



salesforce

# Winter '24 Release in a Box

A digital resource for Admins,  
Business Users, Developers,  
Community Groups, and more.



# Forward-Looking Statements



This presentation contains forward-looking statements about the Company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth, environmental, social and governance goals, expected capital allocation, including mergers and acquisitions (such as the proposed acquisition of Slack Technologies, Inc.), capital expenditures and other investments, expectations regarding closing contemplated acquisitions and contributions from acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the Company's results could differ materially from the results expressed or implied by the forward-looking statements it makes. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: risks associated with our ability to consummate the proposed Slack Technologies, Inc. transaction on a timely basis or at all; our ability to successfully integrate Slack Technologies, Inc.'s operations; our ability to realize the anticipated benefits of the proposed transaction; the impact of Slack Technologies, Inc.'s business model on our ability to forecast revenue results; disruption from the transaction making it more difficult to maintain business and operational relationships; the impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain service performance and security levels meeting the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; our ability to secure and costs related to data center capacity and other infrastructure provided by third parties; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy; current and potential litigation involving us or our industry, including litigation involving acquired entities such as Tableau; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services beyond the CRM market; the success of our strategy of acquiring or making investments in complementary businesses and strategic partnerships; our ability to compete in the market in which we participate; the success of our business strategy and our plan to build our business; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to develop our brands; the valuation of our deferred tax assets and the release of related valuation allowances; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property; uncertainties regarding the effect of general economic conditions; and risks related to our debt and lease obligations.

# What's Included?



## Feature Summaries

This deck includes high-level summaries of the top innovations for each product

## Helpful Links

Most innovations contain links to 1-2 minute digestible demos and/or links to learn more

## End Users

Identify the right features for your end users by using the color-coded legend (Admin, Business User, Developer)





## Identify Features by User



Admin



Business User



Developer

# How do I Learn More?

1

Visit [salesforce.com/releases](https://salesforce.com/releases)

2

Watch the [demo videos](#)

3

[Take the Release Highlights Trail](#)

4

Dive into the detailed [Release Notes](#)

5

Join the [Release Readiness Trailblazers Community Group](#)



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# Sales



## Sales Planning

Bring agility to the sales planning process with a new native, end-to-end solution.

## Activity 360 Reporting

Gain real-time visibility into all customer touchpoints.

## Pipeline Inspection for Partners

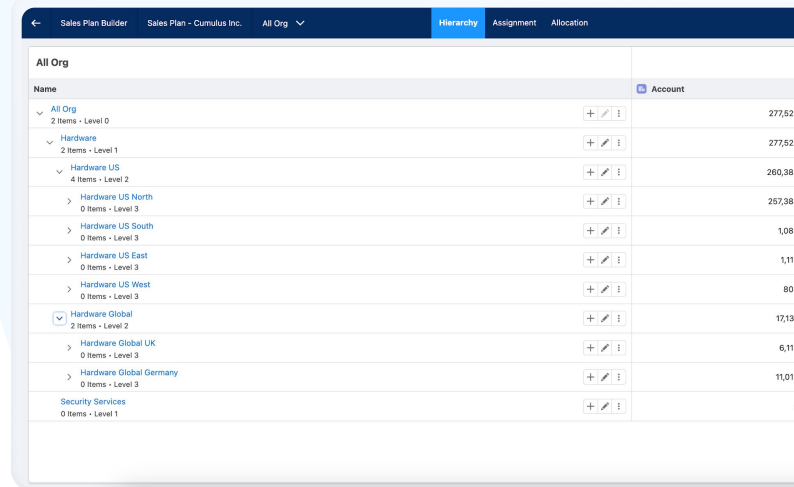
Ensure partners focus on the most important opportunities and forecast revenue more accurately.

## Call Summaries

Streamline sales productivity with automated call summaries and actionable follow-ups.

## Sales Emails

Save time by composing emails in your own style and tone, in just a click.



All Org		
Name	Account	
All Org		277,52
2 Items - Level 0		
Hardware		277,52
2 Items - Level 1		
Hardware US		260,38
4 Items - Level 2		
Hardware US North		257,38
0 Items - Level 3		
Hardware US South		1,08
0 Items - Level 3		
Hardware US East		1,11
0 Items - Level 3		
Hardware US West		80
0 Items - Level 3		
Hardware Global		17,13
2 Items - Level 2		
Hardware Global UK		6,11
0 Items - Level 3		
Hardware Global Germany		11,01
0 Items - Level 3		
Security Services		
0 Items - Level 1		

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# Service

## Einstein for Service

Service just got a whole lot smarter with Einstein for Service.

## Service Intelligence

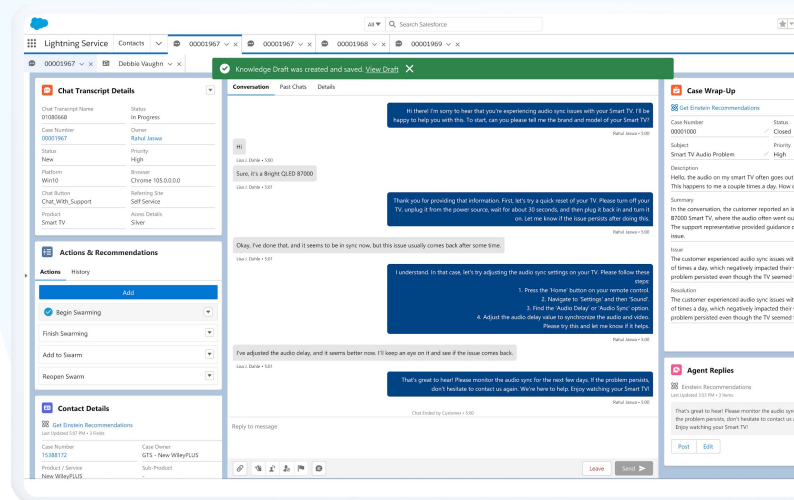
Supercharge customer service with AI-driven insights.

