



Summer<sup>★</sup> 26

# Release in a Box

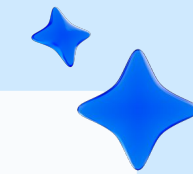
A digital resource for admins, business users, developers,  
community groups, and more

# Forward-looking statements



This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. 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, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. 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 our ability to meet the expectations of our customers; uncertainties regarding AI technologies and their integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation and our ability to compete in the markets in which we participate; and our ability to maintain and enhance our brands.

# What's included?



## Feature Summaries

High-level summaries of the top innovations for each product

## Helpful Links

Links to release notes for each product

## End Users

Features identified by end user (Admin, Business User, Developer)

# Identify features by user



**Admin**



**Business User**



**Developer**



































# How do I learn more?

-  Take the [Release Highlights Trail](#)
-  Dive into the detailed [release notes](#)
-  Join the [Release Readiness Trailblazers group](#)

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## Features by User

### Slackbot MCP Client

Orchestrate work across your agent ecosystem with Slackbot. Slackbot MCP Client connects over 6,000 apps and agents to Slackbot - including the Salesforce MCP platform - so you can describe what you need, and Slackbot routes, coordinates, and executes across your entire stack.



### Slack CRM

Instead of scattered customer info, organize relationships conversationally in Slack. Ask Slackbot to manage contacts, track deals, draft follow-ups, and surface insights, right where your team is already collaborating. Start with the tools you need now, and grow into a full CRM with Salesforce - no data migration.



### Slackbot Skills, Automations, and Actions

Slackbot doesn't just answer. It acts. Ask it to run repeatable business processes as Skills, automate work on a schedule; and take real action across Slack, Salesforce CRM, Google, and Microsoft on your behalf.



### Slack Default-On for Salesforce

Without a true system of engagement, AI stalls. Now, every new Salesforce organization comes with Slack built in and ready to go from day one - the engagement layer every Agentic Enterprise needs, connecting context, people, data, and agents where work happens.

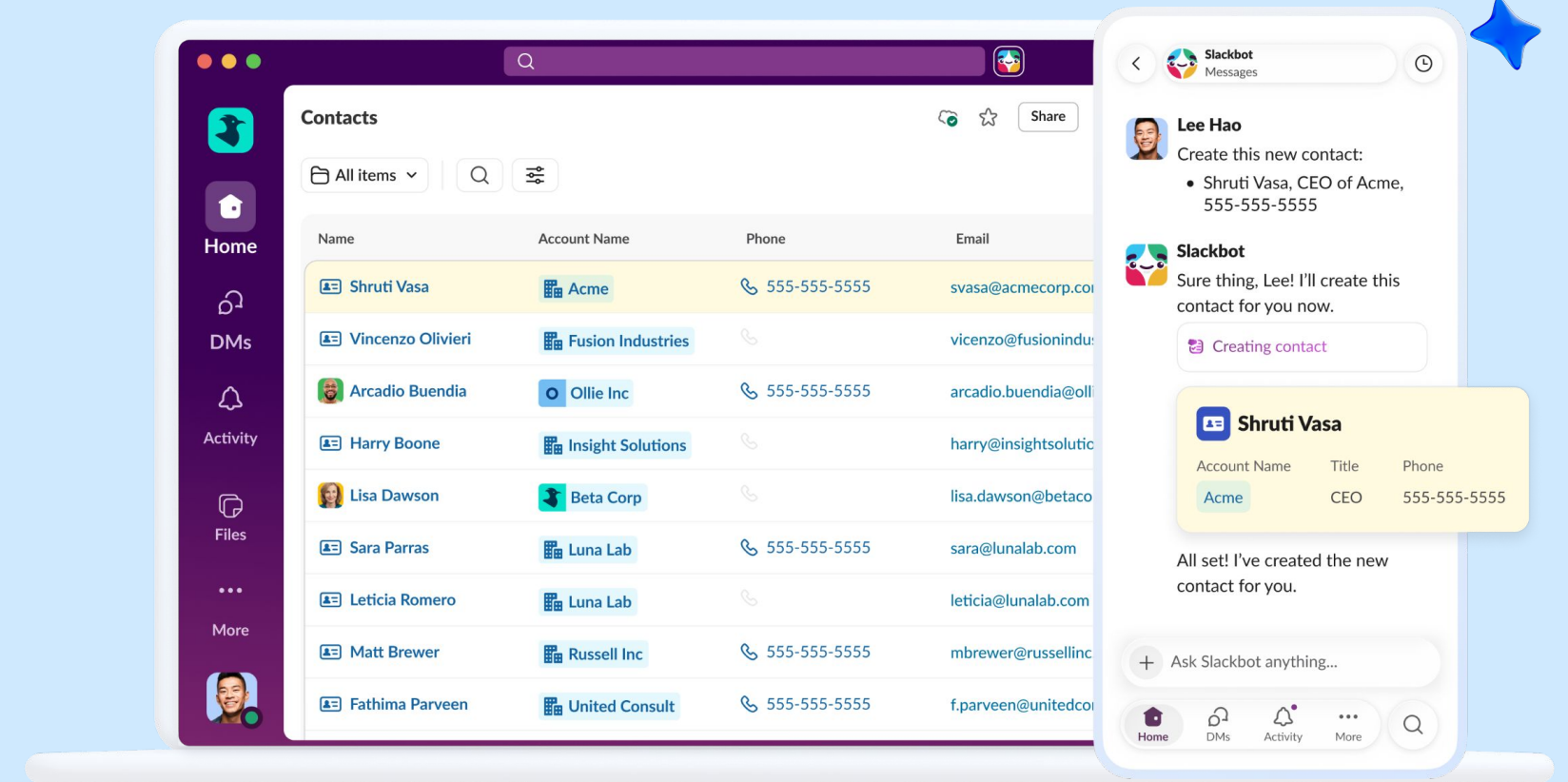


### Slack Today

Instead of being pulled in a dozen directions when you open Slack, start your day grounded in Today. Powered by Slackbot, Today gives you a snapshot of your priorities so you can orient yourself and quickly get started on the work that matters most.



## Slack CRM





# Slackbot MCP Client



## What's Getting in Your Way

As companies deploy more AI tools and agents across systems and teams, employees often don't know which tool or agent to use for a given task. Valuable data and specialized tools sit unused because finding them requires searching across multiple apps, remembering different workflows, or switching contexts. Even when the right agent exists, employees lose time figuring out how to access it instead of getting work done.

## How We Fix It

The **Slackbot MCP Client** transforms Slackbot into a single interface for your entire AI stack.

MCP (Model Context Protocol) is an open standard that lets any app or service connect to Slackbot – including the Salesforce MCP platform, with built-in support for Salesforce, Tableau, and Data Cloud, plus custom servers like Apex actions, flows, and any API-installed tool.

Just describe what you need. Slackbot finds the right tools and gets it done.

## Measurable Results You Can Expect

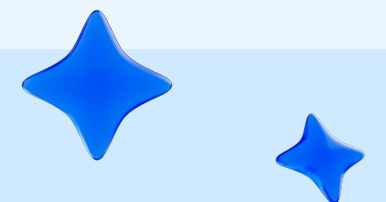
Employees can easily discover and activate the right apps and tools when they need them.

Agents, tools and data become easier to access and use, helping teams complete complex workflows faster.

## Why It's Worth Doing

Every AI investment your organization makes – every agent built, every automation deployed – is only as valuable as how often people actually use it. When your tools are fragmented, adoption stalls. When they're connected, everything compounds.

**Slack** brings your people, data, apps, and agents together in one place – the foundation that makes every AI investment actually deliver. **Slackbot** is how your team puts that foundation to work, every day, without friction. **Slackbot MCP Client** makes it possible for Slackbot to coordinate work across apps, humans and third-party agents.



## Features by User



### Agentforce Voice in Digital & Mobile

Agentforce Voice embeds conversational AI into digital and mobile channels, allowing customers to speak naturally to resolve issues without switching to a phone call or repeating themselves.



### Agentforce Voice Multi-Language Support

Agentforce Voice expands with support for French, Italian, German, Spanish, Portuguese, and Japanese, helping businesses to deliver AI-powered voice experiences across multiple languages globally.



### Multi-Agent Orchestration in Agentforce

Stop settling for AI hallucinations. Multi-Agent Orchestration in Agentforce intelligently routes complex tasks to specialized agents for fast, accurate results. Shared context across channels means customers never have to repeat themselves.

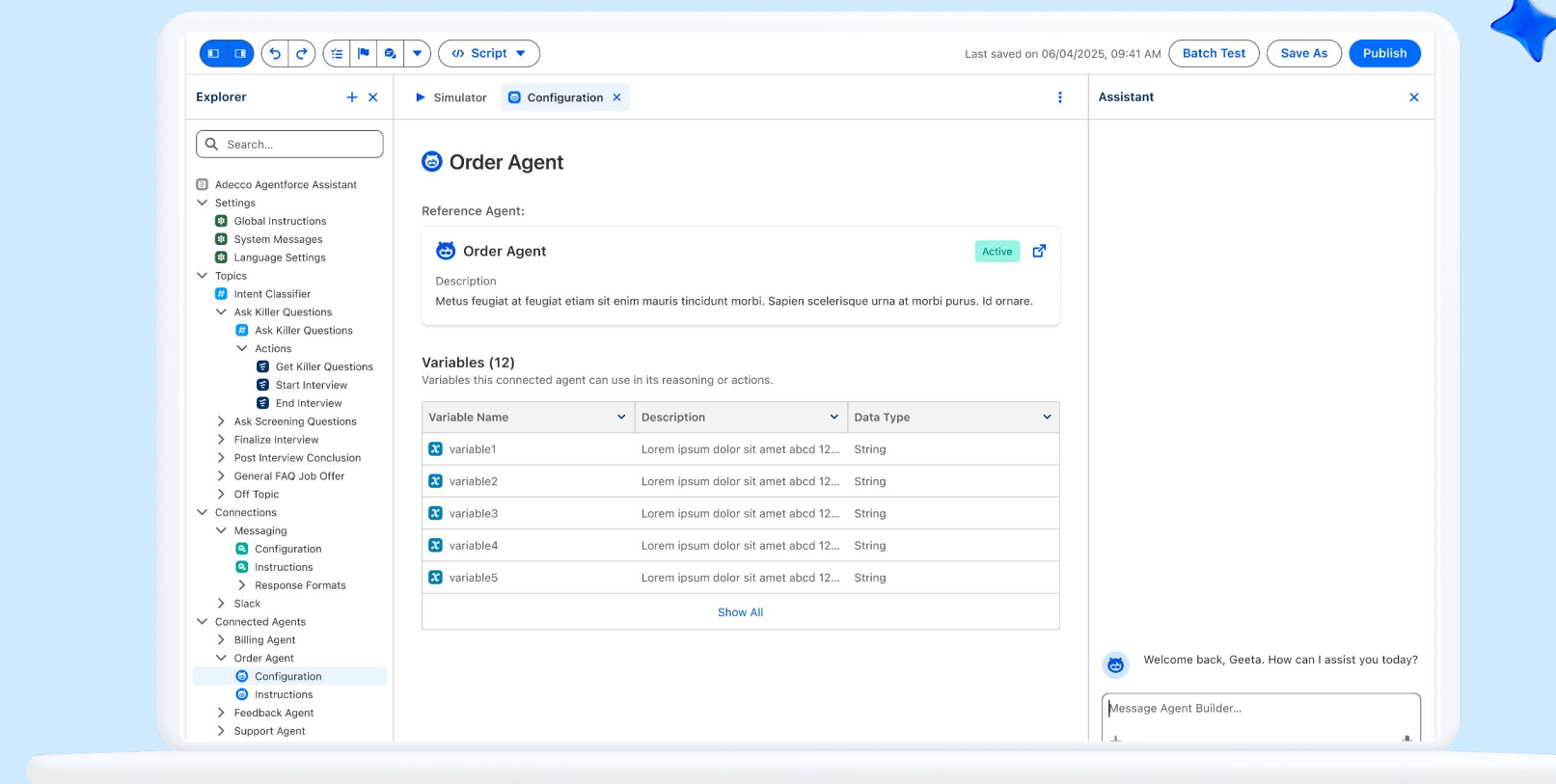
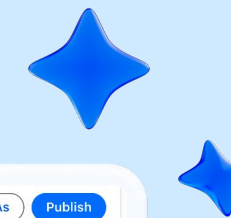


### Agentforce Studio Enhancements

Enhanced Testing Center in Agentforce Studio validates agent quality before deployment. Run batch tests in parallel, auto-generate cases with AI, evaluate accuracy with custom evaluators, and debug with in-line editing, run history, and JSON viewer.



## Multi-Agent Orchestration in Agentforce



**Release Notes**



# Multi-Agent Orchestration in Agentforce



## What's Getting in Your Way

Today, customers face two frustrating options when working with agents. They either have to navigate a maze of specialized agents or rely on a single monolithic agent that's prone to hallucinations, slow responses, and inaccurate answers due to conflicting data. Worse, customers must repeat themselves when switching channels.

## How We Fix It

Multi-Agent Orchestration is Agentforce's capability to intelligently route requests to a team of specialized agents that work together to resolve complex tasks. Instead of a single agent trying to handle everything, orchestration coordinates multiple purpose-built agents, each with specific expertise and data access, ensuring the right agent handles each step of a multi-step workflow while maintaining context throughout the entire interaction.

## Measurable Results You Can Expect

With Multi-Agent Orchestration in Agentforce, customers get a unified user experience via a single "front door" agent, relevant and accurate responses from specialized agents that are less prone to hallucinations, and faster resolutions with shared context so customers never have to repeat themselves.

## Why It's Worth Doing

Agentforce is the most open and interoperable agentic AI platform available. We support leading open-source protocols including Model Context Protocol (MCP) and Agent2Agent (A2A), enabling seamless, standardized coordination across your enterprise systems and third-party agentic providers.

Our Multi-Agent Orchestration is enterprise-grade with:

- Control and governance: Deploy rate limiting and access management to ensure appropriate usage.
- Observability: Monitor and ensure agents act exactly as you intend with full visibility.
- Trust Layer: Protect your sensitive data with built-in security guardrails.





## Features by User

### Slack First Sales

Most sales AI stops at suggestions. To close this gap, Slack First Sales brings CRM context to sellers where they work and conversational AI on demand with Slackbot. By bringing Agentforce Sales in Slack, sellers gain a proactive layer of agents that prospect, engage leads, and manage pipeline on their behalf. This allows a single seller to operate with a full revenue team behind them, scaling without adding headcount.

X ✓ X

### Momentum

Most conversation data never makes it into Salesforce. Momentum centralizes every sales call, email, and meeting directly in Salesforce, forming the AI-ready data foundation that equips Agentforce Sales with rich conversation signals to deliver real-time coaching, insights, and personalized action at scale.

X ✓ X

### Agentic Deal Execution Enhancements

Sales teams lose deals when conversations aren't captured. Risks go unnoticed and agents are working blind. New Pipeline Management inspection enhancements bring your sales methodology (e.g., MEDDIC) and deal risk intelligence together in a single pipeline view so reps act on what's real and managers coach on what matters. Leverage our prebuilt orchestrations or extend them to match your business need so Agentforce automatically moves your deals forward and updates your data.

X ✓ X

### Prospecting Enhancements

Manual list building drains over half of every rep's prospecting time. Agentforce Prospecting now builds and prioritizes your pipeline automatically by pulling signals from 10Ks, web data, and CRM to surface the right accounts daily and self-improving from rep feedback so every list gets smarter.

