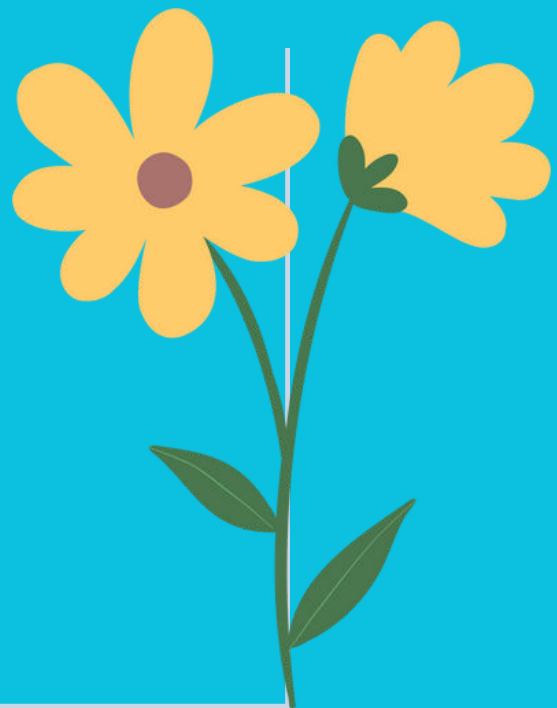


RELEASE NOTES

SPRING 2024



Sales Cloud



Forecast Groups

Group forecasts to align with selling motions or business segments. With a single view, see total attainment across the business and sales organization to drive forecast accuracy.

Seller Home

Allow a sales team to see their most important customer data in one place. Keep sales teams informed of their real-time contributions to the business, setting their own individual weekly goals and identifying where to accelerate connecting with their customers.

Maps Lite

Visualize up to 50 accounts, contacts, or leads within your CRM with Maps Lite, now available in Sales Cloud Unlimited. You no longer need to manually look up where your customers are located before planning out events and focusing campaigns.



SERVICE CLOUD

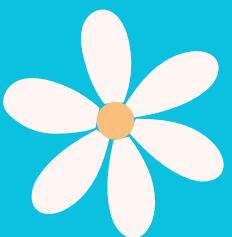


Unified Messaging for WhatsApp

Turn one-way marketing promotional messages into two-way service conversations within the same WhatsApp thread for better engagement, higher conversions, and faster resolutions. Meet your customers where they are—and go from “do not reply” to “please reply.”

Document Builder

Create impactful, tailored service documents with Document Builder, which adapts to various use cases like service reports, asset certificates, and quotes. User-friendly and loaded with Lightning web components, Document Builder lets you embed images, customize content, and go global with language localization. Tailor your documents to match your workflow, from one asset to many, and speak your customers' language effortlessly.





Marketing Cloud Account Engagement

Restrict Which Domains Can Display Account Engagement Assets

Ensure data security by controlling iframing for Account Engagement assets like forms and landing pages. Manage these settings in your Business Unit Settings, where you can:

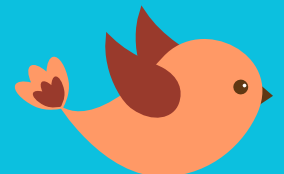
- Restrict completely: No iframing allowed.
- Allow for specific domains: Limit iframing to designated domains.
- No restrictions: Allow iframing without limitations.

Restore a Paused Prospect by Deleting Their Visitor Records

When a prospect's high activity levels affect Account Engagement's performance, they are automatically paused. If a crucial prospect is paused, you can restore them by deleting their visitor activity records. Simply select a date in the past, and Account Engagement will remove the prospect's activity records before that date. As you remove a sufficient number of activity records, Account Engagement restores tracking for that prospect.

Update Email Templates with Invalid Senders

As a part of the domain validation requirement since Spring '23, Account Engagement now avoids sending email templates with sender addresses from unverified domains. You can review templates with invalid senders in Optimizer. To continue using a template, either change the sender email address or validate the sending domain. This ensures adherence to domain validation policies and maintains the integrity of your email communications in Account Engagement.





Data Cloud



Migrate to New Data Cloud Permission Sets

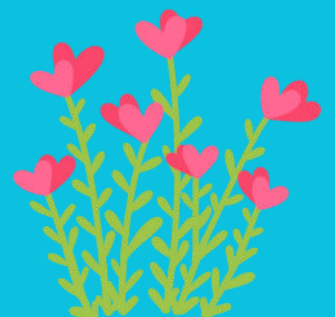
Upgrade to new standard permission sets that enhance data security in Data Cloud data spaces. The existing sets are now labeled "Legacy." To prevent unintended access changes for your users, make the transition to the new Data Cloud permission sets by Spring '24. Click the link provided for more information.

Refine Access with Data Spaces Feature Permissions

Enhancements in data security within Data Cloud data spaces now align better with CRM access control. Security measures for data spaces are now consistent across all access methods. This upgrade integrates data space access control into permission sets, allowing administrators to directly link multiple data spaces to a permission set. The introduction of new feature permissions enables more precise control over access to data space-related features within each designated data space in the permission set. Click the link provided for more information.

Connect to Data Cloud from Tableau Server with the Salesforce Data Cloud Connector

Installing the Salesforce connector for Data Cloud and Tableau Server is now automatic with Tableau installation; no manual steps are required. The built-in connector is data spaces aware, user-friendly, displaying object labels instead of API names. Table names in Tableau are also more intuitive. Previously, this connector was only available for Tableau Cloud, Tableau Desktop, and Tableau Prep. Click the link provided for more information.



Slack



Slack Canvas Enhancements

Create, organize, and share essential information—right in Slack. The new canvas gallery is a centralized place to quickly find templates to use as-is or customize to suit your needs.

Workflow Builder Enhancements

Create time-saving automations with new connectors that seamlessly connect your business tools. Create even more powerful workflows that automate work across multiple systems.



Spring '24 Release Notes



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Tired of a boring opportunity
experience? Change up the colors of
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