## Work Capacity Limits

Empower service managers to plan ahead, meet demand and exceed customer expectations.

## Omni-Channel Enhancements

Improve the routing, agent and supervisor experience with Omni Channel enhancements.



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# Marketing

## Segment Intelligence

Optimize audiences and activations with Segment Intelligence for Data Cloud.

## Referral Marketing

Create engaging referral programs that drive efficient customer acquisition and brand advocacy.

## Segment Creation

Transform your data into action with smarter segments powered by AI.

## Google Analytics 4 Audiences

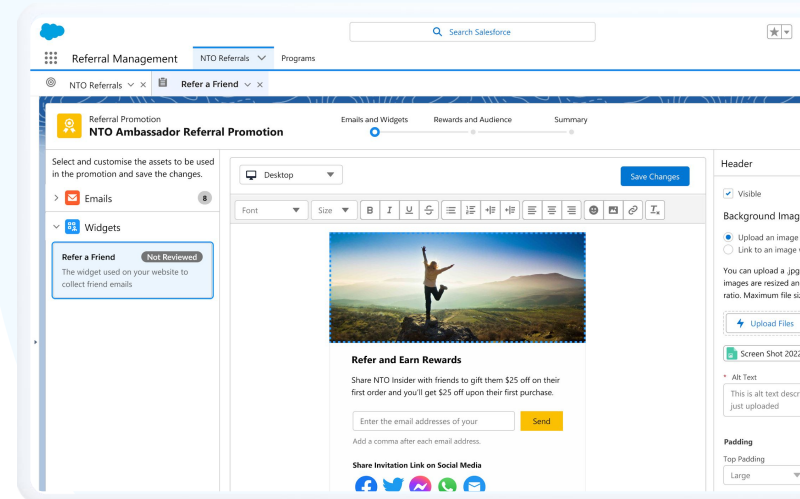
Use audience engagement to trigger customer journeys.

## Sandbox-to-Production Flow

Copy dynamic content, landing pages, and other key assets between your Account Engagement sandbox and production business units.

## Real-Time Customer Event Stream

Get real-time updates on all your customers most recent interactions with your brand.



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# Commerce

## Commerce GPT

Convert more revenue with Einstein GPT powered product descriptions, promotions.

## Pay Now for Salesforce Starter

Realize revenue faster by collecting digital payments immediately from a closed opportunity.

## Salesforce Commerce Enhancements

Create and launch Reorder Portals quickly with new **AI-powered** setup flows that get you to value faster.

## Composable Storefront Enhancements

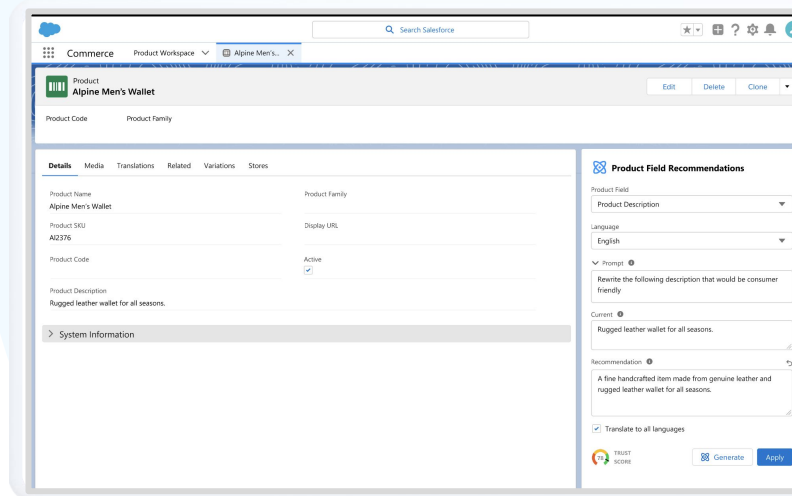
Boost productivity with a new merchandising tool and an update PWA Kit.

## Order Management Enhancements

Give agents revenue-generating tools, inventory data and SKU-level fulfillment tagging.

## Goals-Based Commerce

Achieve key business objectives with goals-based recommendations and expert guidance directly in Commerce.



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# Analytics



## Reports and Dashboards for Data Cloud

You can now use Reports and Dashboards with Data Cloud data to unlock insights across Customer 360.

## Unified Analytics

Create a unified analytics experience with Tableau and CRM Analytics in Salesforce.