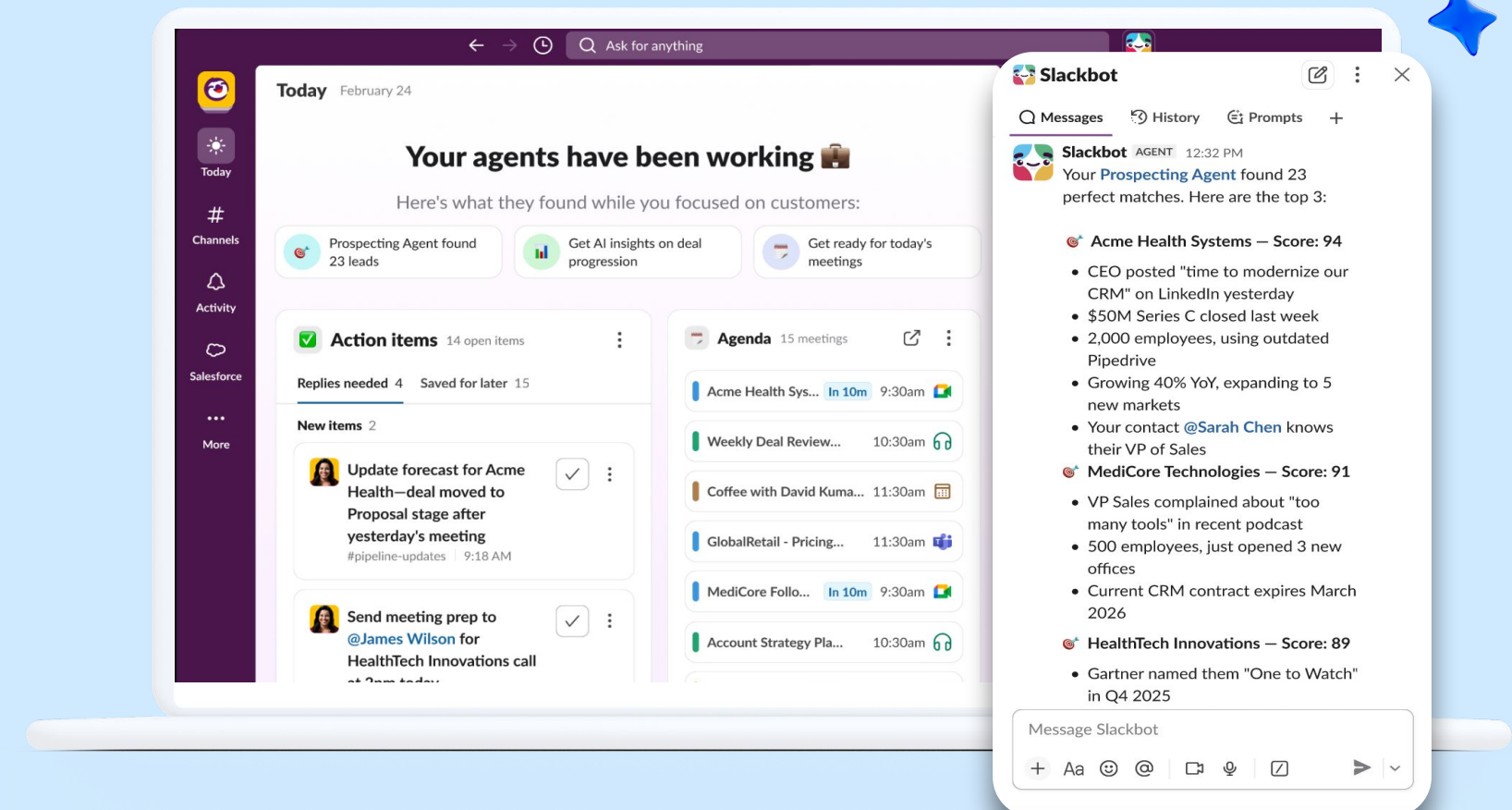
X ✓ X

### Customer Engagement Agent

Qualified leads go cold when sales can't follow up fast enough. Customer Engagement Agent autonomously nurtures and qualifies buyers with two-way conversations across channels (email and web) 24/7, handing off ready leads to sales. This results in generating more quality pipeline while sellers focus on closing deals.

X ✓ X

## Slack First Sales



Release Notes



# Slack First Sales



## What's Getting in Your Way

Today's sales cycle is manual and messy, costing revenue at every stage because growth is strictly limited to the speed of human toil. Reps are drowning in hours of hidden work – prospecting, meeting prep, and CRM updates – which forces them to spend more time managing fragmented tools than closing high-value deals. When your team is stuck in the friction of outdated systems, they aren't selling; they're just surviving a revenue problem that leads to burnout and missed targets.

## How We Fix It

The solution is a fundamental redesign of work. Agentforce Sales in Slack handles repetitive execution while the seller focuses on driving growth. Slackbot not only handles the grunt work of prospecting and data updates but also provides real-time coaching and strategic briefs. This creates a seamless collaboration where humans design the winning strategy and agents execute it at machine speed across the entire lead-to-cash cycle.

## Measurable Results You Can Expect

Sellers will finally break away from being record updaters to working at a higher strategic level entirely. By offloading the operational complexity to Slackbot, reps gain the bandwidth to architect multi-quarter account plans and engineer deal structures that align with deep customer business outcomes. The result is a blended workforce where junior reps sell like veterans and top performers multiply their impact without increasing their workload.

## Why It's Worth Doing

While competitors offer AI suggestions, Slackbot is a tool that acts and transforms you into an Agentic Enterprise. We eliminate the action gap by providing a single, unified engine where data doesn't just sit in a silo – it flows from Slack to CRM to Partner channels automatically. Unlike others who require more headcount to scale revenue, we enable exponential growth by allowing one seller to orchestrate an entire team of sales agents across the complete revenue cycle.



## Features by User



### Agentforce Service Agent Quickstart Setup

Deploying AI self-service agents can be complex and time-consuming. Agentforce Service Agent Quickstart Setup provides a guided, streamlined setup experience that accelerates deployment, reduces effort, and delivers faster time to value with scalable self-service.



### Agentforce Self-Service

Customers waste time navigating disjointed portals, forms, and chat tools to resolve a single issue. Agentforce Self-Service unifies AI conversation with dynamic, actionable tiles in one seamless interface, enabling faster resolution, effortless escalation, and a truly end-to-end support experience.



### Case Catch-Up & Insights

Service reps waste time piecing together case history and risk signals. Case Catch-Up & Insights uses AI to generate instant intent summaries and Case Health Scores, helping reps prioritize faster, prevent escalations, and deliver proactive service.

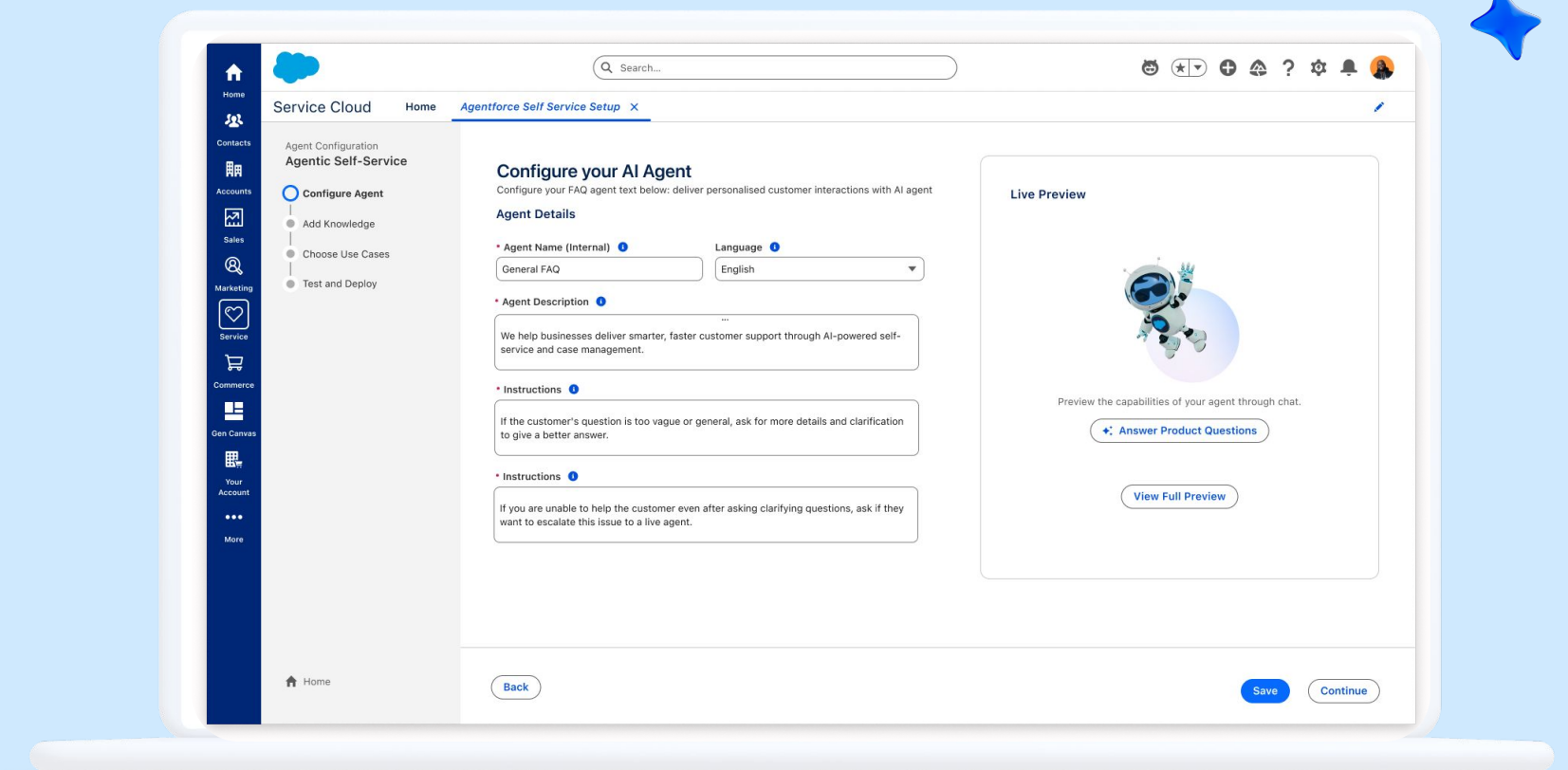
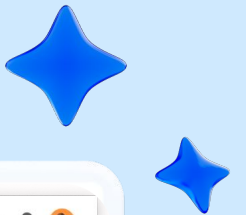


### SLA Breach Prediction for Cases

Teams often discover SLA risks too late, leading to escalations and unhappy customers. AI predicts potential SLA breaches in real time, proactively flagging at-risk cases so reps can prioritize early, prevent misses, and consistently meet service commitments.



## Agentforce Service Agent Quickstart Setup



Release Notes



# Agentforce Service Agent Quickstart Setup



## What's Getting in Your Way

AI-powered service agents offer the highest-impact AI opportunity for customers, drastically reducing case volume, improving response times, boosting satisfaction, and cutting costs. They enable scalable 24/7 self-service, freeing service reps for complex work.

However, **Agentforce Service Agent adoption is low (9%) despite high demand due to friction.** Complex setup, lengthy configurations, and technical dependencies require cross-team coordination and extended implementation, delaying time to value and blocking full realization of AI benefits.

## How We Fix It

**Agentforce Service Agent Quickstart Setup** provides customers with a streamlined, guided configuration experience that removes common deployment barriers.

Instead of navigating a complex and resource-intensive implementation, customers are supported through a structured setup process that simplifies configuration and reduces technical effort. This enables teams to launch Agentforce Service Agents faster and with greater confidence.

## Measurable Results You Can Expect

With a simplified setup experience, customers can:

- Accelerate time to launch
- Reduce implementation overhead
- Increase adoption of Agentforce Service Agents
- Scale AI-powered self-service
- Deflect more service cases
- Improve overall customer experience

By lowering complexity and effort, **Agentforce Service Agent Quickstart Setup** removes adoption barriers and unlocks faster time to value at scale.

## Why It's Worth Doing

While competitors like Zendesk, Microsoft (Copilot), and ServiceNow offer AI tools, they often require heavy setup and customization.

**Agentforce Service Agent Quickstart Setup** accelerates deployment with a structured, intuitive setup experience.

By lowering complexity and effort, we remove adoption barriers and unlock faster time to value at scale.



# Field Service



## Features by User



### Scheduling Console

Modern dispatching is complex, but not with the new Scheduling Console. Get live appointment updates, visualize gaps with map routes and side-by-side schedules, and let Agentforce automatically surface the closest qualified technicians for emergency jobs.



### Interactive Pre-Work Brief

Stop your mobile workers from juggling apps or waiting on dispatchers to clarify job details. Let them chat directly with Agentforce to get instant, CRM-backed answers to any follow-up questions right from the Pre-Work Brief.



### Service Bill of Materials

Power your field operations with the foundational Service Bill of Materials data model. Map exact parts, tools, and labor to an asset's as-maintained state to eliminate compliance risk and ensure mobile workers arrive prepared for every job.



### Asset Inventory Status and Allocation Enhancements

Getting the right parts for a job the first time is easier than ever with Agentforce. Manage stock in real time and securely assign inventory to specific orders using natural language, preventing stock conflicts and making smarter fulfillment decisions.

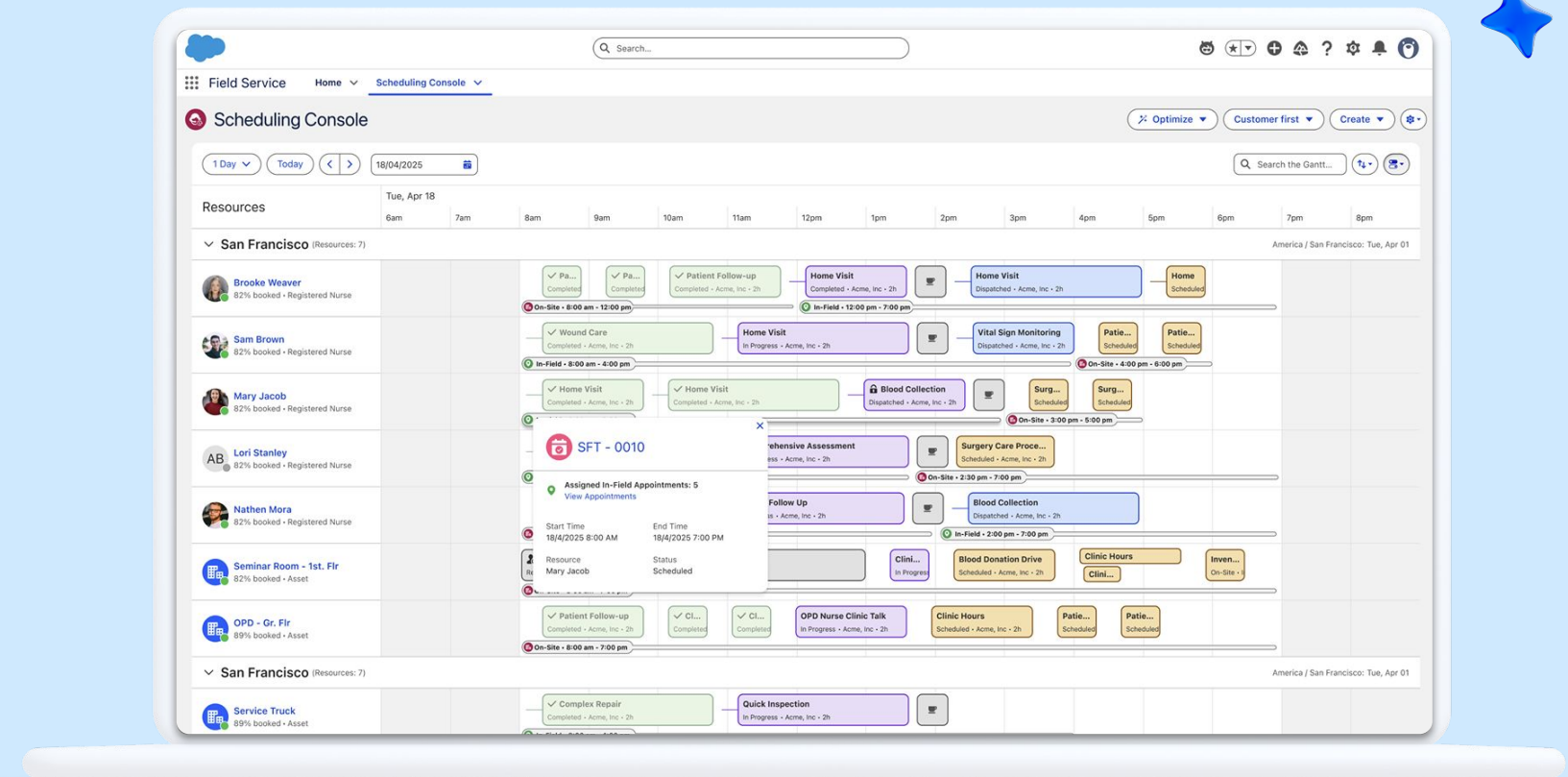
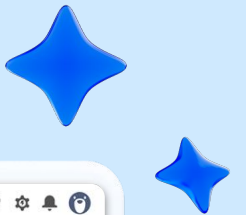


### Visual Remote Assistant (VRA) Multi App Support

Support multiple apps in a single screen-sharing session so agents can see the full picture. Solve complex issues faster to boost first-time resolution and slash handle times.



## Scheduling Console



[Release Notes](#)



# Scheduling Console

salesforce

## What's Getting in Your Way

Tech evolves fast, and since the release of the original dispatch console, Lightning Web Components and GraphQL have been released that are AI-ready and can enable more powerful applications, improved experiences, and scale. Dispatchers need updated tools to manage dynamic environments with minimal clicks and zero friction.

## How We Fix It

The new Scheduling Console is built on Lightning Web Components and has tools that support high-performance workflows and multiscreen configurations, ensuring the system is easy to navigate. This design provides a seamless dispatching experience by focusing on usability, productivity, and high performance. The new console was developed with extensive input from accessibility standards and customer feedback.

## Measurable Results You Can Expect

- Improved CSAT
- Reduced appointment lead and management times
- Improved SLA adherence
- More time back for dispatchers to focus on higher-value work

## Why It's Worth Doing

The new scheduling console provides an enjoyable experience for modern dispatching, embedding AI naturally in dispatcher workflows. The classic dispatch console experience presents several challenges, including hindered performance and scalability limitations. It's worth addressing because these NPS results show these constraints have negatively impacted overall user satisfaction.



