`—URL of the thumbnail for product media. If a value exists, it should be used for the thumbnail whether the image is natively uploaded or hosted externally.
- `title`—Title of the product media.
- `url`—URL of the product media.

**ConnectApi.ProductMediaGroup**

This new output class has these properties.

- `developerName`—API name of the product media group.
- `id`—ID of the product media group.
- `mediaItems`—List of media items within a product media group.
- `name`—Name of the product media group.
- `usageType`—Usage type of a product media item within a media group. Values are:
  - Attachment—Product media group with product documents as attachments.
  - Banner—Product category media group with banner images of the product.
  - Listing—Product media group with listing images of the product.
  - Standard—Product media group with standard images and videos of the product.
  - Tile—Product category media group with tile images of the product.

**ConnectApi.ProductPrice**

This new output class has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the product.
- `listPrice`—List price for the product.
- `priceAdjustment`—Price adjustment schedule for the product.
- `pricebookEntryId`—ID of the pricebook entry.
- `unitPrice`—Unit price for the product.

**ConnectApi.Wishlist**

This new output class has these properties.

- `page`—Page of wishlist items.
- `summary`—Summary of the wishlist.

**ConnectApi.WishlistItem**

This new output class has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the product.
- `error`—Error information.
- `listPrice`—List price of the wishlist item.
- `productSummary`—Product summary for the wishlist item.
- `salesPrice`—Sales price of the wishlist item.
- `wishlistItemId`—ID of the wishlist item.

**ConnectApi.WishlistItemCollection**

This new output class has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the product.
- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Connect REST API URL identifying the current page.
- `hasErrors`—Specifies whether at least one of the results contains an error (`true`) or not (`false`).
- `items`—Collection of wishlist items.
- `nextPageToken`—Token identifying the next page, or `null` if there isn't a next page.
- `nextPageUrl`—Connect REST API URL identifying the next page, or `null` if there isn't a next page.
- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Connect REST API URL identifying the previous page, or `null` if there isn't a previous page.

**ConnectApi.WishlistsSummary**

This new output class has these properties.

- `displayedList`—Oldest wishlist displayed for the context user.
- `summaries`—Summary of wishlists belonging to the context user.
- `wishlistCount`—Total number of wishlists belonging to the context user.

**ConnectApi.WishlistSummary**

This new output class has these properties.

- `createdDate`—Created date for the wishlist in ISO 8601 format, for example, 2011-02-25T18:24:31.000Z.
- `id`—ID of the wishlist.
- `modifiedDate`—Last modified date of the wishlist in ISO 8601 format, for example, 2011-02-25T18:24:31.000Z.
- `name`—Name of the wishlist.
- `wishlistProductCount`—Unique product count in the wishlist.

**ConnectApi.WishlistToCartResult**

This new output class has these properties.

- `cartId`—ID of the cart to which the products were added.
- `failedWishlistToCartItem`—Wishlist items that weren't successfully added to the cart.
- `productsFailedCount`—Total number of products that weren't added to the cart.
- `productsRequestedCount`—Total number of products requested to add to the cart.
- `productsSucceededCount`—Total number of products that were successfully added to the cart.

- succeededWishlistToCartItems—Wishlist items that were successfully added to the cart.

## CMS Managed Content

### **ConnectApi.ManagedContentMediaNodeValue**

This output class has these changed and new properties.

- altUrl—This property is no longer available.

In version 49.0 and later, this information is returned in the thumbnailUrl property.

- mediaType—The value of this property is `Image`. In previous versions, this property is incorrectly documented as `Document`.
- thumbnailUrl—URL to the thumbnail of the media.

### **ConnectApi.ManagedContentMediaSourceNodeValue**

This new output class is a subclass of `ConnectApi.ManagedContentNodeValue` and has these properties.

- fileName—File name of the media source.
- isExternal—Specifies whether the media source is referenced via an external URL (`true`) or uploaded (`false`).
- mediaType—Type of managed content media. Values are:
  - `Document`
  - `Image`
- mimeType—MIME type of the media source.
- referenceId—Reference ID of the uploaded media source.
- resourceUrl—Resource URL of the media source.
- unauthenticatedUrl—URL to the media source for unauthenticated users, or `null` if the media source isn't available to external users.
- url—URL to the media source for authenticated users.

### **ConnectApi.ManagedContentNodeType**

This output class has this changed property.

- nodeType—This property now supports the `mediaSource` value.

### **ConnectApi.ManagedContentNodeValue**

This output class has this changed property.

- nodeType—This property now supports the `mediaSource` value.

## Order Management

### **ConnectApi.AdjustOrderSummaryOutputRepresentation**

This new output class has these properties.

- changeBalances—Expected (for preview) or actual (for submit) financial values for the price adjustment action. Most of the values match the change order values. If two change orders are returned, then these values combine them. The sign of a value in this output is the opposite of the corresponding value on a change order record. For example, a discount is a positive value in `changeBalances` and a negative value on a change order record.
- orderSummaryId—ID of the `OrderSummary`.
- postFulfillmentChangeOrderId—ID of the change Order that holds the financial changes applicable to order products that have been fulfilled. For an `adjustPreview` call, this value is always null.

- `preFulfillmentChangeOrderId`—ID of the change Order that holds the financial changes applicable to order products that have not been fulfilled. For an `adjustPreview` call, this value is always null.

#### **ConnectApi.ChangeItemOutputRepresentation**

This output class has these new properties.

- `totalAdjDeliveryAmtWithTax`—Change to the `TotalAdjDeliveryAmtWithTax` field.
- `totalAdjDistAmountWithTax`—Change to the `TotalAdjDistAmountWithTax` field.
- `totalAdjProductAmtWithTax`—Change to the `TotalAdjProductAmtWithTax` field.

### New and Changed Connect in Apex Enums

These enums are new or have changes.

For information about these enums, see ConnectApi Enums in the *Apex Developer Guide*.

#### **ConnectApi.CartItemSortOrder**

This new enum has these values.

- `CreatedDateAsc`—Sorts by oldest creation date.
- `CreatedDateDesc`—Sorts by most recent creation date.
- `NameAsc`—Sorts by name in ascending alphabetical order (A–Z).
- `NameDesc`—Sorts by name in descending alphabetical order (Z–A).
- `SalesPriceAsc`—Sorts from lowest to highest negotiated price.
- `SalesPriceDesc`—Sorts from highest to lowest negotiated price.

#### **ConnectApi.CartItemType**

This new enum has these values.

- `DeliveryCharge`
- `Product`

#### **ConnectApi.CartMessageSeverity**

This new enum has these values.

- `Error`
- `Info`
- `Warning`

#### **ConnectApi.CartStatus**

This new enum has these values.

- `Active`—Cart is active.
- `Checkout`—Cart is in checkout.
- `Closed`—Cart is closed.
- `Processing`—Cart is processing.

#### **ConnectApi.CartType**

This new enum has this value.

- `Cart`

#### **ConnectApi.ManagedContentMediaType**

This enum has this new value.

- `Document`

**ConnectApi.ManagedContentNodeType**

This enum has this new value.

- MediaSource

**ConnectApi.PriceAdjustmentTierType**

This new enum has these values.

- AmountBasedAdjustment—Price is adjusted by a specified amount.
- PercentageBasedAdjustment—Price is adjusted by a specified percentage.

**ConnectApi.ProductMediaType**

This new enum has these values.

- Document
- Image
- Video

**ConnectApi.ProductMediaUsageType**

This new enum has these values.

- Attachment—Product media group with product documents as attachments.
- Banner—Product category media group with banner images of the product.
- Listing—Product media group with listing images of the product.
- Standard—Product media group with standard images and videos of the product.
- Tile—Product category media group with tile images of the product.

## API: New and Changed Items

Access more data objects, metadata types, and resources in API version 49.0.

### IN THIS SECTION:

[New and Changed Objects](#)

Access more data through these new and changed standard objects.

[New and Changed Standard Platform Events](#)

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

[REST API](#)

REST API includes changed resources.

[Connect REST API](#)

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Take advantage of all that B2B Commerce on Lightning has to offer, including carts, externally managed accounts, products, wishlists, and search settings. Get and update private connect and notifications.

[Einstein Analytics REST API](#)

Create, update, and retrieve user notifications for recipe jobs with Salesforce using the Einstein Analytics REST API. Search data connectors with more filters. Retrieve the application log lines for the application's create and upgrade lifecycle.

[Reports and Dashboards REST API](#)

Reports and Dashboards REST API enhancements include new properties that describe data category filters, CSV file type subscription email attachments, and subscription file attachment encoding.

[User Interface API](#)

Retrieve all actions for a record page. User Interface API also supports more objects.

[Bulk API and Bulk API 2.0](#)

These calls and limits are changed in API version 49.0.

[Tooling API New and Changed Objects](#)

Tooling API includes new and changed objects.

[Metadata API](#)

Metadata API includes new and changed types and fields.

## New and Changed Objects

Access more data through these new and changed standard objects.

### Salesforce Overall

**Specify whether a URL is allowed to iframe Visualforce pages or Survey**

Use the new `Context` field on the `IframeWhiteListUrl` object.

**Get info on the data type of a field that was changed**

Use the new `DataType` field on `StandardObjectNameHistory` objects.

**Add walkthroughs for in-app feature discovery, learning, and training**

Walkthroughs, which are a series of connected prompts that can be shown inside the app, are now part of In-App Guidance.

On the `PromptAction` object, the `LastResult` field was amended to add the `Error` valid value. Monitor your walkthroughs to catch when users encounter walkthrough errors. The `StepCount` and `StepNumber` fields were also added since walkthroughs can support up to 10 prompt steps. The `StepNumber` field was also added to the `PromptVersion` object.

Also on the `PromptVersion` object, the `DelayDays`, `StartDate`, `TimesToDisplay`, and `UserAccess` fields were made optional since each prompt step of a walkthrough doesn't need a start date.

**BEHAVIOR CHANGE: The Location object now supports activities**

You can now associate activities with specific locations. Activities, such as tasks and events related to a location, appear in the activities timeline when viewing the detail page of the location record.

**Find out whether the flow is built with Desktop Flow Designer**

Use the new `IsSwingFlow` field on the `FlowDefinitionView` object or the `FlowVersionView` object.

### Sales

**Add a large number of users to an Einstein Activity Capture configuration**

Use the new `UserEmailCalendarSync` object.

**BEHAVIOR CHANGE: Get clearer territory-related labels in Setup and on reports**

On the `Territory2` object, the `Description` field's label is Territory Description, and the `Name` field's label is Territory Label.

**Learn about Call Coaching configuration changes**

Use the new `CallCoachConfigModifyEvent` object.

**Learn about the recording provider for Call Coaching calls**

Use the new `CallCoachingMediaProvider` object.

**Learn more about call details, call recordings, and voicemail content**

The VoiceCall object supports the updateable attribute, as do the fields ActivityId, OwnerId, and RelatedRecordId.

The VendorCallKey field supports the idLookup attribute. The fields FromCountry and ToCountry were removed, and the fields CallConnectDateTime and MediaProviderId were added.

The VoiceCallRecording object now includes the IsConsented field.

The VoiceMailContent object no longer supports the undeletable attribute.

**Create orders without price books**

Developers in Salesforce orgs with a B2B license can now use API create orders without price books and order items without price book entries.

**See how many price adjustment schedules are associated with each price book entry**

Use the new ActivePriceAdjustmentQuantity field on the PricebookEntry object.

**Learn about the rule settings in your sales cadence branch steps that make your sales cadence even more efficient**

Use the new RuleType, ParentRuleName, and GlobalEventType fields on the ActionCadenceRule object.

**Group relevant emails in your sales cadence together, allowing prospects to view your emails in a conversation view**

Use the new IsThreaded field on the ActionCadenceStep object.

**BEHAVIOR CHANGE: Query for active steps in your sales cadence, while ignoring steps that are marked for deletion**

You must now use the new IsOrphan field on the ActionCadenceStep object to retrieve only those steps which are active.

**Learn whether your sales cadence ended because it encountered an exit criteria**

Use the new AutomaticallyExited field on the ActionCadenceStepTracker object.

**Learn which global exit criteria caused your sales cadence to end**

Use the new ExitGlobalRuleId field and the new AutomaticallyExited picklist value on the CompletionReason field on the ActionCadenceTracker object.

**Learn whether a sales cadence automated email step is in the send queue**

Introduced in Spring '20, the Queued value for the State field on ActionCadenceStepTracker was added to the Object Reference for Salesforce and Lightning Platform.

**BEHAVIOR CHANGE: Retrieve a task's or an event's contacts and leads from inside an Apex trigger**

Querying Task.TaskWhoIDs, Event.AcceptedEventInviteeIds, Event.DeclinedEventInviteeIds, Event.UndecidedEventInviteeIds or Event.EventWhoIDs inside an Apex trigger now returns the IDs of related contacts and leads.

## Salesforce Surveys

**Gather Net Promoter Scores and customer satisfaction scores across stages in customers' lifecycle**

Use the new BusinessProcessGroup object.

**Create stages in a customer lifecycle map**

Use the new BusinessProcessDefinition object.

**Associate survey questions with stages in a customer lifecycle map**

Use the new BusinessProcessFeedback object.

**Specify the context based on which survey is sent or response received**

Use the new SurveyEngagementContext object.

**Get info on the list of access levels to a survey engagement context record**

Use the new SurveyEngagementContextShare object.

**Specify info about the default settings for a survey version**

Use the new SurveyVersionAddlInfo object.

**Associate Live Agent chat session records with survey invitations and responses**

Use the new LivechatTranscript picklist value on the SubjectEntityType field in the SurveySubject object.

**Specify whether a survey invitation was sent to a contact, lead, or user**

Use the new ContactID, LeadID, and UserID fields on the SurveyInvitation object.

**Use new question types for your survey**

Use the new Boolean and ShortText picklist values on the QuestionType field in the SurveyQuestion object.

**Get info on the type of response received for a question**

Use the new Boolean picklist value on the Datatype field in the SurveyQuestionResponse object.

**Track the status of data maps**

Use the new DataMapperExecutionStatus field on the SurveyResponse object.

**Service****Specify the field that you use to track work item status in the Status-Based capacity routing model**

Use the new StatusField field on the ServiceChannel object.

**Specify the values that represent completed and in-progress work-item status for the status field in the Status-Based capacity routing model**

Use the new ServiceChannelStatusField object.

**For additional skills, specify the order in which skills are dropped if after the specified timeout no agent with that skill is available**

Use the new SkillPriority field on the SkillRequirement and AgentWorkSkill objects.

**Create custom keywords and responses for Messaging Channels**

Use the new CustomKeywords and CustomResponse fields on the MsgChannelLanguageKeyword object.

**Log an event when Chat transfers to skills fail**

When this event occurs, the LiveChatTranscriptEvent records the new TransferredToSbrSkillFailed event type.

**Keep track of conversations between agents and end users**

Use the new Conversation object.

**Keep track of participants in conversations**

Use the new ConversationParticipant object.

**Manage expenses linked to a work order**

Use the new Expense object.

**View and report on replies generated by Einstein Reply Recommendations**

Use the new ReplyText object.

**Identify quick text originating from Einstein Reply Recommendations**

Four new fields on the QuickText object help you understand where the quick text originated and how agents access it:

IsInsertable, ShouldPredictInRr, SourceEntity, and SourceType.

**REMOVED: Fields were removed from the ServiceChannel object**

The CapacityPercentage and CapacityWeight fields were removed from the ServiceChannel object in API version 33.0.

**Keep track of participants in conversations**

Use the new ConversationParticipant object.

**Use the planner ResourceType for a service resource**

Use the new `Planner` value for the `ResourceType` picklist field on the `ServiceResource` object.

**Use the Quip template for a service report**

Use the new `text/vnd.salesforce.quip-template` value for the `DocumentContentType` picklist field on the `ServiceReport` object.

**View which service resources are assigned to an appointment**

Use the new `IsAnonymousBooking` field for the `ServiceAppointment` object to see whether a service resource was automatically assigned to an appointment.

**Track asset availability and reliability**

On the `Asset` object, use `AverageUptimePerDay`, `UptimeRecordEnd`, and `UptimeRecordStart` to set criteria for gathering data on an asset's availability and reliability. Then use `SumDowntime`, `SumUnplannedDowntime`, `Availability`, and `Reliability` to report on availability and reliability metrics.

Downtime periods used in the calculation of `SumDowntime` and `SumUnplannedDowntime` are recorded on the `AssetDowntimePeriod` object.

**Enable standard sharing for Knowledge**

Use the new `enableKbStandardSharing` field of the `KnowledgeSettings` object.

**Connect Cases and Knowledge articles**

Use the new `enableKnowledgeAgentContribution` field of the `KnowledgeSettings` object to create Knowledge articles from a Case, and use the new `enableKnowledgeCaseRL` field to create a list of Cases linked to a Knowledge article.

**Create a Knowledge article from a reply**

Use the new `enableKnowledgeAnswersPromotion` field of the `KnowledgeSettings` object.

**Browse, add summaries, and use breadcrumbs with Solutions**

Three new fields of the `CaseSetting` object add features to Solutions. Use the `enableSolutionCategory` field to enable Solutions browsing. The `enableSolutionShortSummary` field enables adding a short summary to a Solution, while the `enableSolutionInlineCategory` field enables inline Solution category breadcrumbs.

**Use multilingual Solutions features**

Use the new `enableMultiLangSolution` field on the `CaseSettings` object to enable multilingual Solutions. Two new fields enable multilingual Solutions searches: `enableMultiLangSolnSrchPKB` enables multilingual searches for public Solutions, and `enableMultiLangSolnSrchCSS` enables multilingual searches for Solutions in self-service portals.

**Customize case subject fields on cases created from social posts**

Use the `CaseSubjectParticle` object. Introduced in API version 41.0, this type has been added to the *SOAP API Developer Guide*.

## Lightning B2B Commerce

**Assign a price book to a buyer group**

Use the new `BuyerGroupPricebook` object.

**Get information about the delivery details for a buyer's purchase**

Use the new `CartDeliveryGroup` object.

**Allow buyer users to choose a delivery method for a cart delivery group**

Use the new `CartDeliveryGroupMethod` object.

**Get information about your checkout session as it moves from cart to order**

Use the new `CartCheckoutSession` object.

**Get information about an item in a buyer's cart**

Use the new `CartItem` object.

**Get information about the estimated and actual tax to be charged against an item in a buyer's cart**

Use the new CartTax object.

**Associate errors to cart entities**

Use the new CartValidationOutput object.

**Assign an entitlement policy to a buyer group**

Use the new CommerceEntitlementBuyerGroup object.

**Create a new entitlement policy for your store**

Use the new CommerceEntitlementPolicy object.

**Share a commerce entitlement policy**

Use the new CommerceEntitlementPolicyShare object.

**Assign an entitlement policy to a product**

Use the new CommerceEntitlementProduct object.

**Add different types of media to products and categories**

Use the new ElectronicMediaGroup object.

**Get information about how media is used.**

Use the new ElectronicMediaUse object.

**Group products into categories.**

Use the new ProductCategory object.

**Associate media with products.**

Use the new ProductMedia object.

**Map checkout integrations in a store using an external service**

Use the new RegisteredExternalService object.

**Map integrations to a store using a service**

Use the new StoreIntegratedService object

**Get information about a buyer's cart**

Use the new WebCart object and WebCartHistory, WebCartOwnerSharingRule, and WebCartShare associated objects.

**Create a store using Lightning functionality.**

Use the new WebStore object.

**Associate a collection of products to a store.**

Use the new WebStoreCatalog object.

**Get information about a buyer's list**

Use the new Wishlist object and WishlistOwnerSharingRule and WishlistShare associated objects.

**Get information about an item on a buyer's list**

Use the new WishlistItem object.

**Assign a price book to a store**

Use the new WebStorePricebook and WebStorePricebookFeed objects.

## Communities

**Allow an external account to manage another external account.**

Use the new DelegatedAccount object.

**Create event and system link navigation menu items**

Use the new Event and SystemLink fields on the NavigationMenuItem object.

**Create an audience target for personalization**

Use the new PersonalizationTargetInfo object.

**Identify the developer name, language, and master label of a permission set assigned by a delegated portal/external user admin (DPUA) to portal users**

Use the new DeveloperName, Language, and MasterLabel fields of the PortalDelegablePermissionSet object.

## Commerce Orders

**Track gross tax on orders for organizations using VAT**

Use the new TaxLocaleType, TotalAdjProductAmtWithTax, TotalAdjDeliveryAmtWithTax, TotalProductAdjDistAmtWithTax, and TotalDeliveryAdjDistAmtWithTax fields on the Order object.

**Track gross tax on order items for organizations using VAT**

Use the new GrossUnitPrice, RoundedLineAmtWithTax, TotalAdjustmentAmtWithTax, AdjustedLineAmtWithTax, TotalLineAdjustmentAmtWithTax, TotalAdjustmentDistAmtWithTax, and TotalAmtWithTax fields on the Order object.

**Track gross tax on order item adjustment line items for organizations using VAT**

Use the new TotalAmtWithTax field on the Order object.

**Track gross tax on order delivery groups for organizations using VAT.**

Use the newTotalLineAmtWithTax and TotalAdjustmentAmtWithTax fields on the Order object.

## Commerce Payments

**Store payment method information from a customer's digital wallet service**

Use the new DigitalWallet object.

**Store caller context for payment API calls**

Use the new ClientContext field on the Payment and Refund objects.

**Store more payment gateway information on payment methods**

Use the new GatewayDate, GatewayResultCode, GatewayResultCodeDescription, GatewayTokenDetails, ProcessingMode, and SfResultCode fields on the CardPaymentMethod object.

**Store more customer payment information on payment methods**

Use the new AuditEmail, CardTypeCategory, IpAddress, MacAddress, and Phone fields on the CardPaymentMethod object.

## Customization

**Translate data stored in the B2B Commerce Product2 and Product Category objects**

Use the new Product2DataTranslation and ProductCategoryDataTranslation objects.

**Return whether data translation is enabled for an object or field**

To return whether data translation is enabled for an object, use the new dataTranslationEnabled property on the DescribeSObjectResult and DescribeGlobalSObjectResult objects. To return whether data translation is enabled for a field, use the new dataTranslationEnabled field on the Field object.

## Lightning Flow

**Perform actions in a flow after a record is saved**

Use the new RecordAfterSave enum in the TriggerType field on FlowDefinitionView. For more information, see [Trigger a Flow to Run After a Record Is Saved](#).

**Trigger a flow when a platform event message is received**

Use the new `PlatformEvent` enum in the `TriggerType` field on `FlowDefinitionView`. For more information, see [Trigger a Flow to Run When a Platform Event Message Is Received](#).