## Revenue Intelligence Enhancements

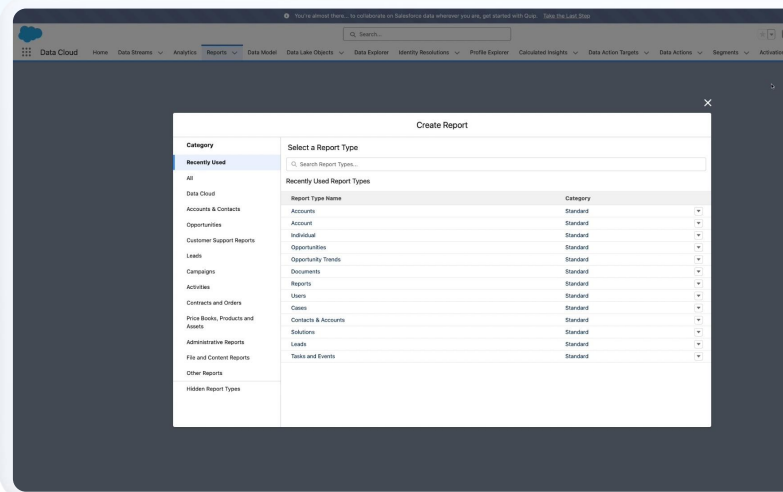
Provide an intelligent experience for sales leaders and CROs.

## Flow Interactions Enhancements

Bring contextual insights with you into Flows to build seamless experiences with clicks, not code.

## Data Recipes - Staged Datasets

Run sequential recipes faster with Staged Data.



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## Anypoint API Experience Hub

Build personalized API portals in minutes using clicks and increase API engagement.

## Anypoint Partner Manager Enhancements: Transaction Replay

Modernize B2B Transactions and Transform Trading Partner Relationships.

## Anypoint API Governance Enhancements

End-to-End API Governance from design to implementation.

## Composer Invocable Flows

Seamlessly integrate automated workflows with Salesforce with Invocable Composer Flows.

[Release Notes](#)



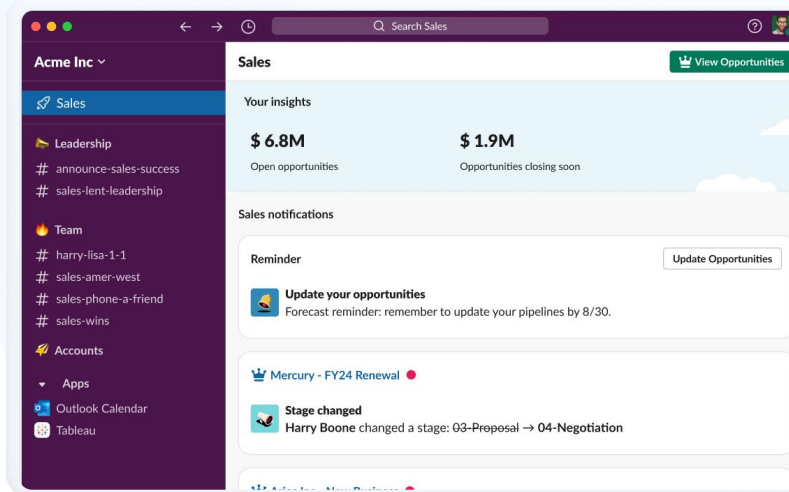


## Sales Elevate

Power sales productivity by centralizing, simplifying, and automating work.

## Workflow Builder

Empower end-user automation with Workflow Builder.



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# Platform - Build



## Sandbox Enhancement: Scale Testing Service

## Data Cloud Support in Lightning Pages

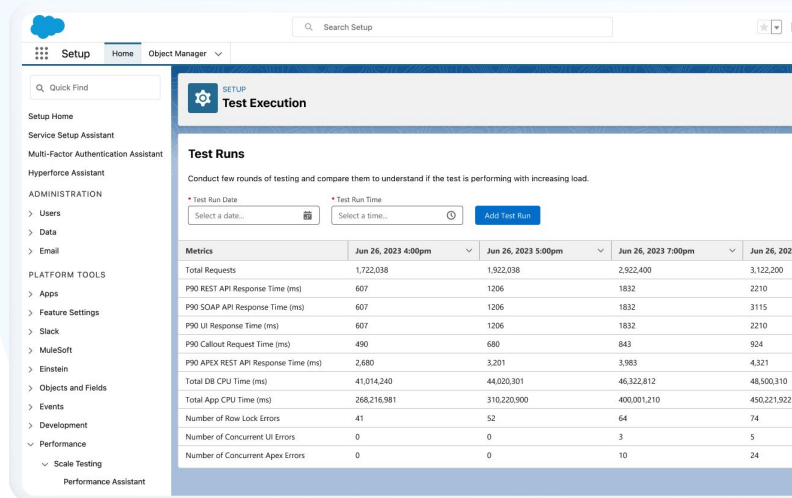
Enrich Lightning experiences with Data Cloud objects.

## GraphQL Wire Adapter

Enhance the efficiency and speed of Salesforce data access with the GraphQL wire adapters.

## Lightning Web Component Enhancements: Standard Component

Create LWR Sites Fast with Standard LWC Components.



The screenshot shows the Salesforce Setup Test Execution page. The left sidebar contains a navigation menu with categories like 'Setup Home', 'ADMINISTRATION', 'PLATFORM TOOLS', and 'Performance Assistant'. The main content area is titled 'Test Execution' and includes a 'Test Runs' section with a table of metrics.