# IT Service



## Features by User



### IT Domain Pack Enhancements

Slash IT costs with over 50 specialized AI agents deployed out of the box across your Service Desk, Slack, and Teams. Leverage Multi-Agent Orchestration to coordinate across specialists or use one unified interface to detect user intent and resolve employee needs proactively.



### Agentforce IT Hardware Asset Management

Automate hardware asset management with a robust end-to-end framework powered by Agentforce. Reduce risk, cut costs, and optimize usage by deploying zero-touch asset lifecycles directly in the IT Service Desk, including real-time visibility in Slack.



### Agentforce IT Compliance

Cut audit prep for IT compliance with end-to-end AI governance, risk, and compliance management. Agentforce enables 24/7 monitoring and automated remediation including risk summaries, triage, and policy drafting – reducing manual overhead and errors.



### HR Domain Pack

Slash HR costs with 14 specialized AI agents deployed out of the box across your Service Desk, Slack, and Teams. Use multiple agents for HR teams or one unified interface to detect user intent and resolve employee needs proactively across specialists.

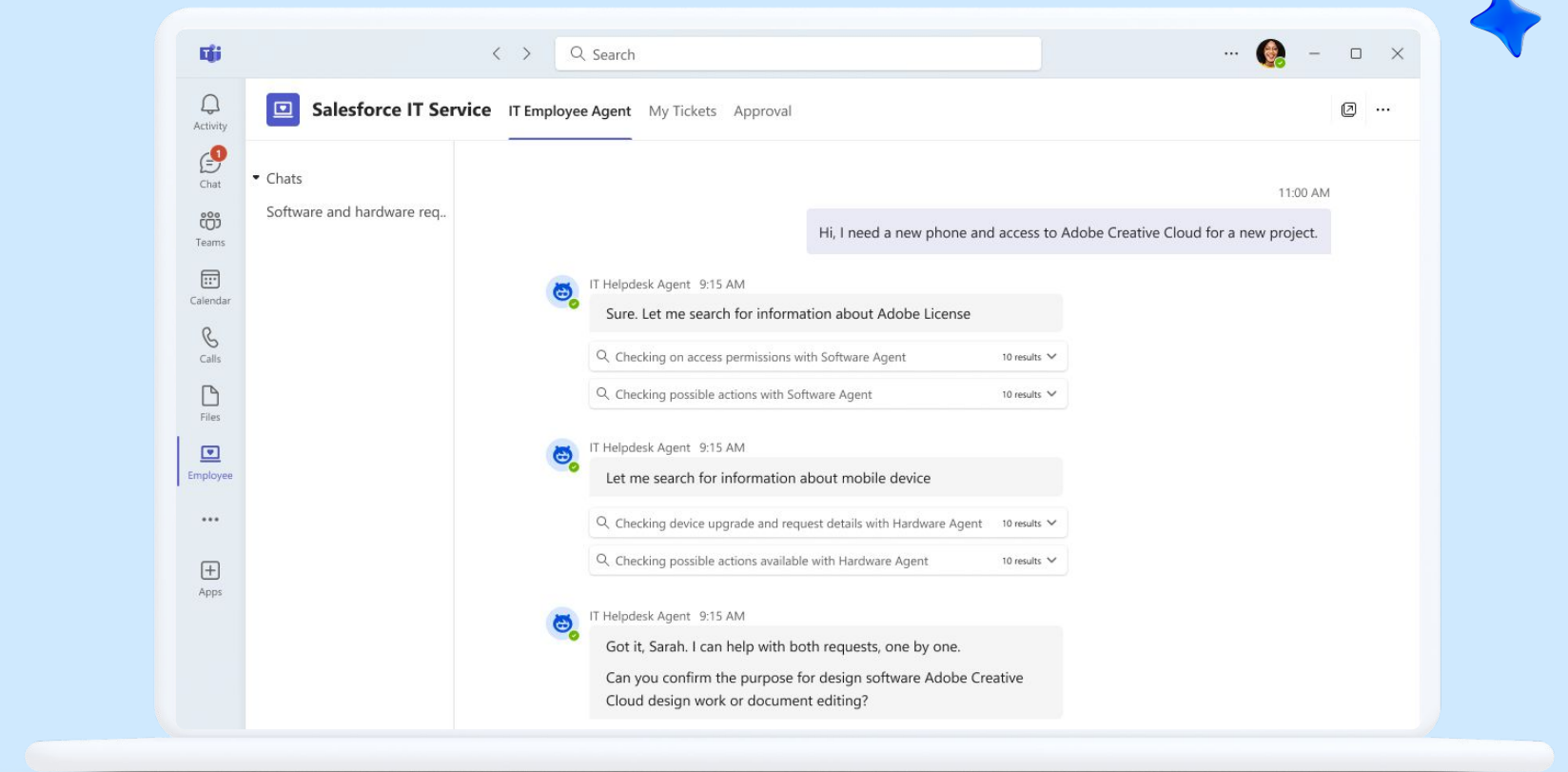
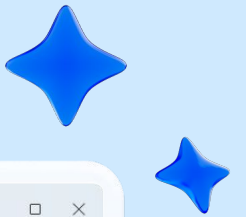


### HR Connectors & Integrations

Turn fragmented employee experiences into a unified system of engagement across all of your HR apps, data, and processes. With frictionless plug-and-play connectivity, customers can go live in weeks to reduce implementation costs and drive fast ROI.



## IT Domain Pack Enhancements



[Release Notes](#)



# IT Domain Pack Enhancements



## What's Getting in Your Way

Employees need a seamless way to quickly resolve their issues, but the vast majority of AI agents handle employee requests in a silo, creating “agent sprawl.”

To deliver a unified experience that increases resolutions, IT needs a single agent interface while allowing each department to control topics and actions for their agents. This requires significant resources to deploy.

## How We Fix It

Automate IT resolutions with over 50 specialized AI agents built into your IT Service Desk, Slack, and Teams. Leverage Multi-Agent Orchestration to coordinate across specialists or use one unified interface to detect user intent and resolve employee needs proactively.

Quickly deploy out of the box from the IT Domain Pack while maintaining departmental security control.

## Measurable Results You Can Expect

- Slash IT costs and drive faster time to value with fast, secure out-of-the-box deployment of over 50 agents.
- Increase employee CSAT and resolutions with a single agent interface.
- Improve AI agent adoption and ROI.

## Why It's Worth Doing

ServiceNow and Moveworks require building two logical layers and keeping them synced. ServiceNow has launched only one specialist agent in controlled availability with caveats. More ServiceNow specialist agents will go live in Q2 to a small set of 100 customers, signalling rollout complexity. Our over 50 agents and all IT service data run on one platform and data model, no separate conversational layer to configure or search stack to keep in sync.





# Contact Center



## Features by User

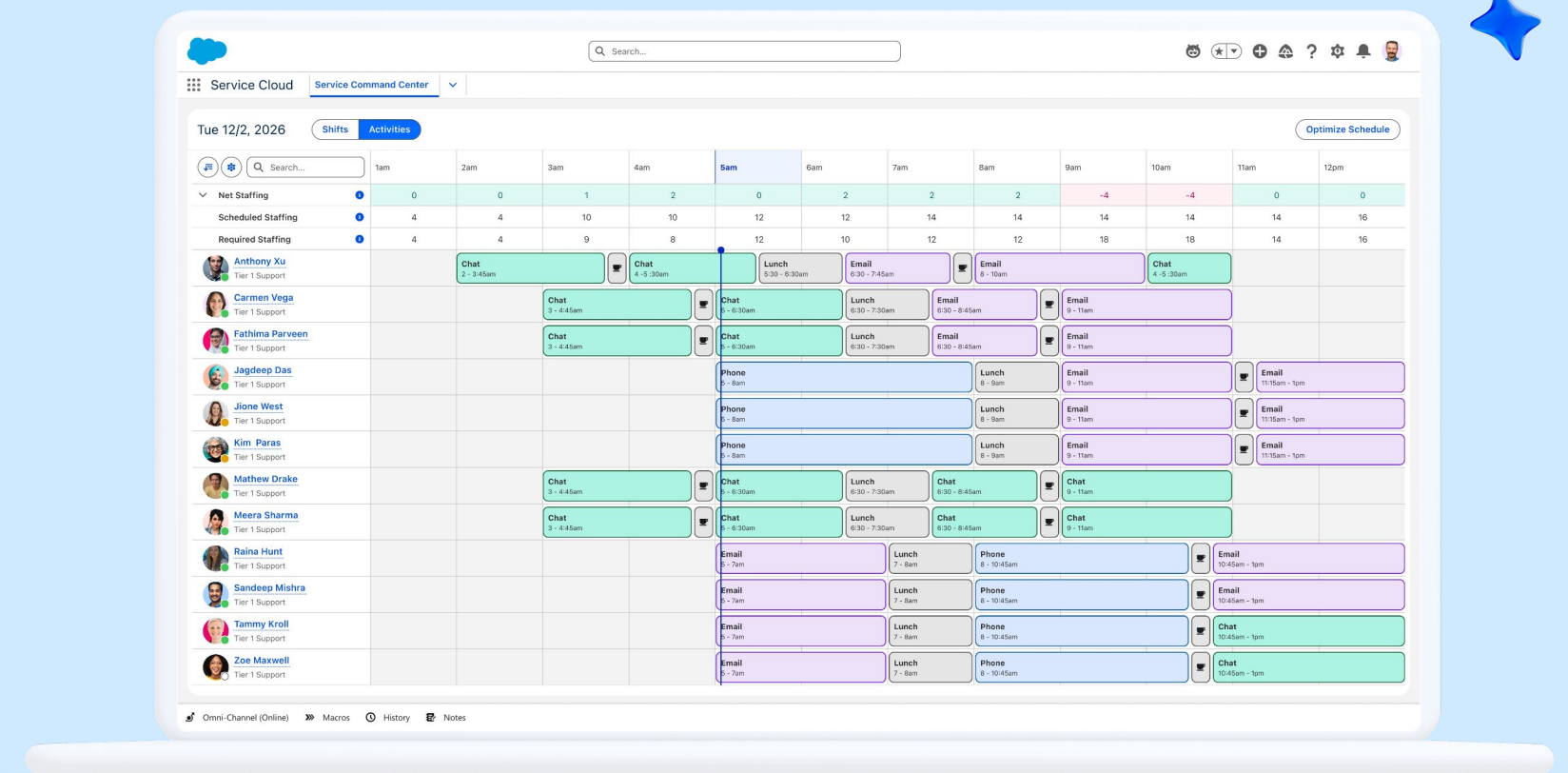
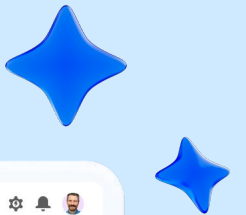


### Workforce Engagement Management

Optimize team resources across all channels with native Workforce Engagement Management for better collaboration, delivering operational flexibility and scale. It streamlines staffing, lowers overtime hours, improves resource utilization, and drives better CSAT.



### Workforce Engagement Management



Release Notes



# Workforce Engagement Management



## What's Getting in Your Way

As AI agents take on more interactions, supervisors lose visibility into the full picture – making it harder to staff effectively, coach reps, and maintain consistent service quality. The result: staffing gaps, longer wait times, agent burnout, and rising labor costs.

## How We Fix It

A native Workforce Engagement Management solution gives supervisors oversight into both human and AI activity so they can schedule and staff smarter and deliver personalized coaching and feedback to reps.

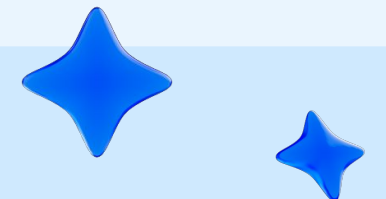
New workforce management and quality management ensure service reps are always available and trained to consistently improve the customer experience.

## Measurable Results You Can Expect

Better staffing decisions reduce overtime costs and coverage gaps, while targeted coaching improves rep performance, resolution rates, and CSAT, even as AI handles more of the interaction volume.

## Why It's Worth Doing

The only Workforce Engagement Management solution built from the ground up for both human and AI labor directly into your CRM, channels, and contact center. With built-in workforce management, quality management, and oversight of both human and AI activity, supervisors can staff smarter, reduce costs, and deliver personalized coaching that consistently improves rep performance and customer experience.



## Features by User



### Customer Engagement Agent

24/7 teammate that proactively engages target buyers, converts leads into meetings, and unifies buyer insights to drive pipeline and upsell. Nurtures and qualifies buyers through always on, conversational campaigns.



### Real-Time Offer Management

Deliver personalized, channel-optimized offers based on dynamic customer behaviors, and maximize promotional ROI. The agent-first offer management capability enables marketers to collaborate and orchestrate offers at scale and close the loop via intelligent insights and attribution.



### Rich Communication Services (RCS)

Deliver branded mobile experiences with rich media and two-way, agentic interactivity. Elevate the customer experience with personalized media cards, tap-through CTAs, and scrollable suggested actions to make every interaction deeply engaging and meaningful.



### AMPscript for Next-Gen

Maximize ROI and ensure business continuity with native AMPscript in Next-Gen Marketing Cloud. Reuse your existing logic within standard content blocks to build dynamic messages – focusing resources on innovation rather than rewriting code.

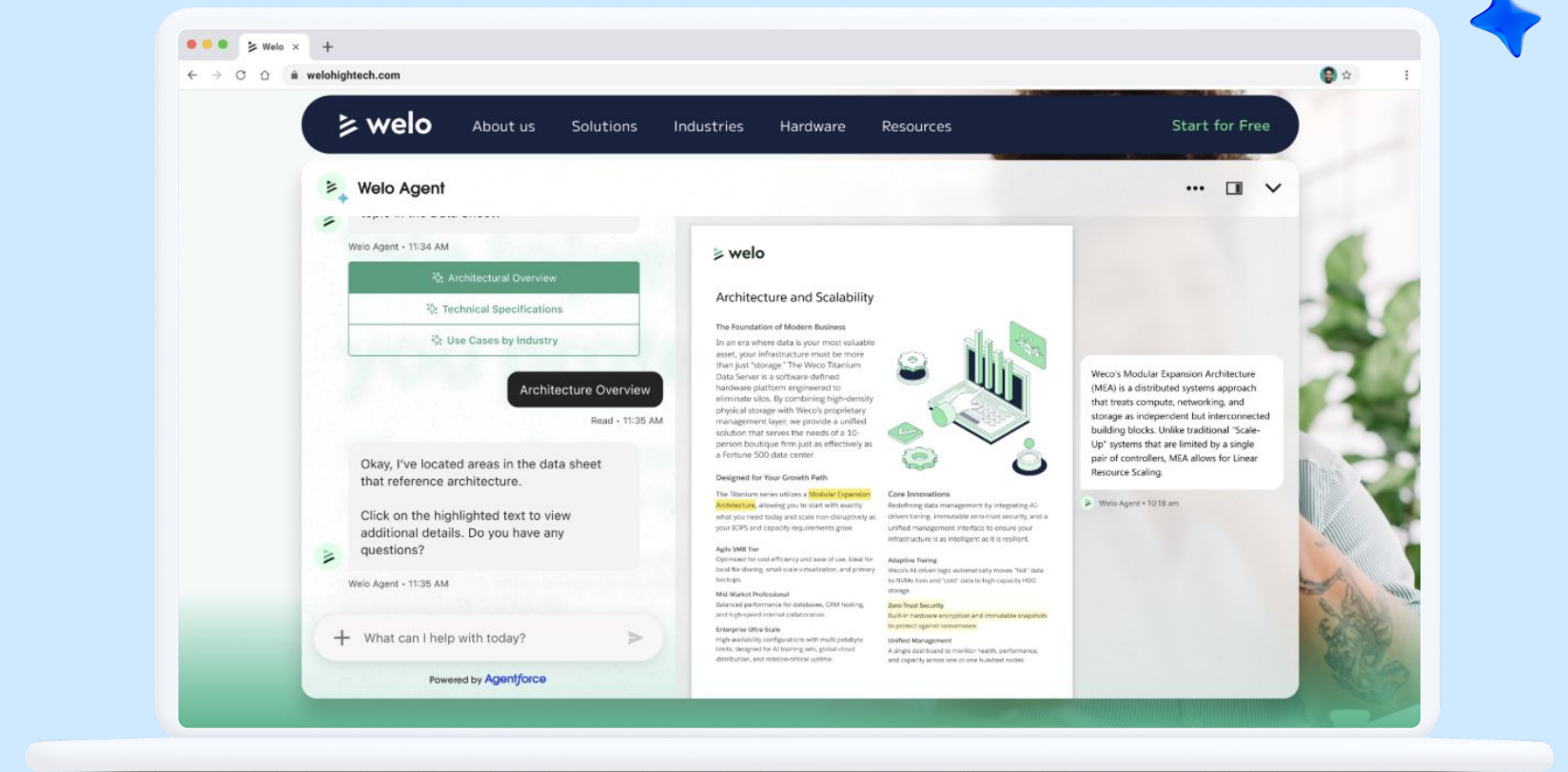


### Adaptive Web Agent

Transform listless web browsing into active engagement with content that dynamically adapts for each visitor. With a new web agent, marketers can turn every conversation into a conversion opportunity where Agentforce serves relevant recommendations in each interaction.