**Get information about the screen flows you build, such as flow interview execution counts, flow status, and screen duration times**

Use the new `FlowInterviewLog` object and `FlowInterviewLogShare` and `FlowInterviewLogOwnerSharingRule` associated objects.

**Get information about log data generated for the `FlowInterviewLog` object**

Use the new `FlowInterviewLogEntry` object.

**Security, Privacy, and Identity****Assigning a custom OAuth scope to a connected app**

Use the new `OauthCustomScopeApp` object.

**Provide feedback about a threat detection event that occurred in your org**

Use the new `ThreatDetectionFeedback` object.

**Get info on the feed activity of feedback provided for a detected threat**

Use the new `ThreatDetectionFeedbackFeed` object.

**Get info on the feed activity of a detected report anomaly storage event**

Use the new `ReportAnomalyEventStoreFeed` object.

**Get info on the feed activity of a detected credential stuffing storage event**

Use the new `CredentialStuffingEventStoreFeed` object.

**Get info on the feed activity of a detected session hijacking storage event**

Use the new `SessionHijackingEventStoreFeed` object.

**Customize transaction security policy error messages**

Use the new `BlockMessage` field on the `TransactionSecurityPolicy` object.

**Manage a customer's consent preferences for specific types of communication**

Use the new `EngagementChannelType` field or the `ContactPointType` field on the `ContactPointTypeConsent` object.

**Manage a customer's preferences for communication channels**

Use the new `EngagementChannelTypeId` field on the `ContactPointConsent` object.

**Store your customer's consent records for authorization forms**

Use the new `RelatedRecordId` field on the existing `AuthorizationFormConsent` object.

**Add multiple addresses to an individual or personal account**

Use the new `ContactPointAddress` object.

**Get customer consent info with a new REST API parameter**

Make a GET request on the Consent API with the `newPolicy` parameter.

**Order Management****Get the ISO currency code for an order in a multicurrency-enabled org**

Use the new `CurrencyIsoCode` field on the following objects:

- `FulfillmentOrder`
- `FulfillmentOrderItemAdjustment`
- `FulfillmentOrderItemTax`
- `FulfillmentOrderLineItem`

- OrderAdjustmentGroupSummary
- OrderDeliveryGroupSummary
- OrderItemAdjustmentLineSummary
- OrderItemSummary
- OrderItemSummaryChange
- OrderItemTaxLineItemSummary
- OrderPaymentSummary
- OrderSummary

### Get the tax locale type (gross or net) for an order

Use the new `TaxLocaleType` field on the `FulfillmentOrder` and `OrderSummary` objects.

### Get tax-inclusive amounts for an order placed using gross tax

Use the following new fields:

- `TotalProductAmtWithTax`, `TotalAdjustmentAmtWithTax`, `TotalDeliveryAdjustAmtWithTax`, and `TotalDeliveryAmtWithTax` on the `FulfillmentOrder` object.
- `TotalAmtWithTax` on the `FulfillmentOrderItemAdjustment` object.
- `GrossUnitPrice`, `TotalLineAmountWithTax`, and `TotalAdjustmentAmountWithTax` on the `FulfillmentOrderLineItem` object.
- `TotalAdjustmentAmtWithTax` and `TotalLineAmtWithTax` on the `OrderDeliveryGroupSummary` object.
- `TotalAmtWithTax` on the `OrderItemAdjustmentLineSummary` object.
- `GrossUnitPrice`, `TotalAdjustmentAmtWithTax`, `AdjustedLineAmtWithTax`, `TotalLineAdjustmentAmtWithTax`, `TotalAdjustmentDistAmtWithTax`, `TotalAmtWithTax`, and `TotalLineAmountWithTax` on the `OrderItemSummary` object.
- `TotalAdjProductAmtWithTax`, `TotalAdjDeliveryAmtWithTax`, `TotalProductAdjDistAmtWithTax`, `TotalDeliveryAdjDistAmtWithTax`, and `TotalAdjDistAmountWithTax` on the `OrderSummary` object.

### Get information about a shopper on an org that doesn't use Person Accounts

Use the new `BillToContactId` field on the `FulfillmentOrder` and `OrderSummary` objects.

### Get the stock keeping unit (SKU) of the product associated with an OrderItemSummary

Use the new `StockKeepingUnit` field on the `OrderItemSummary` object.

### Apply price adjustments to OrderItemSummaries

Select the new `ProductAdjustment` picklist value on the `ChangeType` field on the `OrderItemSummaryChange` object.

### Get information about the last referenced and last viewed dates for an OrderPaymentSummary

Use the new `LastReferencedDate` and `LastViewedDate` fields on the `OrderPaymentSummary` object.

### BEHAVIOR CHANGE: You can now set or modify the PO number on an OrderSummary

The `PoNumber` field on the `OrderSummary` object now has the Create and Update properties.

### BEHAVIOR CHANGE: You can now use OrderSummaries to store data for orders that are managed by an external system

Use the new `OrderLifeCycleType` field on the `OrderSummary` object to identify it as managed (Salesforce Order Management) or unmanaged (external system).

## Development

### BEHAVIOR CHANGE: Return Length of 255 for Standard Picklist Values

Use the `length` field of `DescribeSObjectResult` to return a standard picklist field of 255 characters.

**Correlate multiple debug logs triggered by an Apex request**

Use the new `RequestIdentifier` field on the `ApexLog` object.

**Get the package type for packages you're developing in a particular org**

Use the new `PackageCategory` field on the `MetadataPackage` object.

**Get the ID of the package installed in a subscriber org**

Use the new `MetadataPackageId` field on the `PackageSubscriber` object.

**Get metadata about a Visualforce page**

Use the `ApexPageInfo` object.

## Work.com

**Create solutions for the Work.com Workplace Command Center**

Use the following new objects to create custom solutions for Work.com:

- Crisis
- Employee
- EmployeeCrisisAssessment
- InternalOrganizationUnit

**Associate Employee Records with Users**

Use the `UserId` field on the `Employee` object to link Employee records to users in your org.

**BEHAVIOR CHANGES: When using Work.com objects, you can now exclude individual fields in custom page layouts, track field change history, run custom reports, define criteria-based sharing rules, and display all the object records as a list view**

To track field change history, use the new associated objects `EmployeeHistory`, `EmployeeCrisisAssessmentHistory`, `CrisisHistory`, and `InternalOrganizationUnitHistory`. To define criteria-based sharing rules, use the new associated objects `EmployeeShare`, `EmployeeCrisisAssessmentShare`, `CrisisShare`, and `InternalOrganizationUnitShare`.

**Search select fields on Work.com objects**

Search is now enabled on

- Crisis (CrisisType and Name fields)
- Employee (Email, EmployeeNumber, FirstName, LastName, and PreferredFirstName fields)
- InternalOrganizationUnit (OrganizationCode and OrganizationName fields)

**BEHAVIOR CHANGE: The Name column in Employee list views is now the Employee Record ID column**

We renamed the heading to clarify what value is in the field.

**BEHAVIOR CHANGE: Change the label of the Employees tab to more clearly reflect who's on your team**

We fixed a bug. You can change the label of the Employees tab. For example, you can change the tab label from Employees to Students.

If you change the tab label, the labels of the following fields are updated automatically to match the new tab label.

- Employee Number
- Employee Record ID
- Employee Status

You can manually change the label of the Employee History and Manager fields to match.

## New and Changed Standard Platform Events

Receive real-time notifications from Salesforce by subscribing to the channels of these new and changed standard platform events.

## Service

### Identify cases with low-confidence Einstein Case Classification predictions

Two new fields on AIUpdateRecordEvent let you identify cases whose field predictions fell under the required confidence level for automatic updates by Einstein. `IsUpdated` indicates whether the case was updated, while `UpdatedFields` lists fields that were updated. Use this information to add these cases to a queue for review or rerun case routing logic.

## Security and Identity: Real-Time Event Monitoring

### Create notification-only transaction security policies on the Threat Detection events: CredentialStuffingEvent, ReportAnomalyEvent, and SessionHijackingEvent

We added three fields to the streaming events and their associated storage objects to support transaction security policies: `EvaluationTime`, `PolicyId`, and `PolicyOutcome`. The Threat Detection events were beta in Spring '20 and are now generally available.

### View the Threat Detection storage events in the Salesforce UI: CredentialStuffingEventStore, ReportAnomalyEventStore, and SessionHijackingEventStore

We added three fields: `<Event>Number` (such as `ReportAnomalyEventNumber`), `LastReferencedDate`, and `LastViewedDate`. The Threat Detection events were beta in Spring '20 and are now generally available.

### View a summary of a Threat Detection event: CredentialStuffingEvent, ReportAnomalyEvent, and SessionHijackingEvent

See the `Summary` field of the streaming events and their associate storage objects. The field describes the threat in simple language. The Threat Detection events were beta in Spring '20 and are now generally available.

### View the full list of browser fingerprint features associated with a session hijacking event

See the `SecurityEventData` field of the SessionHijackingEvent and SessionHijackingEventStore Threat Detection events. The field contains the information in JSON format. The Threat Detection events were beta in Spring '20 and are now generally available.

### Differentiate between the total number of rows returned from an ApiEvent and the number of rows returned in a single batch

See the new `RowsReturned` field of ApiEvent and ApiEventStream.

### Track errors when an org exceeds the concurrent long-running Apex limit

Use the new ConcurLongRunApexErrEvent event.

## B2B Commerce

### Track commerce activity to monitor events and resolve errors

Subscribe to CommerceDiagnosticEvent to receive notifications related to checkout, pricing, search, and more in Lightning B2B Commerce.

## REST API

REST API includes changed resources.

## Development

### BEHAVIOR CHANGE: In the response for the /limits request, the DailyBulkApiRequests label has been renamed to DailyBulkApiBatches

The name has been changed to more clearly indicate what this item represents.

### BEHAVIOR CHANGE: In a Composite request body the default value for collateSubrequests is now true

This ensures that more customers gain the performance increase that collation brings.

## Invocable Actions

Invocable Actions represent the actions that can be accomplished on Salesforce with APIs.

Invocable actions are available through REST API. The following actions have been added:

### **chat (Beta)**

Create a chat in Salesforce Anywhere.

### **addUsersToChat (Beta)**

Add users to an existing Salesforce Anywhere chat.

### **addMessageToChat (Beta)**

Add a message to an existing Salesforce Anywhere chat.

### **sendAlert (Beta)**

Send a Salesforce Anywhere alert to a user.

For more information on invocable actions, see the [Actions Developer Guide](#).

## Connect REST API

Integrate mobile apps, intranet sites, and third-party web applications with Salesforce using Connect REST API. Take advantage of all that B2B Commerce on Lightning has to offer, including carts, externally managed accounts, products, wishlists, and search settings. Get and update private connect and notifications.

### IN THIS SECTION:

#### [Chatter REST API Name Change](#)

We renamed Chatter REST API to Connect REST API to better reflect the nature of the APIs included in the framework.

#### [New and Changed Connect REST API Resources](#)

These resources are new or have changes.

#### [New and Changed Connect REST API Request Bodies](#)

These request bodies are new or have changes.

#### [New and Changed Connect REST API Response Bodies](#)

These response bodies are new or have changes.

### SEE ALSO:

#### [ConnectApi \(Connect in Apex\): New and Changed Classes and Enums](#)

#### [Connect REST API Developer Guide](#)

#### [Apex Developer Guide: ConnectApi Namespace](#)

## Chatter REST API Name Change

We renamed Chatter REST API to Connect REST API to better reflect the nature of the APIs included in the framework.

**Where:** This change applies to Lightning Experience, Salesforce Classic, and all versions of the mobile app in every edition, except Personal.

**Why:** Chatter REST API supports many features outside of Chatter. For example, this release introduces B2B Commerce on Lightning, notifications, and more non-Chatter resources. We wanted a name that better represents all the APIs that the framework supports.

#### SEE ALSO:

[Connect REST API Developer Guide](#)

### New and Changed Connect REST API Resources

These resources are new or have changes.

#### B2B Commerce on Lightning

##### Create a cart

Make a POST request to the new `/commerce/webstores/webstoreId/carts` resource with the Cart Input request body.

##### Get a cart

Make a GET request to the new `/commerce/webstores/webstoreId/carts/cartId` resource.

##### Delete a cart

Make a DELETE request to the new `/commerce/webstores/webstoreId/carts/cartId` resource.

##### Get the active cart

Make a GET request to the new `/commerce/webstores/webstoreId/carts/active` resource.

##### Create an active cart if one doesn't exist

Make a PUT request to the new `/commerce/webstores/webstoreId/carts/active` resource.

##### Get the items in a cart

Make a GET request to the new `/commerce/webstores/webstoreId/carts/cartId/cart-items` resource.

##### Add an item to a cart

Make a POST request to the new `/commerce/webstores/webstoreId/carts/cartId/cart-items` resource with the new Cart Item Input request body.

##### Get the items in the active cart

Make a GET request to the new `/commerce/webstores/webstoreId/carts/active/cart-items` resource.

##### Add an item to the active cart

Make a POST request to the new `/commerce/webstores/webstoreId/carts/active/cart-items` resource with the new Cart Item Input request body.

##### Add a batch of up to 100 items to a cart

Make a POST request to the new `/commerce/webstores/webstoreId/carts/cartId/cart-items/batch` resource with the Batch Collection Input request body consisting of new Cart Item Input request bodies.

##### Add a batch of up to 100 items to the active cart

Make a POST request to the new `/commerce/webstores/webstoreId/carts/active/cart-items/batch` resource with the Batch Collection Input request body consisting of new Cart Item Input request bodies.

##### Update an item in a cart

Make a PATCH request to the new `/commerce/webstores/webstoreId/carts/cartId/cart-items/cartItemId` resource with the new Cart Item Input request body.

**Delete an item in a cart**

Make a DELETE request to the new

`/commerce/webstores/webstoreId/carts/cartId/cart-items/cartItemId` resource.

**Update an item in the active cart**

Make a PATCH request to the new

`/commerce/webstores/webstoreId/carts/active/cart-items/cartItemId` resource with the new Cart Item Input request body.

**Delete an item in the active cart**

Make a DELETE request to the new

`/commerce/webstores/webstoreId/carts/active/cart-items/cartItemId` resource.

**Get a collection of externally managed accounts**

Make a GET request to the new `/commerce/webstores/webstoreId/external-managed-accounts` resource.

**Get a product**

Make a GET request to the new `/commerce/webstores/webstoreId/products/productId` resource.

**Get a product category**

Make a GET request to the new

`/commerce/webstores/webstoreId/product-categories/productCategoryId` resource.

**Get the product category path from the root category to the current category**

Make a GET request to the new

`/commerce/webstores/webstoreId/product-category-path/product-categories/productCategoryId` resource.

**Get the price for multiple products**

Make a POST request to the new `/commerce/webstores/webstoreId/pricing/products` resource with the Pricing Input request body.

POST methods typically create an item, but for this resource POST is used to retrieve information.

**Get the list and buyer price for a product**

Make a GET request to the new `/commerce/webstores/webstoreId/pricing/products/productId` resource with the `effectiveAccountId` request parameter.

**Search products**

Make a POST request to the new `/commerce/webstores/webstoreId/search/product-search` resource with the Product Search Input request body.

POST methods typically create an item, but for this resource POST is used to retrieve information.

**Get product search settings**

Make a GET request to the new `/commerce/management/webstores/webstoreId/search/product-settings` resource with the `ids` request parameter.

**Update product search settings**

Make a PATCH request to the new

`/commerce/management/webstores/webstoreId/search/product-settings` resource with the Search Product Setting Collection Input request body.

**Get search indexes**

Make a GET request to the new `/commerce/management/webstores/webstoreId/search/indexes` resource.

**Create an index of a product catalog**

Make a POST request to the new `/commerce/management/webstores/webstoreId/search/indexes` resource.



**Note:** POST doesn't take request parameters or a request body.

### Get a search index

Make a GET request to the new `/commerce/management/webstores/webstoreId/search/indexes/indexId` resource.

### Get searchable attributes

Make a GET request to the new `/commerce/management/webstores/webstoreId/search/attribute-settings/searchable-fields` resource.

### Update searchable attributes

Make a PATCH request to the new `/commerce/management/webstores/webstoreId/search/attribute-settings/searchable-fields` resource with the new Searchable Attributes Collection Input request body.

### Get facetable attributes

Make a GET request to the new `/commerce/management/webstores/webstoreId/search/attribute-settings/facetable-fields` resource.

### Update facetable attributes

Make a PUT request to the new `/commerce/management/webstores/webstoreId/search/attribute-settings/facetable-fields` resource with the new Facetable Attributes Collection Input request body.

### Get wishlists

Make a GET request to the new `/commerce/webstores/webstoreId/wishlists` resource.

### Create a wishlist

Make a POST request to the new `/commerce/webstores/webstoreId/wishlists` resource with the new Wishlist Input request body.

### Get a wishlist

Make a GET request to the new `/commerce/webstores/webstoreId/wishlists/wishlistId` resource.

### Delete a wishlist

Make a DELETE request to the new `/commerce/webstores/webstoreId/wishlists/wishlistId` resource.

### Add a wishlist to a cart

Make a POST request to the new `/commerce/webstores/webstoreId/wishlists/wishlistId/actions/add-wishlist-to-cart` resource with the `cartId` request parameter.

### Add a wishlist to the active cart

Make a POST request to the new `/commerce/webstores/webstoreId/wishlists/wishlistId/actions/add-wishlist-to-cart` resource.

### Get wishlist items

Make a GET request to the new `/commerce/webstores/webstoreId/wishlists/wishlistId/wishlist-items` resource.

### Add items to a wishlist

Make a POST request to the new `/commerce/webstores/webstoreId/wishlists/wishlistId/wishlist-items` resource with the Wishlist Item Input request body.

### Delete a wishlist item

Make a DELETE request to the new

`/commerce/webstores/webstoreId/wishlists/wishlistId/wishlist-items/wishlistItemId`

resource.

## Call Coaching

### Get the status of call coaching

Make a GET request to the new `/callcoaching/callCoachingMediaProviderId` resource.

### Post metadata about new voice calls and recordings

Make a POST request to the new `/voicecalls` resource with the new Connectors Call List Input request body.

### Upload an audio recording of a voice call

Make a POST request to the new `/voicecalls/voiceCallId/audio_upload` resource.

## CMS Managed Content

### Get the binary stream of a media node of published content in a channel

Make a GET request to the new `/connect/cms/delivery/channels/channelId/media/mediaGUID/content` resource.

### Get the searchable statuses of managed content types in a channel

Make a GET request to the new `/connect/cms/channels/channelId/searchable-content-types` resource.

### Update the searchable status of a managed content type in a channel

Make a PATCH request to the new `/connect/cms/channels/channelId/searchable-content-types` resource with the new Managed Content Type Searchable Input request body.

## Commerce Payments



**Note:** To access Commerce Payments resources, you need the following permissions.

- Salesforce Order Management License.
- PaymentsAPIUser user permission. This permission is available with the Salesforce Order Management License and the B2B Community license. Your Salesforce admin assigns it to your user profile.
- PaymentsAPIAccess org permission. Users should request this permission by logging a ticket with Salesforce Tier 3 Support.

### Authorize a payment

Make a POST request to the new `/commerce/payments/authorizations` resource.

## Files

### Retiring support for Adobe Flash renditions

The `/connect/files/fileId/rendition` resource no longer creates Adobe Flash renditions by default. In Winter '21, the resource no longer returns Adobe Flash renditions. Start using the `/connect/files/fileId/previews/previewFormat` resource to get an SVG rendition.

## Lightning Scheduler

### Find available appointment slots for service resources in specified territories

Make a POST request to the new `/connect/scheduling/available-territory-slots` resource with the new Available Territories Input request body.

## Missions

### Purge mission activity for all users

Make a POST request to the new `/connect/communities/communityId/missions/activities/purge-job` resource.



**Note:** POST doesn't take request parameters or a request body.

## Notifications

### Get notifications

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

### Mark a collection of notifications as read, unread, seen, or unseen

Make a PATCH request to the new `/connect/notifications` resource with the Notification Collection Input request body.

### Get a notification

Make a GET request to the new `/connect/notifications/notificationId` resource.

### Mark a notification as read, unread, seen, or unseen

Make a PATCH request to the new `/connect/notifications/notificationId` resource with the Notification Input request body.

### Get the status of notifications

Make a GET request to the new `/connect/notifications/status` resource.

## Order Management

### Preview the expected change order values for a proposed price adjustment action

Make a POST request to the new `/commerce/order-management/order-summaries/orderSummaryId/actions/adjust-item-preview` resource with the new Adjust Order Item Summary Input request body.

### Submit a price adjustment action

Make a POST request to the new `/commerce/order-management/order-summaries/orderSummaryId/actions/adjust-item-submit` resource with the new Adjust Order Item Summary Input request body.

### Create an order summary to represent an order that is managed by an external system

Make a POST request to the `/commerce/order-management/order-summaries` resource with the updated Order Summary Input request body.

## Personalization

### Create new types of audience targets

Make a POST request to the `/connect/communities/communityId/personalization/targets` resource with the updated Target Input request body.

## Private Connect

### Get the inbound network topologies for a connection type

Make a GET request to the new `/network-connection/inbound/connection-types/connectionType/topologies` resource.

### Provision, sync, or tear down the inbound network connection

Make a POST request to the new `/network-connection/inbound/connections/developerName` resource with the required action parameter.

### Get the outbound network topologies for a connection type

Make a GET request to the new `/network-connection/outbound/connection-types/connectionType/topologies` resource.

### Provision, sync, or tear down the outbound network connection

Make a POST request to the new `/network-connection/outbound/connections/developerName` resource with the required action parameter.

## Quip

### Get a list of related records for a Quip document

Make a GET request to the new `/connect/quip/related-records/quipDocumentId` resource.

## New and Changed Connect REST API Request Bodies

These request bodies are new or have changes.

## B2B Commerce on Lightning

### Cart Input

This new request body has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the cart.
- `effectiveAccountId`—ID of the account for which the request is made.
- `name`—Name of the cart.
- `type`—Type of cart. Value is `Cart`.

### Cart Item Input

This new request body has these properties.

- `productId`—ID of the product.
- `quantity`—Quantity of the cart item.
- `type`—Type of item in a cart. Value is `Product`.

### Distinct Value Refinement Input

This new request body has these properties.

- `nameOrId`—Developer name of the attribute.
- `type`—Search facet type. Value is `DistinctValue`.
- `values`—Comma separated list of attribute values.

### Facetable Attribute Input

This new request body has these properties.