Metrics	Jun 26, 2023 4:00pm	Jun 26, 2023 5:00pm	Jun 26, 2023 7:00pm	Jun 26, 2023
Total Requests	1,722,038	1,922,038	2,922,400	3,122,200
P90 REST API Response Time (ms)	607	1206	1832	2210
P90 SOAP API Response Time (ms)	607	1206	1832	3115
P90 UI Response Time (ms)	607	1206	1832	2210
P90 Callout Request Time (ms)	490	680	843	924
P90 APEX REST API Response Time (ms)	2,680	3,201	3,983	4,321
Total DB CPU Time (ms)	41,014,240	44,020,301	46,322,812	48,500,310
Total App CPU Time (ms)	268,216,981	310,220,900	400,001,210	450,221,922
Number of Row Lock Errors	41	52	64	74
Number of Concurrent UI Errors	0	0	3	5
Number of Concurrent Apex Errors	0	0	10	24

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# Platform - Automate



## Flow Orchestration Step Conditions

Control the execution of your orchestration based on dynamic record updates.

## Extensible Flow Orchestration Objects

Add custom fields to orchestration objects such as runs or work items.

## Flow Builder Data Transform (Beta)

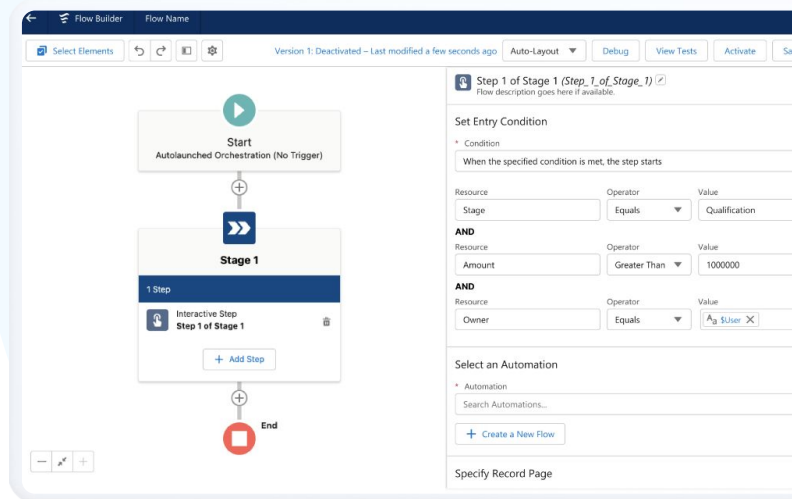
Seamlessly map fields between different structures and transform field values within collections.

## Flow Builder HTTP Callout: All Methods

Easily integrate Flow with external systems across various use cases using HTTP Callouts.

## Flow Builder Reactive Screens

Create full-fledged apps and guided forms with dynamic screen flows.



The screenshot displays the Flow Builder interface. The main canvas shows a flow diagram starting with a 'Start' node (Autolaunched Orchestration), followed by a 'Stage 1' node containing an 'Interactive Step' (Step 1 of Stage 1), and ending with an 'End' node. The right-hand panel is titled 'Step 1 of Stage 1 (Step\_1\_of\_Stage\_1)' and includes a 'Set Entry Condition' section with a table for defining conditions:

Resource	Operator	Value
Stage	Equals	Qualification
<b>AND</b>		
Resource	Operator	Value
Amount	Greater Than	1000000
<b>AND</b>		
Resource	Operator	Value
Owner	Equals	Aj Suser X

Below the conditions, there is a 'Select an Automation' section with a search field and a '+ Create a New Flow' button. At the bottom, there is a 'Specify Record Page' field.

[Release Notes](#)

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# Platform - Secure



## Shield Platform Encryption Enhancement: External Key Management with AWS

Protect sensitive data while addressing regulatory requirements.

## Privacy Center Enhancements

Take control of data privacy with enhancements to Privacy Center.

## Data Mask Enhancements

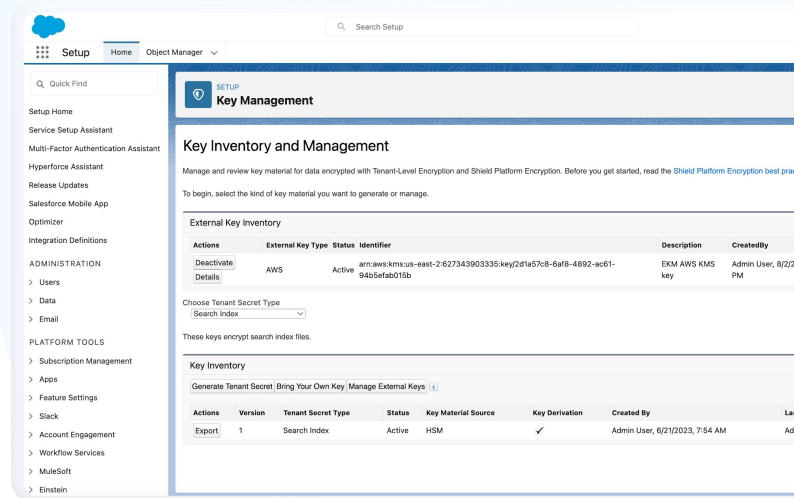
Boost productivity and get greater context with enhancements to Data Mask.

## Salesforce Backup

Protect your enterprise against data loss and corruption.

## Shield Event Monitoring Enhancements

Enhanced monitoring of user activities.