## Customer Engagement Agent



Release Notes



# Real-Time Offer Management



## What's Getting in Your Way

Customers ignore promotions that feel generic. But personalizing offers for every customer, across every channel, takes enormous manual effort – slowing down your team and your results.

Turning one campaign into over 100 tailored offers requires time-consuming manual work.

Teams cobble together disconnected tools and rebuild offers from scratch for each channel.

## How We Fix It

Real-Time Offer Management (RTOM) is your central experience for creating, launching, and optimizing offers all in one place.

**Set your rules once.** RTOM automatically scales them into personalized offer variations across every channel using AI-powered decisioning

**No more manual guesswork.** The system reads each customer's live behavior and intent, then it instantly delivers the most relevant offer for that moment.

## Measurable Results You Can Expect

**Marketers:** Go-to-market faster, eliminate manual busywork, and manage all offer assets in one place.

**Customers:** Receive personalized, relevant offers that feel seamless across every touchpoint.

**The business:** Achieve higher offer conversions, clear attribution on what's driving revenue, and maximum return on promotional spend.

## Why It's Worth Doing

RTOM closes the gap between your customer data and the offers your customers actually see so nothing gets lost in execution.

- Scales global campaigns into individual, personalized offers without added headcount
- Replaces rigid, one-size-fits-all rules with smart, context-aware engagement
- Gives your AI tools the real-time context they need to make better decisions, boosting the value of your existing marketing martech investments





# Commerce



## Features by User



### Storefront Next

Storefront Next delivers enterprise scale with out-of-the-box simplicity. This AI-first storefront is quick to launch, easy to manage, and high-converting. Get the extensibility of an enterprise platform with the speed of a low-code workspace.



### Agentic Merchandising

Merchandisers gain back time for strategy with Agentic Merchandising. Embedded in B2C Commerce, your command center, Agentforce automates tasks like product sorting – cutting manual work by 80% to help you focus on growing sales.



### POS-OMS Order Unification

Unlock true omni-channel agility with real-time POS-to-OMS sync. Unlike disconnected systems, associates can instantly modify items, prices, and delivery at POS, ensuring efficiency and improved customer experience.



### Round Trip Quoting

Drive conversion with Round Trip Quoting by enabling buyers to add quotes to their cart for seamless self-service checkout. Ensure easy handoffs between buyers and sales reps, and expedite the touchpoints needed between negotiations and complex orders.

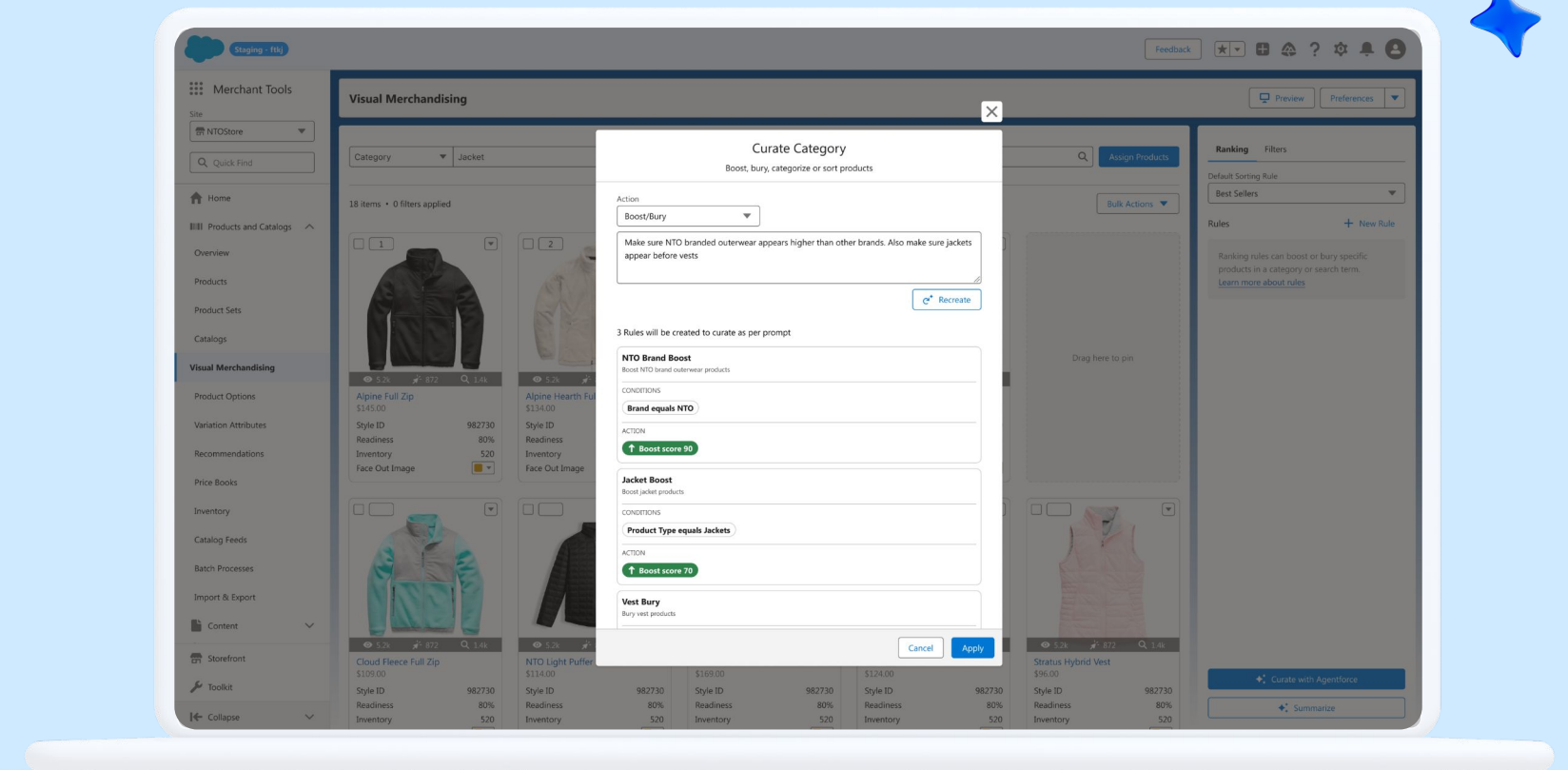


### Cost Based Order Routing

Stop margin erosion with Cost Based Order Routing. Our engine automates fulfillment logic to prioritize low-labor sites and clear slow-moving stock, slashing shipping costs and markdowns while ensuring on-time delivery.



## Agentic Merchandising



Release Notes



# Storefront Next

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## What's Getting in Your Way

Today merchants are forced to make a compromise:

- They get a storefront that's easy to use and offers fast time to value but has limited scale and requires a lot of third-party apps to fill gaps.
- They get an storefront that offers enterprise scale, features, and flexibility, but it's complex to build and manage.

## How We Fix It

Storefront Next is our new storefront for B2C Commerce. It enables merchants to launch 30% faster via industry-themed templates that are fast and high-converting out of the box. The storefront is AEO-ready for LLMs to consume and offers native shopper and merchant agents, developer tools to streamline front-end dev with local MCP, and AI tools to transform Figma designs to code. All of this is underpinned by the enterprise-ready scale and extensibility that B2C Commerce is known for.

## Measurable Results You Can Expect

- Quick time to market (30% faster than past storefront solutions)
- Productivity boost for merchandisers and developers
- Faster performance and higher conversions
- Reliable uptime even during peak traffic

## Why It's Worth Doing

Unlike competitors that force you to choose between an easy storefront that you'll outgrow (Shopify) or an enterprise solution that's complicated (SAP, Adobe, Oracle, etc.), Storefront Next offers out-of-the-box simplicity and enterprise power.





# Revenue Management



## Features by User



### Collections with Agentforce

Accelerate revenue recovery by using AI to score invoice risk and prioritize follow-ups. Use advanced workflows and guidance from Agentforce for context-informed outreach, increasing collection results and customer satisfaction.



### Automated Ramp Deals & Integrated Free Trials

Accelerate deal velocity by automating complex ramp schedules, including free and trial segments. Streamline early renewals for ramped assets to eliminate manual errors and save time, ensuring accuracy across the entire deal lifecycle.



### Smart Product Discovery with Constraint Rules

Accelerate time to close and improve the seller experience with smarter, more accurate deal configuration. Constraint rules provide real-time product visibility and transaction-based recommendations, surfacing compatible products and hiding incompatible options – guiding sellers to the right configuration every time while reducing quote errors.



### Accelerated Deal Approvals in Slack

Accelerate deal velocity by bringing deal review and approval directly into Slack. Approvers get AI-powered summaries of deal structure and quote terms from Slackbot, then they can approve quotes – all without leaving Slack.

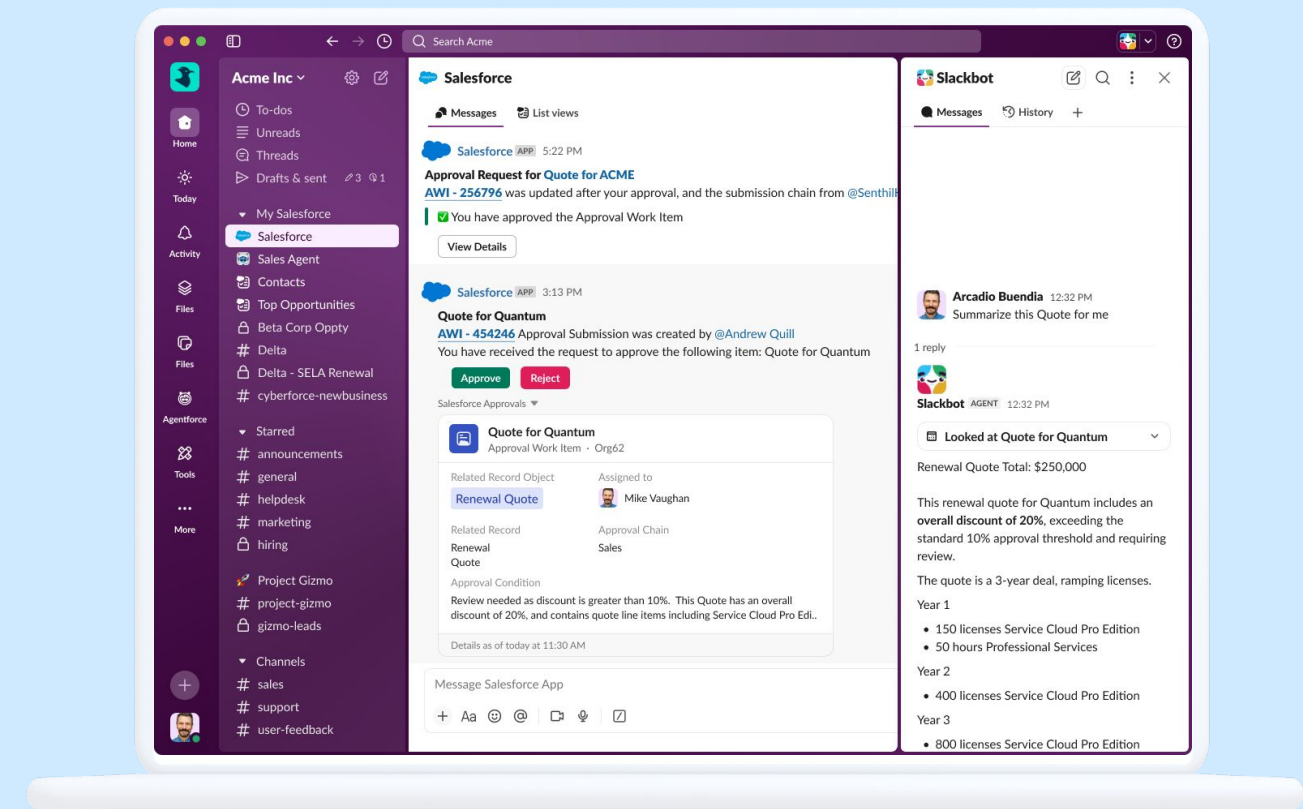


### AI-Supported Bulk Contract Extraction

Protect margins and increase renewal revenue by unlocking historical data often trapped in legacy PDFs. AI-driven imports digitize thousands of contracts, extracting critical details and clauses to leverage previous terms for favorable renewals.



## Accelerated Deal Approvals in Slack



Release Notes



# Accelerated Deal Approvals in Slack



## What's Getting in Your Way

Approval bottlenecks kill deal momentum. Every minute an approver spends hunting for context or switching between tools is time added to your sales cycle. When deals sit waiting for approval, revenue gets delayed and reps lose momentum with buyers.

## How We Fix It

Accelerate deal velocity by bringing quote review and approval directly into Slack.

Approvers get AI-powered summaries of deal structure and quote terms from Slackbot, then they can approve quotes – all without leaving Slack.

## Measurable Results You Can Expect

Faster approvals, faster close. When approvers can review AI-generated quote summaries and take approval action without leaving Slack, decisions happen in minutes, not days.

## Why It's Worth Doing

No CPQ competitor has both the Slack approval and AI summary capability. One SMB competitor offers a basic Slack integration, but it can't deliver the AI-powered quote summaries.





# Platform: Developer Services



## Features by User



### Agentforce Vibes 2.0 Enhancements

Agentforce Vibes 2.0 transforms VS Code into a provider-agnostic, intent-driven IDE. Orchestrate Multi-Agent Swarms across Claude and GPT-5 to build Salesforce apps in parallel, backed by over 30 Skills, over 60 MCPs, and enterprise-grade governance.



### Agentforce Experience Layer

Agentforce Experience Layer separates business logic, data, and permissions from the screen. Define your intent once, and it renders natively everywhere your users work.



### Salesforce Multi-Framework

Build AI agents and apps with industry-standard frameworks like React. Unify your dev stack to innovate faster in one secure, governed environment.



### Data Mask and Seed

Data Mask and Seed (v3.0) is now a core app with an easier UI, speeding up app development. Quickly populate sandboxes with mock, realistic data and test specific use cases. Complete DLO-to-DLO seeding for Data 360 is also available.

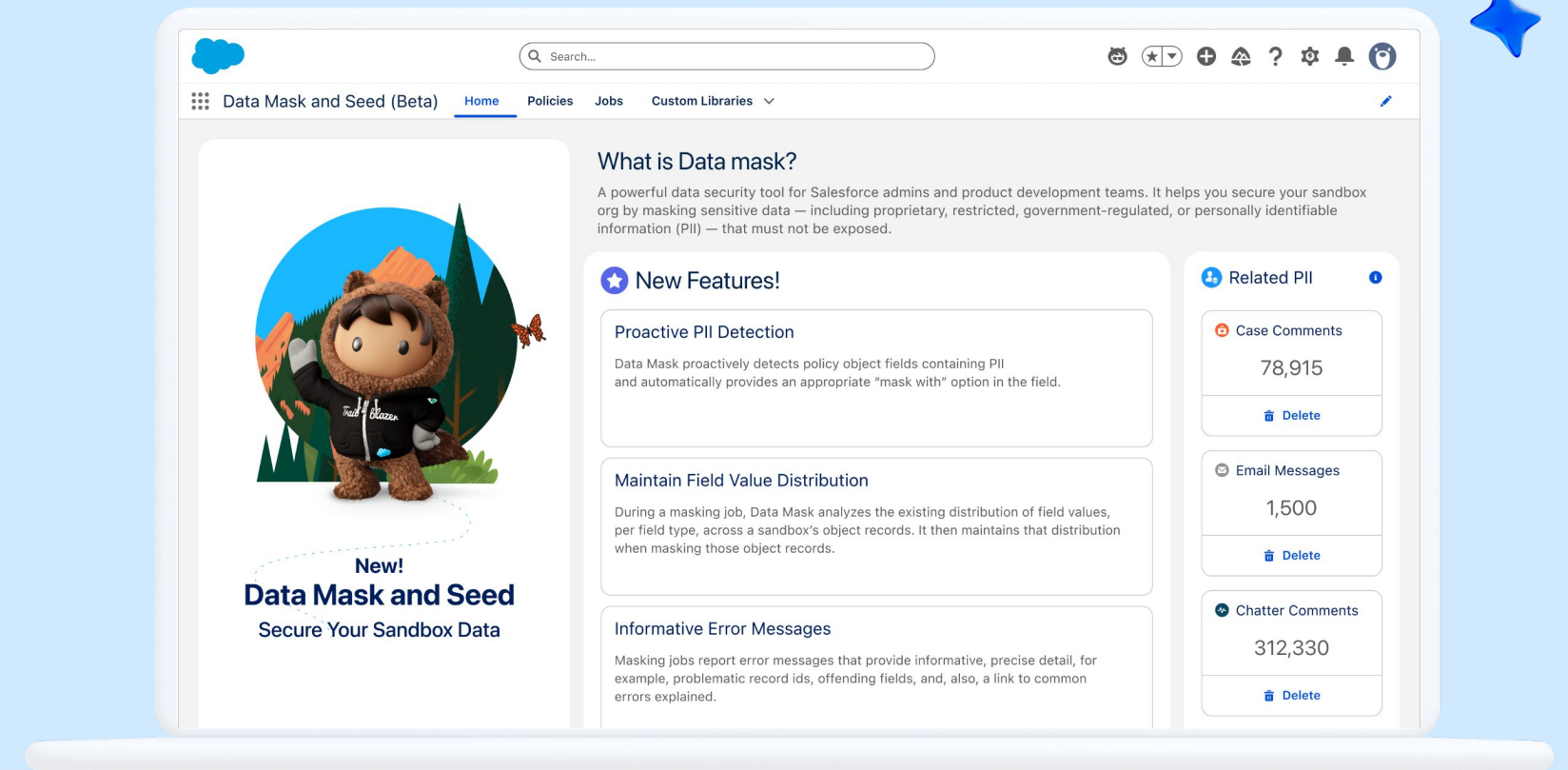
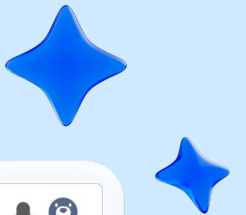


### Setup with Agentforce

Setup with Agentforce brings AI-powered assistance directly into Salesforce Setup, helping admins configure, troubleshoot, and manage their organization using natural language.