- `displayRank`—Display rank of the facet. Valid values are from 1 through 50. Values must be unique and sequential.

- `displayType`—Display type of the facet. Values are:
  - `CategoryTree`
  - `DatePicker`
  - `MultiSelect`
  - `SingleSelect`
- `nameOrId`—Developer name of the attribute.
- `type`—Type of attribute. Values are:
  - `Custom`
  - `ProductCategory`
  - `Standard`

### Facetable Attributes Collection Input

This new request body has this property.

- `facetableAttributeSettings`—Collection of up to 10 facetable settings.

### Pricing Input

This new request body has this property.

- `pricingLineItems`—Line items for pricing.

### Pricing Line Item Input

This new request body has this property.

- `productId`—ID of the product to price.

### Product Search Input

This new request body has these properties.

- `categoryId`—Category ID returns results for products in this category or its subcategories.
- `fields`—Product fields to return in search results. Search results include fields you have access to. If unspecified, all accessible fields are returned.
- `includePrices`—Specifies whether to include prices for products in search results (`true`) or not (`false`). If unspecified, defaults to `false`.
- `page`—Specifies the number of the page you want returned. Starts at 0. If you don't specify a value or if you specify 0, the first page is returned.
- `pageSize`—Specifies the number of items per page. Valid values are from 1 through 200. If unspecified, the default is the value specified in Search Results per Page in **Administration > General Settings > Products & Search**.
- `refinements`—Refinements for search results.
- `searchTerm`—A list of up to 32 space-separated search terms.

### Searchable Attributes Collection Input

This new request body has this property.

- `searchableAttributeSettings`—Collection of up to 25 searchable attributes.

### Searchable Attribute Input

This new request body has these properties.

- `isSearchable`—Specifies whether the attribute is searchable (`true`) or not (`false`). Default value is `true`.
- `nameOrId`—Developer name of the attribute.
- `type`—Type of attribute. Values are:

- Custom
- ProductCategory
- Standard

### Search Product Setting Collection Input

This new request body has this property.

- `searchProductSettings`—Product search settings to update.

### Search Product Setting Input

This new request body has these properties.

- `id`—ID of the product.
- `searchable`—Specifies whether the product is searchable (`true`) or not (`false`).

### Wishlist Input

This new request body has these properties.

- `name`—Name of the wishlist.
- `products`—List of products to add to the wishlist.

### Wishlist Item Input

This new request body has this property.

- `productId`—ID of the product to update or add to the wishlist.

## Call Coaching

### Connectors Call Input

This new request body has these properties.

- `activityId`—ID of task logged.
- `callType`—Type of call. Values are:
  - Inbound
  - Outbound
- `consented`—Specifies whether the caller for inbound calls or the recipient for outbound calls consented to recording (`true`) or not (`false`).
- `endDateTime`—Call end time.
- `externalId`—External ID of call.
- `fromPhoneNumber`—Phone number that initiated the call.
- `mediaProviderId`—ID of media provider.
- `numberChannels`—Number of audio channels in call recording.
- `recordId`—Salesforce account, case, contact, or lead ID.
- `recordingDuration`—Duration of call recording in seconds.
- `recordingFormat`—Recording format. Values are:
  - Flac
  - Mp3
  - Wav
- `startDateTime`—Call start time.

- `toPhoneNumber`—Phone number that received the call.
- `userChannel`—Audio channel number for user's side of call recording. Value is 0 or 1, where 0 means left channel for dual channel recording.
- `userEmail`—Salesforce user email address of the person who initiated or received the call.
- `userId`—Salesforce user ID of the person who initiated or received the call.

### Connectors Call List Input

This new request body has this property.

- `calls`—List of up to 200 voice calls.

## CMS Managed Content

### Managed Content Type Searchable Input

This new request body has these properties.

- `isSearchable`—Specifies whether to set the managed content type to searchable (`true`) or not (`false`).
- `name`—Name of the managed content type.

## Commerce Payments

### Address Input

This new request body has these properties.

- `city`—City of the address of the payment method owner.
- `companyName`—Company name of the address of the payment method owner.
- `country`—Country of the address of the payment method owner.
- `postalCode`—Postal code of the address of the payment method owner.
- `state`—State of the address of the payment method owner.
- `street`—Street of the address of the payment method owner.

### Authorization API Payment Method Input

This new request body has these properties.

- `address`—Address of the payment method owner.
- `cardPaymentMethod`—Information about the card used as the payment method.
- `id`—ID of the payment method record. If this value is available, the Authorization API Payment Method Input doesn't use any other properties.
- `saveForFuture`—Defines whether Salesforce saves the payment method for future use.

### Authorization Input

This new request body has these properties.

- `accountId`—Salesforce account for the authorization transaction.
- `amount`—Amount of the authorization.
- `comments`—Optional comments for the payment authorization.
- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the payment authorization.
- `effectiveDate`—Date that the authorization is applied to the transaction.
- `paymentGatewayId`—The payment gateway that processes the authorization.

- `paymentGroup`—Payment group for the authorization. The payload must reference either a `paymentGroup` or a `paymentGroupId`, but not both.
- `paymentMethod`—The payment method used in the payment gateway for the authorization transaction.

### Capture Input

This request body has this new property.

- `clientContext`—Provides context for payment APIs. Used for a payment caller to reestablish context.

### Card Payment Method Input

This new request body has these properties.

- `accountId`—Salesforce account to which the payment method is linked.
- `cardCategory`—Card processing type. Valid values are `CreditCard` or `DebitCard`.
- `cardHolderFirstName`—First name of the card holder.
- `cardHolderLastName`—Last name of the card holder.
- `cardHolderName`—Full name of the card holder.
- `cardNumber`—Number of the payment method card.
- `cardType`—Card network type. Valid values are `AmericanExpress`, `DinersClub`, `Jcb`, `MasterCard`, `Maestro`, and `Visa`.
- `comments`—Optional comments for providing more information about the card.
- `cvv`—CVV of the card.
- `email`—Email of the card holder.
- `expiryMonth`—Card expiration month.
- `expiryYear`—Card expiration year.
- `nickName`—Optional nickname for the card.
- `startMonth`—Start month of the card.
- `startYear`—Start year of the card.

### Payment Method Input

This new request body has these properties.

- `address`—Address of the payment method owner.
- `cardPaymentMethod`—Information about the card used as the payment method.
- `id`—ID of the payment method record. If this value is available, the Authorization API Payment Method Input doesn't use any other properties.
- `saveForFuture`—Defines whether Salesforce saves the payment method for future use.

### Referenced Refund Input

This request body has this new property.

- `clientContext`—Provides context for payment APIs. Used for a payment caller to reestablish context.

### Refund Line Apply Input

This new request body has these properties.

- `amount`—Amount that must be applied.
- `appliedToId`—ID of the payment or credit memo that received the refund application.
- `comments`—Optional comments for the refund application.
- `effectiveDate`—The date that the application takes effect.

- `refundId`—ID of the parent refund entity.

## Lightning Scheduler

### Available Territories Input

This new request body has these properties.

- `accountId`—ID of the associated account.
- `allowConcurrentScheduling`—Indicates whether concurrent appointments are allowed (`true`) or not allowed (`false`). The default value is `false`.
- `endTime`—latest time that an appointment can end.
- `requiredResourceIds`—List of resource IDs that must be available during the time slot. If not provided, all qualified resources are considered.
- `schedulingPolicyId`—ID of the AppointmentSchedulingPolicy object. If not provided, the default configurations are considered.
- `startTime`—Earliest time that an appointment can start.
- `territoryIds`—List of IDs of service territories where the specified work is performed.
- `workType`—Type of work performed.
- `workTypeGroupId`—ID of the work type group containing all work types performed.

### Work Type Input

This new request body has these properties.

- `blockTimeAfterAppointmentInMinutes`—Period after the appointment that is typically blocked for this work type.
- `blockTimeBeforeAppointmentInMinutes`—Period before the appointment that is typically blocked for this work type.
- `durationInMinutes`—Duration of the appointment in minutes.
- `id`—ID of the work type.
- `operatingHoursId`—ID of the operating hours.
- `operatingHoursTimeZone`—Time zone for the operating hours.
- `skillRequirements`—List of skills required to complete the tasks associated with this work type.
- `timeFrameEndInMinutes`—Ending of the appointment in minutes.
- `timeFrameStartInMinutes`—Beginning of the appointment in minutes.

### Skill Requirement Input

This new request body has the properties.

- `skillId`—ID of the skill required.
- `skillLevel`—Level of the skill required.

## Notifications

### Notification Collection Input

This new request body has these properties.

- `before`—Notifications occurring before this ISO 8601 formatted date string to mark as read, unread, seen, or unseen. If unspecified, defaults to the current date and time.
- `notificationIds`—List of up to 50 notification IDs to mark as read, unread, seen, or unseen.
- `read`—Marks notifications as read (`true`) or unread (`false`).

- `seen`—Marks notifications as seen (`true`) or unseen (`false`).

### Notification Input

This new request body has these properties.

- `read`—Marks a notification as read (`true`) or unread (`false`).
- `seen`—Marks a notification as seen (`true`) or unseen (`false`).

## Order Management

### Adjust Item Input

This new request body has these properties.

- `adjustmentType`—Describes how the amount is calculated. It can have one of these values:
  - `AmountWithTax`—Value of amount is the adjustment, including tax.
  - `AmountWithoutTax`—Value of amount is the adjustment, not including tax. Tax is calculated on the value and added.
  - `Percentage`—Value of amount is a percentage discount. It is divided by 100, and then multiplied by the `TotalPrice` and `TotalTaxAmount` of the `OrderItemSummary` to determine the adjustment amount.
- `amount`—Value used to calculate the adjustment amount, as described by the `adjustmentType`. It must be a negative value.
- `description`—Description of the adjustment.
- `orderItemSummaryId`—ID of the `OrderItemSummary`.
- `reason`—Reason for the adjustment. The value must match one of the picklist values on the `Reason` field of the `OrderItemSummaryChange` object.

### Adjust Order Item Summary Input

This new request body has this property.

- `adjustItems`—List of price adjustments to `OrderItemSummaries`.

### Ensure Refunds Async Input

This request body has this new property.

- `excessFundsAmount`—Amount of excess funds to refund.

### Order Summary Input

This request body has this new property.

- `orderLifeCycleType`—Specifies whether the order is managed in Salesforce Order Management or by an external system. It can have one of these values:
  - `MANAGED`—Managed in Salesforce Order Management.
  - `UNMANAGED`—Managed by an external system.

## Personalization

### Target Input

This request body has this changed property.

- `targetType`—This property supports these new values.
  - `NavigationLinkSet`
  - `Topic`
  - `CollaborationGroup`
  - `KnowledgeArticle`

- ContentDocument
- ManagedContent
- Report
- Dashboard

## New and Changed Connect REST API Response Bodies

These response bodies are new or have changes.

### B2B Commerce on Lightning

#### Cart Item

This new response body has these properties.

- cartId—ID of the cart.
- cartItemId—ID of the item.
- listPrice—List price for the item.
- messagesSummary—Messages summary for the item.
- name—Name of the item.
- productDetails—Summary of the product details.
- productId—ID of the product.
- quantity—Quantity of the item.
- salesPrice—Sales price for the item.
- totalAmount—Total amount for the item.
- totalListPrice—Total list price for the item.
- totalPrice—Total price for the item including adjustments but excluding taxes.
- totalTax—Total tax for the item.
- type—Type of item in a cart. Values are:
  - DeliveryCharge
  - Product

#### Cart Item Collection

This new response body has these properties.

- cartItems—Collection of cart item results.
- cartSummary—Summary of the cart.
- currentPageToken—Token identifying the current page.
- currentPageUrl—Connect REST API URL identifying the current page.
- hasErrors—Specifies whether at least one of the results contains an error.
- nextPageToken—Token identifying the next page, or null if there isn't a next page.
- nextPageUrl—Connect REST API URL identifying the next page, or null if there isn't a next page.
- previousPageToken—Token identifying the previous page, or null if there isn't a previous page.
- previousPageUrl—Connect REST API URL identifying the previous page, or null if there isn't a previous page.

### Cart Item Product

This new response body has these properties.

- `fields`—Map of product fields and values.
- `name`—Name of the product.
- `productId`—ID of the product.
- `sku`—SKU of the product.
- `thumbnailImage`—Thumbnail image of the product.

### Cart Item Result

This new response body has these properties.

- `cartItem`—Cart item.
- `message`—Message when the request isn't successful.
- `status`—Status for the request.

### Cart Item Without Price

This new response body has these properties.

- `cartId`—ID of the cart.
- `cartItemId`—ID of the item.
- `messagesSummary`—Messages summary for the item.
- `name`—Name of the item.
- `productDetails`—Summary of the product details.
- `productId`—ID of the product.
- `quantity`—Quantity of the item.
- `type`—Type of item in a cart. Values are:
  - `DeliveryCharge`
  - `Product`

### Cart Message

This new response body has these properties.

- `message`—Cart message.
- `messageId`—ID of the object supplying the message.
- `relatedEntityId`—ID of the entity, for example, cart, cart item, or cart tax, associated with the message.
- `severity`—Severity of cart message. Values are:
  - `Error`
  - `Info`
  - `Warning`
- `type`—Type of message. Standard values include `Inventory`, `Taxes`, `Pricing`, `Shipping`, `Entitlement`, `SystemError`, and `Other`.
- `visible`—Specifies whether the message is visible (`true`) or dismissed (`false`).

### Cart Messages Summary

This new response body has these properties.

- `errorCount`—If the summary is for a single entity, the count of messages with the `Error` severity level.

- `hasErrors`—Specifies whether there are messages related to the entity (`true`) or not (`false`).
- `limitedMessages`—If the summary is for a single entity, a limited list of messages related to the entity. Otherwise, each message can be related to the cart or to another cart-related entity.
- `relatedEntityId`—If the summary is for a single entity, the ID of the related entity. Otherwise, each message can be related to the cart or to another cart-related entity.

### Cart Summary

This new response body has these properties.

- `accountId`—ID of the account for the cart.
- `cartId`—ID of the cart.
- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the cart.
- `grandTotalAmount`—Grand total amount including shipping and tax for items in the cart, in the currency of the cart.
- `name`—Name of the cart.
- `ownerId`—ID of the owner of the cart.
- `status`—Status of the cart. Values are:
  - `Active`—Cart is active.
  - `Checkout`—Cart is in checkout.
  - `Closed`—Cart is closed.
  - `Processing`—Cart is processing.
- `totalChargeAmount`—Total amount for shipping and other charges in the currency of the cart.
- `totalListPrice`—Total list price for the cart.
- `totalProductAmount`—Total amount including discounts, but excluding shipping and tax, for product items in the cart.
- `totalProductCount`—Total count of items in the cart.
- `totalTaxAmount`—Total tax amount for the cart, including tax on shipping, if applicable.
- `type`—Type of cart. Value is `Cart`.
- `uniqueProductCount`—Total count of unique items, or SKUs, in the cart.
- `webstoreId`—ID of the webstore of the cart.

### Commerce Search Index

This new response body has these properties.

- `completionDate`—Completion date and time of the index.
- `createdDate`—Creation date of the index.
- `creationType`—Specifies the creation type of the index. Valid values are:
  - `Manual`
  - `Scheduled`
- `id`—ID of the index.
- `indexStatus`—Specifies the status of the index. Valid values are:
  - `Completed`
  - `Failed`
  - `InProgress`
- `indexUsage`—Specifies the usage of the index. Valid values are:

- Live
- OutOfUse
- message—Detailed message for the index status.

### Commerce Search Index Collection

This new response body has this property.

- indexes—List of up to two indexes. Returns the completed, live index and either the in progress, out of use index or the most recently failed, out of use index.

### Distinct Facet Value

This new response body has these properties.

- displayName—Display name of the facet value.
- nameOrId—Developer name of the attribute.
- productCount—Number of products in the search result that match the facet value.
- type—Type of facet value. Value is DistinctValue.

### Distinct Value Search Facet

This new response body has these properties.

- attributeType—Type of attribute. Values are:
  - Custom
  - ProductCategory
  - Standard
- displayName—Display name of the facet.
- displayRank—Display rank of the facet. Valid values are from 1 through 50.
- displayType—Display type of the facet. Values are:
  - CategoryTree
  - DatePicker
  - MultiSelect
  - SingleSelect
- facetType—Type of facet value. Value is DistinctValue.
- nameOrId—Developer name of the attribute.
- values—Values of the facet found in the search result. Sorted by display name in alphabetical order.

### External Managed Account Collection Output

This new response body has these properties.

- externalManagedAccounts—Collection of externally managed accounts.
- totalExternalManagedAccounts—Total number of externally managed accounts.

### External Managed Account Output

This new response body has these properties.

- accountId—ID of the account managed by another account.
- externalManagedAccountId—ID of the external managed account record.

### Facetable Attribute

This new response body has these properties.

- `displayRank`—Display rank of the facet. Valid values are from 1 through 50.
- `displayType`—Display type of the facet. Values are:
  - `CategoryTree`
  - `DatePicker`
  - `MultiSelect`
  - `SingleSelect`
- `label`—Localized label of the attribute.
- `nameOrId`—Developer name of the attribute.
- `type`—Type of attribute. Values are:
  - `Custom`
  - `ProductCategory`
  - `Standard`

### Facetable Attributes Collection

This new response body has this property.

- `facetableAttributeSettings`—Collection of facetable attributes.

### Field Value

This new response body has this property.

- `value`—Value of the field.

### Price Adjustment Schedule

This new response body has these properties.

- `id`—ID of the price adjustment schedule.
- `priceAdjustmentTiers`—List of price adjustment tiers.

### Price Adjustment Tier

This new response body has these properties.

- `adjustmentType`—Type of price adjustment for the tier. Values are:
  - `AmountBasedAdjustment`—Price is adjusted by a specified amount.
  - `PercentageBasedAdjustment`—Price is adjusted by a specified percentage.
- `adjustmentValue`—Adjustment value of the tier.
- `id`—ID of the price adjustment tier.
- `lowerBound`—Lower limit of the tier.
- `tierUnitPrice`—Unit price of the tier.
- `upperBound`—Upper limit of the tier.

### Pricing Result

This new response body has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the product.
- `error`—Error code and message.
- `pricingLineItemResults`—Pricing result line items.
- `success`—Specifies whether the execution was successful (`true`) or not (`false`).

### Pricing Result Line Item

This new response body has these properties.

- `error`—Error code and message.
- `listPrice`—List price for the product.
- `pricebookEntryId`—ID of the pricebook entry.
- `productId`—ID of the product to price.
- `success`—Specifies whether the execution was successful (`true`) or not (`false`).
- `unitPrice`—Unit price for the product.

### Product Category

This new response body has these properties.

- `description`—Description of the category.
- `id`—ID of the category.
- `name`—Name of the category.

### Product Category Detail

This new response body has these properties.

- `bannerImage`—Banner image of the product category.
- `fields`—List of fields for the product category.
- `id`—ID of the product category.
- `mediaGroups`—List of media groups of the product category.
- `tileImage`—Tile image of the product category.

### Product Category Media

This new response body has these properties.

- `alternateText`—Alternative text for the product category media.
- `contentVersionId`—ID of the latest published content version if the media is stored as a ContentDocument. If the image is a customer-provided external URL, the value is `null`.
- `id`—ID of the product category image.
- `mediaType`—Type of product media. Values are:
  - Document
  - Image
  - Video
- `sortOrder`—Sort order of a media item inside a media group.
- `thumbnailUrl`—URL of the thumbnail for product category media. If a value exists, it should be used for the thumbnail whether the image is natively uploaded or hosted externally.
- `title`—Title of the product category media.
- `url`—URL of the product category media.

### Product Category Media Group

This new response body has these properties.

- `developerName`—API name of the product category media group.
- `id`—ID of the product category media group.
- `mediaItems`—List of media items within a product category media group.

- `name`—Name of the product category media group.
- `usageType`—Usage type of a product media item within a media group. Values are:
  - `Attachment`—Product media group with product documents as attachments.
  - `Banner`—Product category media group with banner images of the product.
  - `Listing`—Product media group with listing images of the product.
  - `Standard`—Product media group with standard images and videos of the product.
  - `Tile`—Product category media group with tile images of the product.

### Product Category Path

This new response body has this property.

- `path`—List of product categories in a path.

### Product Detail

This new response body has these properties.

- `defaultImage`—Default image of the product.
- `entitlement`—Entitlement details for the product.
- `fields`—List of fields for the product.
- `id`—ID of the product.
- `mediaGroups`—List of media groups of the product.
- `primaryProductCategoryPath`—Primary category path of the product.

### Product Entitlement

This new response body has this property.

- `canViewPrice`—Specifies whether the product's price can be viewed (`true`) or not (`false`).

### Product Media

This new response body has these properties.

- `alternateText`—Alternative text for the product media.
- `contentVersionId`—ID of the latest published content version if the media is stored as a ContentDocument. If the image is a customer-provided external URL, the value is `null`.
- `id`—ID of the product image.
- `mediaType`—Type of product media. Values are:
  - `Document`
  - `Image`
  - `Video`
- `sortOrder`—Sort order of a media item within a media group.
- `thumbnailUrl`—URL of the thumbnail for product media. If a value exists, it should be used for the thumbnail whether the image is natively uploaded or hosted externally.
- `title`—Title of the product media.
- `url`—URL of the product media.

### Product Media Group

This new response body has these properties.

- `developerName`—API name of the product media group.

- `id`—ID of the product media group.
- `mediaItems`—List of media items within a product media group.
- `name`—Name of the product media group.
- `usageType`—Usage type of a product media item within a media group. Values are:
  - `Attachment`—Product media group with product documents as attachments.
  - `Banner`—Product category media group with banner images of the product.
  - `Listing`—Product media group with listing images of the product.
  - `Standard`—Product media group with standard images and videos of the product.
  - `Tile`—Product category media group with tile images of the product.

### Product Price

This new response body has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the product.
- `listPrice`—List price for the product.
- `priceAdjustment`—Price adjustment schedule for the product.
- `pricebookEntryId`—ID of the pricebook entry.
- `unitPrice`—Unit price for the product.

### Product Search Results

This new response body has these properties.

- `categories`—Categories from the search results.
- `facets`—Facets from the search results.
- `locale`—Locale of the search results.
- `productsPage`—Page of products from the search results.

### Product Summary

This new response body has these properties.

- `defaultImage`—Default image of the product.
- `fields`—Map of fields belonging to the product.
- `id`—ID of the product.
- `name`—Name of the product.
- `prices`—Prices of the product.

### Product Summary Collection

This new response body has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the product.
- `pageSize`—Number of products per page in the search results.
- `products`—Collection of product summaries.
- `total`—Total number of products in the search results.