The screenshot shows the Salesforce Setup interface for Key Management. The left sidebar contains navigation options like 'Setup Home', 'Service Setup Assistant', and 'Integration Definitions'. The main content area is titled 'Key Management' and includes a 'Key Inventory and Management' section. Below this, there is a table for 'External Key Inventory' and a 'Key Inventory' section with a table of key details.

Actions	External Key Type	Status	Identifier	Description	CreatedBy
<a href="#">Deactivate</a> <a href="#">Details</a>	AWS	Active	arn:aws:kms:us-east-2:627343903335:key:2d1a57c8-6af8-4892-ac61-94b5efab015b	EKM AWS KMS key	Admin User, 8/22/2023 10:58:00 AM

Actions	Version	Tenant Secret Type	Status	Key Material Source	Key Derivation	Created By
<a href="#">Export</a>	1	Search Index	Active	HSM	✓	Admin User, 6/21/2023, 7:54 AM

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# Data Cloud



## Einstein Studio with Google Vertex AI

Supercharge AI insights across the Customer 360 with your own AI models from Google Vertex AI.

## Data Cloud Triggered Flows

Trigger flows with Data Cloud's unified, real-time data.

## Data Cloud Enrichments

Enhance your Customer 360 by enabling Data Cloud objects and insights on your contact and lead objects.

## Reports and Dashboards for Data Cloud

Use Salesforce Reports and Dashboards to analyze data from Data Cloud and unlock insights across Customer 360.

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## Programs and Project Tracking

Manage individual sustainability programs and track outcomes for clear, actionable insights.

## What-If scenario analysis tool

Experience improved forecasting, clearer direction, and more granular what-if analysis.

## Enhanced Carbon Accounting

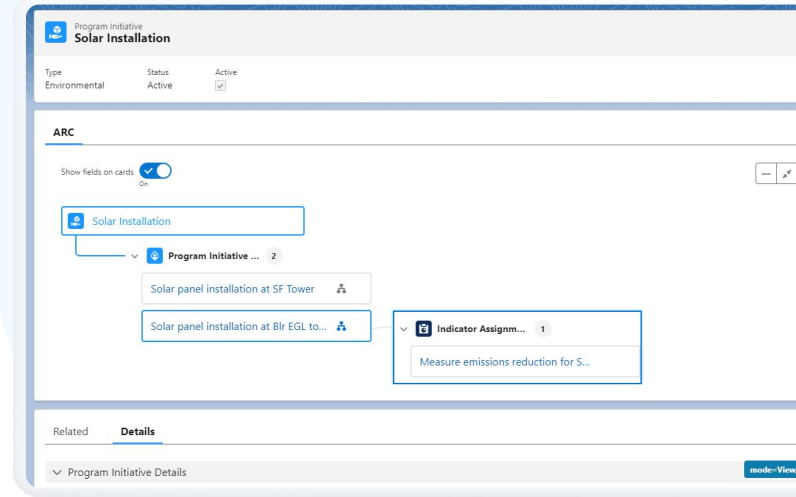
See your renewable energy credits and get more granular input options for fuel and emission factors.

## CSRD Report Builder

The CSRD report builder leverages social and governance data to meet ESG disclosure requirements.

## Emissions Factors Data Availability

Net Zero Marketplace now lets you buy and sell third-party ESG data in addition to carbon credits.



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# Customer Success



## Customer Success Score

View your Customer Success Score and recommendations to improve in the Help Portal.

## Enhanced Annual Technical Health Review (ATHR)

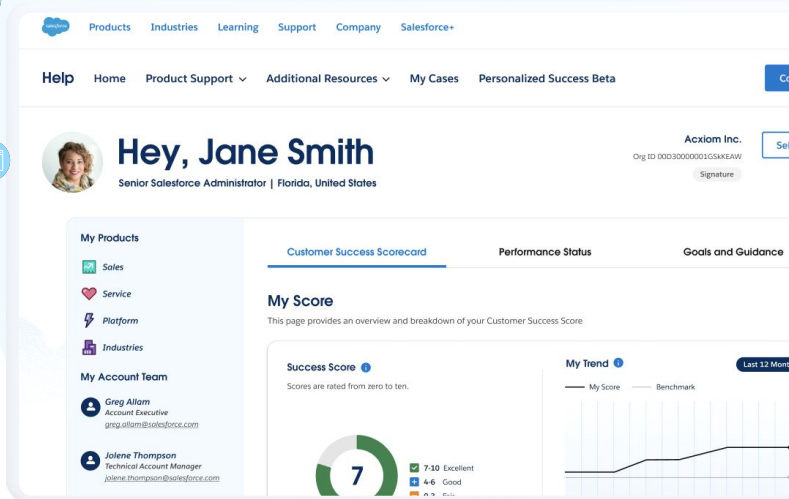
Analysis and guidance for architecture risk areas and technical health of your implementation.

## Proactive Monitoring alert for Search Performance

Identification and guidance to ensure Search functionality is working as designed and running optimally.

## Signature Success Plan for Marketing Cloud Personalization

Benefit from fastest response times for support, Technical Account Managers, and strategic guidance.



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# Automotive



## Fleet Management

Streamline fleet operations and power proactive vehicle maintenance.

## Inventory Management Enhancements

Transfer vehicle inventory across retail locations to meet customer demand.

## Intelligent Document Reader

Digitize and unify the end-to-end document management lifecycle.

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# Communications



## B2B Quoting Process Visualization

Visualize entire quoting process and surface reports and insights quickly.