## Data Mask and Seed



[Release Notes](#)



# Agentforce Vibes 2.0 Enhancements



## What's Getting in Your Way

Standardized, single-model environments limit performance, while excessive context noise (too much irrelevant data) overwhelms LLMs, leading to hallucinations, security risks, and poor code quality.

## How We Fix It

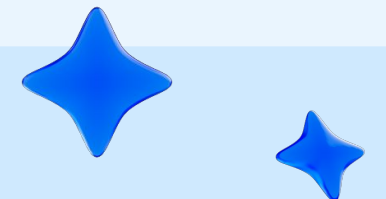
We provide the flexibility to swap LLMs (e.g., Claude Sonnet, GPT-5) for specific dev phases while using a modular framework that dynamically activates only the necessary MCP tools and coding rules based on intent.

## Measurable Results You Can Expect

Developers experience a significant increase in vibe coding speed and efficiency. By minimizing context dilution and maximizing model suitability, you get higher-quality code with fewer architectural errors.

## Why It's Worth Doing

While others offer basic model switching or require manual context configuration, Agentforce Vibes is the only solution that dynamically optimizes both the brain (the model) and the memory (the context) simultaneously.



## Features by User



### MuleSoft Automation in Suites

MuleSoft integration in Starter & Pro suites lets small businesses sync data automatically between their CRM and tools from over 150 connections without the need for IT, with easy setup for common integrations like QuickBooks.



### People Scoring

People Scoring in Starter, Pro, and Foundations gives marketers a preconfigured, one-click scoring model that surfaces fit and engagement scores directly on lead and contact records – helping small businesses prioritize the right prospects without the complexity of a full marketing platform setup.

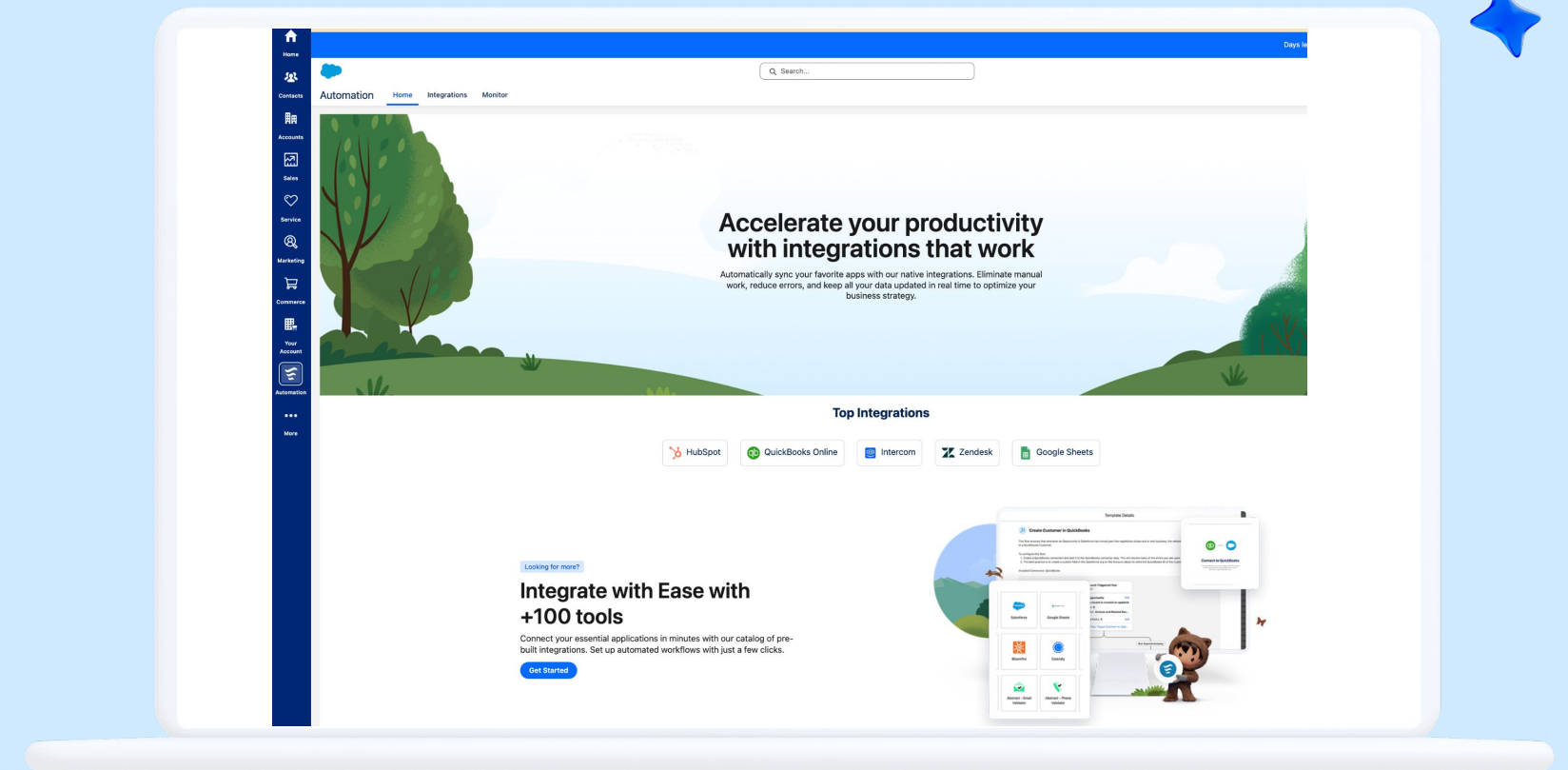


### Invoicing

Generate invoices from opportunities and quotes, and generate PDFs of the invoices to share with customers through a more holistic sales lifecycle process.



## MuleSoft Automation in Suites





# MuleSoft Automation in Suites



## What's Getting in Your Way

Your business data is scattered across a dozen different tools – your CRM says one thing, your accounting software says another, and your support tickets live somewhere else entirely. For small businesses especially, that fragmentation eats up time you don't have and makes it hard to get a clear picture of what's actually going on.

## How We Fix It

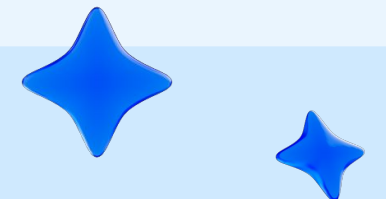
MuleSoft in Suites connects your third-party tools – like QuickBooks, Jira, Zendesk, HubSpot, and Google Sheets – directly to Salesforce, so your data flows automatically without anyone having to move it manually. No coding, no IT team required. Your tools keep working the way they always have, but now Salesforce always reflects the full picture.

## Measurable Results You Can Expect

When your data is centralized, decisions get easier and faster. You spend less time reconciling information across tabs and tools and more time acting on it. Teams work from the same set of facts, follow-ups don't fall through the cracks, and you can trust that what you see in Salesforce is actually up to date.

## Why It's Worth Doing

For small businesses, Salesforce is most valuable when it's the one place your whole operation lives – not just your sales pipeline. Connecting your third-party apps turns it into that single source of truth, without the complexity or cost that typically comes with enterprise integrations. It's already included in Starter and Pro suites, so there's nothing extra to set up or pay for.





# Automotive



## Features by User



### Warranty Claims Assistance

Transform warranty management with AI. Autonomously handle validity checks and claim status to reduce processing time, freeing your team to focus on complex service issues.



### Lease Extension

Retain customers with fast lease extensions. Prebuilt templates and eligibility checks process requests faster, growing revenue while reducing manual errors.



### Customer Refunds

Build trust with transparent refunds. Automate overpayment workflows with real-time visibility to reduce processing time and delight customers with rapid resolution.



### Good Will Repairs

Build loyalty with automated goodwill repairs. Rapid, transparent approval workflows ensure a consistent customer experience while reducing manual effort for OEM teams.

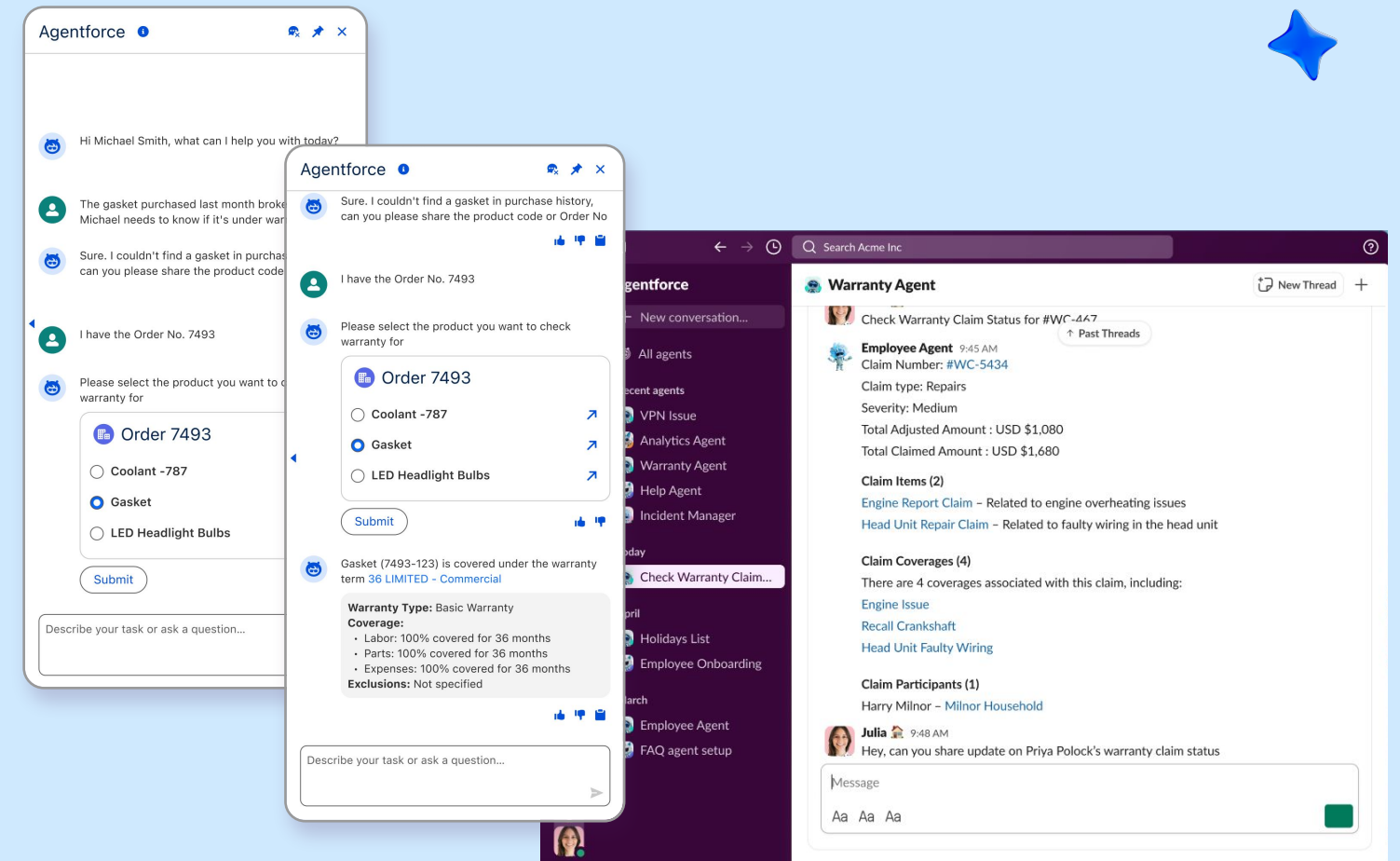


### Sales Concierge Enhancements

Empower dealer sales teams with instant knowledge access. Enhanced AI search and Slack support increase selling time, letting reps find vehicle specs and documentation without leaving their workflow.



## Warranty Claims Assistance



Release Notes



# Warranty Claims Assistance



## What's Getting in Your Way

Automotive service teams are overwhelmed by high-volume warranty inquiries and manual validity checks.

Without real-time access to warranty coverage information and claim history, service representatives waste time researching coverage details, leading to delayed responses and frustrated customers.

## How We Fix It

AI-powered Warranty Claims Assistance with prebuilt capabilities for warranty intake and validation automates key parts of the claim lifecycle.

Service teams can instantly check warranty status, validate coverage for parts and products, and inquire about claim details, all through conversational AI and Slack integration.

The capability provides a complete 360-degree view of claim details and customer history.

## Measurable Results You Can Expect

Reduced warranty processing time and improved accuracy lower the overall cost to serve.

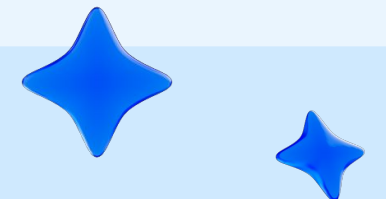
Service representatives respond to warranty inquiries instantly, validate coverage in seconds, and submit claims faster, improving customer satisfaction while reducing administrative burden.

## Why It's Worth Doing

Warranty claims processing doesn't require separate tools, allowing service teams to validate warranty eligibility instantly by accessing real-time vehicle history, ownership records, and service data, all in one place.

It also comes with prebuilt warranty templates designed specifically for automotive manufacturers and dealers. This means faster time to value and warranty workflows that actually match industry processes out of the box.

Because warranty data sits on the same platform as sales, service, and customer engagement data, teams can identify trends like recurring part failures, high-cost dealers, or warranty abuse patterns, insights that siloed warranty systems simply can't provide.





# Common Layer



## Features by User



### AI Relationship Research

Skip manual research by instantly surfacing 360-degree relationship insights for accounts, leads, contacts, and opportunities. Leverage AI to research and aggregate data from Data 360, web sources, and your CRM into a unified view.



### Omnistudio Native Mobile Experience

Deliver pixel-perfect, guided digital experiences on mobile with Omnistudio. Natively extend Omniscritps and Flexcards to mobile devices, ensuring high-performance, optimized journeys with consistent experiences, accurate data capture, and improved field productivity.



### Advanced Predictive AI Algorithms

Drive accurate business decisions with an expanded library of predictive AI algorithms such as multiclass classification, univariate and time series forecasting, and clustering.



### Context Service Integration with Flow

Seamlessly integrate Context Service into Salesforce Flow using Apex-defined data types. Enable admins to easily interact with Context Service actions through Flow variable inputs and outputs - without expensive custom development.



## AI Relationship Research



The screenshot displays the 'Relationship Research Agent' interface. At the top, it shows the time 'Today at 10:37 AM'. The main area features a network diagram with 'Innovate Robotics' at the center, connected to several individuals: David Chen, Jameson Hayes, Guy Hawkins, Dr Evelyn Reed, Jill Stone, Courtney Henry, and Cody Fisher. A detailed profile for 'Dr. Evelyn Reed' is shown on the right, identifying her as the CTO of Innovate Robotics. The profile includes a 'Who is Dr. Evelyn Reed?' section with a summary of her role and a list of analyzed sources: [1] Tegra - Account, [2] Johnny Utah - Account, and [3] wikipedia.com - External Link. At the bottom of the profile, there are 'Merge Record' and 'Ask' buttons.

Release Notes



# AI Relationship Research

salesforce

## What's Getting in Your Way

- Critical insights are scattered across the web, CRM systems, and various data sources, making research fragmented and time-intensive.
- Hidden relationships and meaningful connections are difficult to identify within large volumes of structured and unstructured data. It's also highly error-prone.
- Turning discovered insights into clear, actionable strategies that drive outcomes is complex and often manual.