### Searchable Attribute

This new response body has these properties.

- `label`—Localized label of the attribute.
- `nameOrId`—Developer name of the attribute.

- `type`—Type of attribute. Values are:
  - Custom
  - ProductCategory
  - Standard

### Searchable Attributes Collection

This new response body has this property.

- `searchableAttributeSettings`—Collection of searchable attributes.

### Search Category

This new response body has these properties.

- `category`—Information about the category.
- `children`—First-level child categories of the category searched with non-empty search results.
- `productCount`—Number of products in the search results that belong to the category.

### Search Product Setting Collection Output

This new response body has this property.

- `searchProductSettings`—Collection of product search settings.

### Search Product Setting Output

This new response body has these properties.

- `id`—ID of the product.
- `searchable`—Specifies whether the product is searchable (`true`) or not (`false`).

### Wishlist

This new response body has these properties.

- `page`—Page of wishlist items.
- `summary`—Summary of the wishlist.

### Wishlist Item

This new response body has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the product.
- `error`—Error information.
- `listPrice`—List price of the wishlist item.
- `productSummary`—Product summary for the wishlist item.
- `salesPrice`—Sales price of the wishlist item.
- `wishlistItemId`—ID of the wishlist item.

### Wishlist Item Collection

This new response body has these properties.

- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the product.
- `currentPageToken`—Token identifying the current page.
- `currentPageUrl`—Connect REST API URL identifying the current page.
- `hasErrors`—Specifies whether at least one of the results contains an error (`true`) or not (`false`).
- `items`—Collection of wishlist items.
- `nextPageToken`—Token identifying the next page, or `null` if there isn't a next page.

- `nextPageUrl`—Connect REST API URL identifying the next page, or `null` if there isn't a next page.
- `previousPageToken`—Token identifying the previous page, or `null` if there isn't a previous page.
- `previousPageUrl`—Connect REST API URL identifying the previous page, or `null` if there isn't a previous page.

### Wishlist Summaries

This new response body has these properties.

- `displayedList`—Oldest wishlist displayed for the context user.
- `summaries`—Summary of wishlists belonging to the context user.
- `wishlistCount`—Total number of wishlists belonging to the context user.

### Wishlist Summary

This new response body has these properties.

- `createdDate`—Created date for the wishlist in ISO 8601 format, for example, 2011-02-25T18:24:31.000Z.
- `id`—ID of the wishlist.
- `modifiedDate`—Last modified date of the wishlist in ISO 8601 format, for example, 2011-02-25T18:24:31.000Z.
- `name`—Name of the wishlist.
- `wishlistProductCount`—Unique product count in the wishlist.

### Wishlist to Cart Result

This new response body has these properties.

- `cartId`—ID of the cart to which the products were added.
- `failedWishlistToCartItems`—Wishlist items that weren't successfully added to the cart.
- `productsFailedCount`—Total number of products that weren't added to the cart.
- `productsRequestedCount`—Total number of products requested to add to the cart.
- `productsSucceededCount`—Total number of products that were successfully added to the cart.
- `succeededWishlistToCartItems`—Wishlist items that were successfully added to the cart.

## Call Coaching

### Connectors Call Coaching Status

This new response body has these properties.

- `enabled`—Specifies whether the call coaching preference is enabled and connector for partner is enabled (`true`) or not (`false`).
- `users`—List of user information for every active call coaching user.

### Connectors Call Coaching User Info

This new response body has these properties.

- `userEmail`—User email.
- `userId`—User ID.

### Connectors Voice Call List Result

This new response body has this property.

- `calls`—List of voice call results.

### Connectors Voice Call Result

This new response body has these properties.

- `errorMsg`—Error message.

- `externalId`—External ID of the voice call.
- `isSuccess`—Specifies whether posting the voice call was successful (`true`) or not (`false`).
- `uploadUrl`—URL for uploading the call recording.
- `voiceCallId`—ID of the voice call.

## CMS Managed Content

### Managed Content Media Node Value

This response body has these changed and new properties.

- `altUrl`—This property is no longer available.

In version 49.0 and later, this information is returned in the `thumbnailUrl` property.

- `mediaType`—The value of this property is `Image`. In previous versions, this property is incorrectly documented as `Document`.
- `thumbnailUrl`—URL to the thumbnail of the media.

### Managed Content Media Source Node Value

This new response body has these properties.

- `fileName`—File name of the media source.
- `isExternal`—Specifies whether the media source is referenced via an external URL (`true`) or uploaded (`false`).
- `mediaType`—Type of managed content media. Values are:
  - `Document`
  - `Image`
- `mimeType`—MIME type of the media source.
- `nodeType`—Type of managed content node. Value is `MediaSource`.
- `referenceId`—Reference ID of the uploaded media source.
- `resourceUrl`—Resource URL of the media source.
- `unauthenticatedUrl`—URL to the media source for unauthenticated users, or `null` if the media source isn't available to external users.
- `url`—URL to the media source for authenticated users.

### Managed Content Node Type

This response body has this changed property.

- `nodeType`—This property now supports the `mediaSource` value.

### Managed Content Type Searchable

This new response body has these properties.

- `id`—ID of the managed content type.
- `isSearchable`—Specifies whether the managed content type is searchable (`true`) or not (`false`).
- `label`—Master label of the managed content type.
- `name`—Developer name of the managed content type.

### Managed Content Type Searchable Collection

This new response body has these properties.

- `currentPageUrl`—Connect REST API URL identifying the current page.
- `items`—Searchable statuses for managed content types.

- `nextPageUrl`—Connect REST API URL identifying the next page, or `null` if there isn't a next page.
- `totalItems`—Total count of searchable statuses for managed content types.

### Managed Content Version

This response body has this change.

- `contentNodes`—This property's type now supports maps of Managed Content Media Source Node Value.

## Commerce Payments

### Authorization Gateway Response Output

This new response body has these properties.

- `gatewayAuthorizationCode`—Authorization code for the payment gateway.
- `gatewayAvsCode`—Address verification system used for tokenization in the payment gateway.
- `gatewayDate`—The date that the payment gateway processed the payment transaction.
- `gatewayMessage`—Optional method that the payment gateway returns to provide more information on the status of a payment transaction.
- `gatewayReferenceDetails`—Gateway reference details.
- `gatewayReferenceNumber`—Gateway reference number.
- `gatewayResultCode`—Gateway result code. Indicates the result of the gateway processing the payment transaction. Result codes vary between different gateway providers. Must be mapped to a Salesforce result code.
- `gatewayresultCodeDescription`—Provides more information about the result code.
- `salesforceResultcode`—Salesforce result code. Must be set based on the value of the gateway result code.

### Authorization Output

This new response body has these properties.

- `gatewayResponse`—Gateway response representation for a payment authorization.
- `paymentAuthorization`—Payment authorization representation.
- `paymentGatewayLogs`—Gateway log list representation for a payment authorization.
- `paymentGroup`—Payment group representation for the payment authorization.
- `paymentMethod`—Payment method representation for the payment authorization.

### Payment Authorization Output

This new response body has these properties.

- `accountId`—Salesforce account for the payment authorization.
- `amount`—The amount that the gateway authorized for the payment transaction.
- `currencyIsoCode`—Three-letter ISO 4217 currency code associated with the payment authorization.
- `effectiveDate`—The date that the authorization becomes effective.
- `expirationDate`—The date that the authorization expires.
- `id`—ID of the payment authorization record.
- `paymentAuthorizationNumber`—System-defined number for the payment authorization record.
- `requestDate`—The date that the authorization occurred.
- `salesforceReferenceNumber`—Salesforce reference number.
- `status`—Status of the payment authorization as returned by the gateway.

## Payment Method Output

This new response body has these properties.

- `accountId`—Salesforce account that contains the payment method.
- `id`—ID of the payment method record.
- `status`—Status of the payment method.

## Refund Service Output

This new response body has these properties.

- `error`—Error response representation for a refund.
- `gatewayResponse`—Gateway response representation for a refund.
- `paymentGatewayLogs`—Gateway log collection representation for a refund.
- `paymentGroup`—Payment group associated with a refund.
- `refund`—Refund response representation.

## Communities

### Navigation Menu Item

This response body has these new properties and changes.

- `actionType`—URL type or event of the navigation menu item. Values are:
  - `Event`—Event based navigation.  
 **Note:** `Event` is internal only and can't be used in custom components.
  - `ExternalLink`—URL outside of your community.
  - `InternalLink`—Relative URL inside your community.
- `actionValue`—Route URL or event fully qualified name for the navigation menu item.
- `url`—This property isn't returned in version 49.0 and later. Find this information in the `actionValue` property.
- `urlType`—This property isn't returned in version 49.0 and later. Find this information in the `actionType` property.

## Lightning Scheduler

### Available Territory Slots Output

This new response body has this property.

- `result`—Available territory slots result.

### Available Territory Slots List

This new response body has this property.

- `territorySlots`—List of available territory slots.

### Available Territory Slots

This new response body has these properties.

- `endTime`—End Time of the appointment.
- `resources`—List of resources available in the specified territory.
- `startTime`—Start Time of the appointment.

## Notifications

### Notification

This new response body has these properties.

- `additionalData`—Reserved for future use.
- `communityId`—ID of the community for the notification.
- `communityName`—Name of the community for the notification.
- `count`—Total number of events for the notification.
- `id`—ID of the notification.
- `image`—Url to the image associated with the notification.
- `lastModified`—Date and time when the notification was last modified.
- `messageBody`—Body of the message for the notification.
- `messageTitle`—Title of the message for the notification.
- `mostRecentActivityDate`—Date and time of the most recent activity for the notification.
- `organizationId`—ID of the notification recipient's org.
- `read`—Specifies whether the notification is marked read (`true`) or unread (`false`).
- `recipientId`—ID of the recipient of the notification.
- `seen`—Specifies whether the notification is marked seen (`true`) or unseen (`false`).
- `target`—ID of the record associated with the notification.
- `type`—Type of notification.
- `url`—URL for the notification.

### Notification Collection

This new response body has this property.

- `notifications`—Collection of notifications.

### Notification Status

This new response body has these properties.

- `lastActivity`—Date and time of latest activity date for any notifications or, if none, the current date and time.
- `oldestUnread`—Date and time of oldest unread notification or, if none, the current date and time.
- `oldestUnseen`—Date and time of oldest unseen notification or, if none, the current date and time.
- `unreadCount`—Count of unread notifications.
- `unseenCount`—Count of unseen notifications.

## Order Management

### Adjust Order Summary Output

This new response body has these properties.

- `changeBalances`—Expected (for preview) or actual (for submit) financial values for the price adjustment action. Most of the values match the change order values. If two change orders are returned, then these values combine them. The sign of a value in this output is the opposite of the corresponding value on a change order record. For example, a discount is a positive value in `changeBalances` and a negative value on a change order record.
- `orderSummaryId`—ID of the OrderSummary.

- `postFulfillmentChangeOrderId`—ID of the change Order that holds the financial changes applicable to order products that have been fulfilled. For an `adjustPreview` call, this value is always null.
- `preFulfillmentChangeOrderId`—ID of the change Order that holds the financial changes applicable to order products that have not been fulfilled. For an `adjustPreview` call, this value is always null.

### Change Item Output

This response body has these new properties.

- `totalAdjDeliveryAmtWithTax`—Change to the `TotalAdjDeliveryAmtWithTax` field.
- `totalAdjDistAmountWithTax`—Change to the `TotalAdjDistAmountWithTax` field.
- `totalAdjProductAmtWithTax`—Change to the `TotalAdjProductAmtWithTax` field.

## Private Connect

### Inbound Network Connection AWS Topologies

This new response body has this property.

- `connectionType`—Connection type. Value is `AwsPrivateLink`.
- `region`—AWS region required to set up an inbound connection.
- `serviceName`—Org's AWS service name for making inbound calls.
- `status`—Availability status of the region. Values are:
  - Available
  - Unavailable
- `url`—URL to the inbound network connection topology.

### Inbound Network Connection Topologies

This new response body has these properties.

- `topologies`—List of topologies required for making inbound calls.

### Outbound Network Connection AWS Topologies

This new response body has this property.

- `connectionType`—Connection type. Value is `AwsPrivateLink`.
- `iamRole`—AWS IAM role required for making outbound calls.
- `region`—AWS region that the customer can use.
- `status`—Availability status of the region. Values are:
  - Available
  - Unavailable
- `url`—URL to the outbound network connection topology.

### Outbound Network Connection Topologies

This new response body has these properties.

- `topologies`—Topologies required for making outbound calls.

## Quip

### Quip Content Document Link

This new response body has these properties.

- `contentDocumentId`—ID of the content document.

- `quipLinkedEntities`—List of related linked entities.

### Quip Linked Entity

This new response body has these properties.

- `linkedEntity`—Information about the user, record, or group the file is shared with.
- `linkedEntitySharingType`—Type of sharing permission. Values are:
  - `C`—Collaborator
  - `I`—Determined by location

This type generally occurs when the sharing permission is not set on the file, but on the library instead. This value is also used when the context user is the owner of the file.

- `N`—No access
- `V`—Viewer

### Quip Related Records

This new response body has this property.

- `quipContentDocumentLinks`—List of related content document links.

## Einstein Analytics REST API

Create, update, and retrieve user notifications for recipe jobs with Salesforce using the Einstein Analytics REST API. Search data connectors with more filters. Retrieve the application log lines for the application's create and upgrade lifecycle.

### IN THIS SECTION:

#### [New and Changed Einstein Analytics REST API Resources](#)

These resources are new or have changes.

#### [New and Changed Einstein Analytics REST API Request Bodies](#)

These request bodies are new or have changes.

#### [New and Changed Einstein Analytics REST API Response Bodies](#)

These response bodies are new or have changes.

### New and Changed Einstein Analytics REST API Resources

These resources are new or have changes.

#### Search data connectors with new query parameters

Make a GET request to `/wave/dataConnectors` with the `category`, `folderId`, and `scope` parameters. Valid category values are: `AdvancedPropertiesSupport`, `BatchRead`, `Direct`, `FileBased`, `FilterSupport`, `MuleSoft`, and `Output`.

#### Get the application log for Analytics applications

Make a GET request to `/wave/folders/folderId`. Set the `filterGroup` parameter to `supplemental` to return the `appLog` in the response.

#### Search all recipes by recipe format

Make a GET request to `/wave/recipes/recipeId` with the `format` parameter.

#### Get recipe response by recipe format

Make a GET request to `/wave/recipes` with the `format` parameter.

### Get a recipe notification

Make a GET request to `/wave/recipes/recipeId/notification`.

### Update a recipe notification

Make a PUT request to `/wave/recipes/recipeId/notification` with the new Recipe Notification Input request body.

## New and Changed Einstein Analytics REST API Request Bodies

These request bodies are new or have changes.

### Compact Form Filter Input (**CompactFormFilterInputRepresentation**)

The request body has this new property.

- `booleanFilterLogic` - Boolean filter logic text for the compact form.

### Dynamic Data Input (**DynamicDataInputRepresentation**)

The new request body has the following properties.

- `displayTemplate` - Contains the dynamic expression to resolve.
- `values` - Map of dynamic values.

### Dynamic Value Input (**DynamicValueInputRepresentation**)

The new request body has the following properties.

- `field` - Column used to resolve the value.
- `sourceType` - Interaction type. Valid values are: `Result` and `Selection`.
- `step` - Step id for value.

### Recipe Notification Input (**RecipeNotificationInputRepresentation**)

The new request body has the following properties.

- `longRunningAlertInMins` - Number of minutes that a recipe can run before sending an alert.
- `notificationLevel` - Notification level for email alerts.

### Recipe Input (**RecipeInputRepresentation**)

The request body has this new property.

- `format` - Recipe format type. Valid values are `2.0` and `3.0`.

### SAQL Query Input (**SaqlQueryInputRepresentation**)

The request body has this new property.

- `queryLanguage` - Language in which the query is written. Valid values are: `SAQL` and `SQL`.

### Text Widget Parameters Input (**TextWidgetParametersInputRepresentation**)

The request body has these changes.

- `content` - Dynamic value of the text.
- `text` - **DEPRECATED** Value of the text.

## New and Changed Einstein Analytics REST API Response Bodies

These response bodies are new or have changes.

### App Log Output (**AppLogRepresentation**)

The new response body has the following properties.

- `message` - A log line from the application creation and upgrade process.

### Compact Form Filter Output (**CompactFormFilterRepresentation**)

The response body has this new property.

- `booleanFilterLogic` - Boolean filter logic for the compact form.

### Data Connector Output (**DataConnectorRepresentation**)

The response body has this new property.

- `folder` - Analytics application for the connector.

### Data Connector Type Output (**DataConnectorTypeRepresentation**)

The response body has this new property.

- `associatedCategories` - Categories the data connector type belongs to. Valid values are: AdvancedPropertiesSupport, BatchRead, Direct, FileBased, FilterSupport, MuleSoft, and Output.

### Dynamic Data Output (**DynamicDataRepresentation**)

The new response body has the following properties.

- `displayTemplate` - Contains the dynamic expression to resolve.
- `values` - Map of dynamic values.

### Dynamic Value Output (**DynamicValueRepresentation**)

The new response body has the following properties.

- `field` - Column used to resolve the value.
- `sourceType` - Interaction type. Valid values are: Result and Selection.
- `step` - Step id for value.

### Recipe Notification Output (**RecipeNotificationRepresentation**)

The new response body has the following properties.

- `longRunningAlertInMins` - Number of minutes that a recipe can run before sending an alert.
- `notificationLevel` - Notification level for email alerts.

### Recipe Output (**RecipeRepresentation**)

The response body has this new property.

- `scheduleType` - Schedule type of the recipe. Valid values are: EventDriven and TimeDriven.

### Text Widget Parameters Output (**TextWidgetParametersRepresentation**)

The response body has these changes.

- `content` - Dynamic value of the text.
- `text` - **DEPRECATED** Value of the text.

### Einstein Analytics Features Output (**WaveFeaturesRepresentation**)

The response body has these new properties.

- `orgHasFavorites` - Indicates whether the org is enabled for favorites (`true`) or not (`false`).
- `orgHasWatchlistEnabled` - Indicates whether the org is enabled for watchlists (`true`) or not (`false`).

### Einstein Analytics Folder Output (**WaveFolderRepresentation**)

The response body has this new property.

- appLog - List of message strings that are the log lines for the application's creation and upgrade process.

## Reports and Dashboards REST API

Reports and Dashboards REST API enhancements include new properties that describe data category filters, CSV file type subscription email attachments, and subscription file attachment encoding.

### Changed Resources

New properties describe data category filters and subscription file attachments.

**Reports (/services/data/49.0/analytics/reports/{report\_id}/ and /services/data/49.0/analytics/reports/{report\_id}/describe/)**

A new property on `reportTypeMetadata` object describes data category filters.

Property	Type	Description
<code>dataCategories</code>	<code>dataCategories[]</code>	<p>An array of objects that each describe a data category filter on a report.</p> <p>Each object in the <code>dataCategories</code> array includes these properties.</p> <ul style="list-style-type: none"> <li>• <code>categoryGroupId</code>—Unique ID of the data category filter's root category.</li> <li>• <code>categoryGroupName</code>—User interface name of the data category filter's root category.</li> <li>• <code>categories []</code>—Array of the root category's child categories.</li> <li>• <code>categoryId</code>—Unique ID of a child category.</li> <li>• <code>categoryName</code>—User interface name of a child category.</li> <li>• <code>childNodes []</code>—Array of a child category's child categories. Each child category has <code>categoryId</code> and <code>categoryName</code>, and if it has children of its own, <code>childNodes []</code>.</li> </ul>

For example, this JSON response describes a data category filter on the Location category as the root category. The Location category includes an All child-category which is parent to a North America child-category which is parent to three children categories: Canada, Mexico, and USA.

```
{
  "reportTypeMetadata": {
    "dataCategories": [
      {
        "categoryGroupId": "Locations",
        "categoryGroupName": "Locations",
        "categories": [
          {
            "categoryId": "All",
            "categoryName": "All",
            "childNodes": [
              {
                "categoryName": "North America"
              }
            ]
          }
        ]
      }
    ]
  }
}
```

Property	Type	Description
		<pre>        "categoryId": "North_America",         "categoryName": "North America",         "childNodes": [             {                 "categoryId": "Canada",                 "categoryName": "Canada"             },             {                 "categoryId": "Mexico",                 "categoryName": "Mexico"             },             {                 "categoryId": "USA",                 "categoryName": "USA"             }         ]     } }</pre>



**Note:** Data category filters are only available on report types that include the Knowledge object, such as Knowledge Articles or Knowledge with Cases.

**Notifications** (/services/data/49.0/analytics/notifications?source=lightningReportSubscribe  
&/services/data/49.0/analytics/notifications/{notification\_id}

The `thresholds` object has new and changed properties that describe report subscription file attachments.

Property	Type	Description
attachment	String	<p>Specifies whether a Lightning Experience report subscription includes an attachment. If it includes an attachment, it also specifies the file attachment.</p> <p>A new value, <code>csv</code>, is supported. Valid values are:</p> <ul style="list-style-type: none"><li>• <code>csv</code>—Attach report results to the email as a comma-separated values (.CSV file). Do not include record-level details in the subscription email.</li><li>• <code>excel</code>—Attach report results to the email as a spreadsheet formatted as a .XLSX file.</li></ul> <p>If the Lightning report subscription does not include an attachment, the <code>attachment</code> property is not returned. When the</p>

Property	Type	Description
		<p><code>attachment</code> is not returned; HTML-formatted report results are included directly in the subscription email body.</p>
attachmentEncoding	String	<p>Specifies the file encoding of a Lightning Experience subscription attachment. Valid values are:</p> <ul style="list-style-type: none"> <li>• Unicode</li> <li>• UTF-8</li> <li>• UTF-16</li> <li>• MS932</li> <li>• Shift_JIS</li> <li>• GB18030</li> <li>• GB2312</li> <li>• Big5</li> <li>• Big5-HKSCS</li> <li>• EUC_KR</li> <li>• x-SJIS_0213</li> </ul> <p>For example, this JSON response describes a <code>Unicode</code> file:</p> <pre>{     "recordId": "00Oxx0000011yTxEAY",     "source": "lightningReportSubscribe",     "schedule": {         "frequency": "weekly",         "details": {             "daysOfWeek": [                 "tue"             ],             "time": 9         }     },     "runAs": null,     "thresholds": [         {             "actions": [                 {                     "configuration": {                         "recipients": [],                         "attachment" : "csv",                         "attachmentEncoding": "Unicode"                     },                     "type": "sendEmail"                 }             ],             "conditions": [],             "type": "always"         }     ] }</pre>

Property	Type	Description
		}

For more information, see the [Reports and Dashboards REST API Developer Guide](#) (can be outdated or unavailable during release preview).