## New Agent Consoles for B2B and SMB

Reduce operational expenses and improve customer satisfaction with pre-built dashboard for SMB.

## Enterprise Self-Service Dashboard

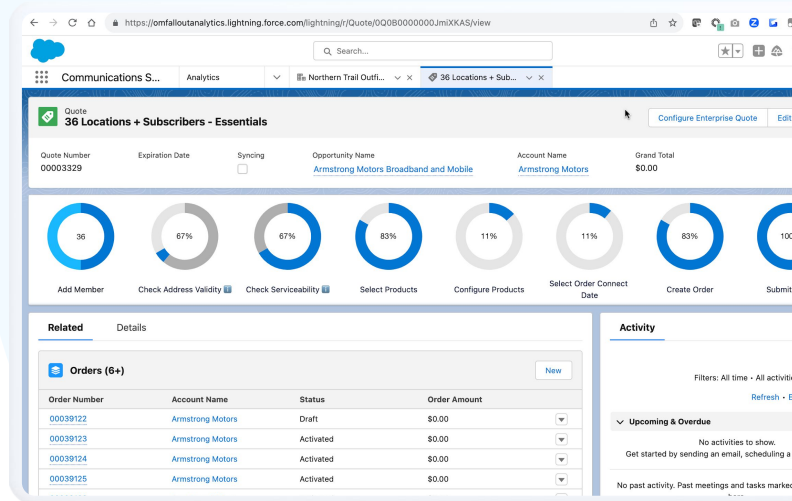
Improve efficiencies with single dashboard for quoting and contracting for complex Enterprise accounts.

## Dynamic Agent Console Components

Provide optimum customer experience with pre-built Console for all post sales needs.

## Cart-based API services

Increase scalability and performance with cart-based API services in Core.



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# Consumer Goods



## Trade Promotion Optimization

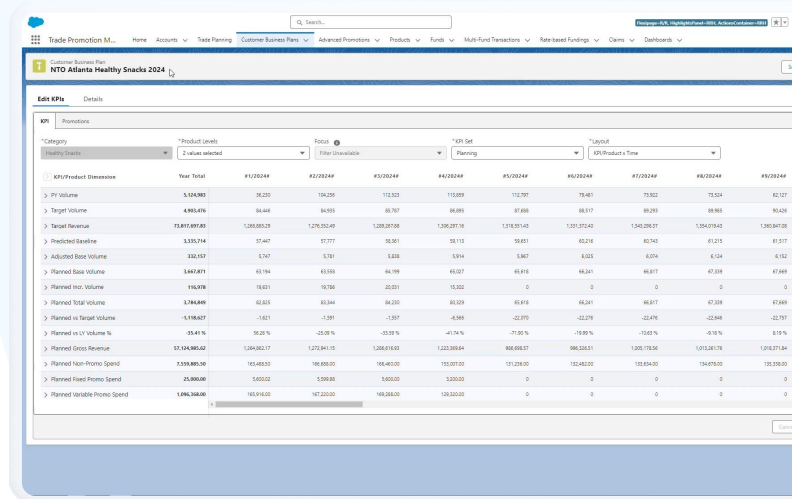
Build more realistic account plans to increase margins and revenue.

## Account Scenario Planning

Identify the optimal mix of promotions to drive account objectives.

## Visual Studio Code Based Modeler

Simplify the installation, consumption and maintenance process for faster implementations.



The screenshot displays a software interface for 'Trade Promotion M...' with a search bar and navigation menu. The main content area is titled 'NTO Atlanta Healthy Snacks 2024' and shows a table of KPIs. The table has columns for 'KPI', 'Promotions', and 'Details'. The 'KPI' column lists various metrics like 'PV Volume', 'Target Volume', 'Target Revenue', etc. The 'Promotions' column shows values for different scenarios (e.g., #1/2024F, #2/2024F, etc.). The 'Details' column shows values for different time periods (e.g., #1/2024F, #2/2024F, etc.).

KPI	Promotions	Details
PV Volume	3,524,983	38,235 194,235 112,523 113,859 112,797 79,461 73,922 73,524 62,127
Target Volume	4,893,426	84,444 84,995 88,767 88,895 87,868 88,817 89,293 88,863 80,426
Target Revenue	73,817,897.83	1,286,883.23 1,276,303.49 1,289,287.68 1,286,297.16 1,218,311.45 1,337,252.49 1,342,298.37 1,284,978.43 1,280,847.05
Predicted Baseline	3,335,714	57,447 57,777 58,361 58,110 58,851 62,616 60,742 61,215 61,517
Adjusted Base Volume	333,157	5,767 5,791 5,838 5,914 5,967 6,025 6,074 6,124 6,162
Planned Base Volume	3,668,871	48,184 48,938 49,199 49,837 49,616 49,341 49,817 49,289 47,649
Planned Non-Promo Volume	116,978	19,831 19,736 20,281 20,281 19,332 0 0 0 0
Planned Total Volume	3,784,849	68,015 68,674 69,480 69,118 69,118 69,341 69,817 69,289 67,649
Planned vs Target Volume	-1,108,577	-1,811 -1,291 -1,397 -1,386 -1,270 -12,276 -12,476 -12,646 -12,597
Planned vs Target Revenue %	-18.41%	-16.26% -15.93% -15.93% -14.74% -17.95% -19.93% -19.61% -19.16% -19.16%
Planned Gross Revenue	51,124,986.62	1,254,625.17 1,272,941.15 1,283,616.82 1,283,616.82 888,688.57 986,252.81 1,025,178.56 1,012,381.76 1,012,571.84
Planned Non-Promo Spend	2,578,895.36	161,485.53 161,688.53 161,463.53 161,927.02 171,288.00 162,443.00 162,684.00 164,475.00 163,260.00
Planned Fixed Promo Spend	25,900.00	5,650.02 5,398.83 5,650.00 5,650.00 0 0 0 0 0
Planned Variable Promo Spend	1,696,348.06	165,940.00 167,200.00 168,268.00 168,268.00 0 0 0 0 0