## How We Fix It

AI Relationship Research helps users walk into every interaction with the right context.

It proactively uncovers hidden relationships and critical insights across the web, CRM, and Data 360 – connecting signals that are easy to miss.

For example: Does my contact volunteer at a nonprofit that I'm very familiar with or that my organization supports, and I can use this to deepen our relationship?

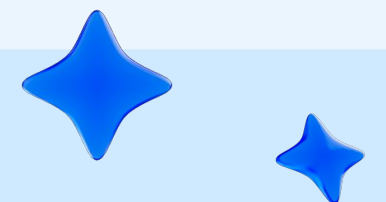
## Measurable Results You Can Expect

- Eliminate hours of manual research by instantly surfacing the most relevant relationship triggers and context.
- Find important connections you might otherwise miss – like shared work history or cross-company ties – that can help you influence decisions.
- Turn data into clear, actionable insights so you know where to focus and how to engage effectively.

## Why It's Worth Doing

Users often know the data that is publicly available but lack the data that sits within Data 360 or CRM or is unstructured. AI Relationship Research provides the complete context and surfaces the hidden relationship across systems.

This helps users with key connections, accelerates deals, deepens relationship, mitigates risks, and surfaces important changes so you can act faster and more confidently.





# Communications



## Features by User



### Enterprise Quoting

Accelerate your transition to autonomous sales. Use our new Invocable Actions to deploy sales agents faster, enabling your teams to build tailored AI workflows for quote creation and deep cloning with minimal effort.



### Enterprise Sales Management Enhancements

Eliminate repetitive, manual setup for every deal. Instantly populate new quotes with pre-validated Working Cart Templates, using AI-powered search to find and reuse complex configurations, ensuring total accuracy and accelerating your sales cycle.

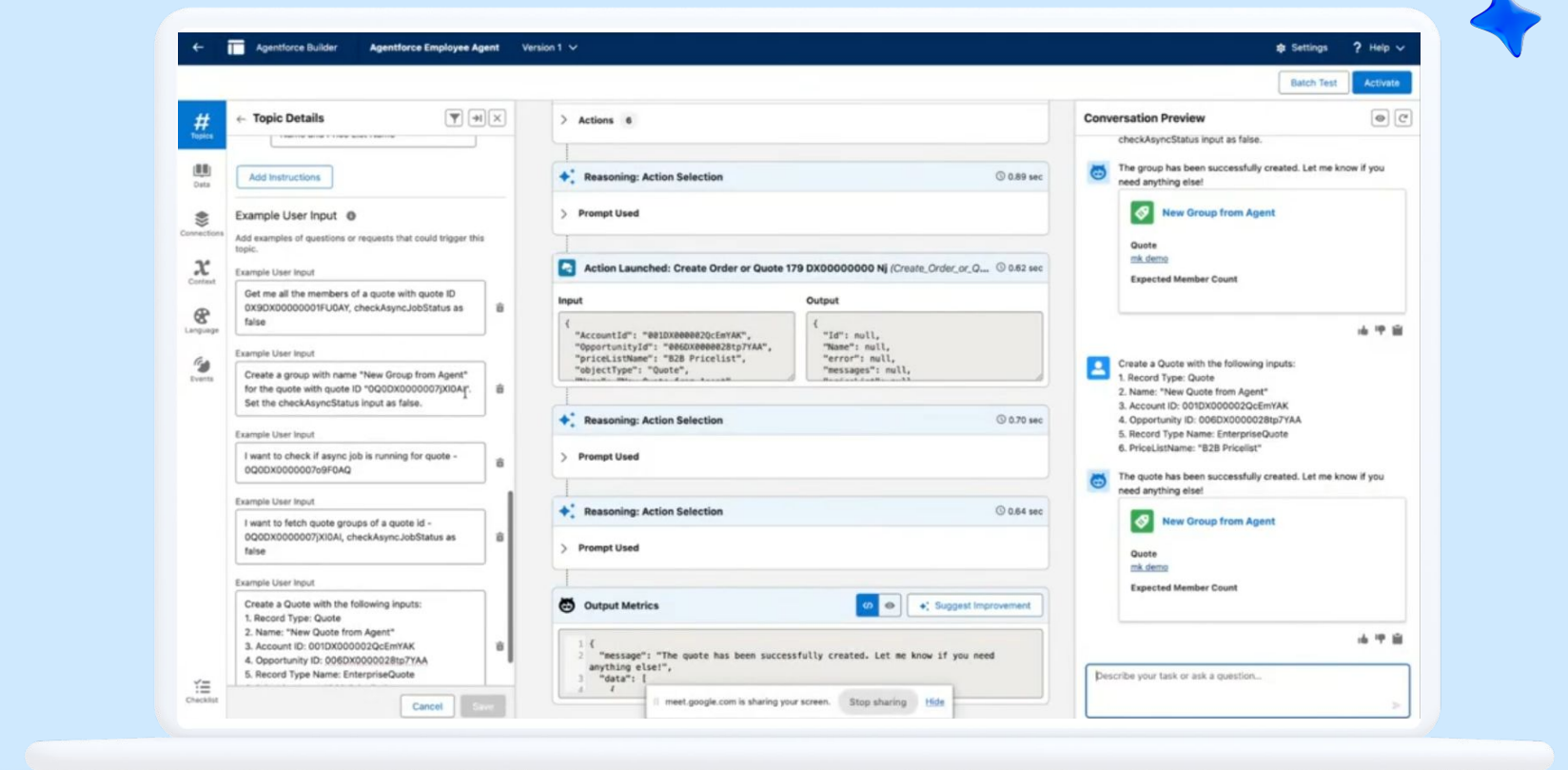


### Extensible API Framework

Stop choosing between industry standards and business flexibility. Customize TMF 620 and 621 APIs with Apex hooks to inject unique logic and data, ensuring your digital architecture scales without increasing technical debt.



## Enterprise Quoting



Release Notes



# Enterprise Quoting



## What's Getting in Your Way

Complex enterprise deal cycles often stall due to fragmented communication, where sales teams and stakeholders must constantly toggle between CRM systems and other apps to configure products and approve details.

## How We Fix It

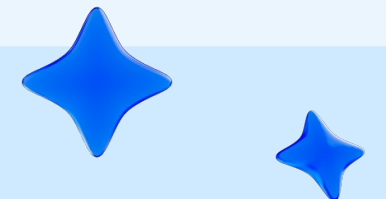
This feature provides a suite of Invocable Actions that wrap enterprise sales management APIs like quote creation, deep cloning, and template management into ready-to-use building blocks that can be easily plugged into custom AI agents or flows.

## Measurable Results You Can Expect

Businesses gain the foundational toolkit to build their own bespoke agentic capabilities, allowing them to automate complex quoting tasks and membership management without writing extensive custom integration code.

## Why It's Worth Doing

No other telco solutions are able to integrate data from CRM, BSS, and OSS and take agentic actions across the complex configure and quoting process. Enterprise quoting allows sellers to accelerate deal velocity and accuracy, capturing incremental revenue in a slow growth industry.





# Consumer Goods



## Features by User



### Retail Execution Dashboards for Tableau Next

Consolidate store-level data to protect margins and shelf share. Audit performance and trigger corrective actions for sales directly from your dashboard. Close the gap between spotting compliance issues and fixing them in one native, unified workflow.



### Purchase Order for Distributor Management

Verify primary sales by pairing digital POs with Goods Received Notes across your distributor network. Accelerate fulfillment and replenishment with verified channel data.



### Salesforce Go for Agentforce Consumer Goods

Launch Retail Execution and TPM with one-click setup. Browse feature libraries by business goals to bypass hours of manual configuration with safe, guided workflows. Monitor adoption to ensure every feature delivers ROI.

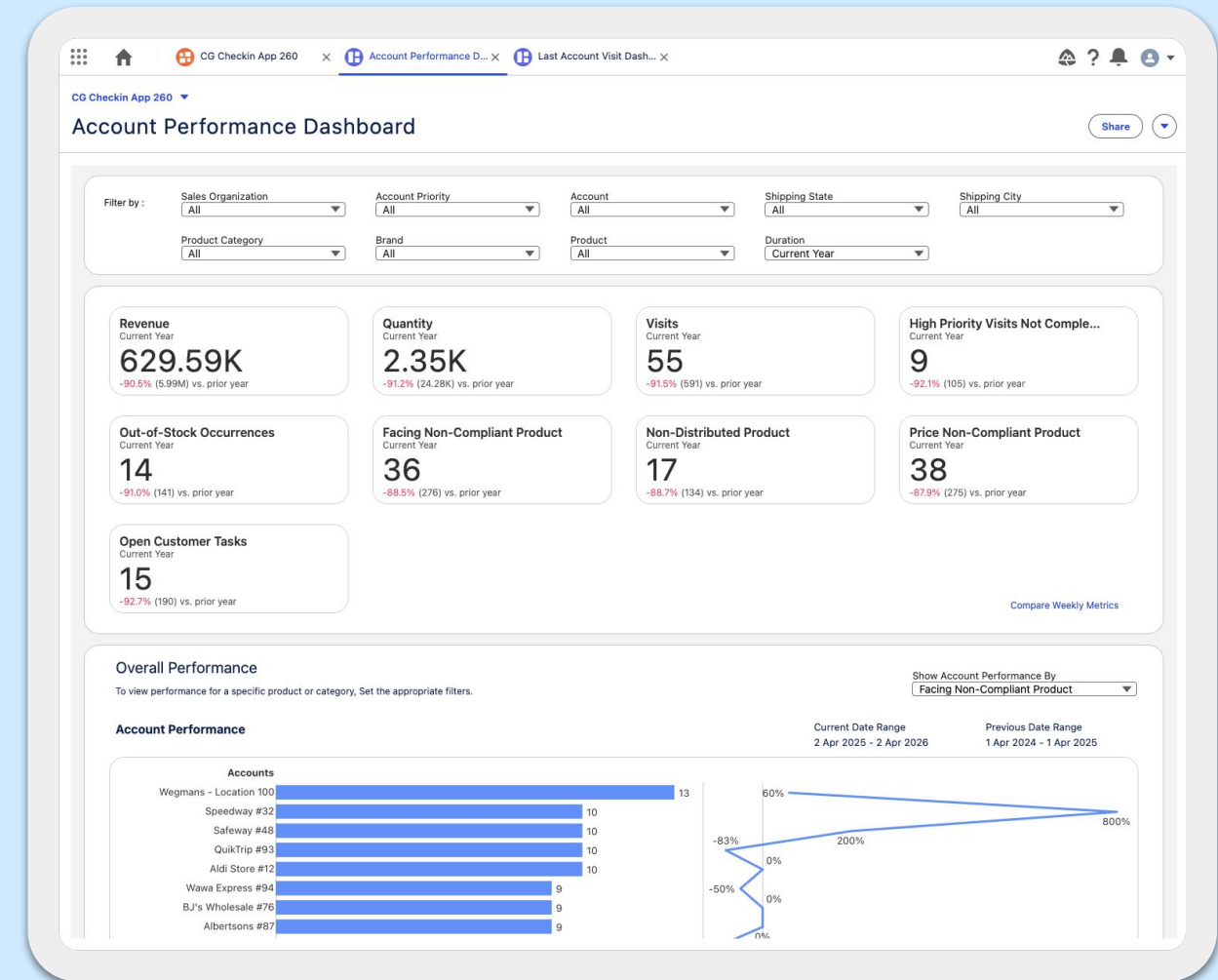
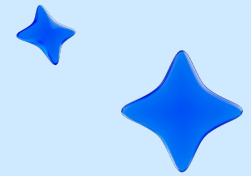


### Partner Management for Consumer Goods

Empower your retail ecosystem to drive growth with one unified, agent-ready platform. Eliminate friction by syncing partner strategy to real-time sales data. Automate trade spend and deploy AI agents for instant pricing and inventory answers.



Retail Execution Dashboards  
for Tableau Next



Release Notes



# Retail Execution Dashboards for Tableau Next



## What's Getting in Your Way

Every consumer good (CG) company has teams on the ground (merchandisers and reps), yet leadership remains unaware of what's happening in store. Millions are wasted on promotions that are never executed, while out-of-stock trends are spotted too late to pivot. Without real-time visibility into store-level compliance, sales teams can't prioritize the corrective actions needed to protect margins and capture market share from competitors.

## How We Fix It

Two prebuilt, Salesforce-native dashboards (Account Performance, and Last Account Visit) transform fragmented store data into a single source of truth. By providing holistic views across sales trends and field execution, CG companies can now pinpoint exactly where performance lags behind benchmarks. HQ teams simply talk to their data to uncover the "why" behind gaps and instantly trigger corrective tasks for sales directly in Salesforce.

## Measurable Results You Can Expect

These dashboards drive operational agility by highlighting and closing the gap between HQ strategy and store-level reality. By triggering actions directly from the data, CG companies now protect margins, raise standards, and maximize growth.

## Why It's Worth Doing

Only Salesforce enables Consumer Goods (CG) leaders to close the gap between seeing a shelf-level problem and fixing it. Unlike traditional reporting, this experience is native, conversational, and agent-ready. Users can drill into visuals or ask natural-language questions to reason through root causes and get suggested actions. This way, shelf-level insights trigger immediate field action, replacing slow, reactive reporting with a unified workflow for real-time execution.





# Education



## Features by User



### Student Financials Enhancements

Empower students to manage costs with a unified dashboard for real-time billing and secure payments, plus an AI agent for financial aid insights. Enable staff to save time with automated account reconciliation that offers granular control and visibility.



### Transfer Credit Faculty Review

Scale transfer programs with a unified workflow that captures academic decisions as permanent rules for faster, more accurate credit matching across every student record.



### Slack for Education

Accelerate student success by connecting faculty and staff with student insights and AI-driven alerts in Slack, enabling teams to identify risks early and deliver proactive, coordinated support.



### Tableau Next for Education

Transform academic data into AI-powered insights to align course capacity with actual demand and help every student thrive.

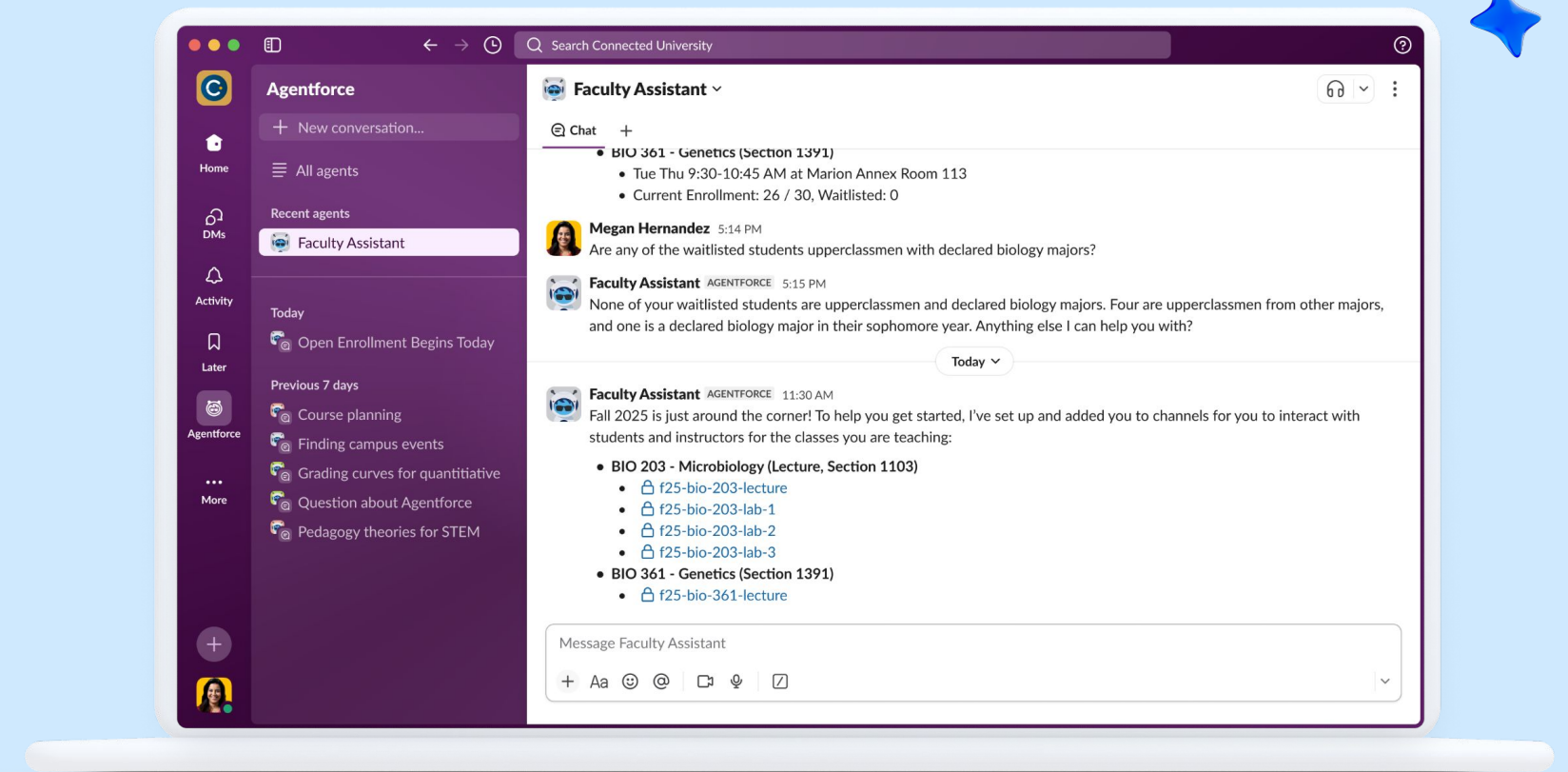


### Corporate Relations Management

Unify institutional partnerships and student placements to track career outcomes. Bridge the gap between academic focus areas and career advancement to showcase how industry collaborations drive student employability.