## User Interface API

Retrieve all actions for a record page. User Interface API also supports more objects.

### Retrieve all actions for a record page

To retrieve all the actions for a record page, use the new `retrievalMode` parameter. To use the `All` value, you must also pass at least one action in the `apiNames` parameter.

```
GET /ui-api/actions/record/001d00000AtfRMAAZ?retrievalMode=All&apiNames=Account,Contact
```

The default value of `retrievalMode` is `PageLayout`, which retrieves actions from the page layout.

### Record Layout response includes more details

The Record Layout response body now includes the properties `objectApiName` and `recordTypeId`.

### Child Records resource returns values for all properties

Previously, some properties always returned `null` from this resource:

`/ui-api/records/${recordId}/child-relationships/${relationshipName}`. Now, these properties contain values: `lastModifiedById`, `lastModifiedDate`, `systemModStamp`, `weakEtag`.

### Supported Objects

These objects are now supported by most User Interface API resources. List views resources and most recently used (MRU) list views resources support a smaller set of objects, which are listed below.

- AccountBrand
- AcctMgrPeriodicTargetDstr
- AcctMgrTarget
- AcctMgrTargetDstr
- AccountParticipant
- ActionPlanTemplate
- ActionPlanTemplateItem
- ActionPlanTemplateItemValue
- ActionPlanTemplateVersion
- Address
- AssessmentIndDefinedValue
- AssessmentTaskContentDocument
- AssetStatePeriod
- BusinessLicenseApplication
- CarePgmProvHealthcareProvider
- CareRegisteredDevice

- Employee
- EmployeeAsset
- EmployeeContact
- EmployeeJob
- EmployeeJobPosition
- EmployeeOrganization
- Expense
- HealthCareDiagnosis
- HealthCareProcedure
- HealthcareProvider
- InspectionAssessmentInd
- JobFamily
- JobPosition
- ListEmail
- Location
- LoyaltyProgram
- MaintenanceWorkRule
- OccupationLicenseApplication
- ProductCategoryMedia
- ProductMedia
- Promotion
- RecordAction
- RecordsetFilterCriteria
- RecordsetFilterCriteriaRule
- RegulatoryCode
- VisitedParty
- Visitor
- VoiceCall
- WorkContract

List views resources now support these objects.

- AcctMgrTarget
- AccountParticipant
- ActionPlanTemplate
- ActionPlanTemplateItem
- ActionPlanTemplateItemValue
- ActionPlanTemplateVersion
- Address
- AssetStatePeriod
- BusinessLicenseApplication
- Expense

- InspectionAssessmentInd
- ListEmail
- Location
- LoyaltyProgram
- OccupationLicenseApplication
- Promotion
- RecordsetFilterCriteria
- RecordsetFilterCriteriaRule
- RegulatoryCode
- Visitor
- VoiceCall

Most recently used (MRU) list views resources now support these objects.

- AccountParticipant
- AcctMgrTarget
- ActionPlanTemplate
- ActionPlanTemplateItem
- ActionPlanTemplateItemValue
- ActionPlanTemplateVersion
- Address
- AssessmentTaskContentDocument
- BusinessLicenseApplication
- Expense
- InspectionAssessmentInd
- ListEmail
- Location
- LoyaltyProgram
- OccupationLicenseApplication
- Promotion
- RecordsetFilterCriteria
- RecordsetFilterCriteriaRule
- Visitor
- VoiceCall

## Bulk API and Bulk API 2.0

These calls and limits are changed in API version 49.0.

### Changed Calls

#### In Bulk API 2.0, Use the New Format for the Locator Value

For query jobs, the `Sforce-Locator` header's value is now a pseudo-random string (instead of a number). This change prevents the mistake of trying to guess what the value is without actually retrieving it.

## In Bulk API 2.0, Use Assignment Rules When Creating or Upserting Leads and Contacts

You can now trigger an assignment rule by specifying the assignment rule ID when creating a job.

## Changed Limits

### Use More Bulk Requests

For both Bulk API and Bulk API 2.0, the limit for the number of batches has increased from 10,000 to 15,000 per day.



**Note:** In Bulk API, batches are used by both ingest and query operations. In Bulk API 2.0, batches are only used by ingest operations.

For both Bulk API and Bulk API 2.0, the limit for the number of records that can be processed for ingest operations has increased from 100 million to 150 million per day.

## Tooling API New and Changed Objects

Tooling API includes new and changed objects.

### Sales

#### Get more information about the `OwnerChangeOptionInfo` object

Our documentation now includes updated information about the supported REST HTTP method and the `DurableId` field. It also shows the `Nillable` property for the `EntityDefinitionId`, `Label`, and `Name` fields.

### Service

#### Specify the order in which additional skills are dropped if after the specified timeout no agent with that skill is available

Use the new `SkillPriority` field on the `WorkSkillRoutingAttribute` object.

#### REMOVED: The `headerBackgroundImg` field on the `EmbeddedServiceLiveAgent` object is removed

The `headerBackgroundImg` field is removed in API version 49.0.

#### REMOVED: The `CustomPrechatComponent` field on the `EmbeddedServiceLiveAgent` object was removed

The `CustomPrechatComponent` field was removed in API version 46.0.

#### REMOVED: The `LiveChatButtonId` and `LiveChatDeploymentId` fields on the `EmbeddedServiceLiveAgent` object are removed

The `LiveChatButtonId` and `LiveChatDeploymentId` fields were never exposed in the Tooling API and are removed from the *Tooling API Reference and Developer Guide*.

#### Customize the colors for the header in the embedded service component

Use the new `navBarTextColor` and `secondaryNavBarColor` fields on the `EmbeddedServiceBranding` object.

#### Use an accent branding colour in the embedded service component

Use the `ContrastInvertedColor` field on the `EmbeddedServiceBranding` object. Introduced in API version 43.0, this type has been added to the *Tooling API Reference and Developer Guide*.

#### Work with common fields on the `EmbeddedServiceBranding` object

Documentation for the fields `DeveloperName`, `FullName`, `Language`, `ManageableState`, `MasterLabel`, `Metadata`, and `NamespacePrefix` on the `EmbeddedServiceBranding` object have been added to the *Tooling API Reference and Developer Guide*.

## Customization

### Translate custom labels for UI components

Use the new ExternalStringLocalization object.

## Lightning Flow

### Set your flow to run in system context without sharing

Use the new SystemModeWithoutSharing enum in the runInMode field on the Flow object.

## Security and Identity

### Route data traffic securely between Salesforce and AWS with a private connection

Use the new Tooling API objects InboundNetworkConnection, OutboundNetworkConnection, InboundNetworkConnProperty, and OutboundNetworkConnProperty to define and establish the connections.

### Customize transaction security policy error messages

Use the new BlockMessage field on the TransactionSecurityPolicy object.

## Deployment

### Query about completed or in-progress deployment operations

Use the new DeployRequest object.

### Query about Apex test results for completed or in-progress deployments

Use the new DeployTestResult object.

## Development

### Correlate multiple debug logs triggered by an Apex request

Use the new RequestIdentifier field on the ApexLog object.

### Get the package type for packages you're developing in a particular org

Use the new PackageCategory field on the MetadataPackage object.

### Check if the unlocked package depends on metadata in the installation org

Use the new IsOrgDependent field on either the Package2 object or the SubscriberPackageVersion object. This field applies to unlocked packages only.

### Get metadata about a Visualforce page

Introduced in AP version 37.0, the ApexPageInfo object has been added to the *Tooling API Reference and Developer Guide*.

### Indicate whether a field is describable by the API

Use the new IsEverApiAccessible field on the FieldDefinition object.

## Metadata API

Metadata API includes new and changed types and fields.

## Salesforce Overall

### Add walkthroughs for in-app learning, feature adoption, and training

Use the new stepNumber field on the Prompt metadata type.

**BEHAVIOR CHANGE: The fields `startDate` and `userAccess` are now optional**

These fields are found on the Prompt metadata type.

**Gather feedback on why users are switching from Lightning Experience to Salesforce Classic**

Use the new LightningOnboardingConfig metadata type.

**Turn off permissions**

Use the MutingPermissionSet metadata type. Available since API version 46.0, MutingPermissionSet is added to the Metadata API Developer Guide.

**REMOVED: The `enableWorkUseObjectivesForGoals` field on the `WorkDotComSettings` type was removed**

The enableWorkUseObjectivesForGoals field was removed in API version 49.0.

## Salesforce Surveys

**Enable Customer Lifecycle Maps to track customers' feedback across different stages in their lifecycle**

Use the new `enableIndustriesCxmEnabled` field on the SurveySettings metadata type.

**Use surveys to track customers' experiences across different stages in their lifecycle**

Use the new BusinessProcessGroup metadata type.

## Sales

**Set the access level that users get to the opportunities assigned to their territories' child territories**

Use the new `t2ForecastAccessLevel` field on the Territory2Settings metadata type.

**Show a success banner on the Territory Settings page**

Use the new `showTM2EnabledBanner` field on the Territory2Settings metadata type.

**Turn on Einstein Attribution for your org**

Use the new `enableAIAttribution` field on the CampaignSettings metadata type.

**Define a timeframe during which Einstein Attribution scans for influential campaigns**

Use the new `aiAttributionTimeframe` field on the CampaignSettings metadata type.

**BEHAVIOR CHANGE: Distinguish the My Opportunity Teams list view from the My Team's Opportunities list view**

The FilterScope enumeration has a new enumeration value, SalesTeam. The SalesTeam enumeration value represents opportunities assigned to an opportunity team. The Team enumeration value on the FilterScope enumeration now represents only records assigned to a team. Previously, Team represented both list views.

**BEHAVIOR CHANGE: The `enableEmailTrackingInMobile` field on the `EmailIntegrationSettings` metadata type now applies to desktop, mobile, and legacy versions of Inbox**

Use the `enableEmailTrackingInMobile` field on the EmailIntegrationSettings metadata type to turn off the email tracking feature in the Outlook integration with Inbox and Gmail integration with Inbox. The field also turns off email tracking in the Inbox mobile app and legacy versions of Inbox.

**Predict the likelihood of an opportunity being won**

Use the new OpportunityScoreSettings metadata type.

**Configure media providers so you can upload phone recordings to Einstein Call Coaching**

Use the new CallCoachingMediaProvider metadata type.

**Analyze your rep's call recordings and gain insights on how your team can improve**

Use the new ConversationIntelligenceSettings metadata type.

**Customize work queue options for third-party scoring**

Use the new SalesWorkQueueSettings metadata type.

**Allow non-Latin-based characters in email addresses when sending emails from Salesforce**

Use the new `enableInternationalEmailAddresses` field on the `EmailAdministrationSettings` metadata type.

## Commerce

**Define whether Salesforce Order Management represents shoppers with Person Accounts or with Accounts and Contacts**

Use the new `enablePersonAccountsForShoppers` field on the `OrderManagementSettings` metadata type.

**Create a Store using Lightning Experience**

Use the new `webStoreTemplate` metadata type.

## Service

**Specify the order in which additional skills are dropped if after the specified timeout no agent with that skill is available**

Use the new `skillPriority` field on the `WorkSkillRouting` metadata type.

**Use surveys to gather post-chat feedback**

Use the new `LA_Survey` value in the `FlowType` field (EmbeddedServiceFlow subtype) on the `EmbeddedServiceConfig` metadata type.

**REMOVED: The `headerBackgroundImg` field on the `EmbeddedServiceLiveAgent` type was removed**

The `headerBackgroundImg` field was removed in API version 49.0.

**Customize the colors for the header in the embedded component**

Use the new `navBarTextColor` and `secondaryNavBarColor` fields on the `EmbeddedServiceBranding` metadata type.

**Enable menu item to display on page load**

Use the new `isDisplayedOnPageLoad` field on the `EmbeddedServiceMenuItem` subtype of the `EmbeddedServiceMenuSettings` metadata type.

## Analytics

**Enable the Analytic Calendar App for Industry dependent templates**

Use the new `analyticsCalendarApp` field on the `AnalyticsSettings` metadata type.

**Enable the S3 Output Data Connector**

Use the new `enableS3OutputConnector` field on the `AnalyticsSettings` metadata type.

**Enable the Snowflake Output Data Connector**

Use the new `enableSnowflakeOutputConnector` field on the `AnalyticsSettings` metadata type.

**Specify the Analytics Data Recipe format**

Use the new `format` field on the `WaveRecipe` metadata type.

## Communities

**Specify external domains that you allow to frame your site or community pages**

Use the new `siteIframeWhiteListUrls` field on the `CustomSite` metadata type.

**Apply your community login page type to all Embedded Login implementations**

Use the new `applyLoginPageTypeToEmbeddedLogin` field on the `CommunitiesSettings` metadata type.

**Export your commerce template**

Use the new `Commerce` value in the `category` field on the `CommunityTemplateDefinition` metadata type.

**Initiate commerce-related actions in a Flow**

Use the new `cancelCartAsyncOperation`, `checkoutSessionAction`, and `updateCheckoutSessionStateAction` actions from the `actionType` field on the `FlowActionCall` subtype of the Flow metadata type.

**Add variations for Navigation Menu and CMS Collection components**

Use the new `componentAttributes` value in the existing `propertyOverrides` property of the variations on the `ExperienceBundle` metadata type.

**When true, guest user visibility can be turned off.**

Use the new `enableGuvSecurityOptOutPref` field on the `CommunitiesSettings` metadata type.

## Customization

**View and configure the names, properties, and other information for components and fields on a Lightning page in a new way**

Use the new `FlexiPageRegion` `itemInstances` field and the new `ItemInstance` and `FieldInstance` subtypes on the `FlexiPage` metadata type.

**REMOVED: On the FlexiPage metadata type, the `componentInstances` field on the FlexiPageRegion subtype was removed**

Use the new `itemInstances` field instead.

**Turn on Dynamic Forms in your org**

Use the new `enableDynamicForms` field on the existing `RecordPageSettings` metadata type.

**Define elements in an array as individual items, instead of using a comma-separated list**

Use the new `valueList` field on the `ComponentInstanceProperty` subtype of `FlexiPage` and the new `valueListItems` field on the `ComponentInstancePropertyList` subtype of `FlexiPage`.

**Enable split view in list views for the standard navigation style**

Use the new `enableSplitViewOnStandard` field on the `LightningExperienceSettings` metadata type.

**Turn on data translation in your org**

Use the new `enableDataTranslation` field on the `LanguageSettings` metadata type. For more information, see [Translate Product Details with Data Translation](#).

**Control the order of approval processes**

Use the new `processOrder` field on the `ApprovalProcess` metadata type. For more information, see [Control the Order of Active Approval Processes Programmatically](#).

## Lightning Flow

**Apply order item summary price adjustments in flows (orgs with Salesforce Order Management enabled)**

Use the new `adjustOrderItemSummariesPreview` and `adjustOrderItemSummariesSubmit` enums for Order Management in the `actionType` field on Flow.

**Use Survey Data Mapper to create or update records based on participant responses**

Use the new `SurveyEnrich` enum value in the `processType` field on Flow.

**Map generic sObject inputs or outputs to a specific object**

Use the new `dataTypeMappings` field on the `FlowScreenField` subtype of Flow. For more information, see [Create Flow Screen Components That Work for Multiple Objects \(Beta\)](#).

**Perform actions in a flow after a record is saved**

Use the new `RecordAfterSave` enum in the `triggerType` field on the `FlowStart` subtype of Flow. For more information, see [Trigger a Flow to Run After a Record Is Saved](#).

**Trigger a flow when a platform event message is received**

Use the new `PlatformEvent` enum in the `triggerType` field on the `FlowStart` subtype of Flow. For more information, see [Trigger a Flow to Run After a Record Is Saved](#).

**Set your flow to run in system context without sharing**

Use the new `SystemModeWithoutSharing` enum in the `runInMode` field on Flow. For more information, see [Run Flows That Bypass User Permissions](#).

**Indicate that a Subflow element's output values are stored automatically**

Use the new `storeOutputAutomatically` field on the `FlowSubflow` subtype of Flow. For more information, see [Configure Subflow Elements Without Assigning Output Values](#).

**BEHAVIOR CHANGE: Specifying an API name for a translation of a Flow version is no longer required**

The `fullName` field on the `FlowTranslation` subtype of the Translation metadata type is now optional.

**Work with Salesforce Anywhere in flows (Beta)**

Use the new `chat`, `addMessageToChat`, `addUserToChat`, and `sendAlert` enum values of the Salesforce Anywhere `actionType` field on the Flow metadata type to work with Salesforce Anywhere chats and actions.

## Personalization

**BEHAVIOR CHANGE: Indicating whether an audience is default is no longer required**

The `isAudienceDefault` field of the Audience type is now optional.

**Create new types of audience targets**

Use the new `NavigationLinkSet`, `Report`, and `Dashboard` values of the `targetType` field (`PersonalizationTargetInfo` subtype) on the Audience type.

## Security and Identity

**Route data traffic securely between Salesforce and AWS with a private connection**

Use the new metadata types `InboundNetworkConnection` and `OutboundNetworkConnection` to define and establish the connections.

**Indicate which outbound network connection uses the named credential to send callouts to AWS**

Use the new `outboundNetworkConnection` field on the `NamedCredential` type.

**Restrict user access to a connected app**

Use the new `BlacklistedConsumer` metadata type.

**Prevent impersonation by using inbound certificates**

Use the new `InboundCertificate` metadata type.

**Specify an OAuth asset token configuration for connected apps**

Use the new `oauthConfig` field (`ConnectedAppOauthAssetToken` subtype) on the `ConnectedApp` type.

**Specify OAuth access policies for connected apps**

Use the new `oauthPolicy` field (`ConnectedAppOauthPolicy` subtype) on the `ConnectedApp` type.

**Specify configuration options for a connected app's session policies**

Use the new `sessionPolicy` field (`ConnectedAppSessionPolicy` subtype) on the `ConnectedApp` type.

**Define whether a client secret is required in exchange for an access token in the OAuth 2.0 web server flow**

Use the new `isConsumerSecretOptional` field on the `ConnectedAppOauthConfig` subtype of the `ConnectedApp` type.

**Authorize a connected app to introspect all access and refresh tokens within an entire org**

Use the new `isIntrospectAllTokens` field on the `ConnectedAppOauthConfig` subtype of the `ConnectedApp` type.

**Allow access to Pardot API services with a connected app**

Use the new `Pardot` enum in the `scopes` field on the `ConnectedApp` metadata type.

**Define the connected app to which a custom scope is assigned**

Use the new `assignedTo` field (`OauthCustomScopeApp` subtype) on the `OauthCustomScope` type.

**Define information to use during a user provisioning request flow**

Use the new `UserProvisioningConfig` type.

**Enable case-sensitivity for Federation IDs**

Use the new `enableCaseInsensitiveFederationID` field on the `SecuritySettings` type.

**Restrict single sign-on from external identity providers**

Use the new `isLoginWithSalesforceCredentialsDisabled` field on the `SecuritySettings` type.

**Create a transaction security policy on a Threat Detection storage event**

Use the new values `ReportAnomalyEventStore`, `CredentialStuffingEventStore`, and `SessionHijackingEventStore` in the `eventName` field on the `TransactionSecurityPolicy` type.

**Customize transaction security policy error messages**

Use the new `blockMessage` field on the `TransactionSecurityPolicy` type.

## Development

**Configure settings related to your allowlist of external domains where you allow framing of your Visualforce content or surveys**

Use the new `IframeWhiteListUrlSettings` metadata type.

**Enforce requiring the View Setup and Configuration permission to access the AsyncApexJob and FlexQueueItem objects**

Use the new `enableAsyncRequiresViewSetup` field on the `ApexSettings` metadata type. This field controls the activation of the update "Require View Setup permission to enqueue async Apex Jobs". When the field is set to `true`, users must have the "View Setup and Configuration" permission to access the `AsyncApexJob` and `FlexQueueItem` objects. Apex classes and triggers, or other features running in system mode, are exempt from this requirement.

**Enforce requiring the View Setup and Configuration permission to access Apex test objects**

Use the new `enableApexTestReqViewSetup` field on the `ApexSettings` metadata type. This field controls the activation of the update "Require View Setup permission to access Apex test data". When the field is set to `true`, users must have the "View Setup and Configuration" permission to access these SOAP API objects: `ApexTestQueueItem`, `ApexTestResult`, `ApexTestResultLimits`, `ApexTestRunResult`, `ApexTestSuite`, and `TestSuiteMembership`.

**Receive email for unhandled Apex errors by specifying a Salesforce username or email address**

Use the new `ApexEmailNotifications` metadata type.

**Enable source tracking automatically in Developer and Developer Pro sandboxes that you create or refresh from then on (Beta)**

Use the new `SourceTrackingSettings` type.

**Change the Lightning Locker API Version for custom Lightning components**

Use the new `lockerServiceAPIVersion` field on the `SessionSettings` subtype of the `SecuritySettings` metadata type.

Introduced in API version 47.0, the `lockerServiceAPIVersion` field has been added to the Metadata API Developer Guide.

## Salesforce CLI: New and Changed Commands

Use Salesforce CLI to create environments for development and testing, synchronize source code, run tests, and control your application lifecycle. Read the weekly release notes to learn about recent updates to [v49 of the core salesforcedx plug-in](#).

### IN THIS SECTION:

#### [Uninstall the Pre-Release Version of Salesforce CLI](#)

If you installed the pre-release version of the `salesforcedx` v49 plug-in to test the next version of Salesforce CLI, uninstall it and update the CLI. We're no longer updating the pre-release v49 plug-in.

#### [Organize Your Code with Multiple Package Directories](#)

Use the `force:source:push` and `force:source:pull` commands on metadata files stored in multiple package directories instead of just the default package directory. Multiple package directories help you organize your local source code into logical units.

#### [Discover New and Changed Commands](#)

Read about the new and updated commands in v49 of the `salesforcedx` plug-in. Also review a summary of the updates in past weekly v48 releases. We release changes to Salesforce CLI regularly. Read the weekly release notes to learn about recent updates for [v49 of the core CLI plug-in \(salesforcedx\)](#).

## Uninstall the Pre-Release Version of Salesforce CLI

If you installed the pre-release version of the `salesforcedx` v49 plug-in to test the next version of Salesforce CLI, uninstall it and update the CLI. We're no longer updating the pre-release v49 plug-in.