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# Energy & Utilities



## Clean Energy Program Enhancements

The intelligent platform to engage utility customers in clean energy and sustainability programs.

## Utility Field Service Short Cycle Mobile Apps

Preconfigured mobile apps designed with utility field service best practices.

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# Financial Services



## Integrated Onboarding Enhancements

Get a headstart on deploying onboarding experiences with Salesforce.

## Service Process Automation Enhancements

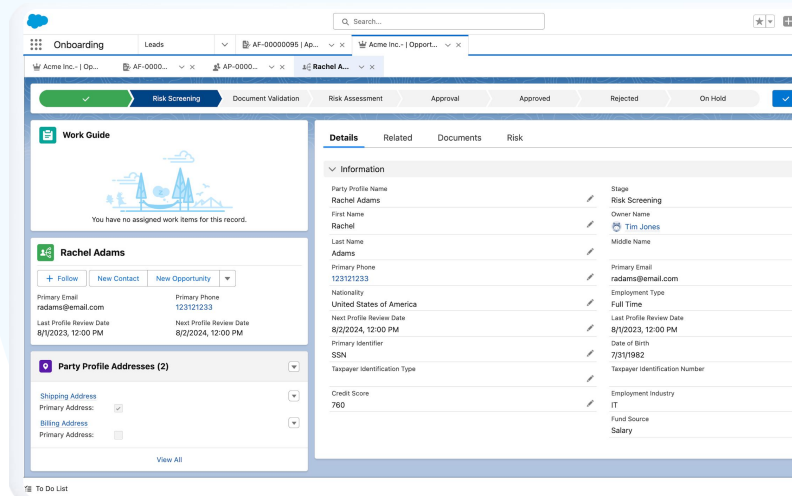
Increase service efficiency with new self-service capabilities and pre-built automation templates.

## Financial Goals and Plans

Empower your customers' financial success with actionable financial goals.

## Document Matrix

Complex customer document collection, simplified for the Admin.



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# Health



## Referral Management Enhancements

Streamline referrals from one single system.

## Home Health Enhancements

Deliver personalized and coordinated care in the home.

## Integrated Care Management Enhancements

Deliver human centered, integrated care delivery.

## Advanced Therapy Management Enhancements

Orchestrate intelligent care programs for advanced therapies.

## Marketing Cloud Engagement for Health Cloud

Personalize health consumer engagement at scale.

The screenshot displays a software interface for Referral Management. The main section is titled "Referral Worklist" and contains a table with the following data:

Referral Number	Referral Number	Patient Account	Status	Source
6505263248	6505263248	Abbey Carrol	Declined	Ena
15644823	15644823432	Adonis Terrell	Declined	EHR
384348	38434857435	Alex Bradford	Accepted	Fax
98763	98763475745	Ally Odonnell	Accepted	Fax
7658	76587656756	Alyvia Horton	In Review	Portal
453	45345454545	Joe Brown	In Review	EHR
234	23456789876	Jane Smith	In Review	Manual
324	32456787656	John Strike	Scheduled	Portal
2345	23456787656	Amelia Kerr	Scheduled	Fax
4345	45345457654	Cliton Ball	New	Email

Below the table is a section for "Incoming Documents" with a list of documents and their details:

Document	Source	Priority	Action
00879932-0991	...	Low	...
00879932-0992	...	New	...
00879932-0993	...	Needs Review	...
00879932-0994	...	Needs Review	...
00879932-0995	Makana Hospital	Medium	Needs Review

On the right side, there is a "My Task List" with several tasks and a "My Statistics" section showing:

- My Referrals Total: 300
- Internal Referrals: 100
- External Referrals: 200
- Referral Scheduled Rate: 68% (vs last year)
- Average Time to Close T: 47 Days (vs last year)

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# Manufacturing



## Warranty Insights

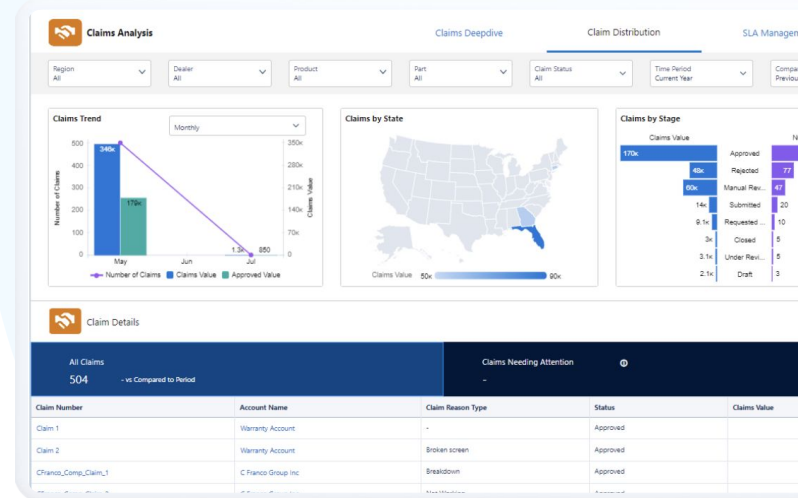
Improve claim processing efficiencies and reduce warranty costs with insights.