## Slack for Education



[Release Notes](#)



# Slack for Education

salesforce

## What's Getting in Your Way

Educational collaboration is currently fragmented across disconnected emails and systems, forcing faculty and staff to constantly switch between tools. This “context switching” leaves critical student data siloed, leading to delayed interventions and a disjointed experience for students.

## How We Fix It

This feature embeds Agentforce Education data and agentic workflows directly into Slack, automatically creating dedicated channels and canvases for courses and cohorts. It allows faculty and advisors to access real-time student insights, manage alerts, and communicate with students within a single, unified workspace.

## Measurable Results You Can Expect

Institutions can move from reactive support to proactive, intelligent collaboration that speeds up response times and improves student outcomes. By turning static data into actionable conversations, faculty and staff can coordinate support effortlessly while students enjoy a more connected and engaged education journey.

## Why It's Worth Doing

Unlike fragmented systems that force constant context switching, we eliminate siloed student data. This prevents delayed interventions by ensuring faculty and staff are no longer trapped between disconnected tools.

We uniquely embed Agentforce Education data and agentic workflows directly into Slack. By turning static data into actionable conversations, we enable proactive, intelligent collaboration that drives faster response times and improved student outcomes.





# Energy & Utilities



## Features by User



### Multi-Site Quoting Enhancement

Simplify and accelerate quoting for large commercial and industrial customers by enabling sales reps to group individual sites and apply a single product configuration to the entire group at once. Use background processing to handle the more intense data replication..



### B2B External Pricing

Accelerate the delivery of complex B2B bids by fetching real-time spot market rates directly from proprietary risk engines. Eliminate application switching to ensure sales reps present precise, risk-adjusted pricing to industrial clients.



### Self-Service Enrollment

Allow anonymous sales journey. Modernize the enrollment journey for not logged in customers so users can verify service availability and activate contracts in minutes, meeting the high expectations of today's digital-native consumers.



### Tariff Comparison Enhancements

Improve retention during high-bill inquiries by offering immediate, actionable savings. Agents can quickly compare historical consumption against Time-of-Use plans, transforming a negative billing complaint into a proactive plan migration.

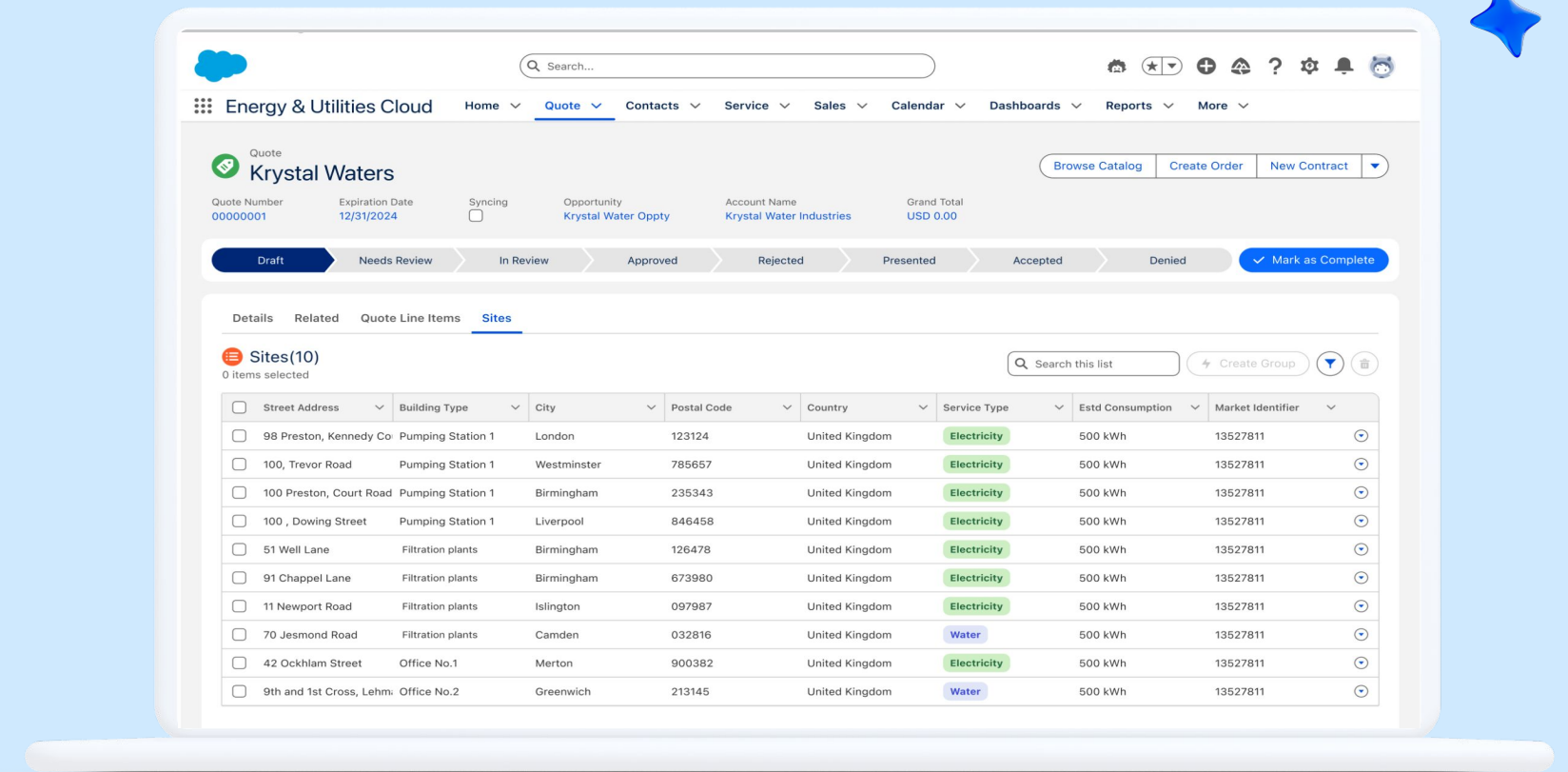


### Voice to Timesheet Form

Voice to data entry for timesheets reduces frustration and admin time by enabling a service resource to quickly create, edit and submit a timesheet with their voice instead of typing on the device keyboard.



## Multi-Site Quoting Enhancement



Release Notes



# Multi-Site Quoting Enhancement



## What's Getting in Your Way

Large commercial and industrial customers often need quotes for dozens or hundreds of locations. Sales representatives currently have to create quotes one by one for each site, which is labor-intensive and slow.

## How We Fix It

This feature allows sales reps to group individual sites and apply a single product configuration to the entire group at once. It uses background processing to handle the heavy data lifting.

## Measurable Results You Can Expect

It eliminates manual data entry for large-scale deals, significantly speeding up the quoting process and improving operational efficiency.

## Why It's Worth Doing

While competitors often force users to manage sites via simple, dumb lists, our solution employs intelligent grouping based on feasibility conditions. The system can automatically group sites based on criteria like serviceability and eligibility, allowing sales reps to apply a single product configuration to a massive group of recipients instantly. This logic eliminates the need to manually verify and configure each location individually, drastically reducing the risk of human error in complex commercial contracts.





# Financial Services



## Features by User



### Process Compliance Navigator Enhancements

A single platform connects regulation policy risk and controls to front-line execution. Unlike reactive audits, it monitors live workflows to intercept violations, preventing costly fines and reputational damage.



### Agentforce Meeting Concierge

Advisors spend as much time on meeting admin as they do with clients. Meeting Concierge embeds agents across the lifecycle – preparing advisors with instant briefs, capturing live conversations, and autonomously orchestrating follow-ups and recommendations.



### Connector Library

Connector Library is a marketplace of prebuilt integrations that connects Agentforce Financial Services with your apps and tools in minutes. With client data and workflows unified on one trusted platform, teams and agents can act on the full picture.



### Insurance Claims Employee Assistance

Accelerate First Notice of Loss (FNOL) with a prebuilt agent to capture claims data across auto, home, medical, and other business lines in a single window, reducing call times and improving customer service.

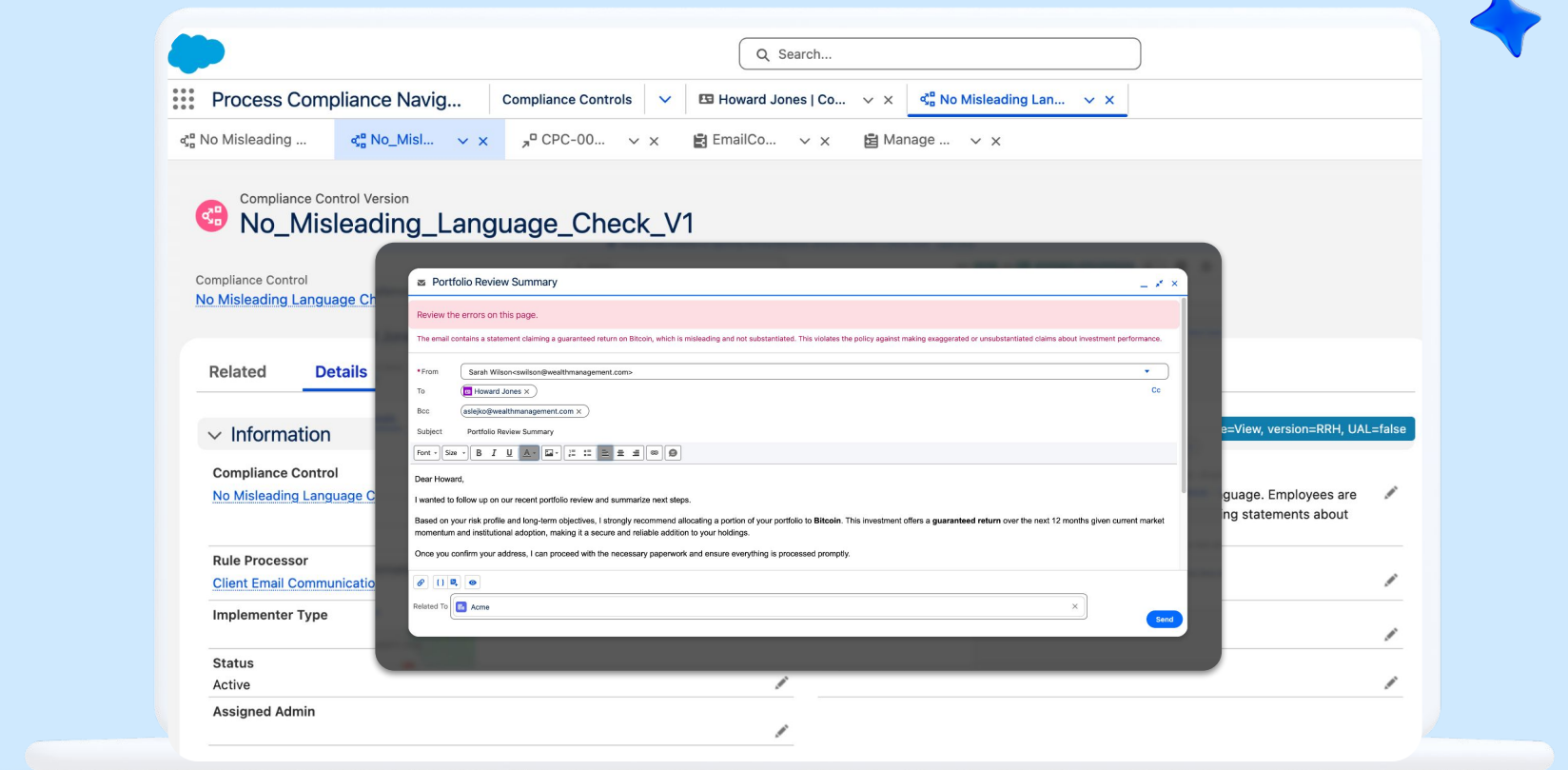


### Visa Integration for Disputes

A direct integration with the Visa network provides enriched transaction details. It communicates dispute data between systems to trigger next steps automatically, eliminating system swivel to reduce cost to serve and accelerate resolution.



## Process Compliance Navigator Enhancements



Release Notes



# Process Compliance Navigator Enhancements



## What's Getting in Your Way

In financial services, **compliance is dangerously reactive**. Regulatory changes outpace manual tracking, and critical updates rarely reach the front line where risk actually lives. Current governance, risk, and compliance (GRC) **sit outside the daily workflow, flagging violations only after the business is exposed**.

This posture is incredibly costly, with customers spending over \$200B in compliance software and still incurring \$4B in violations per year, exposing firms to severe **regulatory and reputational damage every time a manual check fails**.

## How We Fix It

We deliver a **completely automated compliance lifecycle**. The platform **ingests new regulations** and uses **AI to map the blast radius** across policies, processes, and front-line teams.

Compliance teams can revise policies natively using embedded Microsoft **Office 365** tools and **translate those updates into active controls** using simple natural language. Implementing these controls as **active guardrails into human and agentic workflows** gives the front line total confidence to execute effectively while remaining in compliance.

## Measurable Results You Can Expect

The result is a **proactive defense system** that physically **stops risk before it occurs**. We provide an automated, end-to-end flow from regulatory change to continuous **front-line monitoring** and **interception** of risky content before a violation occurs.

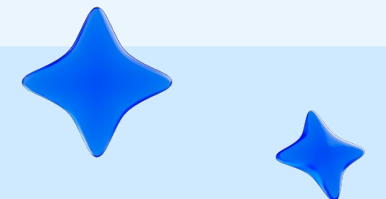
Every action is recorded in an immutable audit trail, allowing leaders to provide **definitive proof of adherence to regulators in minutes**. Compliance transforms from a reactive bottleneck into a continuous, real-time safety net.

## Why It's Worth Doing

We have fundamentally **redefined the GRC category**. While competitors focus on **passive, backward-looking** logging and remediation, we deliver **active, real-time prevention**.

By including robust **risk and policy management layers** with our existing regulatory intelligence and native control framework, we have built the complete GRC powerhouse our customers have been yearning for.

**Competitors can't** translate a back-office policy change into front-line enforcement and interception in real time; **now, we can**.



## Features by User



### Payer Contact Center — Prior Auth and Provider Networks

Resolve inquiries faster and equip contact center teams with Agentforce-powered prior authorization summaries and real-time provider network data to boost productivity.



### Health Engagement

Drive proactive engagement and close care gaps with data-driven journeys. Target segments and automate outreach to promote adherence and patient satisfaction.



### Integrated Care Management — Assessments

Enhance assessments with AI-suggested responses and dynamic auto-save, leveraging unified member profiles to accelerate completion.



### Referral Management

Simplify referrals and boost conversion. Automate intake from any source, referral scoring by urgency, and outreach to patients to speed time to care.