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

**How:** Uninstall the pre-release and update to the released version:

```
$ sfdx plugins:uninstall salesforcedx  
$ sfdx update
```

## Organize Your Code with Multiple Package Directories

Use the `force:source:push` and `force:source:pull` commands on metadata files stored in multiple package directories instead of just the default package directory. Multiple package directories help you organize your local source code into logical units.

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

**How:** Each package directory must adhere to the standard Salesforce DX project structure. List the package directories in your `sfdx-project.json` file in the order you want the packaged metadata deployed to your Salesforce org. ([GitHub Issue #379](#))

### SEE ALSO:

#### [Salesforce DX Developer Guide: Multiple Package Directories](#)

## Discover New and Changed Commands

Read about the new and updated commands in v49 of the `salesforcedx` plug-in. Also review a summary of the updates in past weekly v48 releases. We release changes to Salesforce CLI regularly. Read the weekly release notes to learn about recent updates for [v49 of the core CLI plug-in \(salesforcedx\)](#).

## New Commands

These commands were added in a weekly patch of `salesforcedx` v48.

We introduced three new commands to offer you Lightning Web Components test functionality.

### **force:lightning:lwc:test:create**

Creates a Lightning Web Components test with boilerplate code inside.

### **force:lightning:lwc:test:run**

Invokes Lightning Web Components Jest unit tests.

### **force:lightning:lwc:test:setup**

Installs Jest unit testing tools for Lightning Web Components.

We introduced a new topic (`cmt`) and five new commands in this topic for managing custom metadata types.

### **force:cmt:create**

Creates a custom metadata type in the current project.

### **force:cmt:field:create**

Generates a custom metadata field based on the provided field type.

### **force:cmt:generate**

Generates a custom metadata type and all its records for the provided sObject.

### **force:cmt:record:create**

Creates a record for a given custom metadata type in the current project.

### **force:cmt:record:insert**

Creates custom metadata type records from a comma-separated values (.csv) file.

We introduced two new commands to override how the CLI tracks your local source code. The commands work with any org that supports source tracking.

### **force:source:tracking:reset**

Resets local and remote source tracking so that the CLI doesn't register current differences between your local files and metadata in the org. When you next run `force:source:status`, the CLI returns no results, even if conflicts actually exist. The CLI then resumes tracking new source changes as usual.

The main use case is when the CLI doesn't have any tracking history for an org. For example, you want to use an org that's pre-populated by an automated process with the same metadata that's in your VCS. Run this command to make the CLI behave as if the local and remote files are the same at the moment you run the command.

### **force:source:tracking:clear**

Clears all local source tracking information. When you next run `force:source:status`, the CLI displays all local and remote files as changed, and any files with the same name are listed as conflicts. You manually resolve these conflicts yourself by, for example, forcing a push or pull. The CLI then resumes tracking new source changes as usual.

Salesforce Customer Support uses this command to diagnose issues. We don't recommend using this command in your normal work flow.



**Warning:** The `force:source:tracking` commands delete or modify all existing local source tracking files in your project and affect subsequent behavior of the `force:source` commands. For example, if you reset source tracking then run `force:source:pull`, the CLI can silently overwrite local files even if there's actually a conflict. Use the commands only if you understand the differences between your local source files and the metadata in your org. And use extreme caution. Really.

## Changed Commands

These commands were changed in a weekly patch of `salesforcedx` v48.

**force:project:create**

We added a `package.json` file to the standard and Analytics Salesforce DX templates. To create these templates, run `force:project:create --template=standard` or `force:project:create --template=analytics`. Use the `package.json` file to work with lightning web components.

**commands**

We've improved the output of the `commands` command. By default, the command displays the full list of CLI commands and their descriptions in table format. With the new parameters, you can display more columns, such as command usage and the plug-in it belongs to. You have more choices for the output format (`.csv`, `.json`, `.yaml`). You can also filter and sort the output. The `commands` command works the same as the [oclif command](#).

## Deprecated Commands

These commands are still deprecated in `salesforcedx` v49. They will be removed in a future release. Use `sfdx commands` instead, which produces similar output.

**force:doc:commands:list****force:doc:commands:display**

These commands are deprecated in `salesforcedx` v49. Use the `force:lightning:lwc:test:*` commands instead.

**force:lightning:test:create****force:lightning:test:install****force:lightning:test:run**

## New Parameters

This parameter was added to a weekly patch of `salesforcedx` v48.

**force:org:list --skipconnectionstatus**

Removes the Connected Status column from the org list output to improve performance of the command.

This parameter was added to `salesforcedx` pre-release v49.

**force:package:create --orgdependent (beta)**

For unlocked packages only, allows the package to depend on unpackaged metadata in the installation org.



**Note:** As a beta feature, Org-Dependent Unlocked Packages is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Org-Dependent Unlocked Packages [Trailblazer Community](#).

## JSON Output for All Commands

JSON output for all commands is now sent to `stdout` by default. This behavior is equivalent to setting the `SFDX_JSON_TO_STDOUT` environment variable to `true`. If you currently rely on parsing errors from `stderr` when using the `--json` parameter, either update your tools and scripts to instead use `stdout` or set `SFDX_JSON_TO_STDOUT` to `false`. CLI commands usually send more warnings and errors to `stderr` even when you set `--json`.

## Other Changes

- We upgraded the CLI's version of Node.js to 12.13.0.
- The `force:org:clone` and `force:org:status` sandbox CLI commands are generally available.

## Develop Solutions for Workplace Command Center for Work.com

Workplace Command Center helps you monitor return-to-work readiness and decide when to safely bring people back to the workplace. As employees return, keep everyone safe by monitoring employee health and location readiness. Workplace Command Center includes Employee Wellness Check components, Operations Feed, and Global COVID-19 Tracker.

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

**Who:** Salesforce Customer 360 Platform developers who want to build custom solutions that enhance the Workplace Command Center, or integrate Work.com data with existing apps.

**Why:** Enhance the Workplace Command Center experience with new functionality that integrates with Work.com. Leverage the Work.com framework to build custom solutions that help companies efficiently and safely reopen their workplaces.

**How:** Use the Work.com data model to integrate Work.com data with custom solutions. Create custom Lightning Web Components that respond to Workplace Command Center global filters. Deliver custom solutions as managed packages or extension packages so customers can seamlessly install your solution in their Work.com org.

SEE ALSO:

[Workplace Command Center for Work.com Developer Guide: Extend Work.com with Custom Solutions](#)

## Quip: Template Metrics, Einstein Analytics Live App, Full Support in VPC and Sandbox, and More

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See how your users employ Quip templates with Quip for Customer 360 metrics. Bring your Einstein Analytics dashboards into Quip. Use all Quip for Customer 360 features in a sandbox. Keep your Quip documents with full VPC support. Add relationship maps to your Account Plans so that your reps can easily find key contacts and account history.

IN THIS SECTION:

[Get Actionable Metrics on Your Quip Templates](#)

See how your users employ Quip documents and templates. Track user engagement with important documents like Account Plans and Mutual Close Plans. With Quip for Customer 360 metrics, you can build Lightning dashboards in Salesforce that track your users' template adoption.

[Create Relationship Maps in a Quip Document](#)

Map out key stakeholders, easily identify deal detractors and influencers, and more. With the Relationship Map live app in Quip, create lightweight org charts that help your sales reps stay organized and close deals.

[Add Live Einstein Analytics Dashboards to Quip Documents \(Generally Available\)](#)

Keep relevant information in context with live Einstein Analytics dashboards in your Quip documents. Streamline your Quip Account Plans with dynamic Einstein Analytics dashboards. Einstein Analytics live apps added to an embedded Account Plan in Salesforce automatically populate based on the Salesforce record.

### [Keep Your Documents in Sync with Live Paste in Lightning Flow](#)

Save time updating multiple Quip documents and create a single source of truth with Live Paste. Copy content from a source document and paste it with Live Paste in a new document. After you update the source content, set the content to update automatically in all documents that reference it. With Live Paste in Lightning Flow, you can automatically add and update content from a source document to a target document when a record is changed in Salesforce.

### [Keep Your Data Secure with Quip for Customer 360 Features in VPC](#)

Let your users collaborate and stay productive while keeping your Salesforce data secure. Grants users on your VPC allowlist access to Quip for Customer 360 features like live Salesforce lists that sync back to Salesforce and live reports. With Quip for Customer 360 in VPC, your data stays secure without hindering collaboration.

### [Test Quip for Customer 360 Features in a Salesforce Sandbox](#)

Now you can test Quip for Customer 360 features in a sandbox org. See how features like synced sharing, log a call, live Salesforce records and list views in Quip, and more work in a sandbox before adding them to your production orgs.

### [Control Which Salesforce Orgs Are Connected to Quip](#)

See a list of the Salesforce orgs that are connected to your Quip site from the Quip Admin Console. Create an allowlist to control which Salesforce orgs your users can connect to Quip and pull data from. With multi-org allowlisting, you can make sure that company-critical data stays secure and users are accessing only the Salesforce data that you approve.

### [Deploy Quip for Customer 360 Faster](#)

Save your users time connecting their Salesforce accounts to Quip and speed up your Quip deployments. Users can access Quip Lightning components in Salesforce and Salesforce data in Quip by either clicking the Connect Now banner in Salesforce, or by connecting their Salesforce org in Quip. Users no longer click the Connect Now banner in Salesforce and then connect their Salesforce orgs in Quip. Your users save clicks and are prompted to complete the Salesforce connection wherever they choose to work.

### [Customize Mail Merge Defaults in a Quip Document](#)

Add a default mail merge state in your Quip templates. If a user creates a document from a template but the mail merge fields don't match the record fields, show a user-friendly mail merge state.

### [Get Enhanced Salesforce Live Apps in Quip](#)

We made enhancements to the Salesforce List and Salesforce Record live apps and added new functionality.

### [Remove Quip Documents from Lightning Components](#)

Remove a Quip document from a Quip Lightning component, or remove it from all components. You can remove a document from the Quip Document component, but have it stay in the Quip Associated Documents component, or remove it from the record entirely.

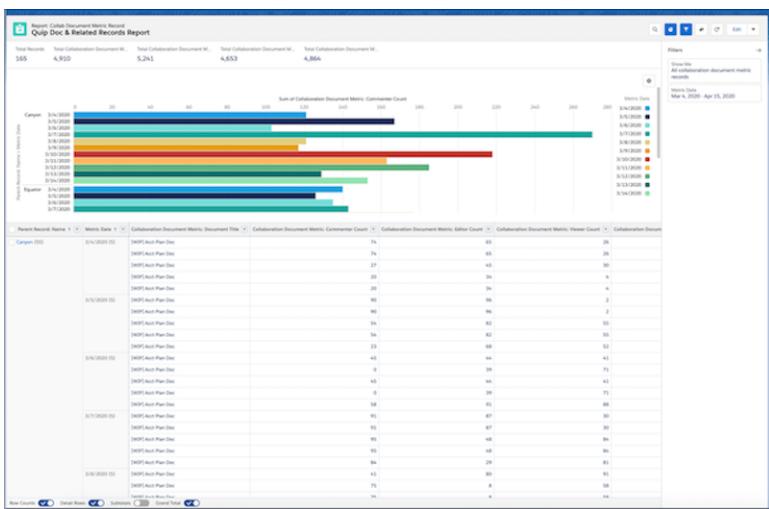
## Get Actionable Metrics on Your Quip Templates

See how your users employ Quip documents and templates. Track user engagement with important documents like Account Plans and Mutual Close Plans. With Quip for Customer 360 metrics, you can build Lightning dashboards in Salesforce that track your users' template adoption.

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

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

**Why:** Use template metrics to rethink your template strategy. Keep your sales reps organized and accountable with data on how many Account Plans are created from a template. With metrics on document views, comments, and edits, create Lightning charts and reports to see what processes work best for your team and which don't.



**How:** In Setup, enter *Quip* in the Quick Find box. Under Gather Data on Quip for Customer 360 Usage, click **Turn On Quip Metrics**.



#### SEE ALSO:

[Add Quip Template Metrics to a Lightning Dashboard](#)

## Create Relationship Maps in a Quip Document

Map out key stakeholders, easily identify deal detractors and influencers, and more. With the Relationship Map live app in Quip, create lightweight org charts that help your sales reps stay organized and close deals.

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

**When:** Add the Relationship Map live app to Quip documents by mid-June 2020. Not available by the Salesforce Sandbox Preview.

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

**Why:** Add relationship maps to Account Plans so that your reps can easily pinpoint an account's important contacts and history. Base a card's status on a custom field to make information scannable—for deal detractors, create a Relationship field with a Detractor picklist option, and associate Detractor with the color red. After you mark a user's card as a Detractor, it will appear with a red color status indicator.



**How:** In a Quip document, enter `@Relationship Map`. To start your map, create an initial card and enter a name. After you create customized fields like a Relationship or Position field, you can use the Map Builder to drag cards and create a hierarchy. After you create cards and add fields, check out your relationships on the Tree Map.

 **Note:** The Relationship Map live app is Quip-only and doesn't include Salesforce data.

## Add Live Einstein Analytics Dashboards to Quip Documents (Generally Available)

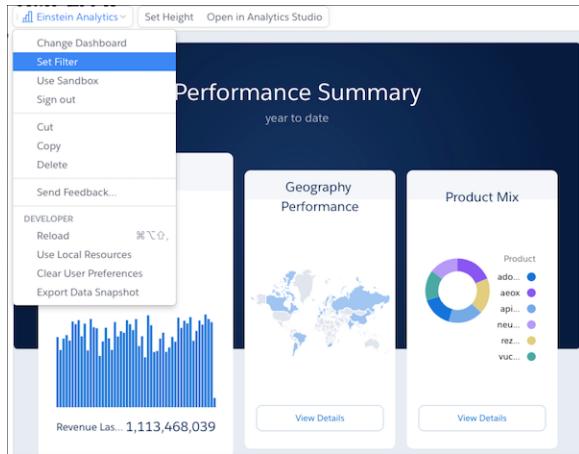
Keep relevant information in context with live Einstein Analytics dashboards in your Quip documents. Streamline your Quip Account Plans with dynamic Einstein Analytics dashboards. Einstein Analytics live apps added to an embedded Account Plan in Salesforce automatically populate based on the Salesforce record.

**Where:** This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions. The Einstein Analytics live app isn't supported on the Quip mobile or desktop app.

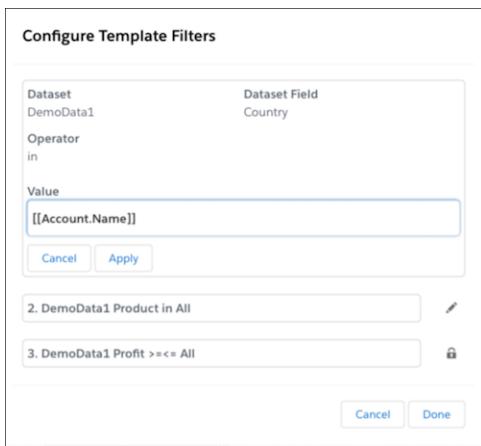
**When:** Add the Einstein Analytics live app to Quip documents by mid-June 2020. Not available by the Salesforce Sandbox Preview.

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan and Einstein Analytics Growth or Einstein Analytics Plus licenses.

**Why:** Add the Einstein Analytics live app to your Account Plans so that your sales reps can do all of their account work in one place. Make your Account Plan templates dynamic with Einstein Analytics filter values that update based on the Salesforce record. Dynamic Einstein Analytics dashboards make your templates scalable and save your users time configuring dashboard filters to match their accounts.



**How:** In a Quip document, enter `@Einstein Analytics` and click **Insert**. After you connect to Salesforce, users with Einstein Analytics licenses can select a dashboard, configure filters, make filters dynamic, and comment on dashboard sections.



## Keep Your Documents in Sync with Live Paste in Lightning Flow

Save time updating multiple Quip documents and create a single source of truth with Live Paste. Copy content from a source document and paste it with Live Paste in a new document. After you update the source content, set the content to update automatically in all documents that reference it. With Live Paste in Lightning Flow, you can automatically add and update content from a source document to a target document when a record is changed in Salesforce.

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

**Who:** Available in orgs with a Quip for Customer 360 plan or free Quip trial.

**Why:** Automate your account planning templates with Live Paste in Process and Flow Builder. Trigger a leadership review from a process when a sales rep marks an Account Plan as ready for review. Account Plan sections like an Executive Summary or Action Items can be live pasted automatically into a separate Quip document for leadership to review and approve.

**How:** In Process Builder or Flow Builder, create a Quip action and select **Copy with Live Paste**. Enter the URL of source document and the URL of the document where you want to add the live pasted content. Under Source Section Anchor Link, enter the link of the section where you want to copy content with Live Paste. Choose where in your new document you want to your copied content, and save your changes.

## SEE ALSO:

[Copy Content with Live Paste from a Process](#)

## Keep Your Data Secure with Quip for Customer 360 Features in VPC

Let your users collaborate and stay productive while keeping your Salesforce data secure. Grants users on your VPC allowlist access to Quip for Customer 360 features like live Salesforce lists that sync back to Salesforce and live reports. With Quip for Customer 360 in VPC, your data stays secure without hindering collaboration.

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

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Quip for Customer 360 Feature	VPC Support
Salesforce connection	Yes
Salesforce SSO	Yes
Native Quip	Yes
Synced sharing	Yes
Document linking	Yes
Log a call in Quip	Yes
Create a task in Quip	Yes
Salesforce Record live app	Yes
Salesforce List live app	Yes

Quip for Customer 360 Feature	VPC Support
Einstein Analytics live app	Yes
Third-party live apps	Yes
Live Salesforce reports	Yes
Quip Document component	Yes
Quip Associated Documents component	Yes
Quip Notifications component	Yes

SEE ALSO:

[Quip for Customer 360 in a VPC](#)

## Test Quip for Customer 360 Features in a Salesforce Sandbox

Now you can test Quip for Customer 360 features in a sandbox org. See how features like synced sharing, log a call, live Salesforce records and list views in Quip, and more work in a sandbox before adding them to your production orgs.

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

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

Quip for Customer 360 Feature	Sandbox Support
Salesforce connection	Yes
Salesforce SSO	Yes
Native Quip	Yes
Synced sharing	Yes
Document linking	Yes
Log a call in Quip	Yes
Create a task in Quip	Yes
Salesforce Record live app	Yes
Salesforce List live app	Yes
Einstein Analytics live app	Yes
Third-party live apps	Yes
Live Salesforce reports	Yes
Quip Document component	Yes
Quip Associated Documents component	Yes

Quip for Customer 360 Feature	Sandbox Support
Quip Notifications component	Yes

## SEE ALSO:

[Supported Quip for Customer 360 Features](#)

## Control Which Salesforce Orgs Are Connected to Quip

See a list of the Salesforce orgs that are connected to your Quip site from the Quip Admin Console. Create an allowlist to control which Salesforce orgs your users can connect to Quip and pull data from. With multi-org allowlisting, you can make sure that company-critical data stays secure and users are accessing only the Salesforce data that you approve.

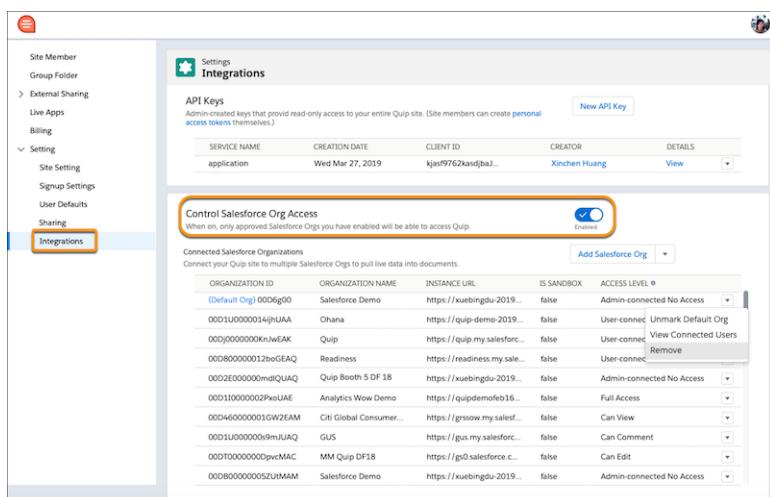
**Where:** This change applies to Lightning Experience in Professional, Performance, Unlimited, and Developer editions.

**When:** Control access to your Salesforce orgs by end of June 2020. Not available by the Salesforce Sandbox Preview.

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

**Why:** Let your users collaborate and work with Salesforce data in Quip while maintaining data security. Go to the Quip Admin Console to see a list of connected Salesforce orgs, disconnect user-connected orgs, and see which users are using which orgs. You can also add default orgs that are recommended to your users when they connect their Salesforce orgs to Quip.

**How:** Go to the Quip Admin Console and enter your admin credentials. Under Settings, click **Integrations**. After you turn on access-controls for connected Salesforce orgs, users can access only the Salesforce orgs in Quip that you approve. From here you can see and update synced sharing settings, remove org access, and new production and sandbox orgs.



## Deploy Quip for Customer 360 Faster

Save your users time connecting their Salesforce accounts to Quip and speed up your Quip deployments. Users can access Quip Lightning components in Salesforce and Salesforce data in Quip by either clicking the Connect Now banner in Salesforce, or by connecting their Salesforce org in Quip. Users no longer click the Connect Now banner in Salesforce and then connect their Salesforce orgs in Quip. Your users save clicks and are prompted to complete the Salesforce connection wherever they choose to work.

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

**When:** Streamline your Quip deployments starting in July 2020. Not available by the Salesforce Sandbox Preview.

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

## Customize Mail Merge Defaults in a Quip Document

Add a default mail merge state in your Quip templates. If a user creates a document from a template but the mail merge fields don't match the record fields, show a user-friendly mail merge state.

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

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

**Why:** Previously, if Account.Owner.PhoneNumber wasn't defined when creating an account in Salesforce, your template mail merge field remained `[[Account.Owner.PhoneNumber]]`. Now you can customize the message that appears by adding a string after the mail merge syntax. To replace mail merge syntax with "Account Owner Phone Number Default" when the field doesn't exist, enter

`[Account.Owner.PhoneNumber, "Account Owner Phone Number Default"]]`.

## Get Enhanced Salesforce Live Apps in Quip

We made enhancements to the Salesforce List and Salesforce Record live apps and added new functionality.

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

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

**Why:** Enhancements in the Salesforce live apps include the following.

- Multi-currency support in the Salesforce List live app.
- Search by object type in the Salesforce Record live app.
- Locale date formatting support in the Record live app.
- Updated refresh behavior for the Salesforce Record live app. On refresh, the Salesforce Record live app requires the following:
  - User is logged in to the same org as the Salesforce Record live app.
  - User has access to the record in Salesforce.
  - User has access to the record's fields.
- Single live app reload support.