## Ship & Debit Insights

Unlock actionable Ship & Debit Claims insights with Ship & Debit Intelligence.

## Intelligent Document Reader

Digitize and unify the end-to-end document management lifecycle.



[Release Notes](#)



# Media



## Advertising Sales Management Enhancements: Programmatic Support

Increase efficiency transacting via direct and programmatic through a single platform.

## Advertising Sales Management Enhancements: Calendar View

Easily view advertising inventory availability.

Ad Space Product	Placement Name	Availability	Pricing Model	Base Rate	Budget	Requested Units	Ad Space(s)	Ad Space Size
Digital Banner	Banner-Leaderboard	--	CPM	Per 1000 impressions \$33.00	--	1,000	Leaderboard TN_Science_Banner	50x320 Pixels
Digital Video	Video-Preroll	--	CPM	Per 1000 impressions \$78.75	--	1,000	Video Pre Roll	90x728 Pixels
20 sec skippable Pre-roll	Audio Preroll	--	CPM	Per 1000 impressions \$10.00	--	1,000	Audio Pre Roll	90x970 Pixels
20 sec skippable Mid-roll	Audio Midroll	--	CPM	Per 1000 impressions \$10.00	--	1,000	Audio Mid Roll	90x970 Pixels
Digital Banner	Banner-Skyscraper	--	CPM	Per 1000 impressions \$31.50	--	1,000	Skyscraper TN_Home_Banner	600x120 Pixels
<b>Digital Total</b>								
Total Placements: 5								Plan Budget: \$234,324.00

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# Public Sector



## Provider Service Delivery Data Model

Track provider service delivery.

## Provider Search

Find the right provider faster.

## Constituent Snapshot

Understand constituents in a whole new way.

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# Education



## Education Cloud Intelligence

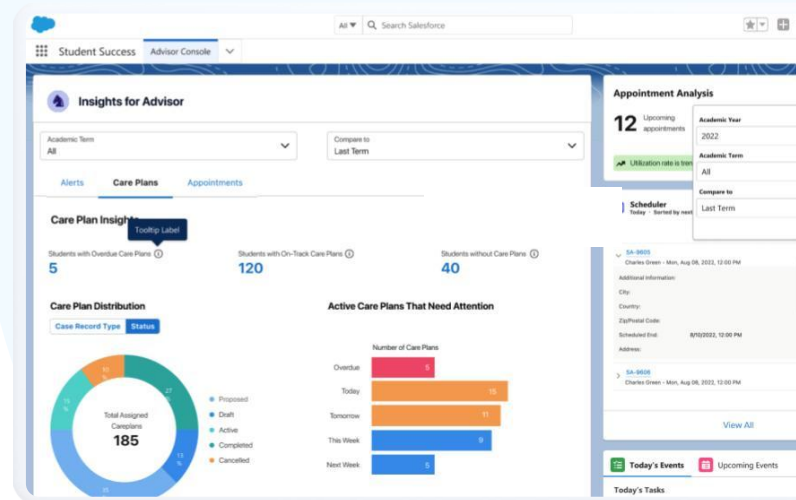
Accelerate AI-powered analytics across campus.

## Education Cloud for Advancement and Alumni Relations

Build trusted lifelong alumni and donor relationships.

## Learning Program Builder

Streamline program creation to drive lifelong learning.



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# Nonprofit



## Outcome Management

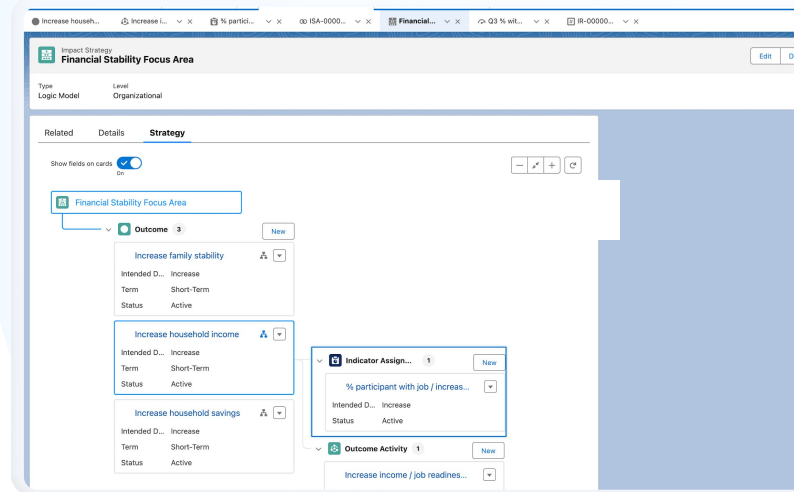
Track and evaluate outcomes to maximise impact.

## Grantmaking

Accelerate funding to invest in stronger outcomes.

## Fundraising

Build lasting relationships with all supporters.



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Thank You