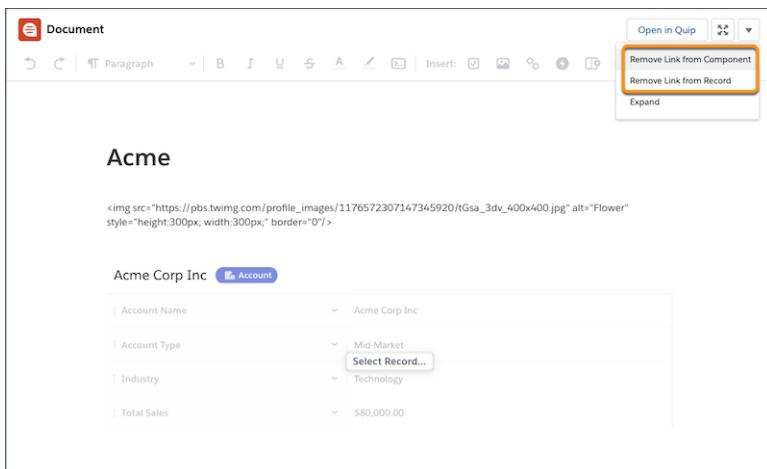
## Remove Quip Documents from Lightning Components

Remove a Quip document from a Quip Lightning component, or remove it from all components. You can remove a document from the Quip Document component, but have it stay in the Quip Associated Documents component, or remove it from the record entirely.

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

**Who:** Available in Salesforce orgs with a Quip for Customer 360 plan or free Quip trial.

**How:** From the Quip Document component dropdown, select **Remove Link from Component** or **Remove Link from Record**.



## Marketing: Transactional Sending and Behavioral Triggers in Journey Builder, Ecommerce Optimizer App in Datorama, Einstein in Interaction Studio

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

Learn about our latest features and enhancements in Marketing Cloud Release Notes.

- [July 2020 Release](#)
- [March 2020 Release](#)
- [January 2020 Release](#)
- [October 2019 Release](#)
- [August 2019 Release](#)
- [June 2019 Release](#)
- [April 2019 Release](#)
- [January 2019 Release](#)

### SEE ALSO:

- [Marketing Cloud Overview](#)
- [Marketing Cloud: Earlier Release Notes](#)
- [Salesforce Marketing Cloud Facebook Page](#)

# Release Updates: Critical Updates and Security Alerts in One Location, Permission Changes for Apex, and More

Enjoy a cleaner view of important updates and alerts in one location. Ensure that your org stays up to date on all changes that affect its performance, security, and users.

## IN THIS SECTION:

### [Review Important Org Changes with Release Updates \(Beta\)](#)

Understand and act on updates that impact your Salesforce org using an improved user interface. View your updates and alerts information in a single, easy-to-use page.

### [Release Updates \(Beta\)](#)

Salesforce periodically releases updates that improve the performance, logic, security, and usability of Salesforce, but which can affect your existing customizations. Find the Summer '20 updates in the Release Updates node in Setup.

### [Security Alerts](#)

Security Alerts help customers implement security-related updates in their org. Find the Summer '20 alerts in the Security Alerts node in Setup.

## Review Important Org Changes with Release Updates (Beta)

Understand and act on updates that impact your Salesforce org using an improved user interface. View your updates and alerts information in a single, easy-to-use page.

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



**Note:** As a beta feature, Release Updates is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only on the basis of generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature.

**Why:** Release Updates offers a more detailed view of information previously found in the Critical Updates console. The page also contains information found in the Security Alerts node. (Security alerts functionality remains the same.) Use tabs to filter for the information that you want to see. When you perform an action on an update, a series of detailed steps helps you to evaluate the impact on your org. You can adopt the update early or, depending on your org, use the recommended test run option.



**Important:** In beta, most updates still appear in the Critical Updates console and Security Alerts still appear in the Security Alerts node in Setup. You can activate or act on an update or alert in either location, but it's not necessary to do so in both.

**How:** From **Setup**, type *Release Updates* in Quick Find. The release updates page has four tabs: Needs Action, Due Soon, Overdue, and Steps Completed. The page view defaults to Needs Action. From this tab, select a release update to review. You can:

1. Check the Complete Steps By date; testing may not be supported after this date.
2. View the release in which an update is automatically enforced. (In Critical Updates, the Auto-Activation date field contained this information in a date format.) To get the major release upgrade date for your instance, go to [Trust Status](#), search for your instance, and click the maintenance tab.

3. Learn more about an update, including the impact you can expect it to have on your org, by clicking **View Details**.
4. Start or stop a test run, and view step update history by clicking **Get Started**.
5. Proceed with the update steps and confirm when you finish them.

The screenshot shows the 'Release Updates' section in the Salesforce Setup. It lists two updates:

- Require View Setup permission to access Apex test data**: Complete by Aug 6, 2020. Status: TEST RUN SUPPORTED. Progress: 0%.
- Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile**: Complete by Aug 8, 2020. Status: TEST RUN SUPPORTED. Progress: 0%.

Both updates have a 'Get Started' button and a 'View Details' link.

## Release Updates (Beta)

Salesforce periodically releases updates that improve the performance, logic, security, and usability of Salesforce, but which can affect your existing customizations. Find the Summer '20 updates in the Release Updates node in Setup.

The Release Updates page provides a list of updates that affect your org. Each update includes step-by-step actions for you to take. To ensure a smooth transition, many release updates have test runs available. Use the test run option to activate and deactivate an update as often as needed before the "Complete Steps By" date so that you can evaluate its impact on your org.

**Important:** In beta, most updates still appear in the Critical Updates console and Security Alerts still appear in the Security Alerts node in Setup. You can activate or act on an update or alert in either location, but it's not necessary to do so in both.

## New Release Updates

**These release updates are new in Summer '20. You can view these updates in the Release Updates node.**

### Allow Users to Use Standard External Profiles to Self-Register and Log Into Communities and Portals (Update) on page 380

Activating this update enables the Allow using standard external profiles for self-registration and user creation setting in your org. This setting allows admins to use standard external profiles for self-registration, user creation, and login.

### Opt Out of Enforcing Guest User Object Permission Changes (Update) on page 373

In Salesforce orgs created before Winter '21, this update opts out your org from enforcing guest user object permission changes aimed at increasing your data security.

### Require View Setup Permission to Enqueue Async Apex Jobs (Update)

Improve security for your Salesforce org with this update. Users must have the "View Setup and Configuration" permission to access the AsyncApexJob and FlexQueueItem objects in SOAP API when this update is enabled.

### Require View Setup Permission to Access Apex Test Data (Update)

Improve security for your Salesforce org with this update. When this update is enabled, users must have the "View Setup and Configuration" permission to access these SObjects: ApexTestQueueItem, ApexTestResult, ApexTestResultLimits, ApexTestRunResult, ApexTestSuite, and TestSuiteMembership.

### Enable Enhanced Folder Sharing (Update)

Enhanced folder sharing introduces new user permissions and changes each user's access to existing reports and dashboards. In the Winter '21 release (subject to change to a later release), legacy folder sharing is retiring and enhanced folder sharing replaces it.

### Transition CPQ to Permission Set Licenses (Update)

Salesforce CPQ is replacing Managed Package Licenses with Permission Set Licenses. You must assign the new license to all users before installing or upgrading to the Winter '21 version.

### Disable Rules for Enforcing Explicit Access to Apex Classes (Update, Postponed)

The Require User Access to Apex Classes Invoked by Flow update has been retired. The Disable Rules for Enforcing Explicit Access to Apex Classes release update, originally announced in Summer '20, is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Spring '21. The Disable Rules for Enforcing Explicit Access to Apex Classes update returns orgs to their original state – where users only need access to the flow to be able to run a flow that includes Apex actions.

### Prevent Consecutive API Navigation Calls in Visualforce Pages (Update)

In Visualforce pages, API navigation calls can be fired consecutively, which can lead to unwanted behavior. This release update prevents this API navigation call pattern, firing only the first navigation call.

## Previously Released Updates

**These updates were announced in a previous release and are still available. You can view these updates in the Release Updates node.**

### Enable Improved Caching of Org Schema (Previously Released Update)

Improved caching of org schema resolves known issues with version-specific object and field handling. The auto-activation (enforcement) date is now advanced, by almost a year, to August 12, 2020 from August 9, 2021. Sandbox orgs that are upgraded to Summer '20 have this update enabled by default. You can manually disable the update until it is auto-activated.

### Block Certain Fields in the User Record for Orgs with Communities and Portals (Previously Released Security Alert and Update, Enforced)

Salesforce is giving customers the option to enable a user setting that allows the hiding of certain personal information fields on the user records in orgs with communities or portals. The fields are hidden from view when external users are accessing user records. External users can still see their own user records. This change doesn't apply to queries running in System Mode.

### Enable ICU Locale Formats (Previously Released Update)

To help you do business wherever you are, we're adopting the International Components for Unicode (ICU) formats for dates and times. ICU sets the international standard for these formats for all locales. The new formats provide a consistent experience across the Salesforce platform and improve integration with ICU-compliant applications across the globe. The ICU formats replace Oracle's Java 8 Development Kit (JDK8) formats. This update was first made available in Winter '20.

### Migrate Legacy Policies to the Enhanced Transaction Security Framework (Previously Released Update)

With the Enhanced Transaction Security Policy framework, you can create transaction security policies that execute actions on any standard or custom object. Now that the new framework is generally available, we no longer allow users to create or modify legacy transaction security policies. We're retiring the legacy framework in the Winter '21 release. To prepare for this retirement and take advantage of the new features, migrate your legacy transaction security policies to the new framework as soon as possible. This update was first made available in Winter '20.

### Keep Working with Tab-Focused Dialogs (Previously Released Update)

In Lightning console apps, dialogs no longer stop you from interacting with the rest of the UI. This release update limits the focus of dialogs triggered by a workspace tab or subtab to only the tab that triggered it. This release update was first made available in Winter '20.

**These updates were announced in a previous release and are still available. You can view these updates in the Critical Updates console.**

### Opt Out of Guest User Security Policies Before Summer '20 (Previously Released Update)

By activating this update, you opt out of three policies aimed at increasing your data security for guest, or unauthenticated, users. Activating this update opts your org out of having the following settings automatically enabled with the Summer '20 release: Secure guest user record access, Assign new records created by guest users to the default owner, and Assign new records created by Salesforce Sites guest users. If your org already has these settings enabled, activating this update doesn't change your configuration.

### Opt Out of Turning Off Community-Specific Setting for Guest Users to See Other Members (Previously Released Update)

By activating this update, you opt out of turning off the community-specific Let guest users see other members of this community setting in the Winter '21 release.

### Remove the Manage Encryption Keys Permission from the System Admin Profile (Previously Released Update)

Admins must actively assign the ability to perform key management roles. The Manage Encryption Keys permission is revoked for the standard admin profile when you apply this release update. Custom profiles that include the Manage Encryption Keys permission are not affected. Any user who has the permission through a custom profile or permission still has the permission. This release update was first made available in Spring '16 and applies only to customers who enabled Shield Platform Encryption before the Spring '16 release.

## Enforced Updates

**These updates were announced in a previous release and are now enforced. You can view these updates in the Release Updates node.**

### Route My Domains Through Salesforce Edge (Update, Enforced)

With this update, we accelerate domain requests for My Domains. You can keep the same My Domain address, but requests go through Salesforce Edge. Salesforce Edge uses machine-learning technology to improve connectivity and performance. This update was first available in Winter '20 and is enforced in Summer '20.

**These updates were announced in a previous release and are now enforced. You can view these updates in the Critical Updates console.**

### Open Hyperlinks in Formula Fields Correctly (Update, Enforced)

If you have formula fields that contain a HYPERLINK function, Lightning Experience ignores the target value when attempting to open the link. This update ensures that the target value for hyperlinks is honored, whether it's explicitly configured or set by default. This update was first made available in Winter '19 and is enforced in Summer '20.

### Require Secure HTTPS Connections (Update, Enforced)

Require Secure HTTPS Connections was an update in Spring '20 and was enforced in production orgs on May 1, 2020. As part of updates related to Google Chrome's SameSite cookie changes, HTTPS connections are required to access Salesforce. HTTP connections are no longer permitted. This update enabled the Require secure connections (HTTPS) setting on the Session Settings Setup page and prevented it from being disabled. The Require secure connections (HTTPS) for all third-party domains setting isn't affected by this update.

### Stabilize the Hostname for My Domain URLs in Sandboxes (Update, Enforced)

We're removing instance names from MyDomain URLs for sandboxes. The instance name identifies where your Salesforce sandbox org is hosted. Removing the instance name makes the URL cleaner and easier for users to remember. For example, MyDomain--SandboxName.my.salesforce.com replaces

MyDomain--SandboxName.cs5.my.salesforce.com. This update was first made available in Summer '18 and is enforced in Summer '20.

### Improve Email Security with Redesigned DKIM Keys (Update, Enforced)

To address potential security vulnerabilities with DomainKeys Identified Mail (DKIM) keys, we improved the way they're created. You no longer have to work with public and private keys. And, because sharing keys can introduce security vulnerabilities, we removed the ability to import DKIM keys. Improve Email Security with Redesigned DKIM Keys was an update in Winter '19 and is enforced in Summer '20.

## Postponed Updates

**These updates are postponed. You can view these updates in the Release Updates node.**

### Stabilize URLs for Visualforce, Experience Builder, Site.com Studio, and Content Files (Update, Postponed)

We're removing the instance names from Visualforce, Experience Builder, Site.com Studio, and content file URLs. An instance name identifies where your Salesforce org is hosted. Instanceless domains are cleaner and easier for users to remember. This update applies to orgs that have a deployed My Domain. After this update is activated, a URL that includes the instance name, such as a bookmark, automatically redirects to the new hostname. Released in Spring '18, this update was scheduled for automatic activation on July 11, 2020 and has been postponed to Summer '21.

### Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile (Update, Postponed)

This update is postponed to Winter '21. It was scheduled for auto-activation (enforcement) in Spring '20. This update gives you more control over which guest, portal, or community users can access Apex classes containing @AuraEnabled methods. Add guest user profile access to any @AuraEnabled Apex class used by a community or portal. When this update is activated, a guest, portal, or community user can access an @AuraEnabled Apex method only when the user's profile or an assigned permission set allows access to the Apex class.

### Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile (Update, Postponed)

This update is postponed to Winter '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update gives you more control over which authenticated users can access Apex classes containing @AuraEnabled methods. When this update is activated, an authenticated user can access an @AuraEnabled Apex method only when the user's profile or an assigned permission set allows access to the Apex class.

### Prevent Creation of Function Expressions in Dynamically Created Aura Components (Update, Postponed)

This update is postponed to Winter '21. It was scheduled for auto-activation (enforcement) in Summer '20. To improve security and stability, this update prevents attribute values passed to \$A.createComponent() or \$A.createComponents() from being interpreted as Aura function expressions.

### Enable Dependency Access Checks In Lightning Components (Update, Postponed)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update enforces the permission required to access component dependencies. A Salesforce-provided Lightning component can require an org or user permission to access the component. A dependency is any resource used within a top-level component. For example, a component can use or extend another component in its markup or implement an interface. This update has no effect and is unrelated to the access checks for Aura's access attribute on the <aura:component> tag.

### Use with sharing for @AuraEnabled Apex Controllers with Implicit Sharing (Update, Postponed)

This update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Spring '20. This update changes the behavior of @AuraEnabled Apex controllers that don't specify with sharing or without sharing to default to with sharing.

### Disable Access to Non-global Controller Methods in Managed Packages (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Winter '20. This update corrects access controls on Apex controller methods in managed packages. When this update is enabled, only methods marked with the

`global` access modifier are accessible by Aura components from outside the package namespace. These access controls prevent you from using unsupported API methods that the package author didn't intend for global access.

#### Enforce Access Modifiers on Apex Properties in Lightning Component Markup (Update, Postponed)

This update is postponed to Summer '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update makes Lightning components consistent with the use of Apex properties in other contexts. For example, a markup expression can no longer access an Apex property with a private Apex getter.

#### Enable Partial Save for Invocable Actions (Update, Postponed)

This release update is postponed to Spring '21. It was originally scheduled for auto-activation (enforcement) in Spring '20 and then postponed to Winter '21. This release update improves the behaviors and effects of failed invocable actions. It only affects external REST API calls to invocable actions done in bulk. With this update, when invoking a set of actions in a single request, a single failed invocable action no longer causes the entire transaction to fail. Without this update, if a single invocable action fails, other invocable actions within the transaction are rolled back and the entire transaction fails.

#### Enforce Data Access in Flow Formulas (Update, Postponed)

This release update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Summer '20. This update enforces the running user's data access when Flow Builder uses a merge field to access a field on a related record.

#### Evaluate Criteria Based on Original Record Values in Process Builder (Update, Postponed)

This release update is postponed to Winter '22. It was originally scheduled for auto-activation (enforcement) in Summer '20 and then postponed to Winter '21. This release update ensures that a process with multiple criteria and a record update evaluates the *original* value of the field that began the process with a value of null. This release update was first made available in Summer '19.

#### Make Flows Respect Access Modifiers for Legacy Apex Actions (Update, Postponed)

This release update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Summer '20. With this release update enabled, developers can trust that their legacy Apex actions are properly protected and available only to other components in their managed packages. This update makes a flow fail if it contains a public legacy Apex action.

#### Require Permission to View Record Names in Lookup Fields (Update, Postponed)

To better protect your Salesforce org's data, we restricted who can view record names in lookup fields. Users must have read access to these records or the View All Lookup Record Names permission to view this data. This update also applies to system fields, such as Created By and Last Modified By. This update, released in Spring '20, was scheduled for auto-activation (enforcement) in Winter '21, but was postponed in August 2020 to Spring '21.

#### Return Null Values in Process and Flow Formulas (Update, Postponed)

The Check for Null Record Variables or Null Values of Lookup Relationship Fields in Process and Flow Formulas release update is postponed to Spring '21. It was scheduled for auto-activation (enforcement) in Spring '20. **Note:** This update has already been enabled in Salesforce orgs that received Summer '20 prior to July 10, 2020. If this is the case for your org, you may disable the update if you wish until Spring '21. This update enables process and flow formulas to return null values when the calculations involve a null record variable or null lookup relationship field.

## Retired Updates

These updates were announced in a previous release but are retired. They were removed from the Critical Update Console and the Release Updates node and won't be activated.

#### Require User Access to Apex Classes Invoked by Flow (Update, Retired)

This update, released in Summer '19 and postponed to Spring '21, has been retired. The update was previously called "Improve Security by Requiring User Access to Apex Classes Invoked by Flow."

## Security Alerts

Security Alerts help customers implement security-related updates in their org. Find the Summer '20 alerts in the Security Alerts node in Setup.

The alert and recommendations tell you when to complete the tasks, what is changing in the org, and how your org is impacted. A series of steps helps you prepare your org for the security enhancement. Sometimes, you don't need to do anything, but we want to inform you of what's happening. When a change affects your org, we want you to know how you could be impacted, and have all the information to make any fixes. At the end of the recommendations, there's a review and confirmation step that tells us you've gone through the information and recommendations.

For more details, see [Keep Up with Security Alerts](#).

## Previously Released Security Alerts

These security alerts were announced in a previous release.

### **[Block Certain Fields in the User Record for Orgs with Communities and Portals \(Previously Released Security Alert and Update, Enforced\)](#)**

Salesforce is giving customers the option to enable a user setting that allows the hiding of certain personal information fields on the user records in orgs with communities or portals. The fields are hidden from view when external users are accessing user records. External users can still see their own user records. This change doesn't apply to queries running in System Mode.

### **[View All Users and Other Permissions Disabled in Guest User Profiles \(Previously Released Security Alert, Enforced\)](#)**

Guest users typically don't need access to view all users in a Salesforce org, so to promote data security, we disabled the View All Users permission in guest user profiles. If you have a production org that was created before Winter '20, we recommend that you check guest user access and deselect the View All Users permission in all your guest user profiles. To enhance security, we also removed these permissions from the guest user profile: Can Approve Feed Post and Comments, Enable UI Tier Architecture, Remove People from Direct Messages, View Topics, and Send Non-Commercial Email.

### **[Secure Guest Users' Org-Wide Defaults and Sharing Model \(Previously Released Security Alert, Enforced\)](#)**

Learn about the Secure guest user record access setting in this security alert, and how to safeguard your org's data. This setting enforces private org-wide defaults for guest users and restricts the sharing mechanisms that you can use to grant record access to guest users. If you have a Salesforce org created before Winter '20, we recommend that you review the external org-wide defaults, public groups, queues, manual sharing, and Apex managed sharing that you use to grant access to guest users. Then replace the access previously granted by these sharing mechanisms with guest user sharing rules before the security alert is enforced.

### **[Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile \(Security Alert\)](#)**

This security alert is related to an update that gives you more control over which guest, portal, and community users can access Apex classes with `@AuraEnabled` methods in Aura and Lightning web components.

### **[Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile \(Security Alert\)](#)**

This security alert is related to an update that gives you more control over which authenticated users can access Apex classes with `@AuraEnabled` methods in Aura and Lightning web components.

## Spotlight on Content

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We added Pardot Help enhancements, Financial Services Cloud Administrator Guide updates, new Trailhead modules, and instructional videos. We also updated our Trust and Compliance documentation.

## IN THIS SECTION:

### [Find More of What You Need in Pardot Help](#)

Scan Pardot help topics in the left pane to find what you're looking for. Streamlined top-level topics in the Pardot Help area, mean fewer items to sort through at first glance. And you can find new or improved implementation guides on the Pardot Downloads page.

### [Review the Financial Services Cloud Administrator Guide](#)

We updated the Financial Services Cloud Administrator Guide for better usability and discoverability.

### [Take a Deeper Dive into Translation](#)

Manage your translations better and more easily with the updated and reorganized Translation Workbench documentation in Salesforce Help. The expanded Translation export and import documentation provides detailed translation examples and includes information on working with XML Localization Interchange File Format (.xlf) translation files. And there's information on data translation, a new feature for B2B Commerce in Summer '20.

### [Review Trust and Compliance Documentation](#)

We made seasonal updates to the Salesforce Trust and Compliance Documents.

### [Watch Videos \(English Only\)](#)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

### [Explore Features with Trailhead](#)

Get familiar with Salesforce or discover a new feature with Trailhead, a fun, guided, and interactive tool. You can follow guided learning paths for admins or developers, or choose your own adventure with self-paced modules.

## Find More of What You Need in Pardot Help

Scan Pardot help topics in the left pane to find what you're looking for. Streamlined top-level topics in the Pardot Help area, mean fewer items to sort through at first glance. And you can find new or improved implementation guides on the Pardot Downloads page.

## New and Improved Implementation Guides

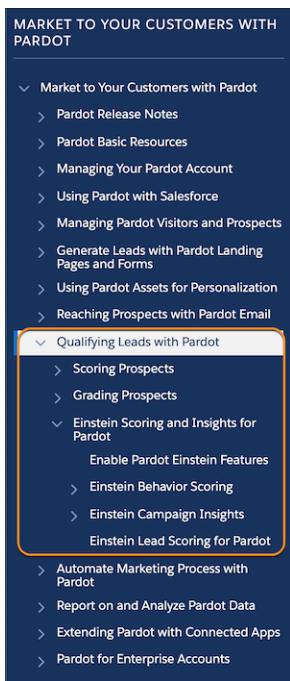
On the [Downloadable Pardot User Guides](#) page, you can see the most up-to-date list of our downloadable PDF implementation guides. For Summer '20, we added or updated these guides:

- B2B Marketing Analytics
- B2B Marketing Analytics Plus
- Pardot Einstein Features
- Engagement History
- Connected Campaigns
- Campaign Influence

## Streamlined Help Navigation

We revised the Pardot Help section based on feedback from the Salesforce Customer Success Group and other web traffic data. Instead of 22 feature-related items in the navigation pane, you find 13 entries grouped by task or goal. Select one to find supporting documentation.

For example, click **Qualifying Leads with Pardot** to find all related documentation, such as Pardot Scoring, Pardot Grading, and Pardot Einstein features like Einstein Behavior Scoring and Campaign Insights.



## Review the Financial Services Cloud Administrator Guide

We updated the Financial Services Cloud Administrator Guide for better usability and discoverability.

**Where:** This change applies to Lightning Experience in Professional, Enterprise, and Unlimited editions where Financial Services Cloud is enabled.

**Why:** We reorganized the Financial Services Cloud Administrator Guide into these sections:

### Overview

High-level information about Financial Services Cloud. Includes content on topics like planning considerations, data models, permission set licenses, and custom settings.

### Subverticals for Financial Services Cloud

Information about the setup and management of Financial Services Cloud line-of-business products. Includes content on products such as Commercial Banking, Insurance, Mortgage, and Retail Banking.

### Common Capabilities in Financial Services Cloud

Information about the setup and management of Financial Services Cloud features that aren't specific to a line of business. Includes content on features such as Groups (Householding), Action Plans, the Life Events and Business Milestones component, and Intelligent Referrals and Scoring.

### Add-Ons for Financial Services Cloud

Information about the setup and management of products that you can add on to Financial Services Cloud. Includes content on add-ons such as Einstein Analytics for Financial Services Cloud, Einstein Referrals, Lighting Scheduler, and Salesforce Surveys.

### Extend Financial Services Cloud with Other Salesforce Products

Information about other Salesforce products that you can use with Financial Services Cloud. Includes content on Salesforce Shield, Lightning Flows for Financial Services Cloud, Salesforce for Outlook, and Salesforce Pardot.

### Work with Data

Information about uploading data to Financial Services Cloud using Data Loader.

## Financial Services Cloud Availability and Limitations

Information about Financial Services Cloud implementation issues.

## Take a Deeper Dive into Translation

Manage your translations better and more easily with the updated and reorganized Translation Workbench documentation in Salesforce Help. The expanded Translation export and import documentation provides detailed translation examples and includes information on working with XML Localization Interchange File Format (.xliff) translation files. And there's information on data translation, a new feature for B2B Commerce in Summer '20.

**Where:** Metadata translation is available in Lightning Experience and Salesforce Classic in Professional, Enterprise, Performance, Unlimited, and Developer Editions. Data translation is available for B2B Commerce in Lightning Experience in Enterprise, Performance, Unlimited, and Developer editions.

**How:** In consolidating translation considerations, we removed Considerations for Updating Terms from Salesforce Help. If you bookmarked that page, update your bookmark to point to the new Translation Considerations page.

### SEE ALSO:

- [Translate Product Details with Data Translation](#)
- [Salesforce Help: Manage Your Translations](#)
- [Salesforce Help: Work with Translation Files](#)
- [Salesforce Help: Translation Considerations](#)

## Review Trust and Compliance Documentation

We made seasonal updates to the Salesforce Trust and Compliance Documents.

## Infrastructure and Sub-Processors

These changes have been made in the **Infrastructure and Sub-Processors Documentation**.

### Audience Studio

- No updates

**Sales Cloud, Service Cloud, Community Cloud, Chatter, Lightning Platform (including Force.com), IoT Explorer (including IoT Plus), Site.com, Database.com, Einstein Analytics (including Einstein Discovery), WDC, Messaging, Financial Services Cloud, Health Cloud, Sustainability Cloud, Consumer Goods Cloud, Manufacturing Cloud, Emergency Program Management, Salesforce CPQ and Salesforce Billing, Salesforce Maps, Workplace Command Center, Shift Management, and the Salesforce.org LLC ("Salesforce.org") services branded as Salesforce Advisor Link, foundationConnect (provisioned on or after August 19, 2019), Accounting Subledger, Salesforce.org Insights Platform: Data Integrity, and Nonprofit Cloud Case Management**

- **Scope:** Added the following additional Covered Services to the scope of this document: Emergency Program Management, Accounting Subledger, Salesforce.org Insights Platform: Data Integrity, Nonprofit Cloud Case Management, Command Center, and Shift Management. Rebranded all instances of Work.com (provisioned before May 1, 2020) as WDC. References to Einstein Discovery Classic were removed. Clarified that document does not apply to B2C Order Management. Clarified that Insights Platform is also subject to the Trust and Compliance Documentation for Heroku. Added a link to Salesforce's Data Processing Addendum for further information on capitalized terms.
- **Sub-Processors - Customer Data Storage:** In the Americas, added a GSO (Trials only) Instance in two United States-based Data Centers, which are hosted by salesforce.com, inc. and Amazon Web Services.

- **Sub-Processors - Customer Data Processing:** Insights Platform was added to the list of services that use Heroku, Inc. as a sub-processor. Bugsnag Inc. was added as a sub-processor for Salesforce Maps. Shift Management was added to the list of features that use ClickSoftware, Inc. as a sub-processor.

## B2B Commerce

- No updates

## B2C Commerce/Commerce Cloud

- Throughout the document changed "Order Management" to "B2C Commerce Order Management" to differentiate it from Salesforce Order Management.

## Customer 360 Data Manager

- **Scope:** Added a link to Salesforce's Data Processing Addendum for further information on capitalized terms.
- **Sub-processors - Data Storage:** Added a link to Salesforce's Data Processing Addendum for further information on capitalized terms. Removed a reference and links to AWS security website and security processes.

## Data.com

- No updates

## Desk.com

- Product has been discontinued.

## Einstein Discovery Classic

- Product has been discontinued.

## "Einstein Platform" (Sales Cloud Einstein, Pardot Einstein, Salesforce Inbox, Einstein Engagement Scoring, Einstein Vision and Language, Einstein Bots, Service Cloud Einstein, Einstein Prediction Builder, and Einstein Vision for Social Studio)

- **Scope:** Einstein Reply Recommendation added as a new feature of Service Cloud Einstein.

Einstein Call Coaching added as a new feature of High Velocity Sales.

- **Branding:** Einstein Vision for Social Studios changed to Einstein Vision for Social Studio throughout.
- **Sub-processors - Customer Data Storage:** Separately listed sub-processor information for Einstein Object Detection as a feature of the Consumer Goods Cloud Service, distinct from Einstein Vision, and added European AWS data center location. Clarified European AWS data center locations for Einstein Prediction Builder, Einstein Article Recommendations, and Einstein Case Classification. Clarified data storage location of European-based Einstein Bots customers who enable the NLP functionality. Clarified storage location of different features for High Velocity Sales customers.

## Government Cloud Plus

- **Sub-processors - Customer Data Storage:** Clarified that encrypted customer data may pass through various points on its way to storage and processing on the previously specified hosts.

## Heroku

- No updates

## IoT Cloud

- No updates

## LiveMessage, Quip, myTrailhead

- Desk.com, Einstein Discover, and SalesforceIQ have been discontinued.
- **Sub-processors - Customer Data Storage:** Clarified hosting location options for Quip customers who have purchased Virtual Private Cloud.

- **Sub-processors - Customer Data Processing:** List of countries for Coveo (for myTrailhead) was amended by clarifying that by “European Union” we mean “European Union member states”. Also deleted “Ireland” from the list of countries in which Coveo processes customer data as the European Union was already mentioned as location of processing and that Ireland is part of the European Union. A Content Delivery Network (CDN) was added for myTrailhead.

## Marketing Cloud

- **Scope:** No longer includes Advertising Campaigns as part of Advertising Studio. Marketing Cloud Einstein and Measurement Platform was shortened to Marketing Cloud Einstein. Added a link to Salesforce’s Data Processing Addendum for further information on capitalized terms.
- **Sub-processors - Customer Data Processing:** Israel was added to the list of countries in which salesforce.com, inc. and its associates process customer data. Datorama Technologies Ltd. was removed from the list of sub-processors.

## MuleSoft

- **Sub-processors - Customer Data Processing:** Great Software Laboratory Pvt Ltd and Great Software Laboratory, Inc. were removed from the list of sub-processors.

## Pardot

- No updates

## SalesforceIQ

- Product has been discontinued.

## Security, Privacy, and Architecture

These changes have been made in the **Security, Privacy, and Architecture Documentation**.

### Audience Studio

- **Deletion of Data:** Terms and timelines for return and destruction or deletion of Customer data were updated.
- **Personal Data and Sensitive Data:** Clarified which users and actions are under the NAI Code of Conduct. Clarified that sensitive data may not be submitted pseudonymized. Clarified that targeted advertising, based on traffic on sites directed at children, is governed by local applicable law.

**Sales Cloud, Service Cloud, Community Cloud, Chatter, Lightning Platform (including Force.com), IoT Explorer (including IoT Plus), Site.com, Database.com, Einstein Analytics (including Einstein Discovery), WDC, Messaging, Financial Services Cloud, Health Cloud, Sustainability Cloud, Consumer Goods Cloud, Manufacturing Cloud, Emergency Program Management, Salesforce CPQ and Salesforce Billing, Salesforce Maps, Workplace Command Center, Shift Management, and the Salesforce.org LLC ("Salesforce.org") services branded as Salesforce Advisor Link, foundationConnect (provisioned on or after August 19, 2019), Accounting Subledger, Salesforce.org Insights Platform: Data Integrity, and Nonprofit Cloud Case Management ("Covered Services")**

- **Services Covered:** Added new services including: Emergency Program Management, Salesforce Order Management, Accounting Subledger, Salesforce.org Insights Platform: Data Integrity, Nonprofit Cloud Case Management, Workplace Command Center, and Shift Management. Differentiates Salesforce Order Management from B2C Commerce Order Management and the documentation that governs each. Clarified which sections of the document apply to Scratch Orgs. Clarifies additional governing documentation for Field Service Lighting feature, the Insights Platform, and services which integrate with the Covered Services. Clarified which versions of Einstein Discovery are included in Covered Services. Rebranded all instances of Work.com (provisioned before May 1, 2020) as WDC.
- **Third-Party Functionality:** Added WhatsApp to the list of over-the-top messaging services.
- **Audits and Certifications:** Updated list of services excluded from each referenced certification. Updated location where customers can access SOC reports. Removed Industry Cloud from the list of products certified by Japan CS Gold. Updated list of services whose

data is hosted or processed on AWS infrastructure. Added a section describing Insights Platform use of Heroku's architecture for hosting or processing data.

- **Security Controls:** Updated list of services using AWS. Added Insights Platform's use of Heroku, and a link to Heroku's security documentation.
- **Security Policies and Procedures:** Salesforce will only provide log entry records to assist customers in forensic analysis, when available.
- **Reliability and Backup:** Clarifies which Services' data may be unrecoverable, if uninstalled by customers.
- **Disaster Recovery:** Clarified that this section does not apply to Click FSL Optimizer.
- **Data Encryption:** Clarifies data transmission methods between data centers.
- **Deletion of Customer Data:** Clarifies duration of data retention for Insights Platform on AWS and Heroku servers.
- **Sensitive Data:** Amended list of unsubmittable data types. Clarified Customer responsibilities for ensuring use of services for processing of submitted sensitive or regulated data complies with all applicable laws and regulations.
- **Interoperation with Other Services:** Added description of metadata that may be captured by Salesforce when third-party systems are connected to Covered Services. Addresses protection and use of that data.

## B2B Commerce

- **Sensitive Data:** Amended list of unsubmittable data types. Clarified Customer responsibilities for ensuring use of services for processing of submitted sensitive or regulated data complies with all applicable laws and regulations.

## B2C Commerce/Commerce Cloud

- Throughout the document changed "Order Management" to "B2C Commerce Order Management" to differentiate it from Salesforce Order Management.
- Added link to Salesforce Order Management documentation.
- **Audits and Certifications:** Updated link locations for Salesforce's AoC, ISO, and SOC reports.
- **Sensitive Data:** Amended list of unsubmittable data types. Clarified Customer responsibilities for ensuring use of services for processing of submitted sensitive or regulated data complies with all applicable laws and regulations.

## Customer 360 Data Manager

- **Audits and Certifications:** Removed references to AWS infrastructure used to host Customer Data.
- **Security Controls:** Removed references to AWS security policy.
- **Security Policies and Procedures:** Updated method by which customers may locally save Audit Trail content.
- **Sensitive Data:** Amended list of unsubmittable data types. Clarified Customer responsibilities for ensuring processing of submitted data complies with all applicable laws and regulations.

## Data.com

- No updates

## Desk.com

- Product has been discontinued.

## Einstein Discovery Classic

- Product has been discontinued.

## Einstein Platform

- **Audits and Certifications:** Updated list of products excepted from Salesforce's BCR for processors. Updated list of Einstein features that meet ISO standards. Updated list of features evaluated under SOC.

## Government Cloud Plus

- **Intrusion Detection:** Examples of data possibly being collected were removed.

- **Data Encryption:** Clarified type of symmetric encryption keys.
- **Sensitive Data:** Amended list of unsubmitable data types. Clarified Customer responsibilities for ensuring use of services for processing of submitted sensitive or regulated data complies with all applicable laws and regulations.

### LiveMessage, myTrailhead, and Quip

- **Services Covered:** Desk.com, Einstein Discover, and SalesforcelQ have been discontinued.
- **Audits and Certifications:** List of services covered by Audits and Certifications has been edited to reflect services covered by this document.
- **User Authentication:** Updated types of identifiers used to manage user's session.
- **Viruses:** Updated list of services which do not scan for viruses. Added optional virus scanning for Quip customers.
- **Return of Customer Data:** Removed data retrieval methods for discontinued services.
- **Deletion of Customer Data:** Updated list of products for which customer data can be deleted, and the terms and timelines under which it is overwritten or deleted.
- **Sensitive Data:** Amended list of unsubmitable data types. Clarified Customer responsibilities for ensuring use of services for processing of submitted sensitive or regulated data complies with all applicable laws and regulations.

### Heroku

- **Audits and Certifications:** Updated names of features covered under the PCI certification. Added ASIP Santé certification.
- **Disaster Recovery:** Updated list of Heroku Shield services.
- **Sensitive Data:** Amended list of unsubmitable data types. Clarified Customer responsibilities for ensuring processing of submitted data complies with all applicable laws and regulations.

### IoT Cloud

- **Sensitive Data:** Amended list of unsubmitable data types. Clarified Customer responsibilities for ensuring use of services for processing of submitted sensitive or regulated data complies with all applicable laws and regulations.

### Marketing Cloud

- **Services Covered:** No longer includes Advertising Campaigns as part of Audience Studio. Marketing Cloud Einstein and Measurement Platform was shortened to Marketing Cloud Einstein. Updated documentation to which Einstein Engagement Frequency is subject.
- **Audits and Certifications:** Under ISO certification, changed Predictive Intelligence to Marketing Cloud Einstein and Measurement (MCEM).
- **Sensitive Data:** Amended list of unsubmitable data types. Clarified Customer responsibilities for ensuring use of services for processing of submitted sensitive or regulated data complies with all applicable laws and regulations.

### MuleSoft

- **User Authentication:** Clarified credentials used to authenticate and manage user's session.
- **Data Encryption:** Clarified management and runtime data encryption.
- **Deletion of Customer Data:** Added data retention policy for Transaction Processing Information in MuleSoft Anypoint Partner Manager.
- **Sensitive Data:** Amended list of unsubmitable data types. Clarified Customer responsibilities for ensuring use of services for processing of submitted sensitive or regulated data complies with all applicable laws and regulations.

### Pardot

- **Security Controls:** Updated terms under which Email Login Verification is required. Clarified description of Email Login Verification.
- **Viruses:** Section and subject renamed Malicious Software.
- **Data Encryption:** TLS version updated.

- **Sensitive Data:** Amended list of unsubmittable data types. Clarified Customer responsibilities for ensuring use of services for processing of submitted sensitive or regulated data complies with all applicable laws and regulations.

### SalesforceIQ

- Product has been discontinued.

## Notices and Licenses

These changes have been made in the **Notices and Licenses Documentation**.

### Audience Studio

- **Restricted Uses of Information and Compliance with Self-Regulatory Programs:** Clarified that sensitive data may not be submitted pseudonymized. Clarified that targeted advertising, based on traffic on sites directed at children, is governed by local applicable law.
- **Use of Third Party Data:** Clarified that targeted advertising, based on traffic on sites directed at children, is governed by local applicable law.

### Salesforce

- **Services Covered:** Added new services including: Salesforce Order Management, Emergency Program Management, Accounting Subledger, Salesforce.org Insights Platform: Data Integrity, Nonprofit Cloud Case Management, Workplace Command Center, and Shift Management. Differentiates Salesforce Order Management from B2C Commerce Order Management and the documentation that governs each. Rebranded all instances of Work.com (provisioned before May 1, 2020) as WDC.
- **Field Service Lightning:** Section removed.
- **Google Maps:** Simplified and clarified terms of use. Updated links to salient Google policies.
- **Insights Platform:** Added terms for integrating Insights Platform and Melissa Data.
- **Workplace Command Center:** Added Third Party Platforms disclosure.
- **Distributed Software:** removed reference to former WDC mobile app.
- **External Resources:** Clarifies Salesforce's relationship with, and limits its liability in relation to, referenced sites or resources.

### B2B Commerce

- No updates

### B2C Commerce/Commerce Cloud

- Throughout the document changed "Order Management" to "B2C Commerce Order Management" to differentiate it from Salesforce Order Management.

### Customer 360 Data Manager

- No substantive updates

### Desk.com

- Product has been discontinued.

### Einstein Analytics

- **Services Covered:** Removed references to older versions of Einstein Discovery.

**"Einstein Platform" (Sales Cloud Einstein, Pardot Einstein, Salesforce Inbox, Einstein Engagement Scoring, Einstein Vision and Language, Einstein Bots, Service Cloud Einstein, Einstein Prediction Builder, and Einstein Vision for Social Studios)**

- **Services Covered:** Updated to include additional features, Einstein Call Coaching.
- **Salesforce Inbox:** Removed terms specific to Third-Party Contact Enrichment Providers.

- **Einstein Call Coaching:** Added additional terms to Customer's use of this new feature. Terms also added for integrating Call Coaching features with third-party products and services.

### Einstein Discovery Classic

- Product has been discontinued.

### Data.com

- No updates

### Desk.com

- Product has been discontinued.

### Heroku

- No updates

### IoT Cloud

- No updates

### Marketing Cloud

- **ExactTarget, Advertising Studio, and Interaction Studio:** Under Services Covered, removed Advertising Campaigns from the list of "Covered Services". Clarified that Customers are responsible for any material their users provide to Third Party Platforms.
- **Predictive Intelligence:** Under Services Covered, removed iGo Digital and references to iGo, LLC. Rebranded two services, and clarified which services are subject to additional documentation.
- **Social Studio:** Under Command Center - Public Display, removed restrictions on syndication, on conducting analysis, or on creating derivatives from Twitter content.

### Messaging and LiveMessage

- **Restricted Uses of Information:** Added a link to the Acceptable Use and External Facing Services Policy. Consolidated and enhanced the list of principles, best practices or guidelines to which customer must comply to include MMA Global U.S. Consumer Best Practices for Messaging, CTIA Mobile Commerce Compliance Handbook, and U.S. Short Code Registry Best Practices.

### MuleSoft

- **Third-Party Platforms:** Clarified Non-SFDC Applications in Anypoint Exchange.
- **Anypoint Service Mesh:** New section clarifying Istio as a Non-SFDC Application or Third Party Application.

### myTrailhead

- No updates

### Pardot

- **Third-Party Platforms:** Clarified that Customers are responsible for any material their users provide to Third Party Platforms.
- **Third-Party Notices:** Removed FullContact as an applicable service.

### Quip

- No updates

### SalesforceIQ

- Product has been discontinued.

## Watch Videos (English Only)

We created and updated instructional videos to help your users learn about new and improved Salesforce features.

- The new  [Create Prompts in Lightning Experience](#) video shows how to create informational popovers for training and feature adoption.
- The new  [Create Walkthroughs in Lightning Experience](#) video shows how to create hands-on guided training experiences.
- The new  [Get Started with In-App Guidance in Lightning Experience](#) video guides you through the In-App Guidance Builder and gives a tour of the setup page.
- The new  [Short Codes for Service](#) video shows you the exciting features and use cases for Digital Engagement short code channels.

## Explore Features with Trailhead

Get familiar with Salesforce or discover a new feature with Trailhead, a fun, guided, and interactive tool. You can follow guided learning paths for admins or developers, or choose your own adventure with self-paced modules.

Check out Trailhead at <https://trailhead.salesforce.com>, and find the right trail for you. Here are the latest modules, trails, and projects.

## Modules

### **Enhanced Transaction Security**

Monitor events, enforce policies, and get instant notifications based on rules you create.

### **Entitlement Management for Lightning Experience**

Use entitlements to ensure that your customers receive top-notch service.

### **Increased Productivity with Einstein Search**

Use the three features of Einstein Search—Personal, Natural, Actionable—to work faster, smarter, and more efficiently.

## Other Salesforce Products and Services

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### Heroku

Heroku is a cloud-based application platform for building and deploying web apps.

For information on new features, go to the [Heroku Changelog](#).

### Success Cloud

The certified experts, consultants, and innovative tools of Salesforce Success Cloud are here to help with professional services, prescriptive advice, and expertise at every stage of your journey.