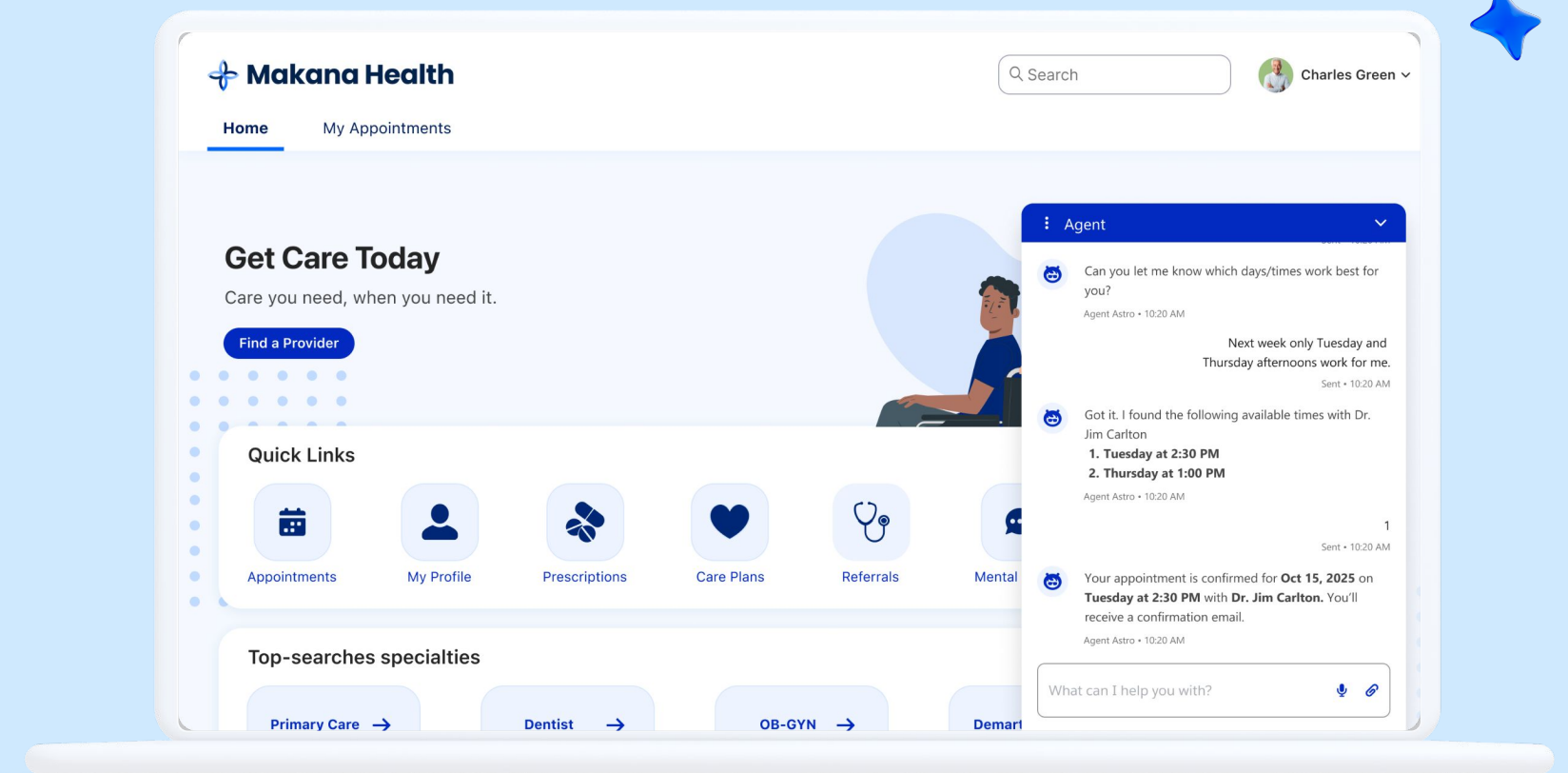


### Digital Health Insurance

Accelerate small group benefits sales with a guided quoting experience. Use AI to compare plans, helping brokers generate estimates faster and close more deals.



## Health Engagement



**Release Notes**



# Referral Management, Health Engagement, and Contact Center



## What's Getting in Your Way

The patient journey is **currently disconnected** due to disconnected systems.

**Referrals** fall into black holes of manual fax intake, preventive **care is delayed** because outreach is reactive, and patients are forced to wait **on hold** for simple answers because data is trapped in back-end systems.

This results in **referral leakage, high administrative costs, and poor patient experiences.**

## How We Fix It

An **end-to-end, connected platform** connects every stage of the patient lifecycle:

- **Real-Time Access:** AI instantly digitizes and scores inbound referrals from faxes to prioritize care.
- **Proactive Engagement:** Data 360 triggers personalized outreach for care gaps and automated appointment scheduling.
- **Agentic Self-Service:** Always-on support answers patient inquiries.

## Measurable Results You Can Expect

Agentforce Health reduces the administrative burden to accelerate care.

- **Stop Revenue Leakage:** Maximize appointment conversion by prioritizing high-value referrals and automating patient booking.
- **Reduce Cost to Serve:** Deflect routine calls to low-cost, 24/7 self-service agents.
- **Improve Health Outcomes:** Drive adherence by targeting the right patients with timely, personalized care gap journeys.

## Why It's Worth Doing

Electronic health records silo data, point solutions fragment care, and generic AI platforms demand custom builds.

- **Unified Patient 360:** Clinical, engagement, and claims data in a single Patient 360 powers every interaction.
- **Trusted Intelligence:** Compliant, contextual agents answer complex, personalized questions like "Why was my prior authorization denied?" without human intervention.





# Life Sciences



## Features by User



### Briefings

Equip field sales reps, key account managers, and medical science liaisons with a daily bite-sized, context-curated audio playlist of HCP account summaries delivered through an intuitive, offline-ready experience.

X ✓ X

### Field Events

Empower teams to compliantly manage in-person and virtual life sciences events with configurable workflows, collaborative planning, and transparent expense tracking while automating expert qualification and territory-based quota management.

X ✓ X

### Visit Management

Improve healthcare provider engagement with remote interactions and pre-call planning, simplify expense reporting, and accelerate decisions with accurate organization recommendations and compliant signature disclaimers.

X ✓ X

### Home Health for Life Sciences

Engage with patients beyond the clinic. Broadcast, schedule, and reschedule visits; manage caregivers; and execute each home visit efficiently with contextual insights for improved patient adherence.

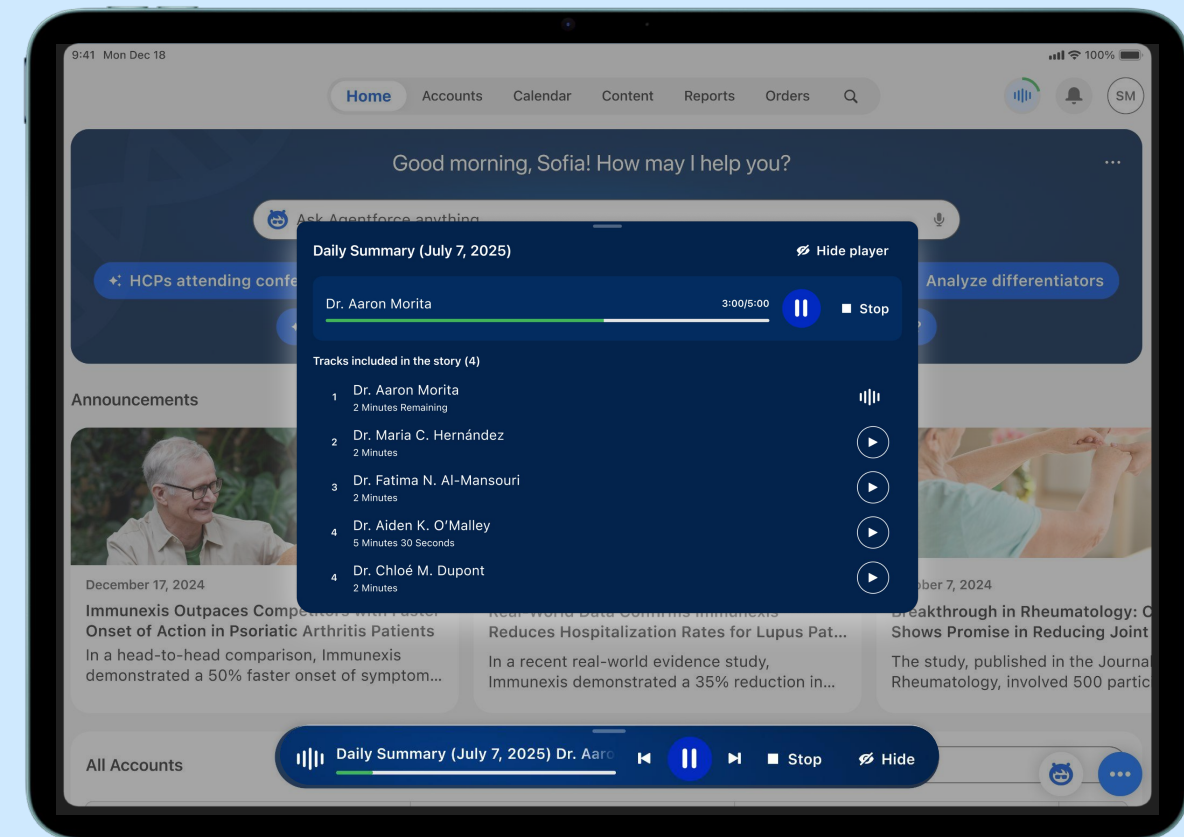
X ✓ X

### EPPV and MID Support Capabilities

Seamlessly engage with healthcare providers in Japan with built-in compliance for EPPV, MID, and Institution-Doctor with prebuilt templates, execution monitoring, and summarization.

✓ ✓ X

## Briefings



Release Notes

## What's Getting in Your Way

Field reps, key account managers, and medical sciences liaisons have an average of seven healthcare visits per day, each with **complex preparation**.

This involves **manually sifting through scattered data** like account records, visit histories, emails, and field notes just to prepare talking points.

The result: **Key information is missed**, and **less time** is spent building HCP relationships and boosting prescription rates.

## How We Fix It

A podcast-style audio playlist gets field teams up to speed on their scheduled visits in minutes with:

- Comprehensive **AI-generated summaries** of their week, individual HCP accounts, and insights
- Account summaries that are sorted **based on the visit schedule** and can be queued for easy listening
- **Offline availability** that enables them to prepare for visits anytime, anywhere

## Measurable Results You Can Expect

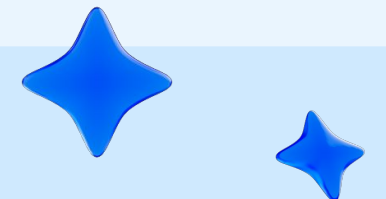
These audio briefings make field reps more productive and effective going into HCP meetings.

- Field teams don't have to hit pause on a busy day. Account research and prep is available on the go.
- Account data is unified, delivering more personalized insights.
- More time is spent with HCPs building relationships and driving therapy adherence.

## Why It's Worth Doing

**Built-in AI:** Competitors like Veeva rely on AI capabilities that are bolted on, while Agentforce Life Sciences builds AI into the flow of work.

**Unified Architecture:** Agentforce Life Sciences is built on a deeply unified platform, enabling Briefings to pull insights across clinical and commercial to better prepare reps with accurate, personalized insights ahead of every visit.





# Manufacturing



## Features by User



### Warranty Claims Assistance

Transform warranty management with AI. Autonomously handle validity checks and claim status to reduce processing time, freeing your team to focus on complex service issues.



### Sample Management Enhancements

Stop manual sample tracking from slowing sales. Automate sample orders and fulfillment to reduce cycle times and delight customers with transparent delivery.



### Purchase Order for DMS

Gain control over your supply chain with purchase order and goods receipt management. Accelerate fulfillment, eliminate inventory errors, and strengthen distributor relationships with real-time visibility from order placement to receipt.



### Rebate and Accruals Management Advanced

Automate complex rebate calculations with Data 360. Support tiered and growth structures to reduce errors and scale your partner programs with real-time incentives.

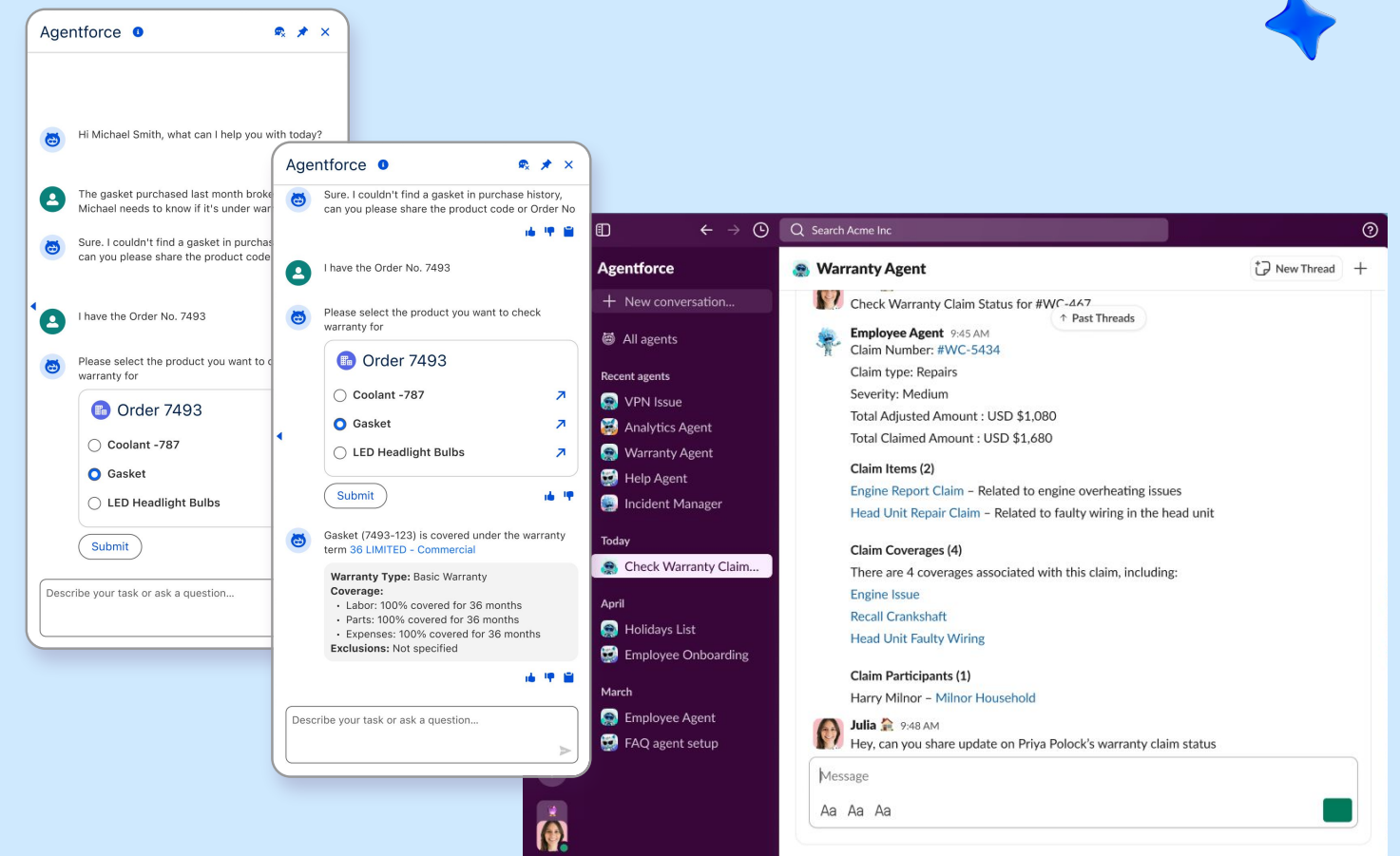


### Sales Agreement Enhancements

Manage agreements faster with Enterprise AG Grid and Dynamic Forms. Enhanced visualization and flexible configuration boost productivity, allowing reps to respond instantly.



## Warranty Claims Assistance



Release Notes



# Warranty Claims Assistance



## What's Getting in Your Way

Manufacturing service teams are overwhelmed by high-volume warranty inquiries and manual validity checks across products and assets.

Without real-time access to warranty coverage information and claim history, service representatives waste time researching coverage details, leading to delayed responses and frustrated customers.

## How We Fix It

AI-powered Warranty Claims Assistance with prebuilt capabilities for warranty intake and validation automate key parts of the claim lifecycle.

Service teams can instantly check warranty status, validate coverage for parts and products, and inquire about claim details, all through conversational AI and Slack integration.

The capability provides a complete 360-degree view of claim details and customer history.

## Measurable Results You Can Expect

Reduced warranty processing time and improved accuracy through AI-guided workflows lower the overall cost to serve.

Service representatives respond to warranty inquiries instantly, validate coverage in seconds, and submit claims faster, improving customer satisfaction while reducing administrative burden.

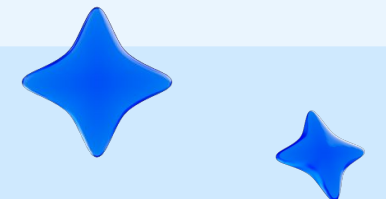
## Why It's Worth Doing

Warranty claims processing doesn't require separate tools. Service teams validate eligibility instantly by accessing real-time product history, ownership records, and service data on one platform.

Prebuilt AI-guided templates deliver faster time to value with workflows designed for manufacturers.

Because warranty data sits alongside sales, service, and customer data, teams identify trends like recurring failures or abuse patterns that siloed systems can't provide.

Slack integration lets service teams handle inquiries without switching systems.



# Media



## Features by User

### Ad Proposal

Manual proposal creation stalls deals. Ad Proposal pulls in research from across an array of systems relevant to the customer to create quotes and can even feed them into presentation template slides, saving time and accelerating deal cycles.



### B2B and B2C Subscriber Lifecycle Management

Accelerate time to revenue and drive retention by designing personalized B2B and B2C subscriber experiences. Simplify quote generation, tailor subscriber experiences, streamline renewals, and gain a 360-degree view of subscribers on one platform.



### Converged Media Planning

Fragmented systems for linear and digital planning slow deals and billing. Converged Media Planning unifies planning in one grid to simplify pricing, scheduling, and billing, accelerating cash flow and reducing revenue leakage on a single platform.

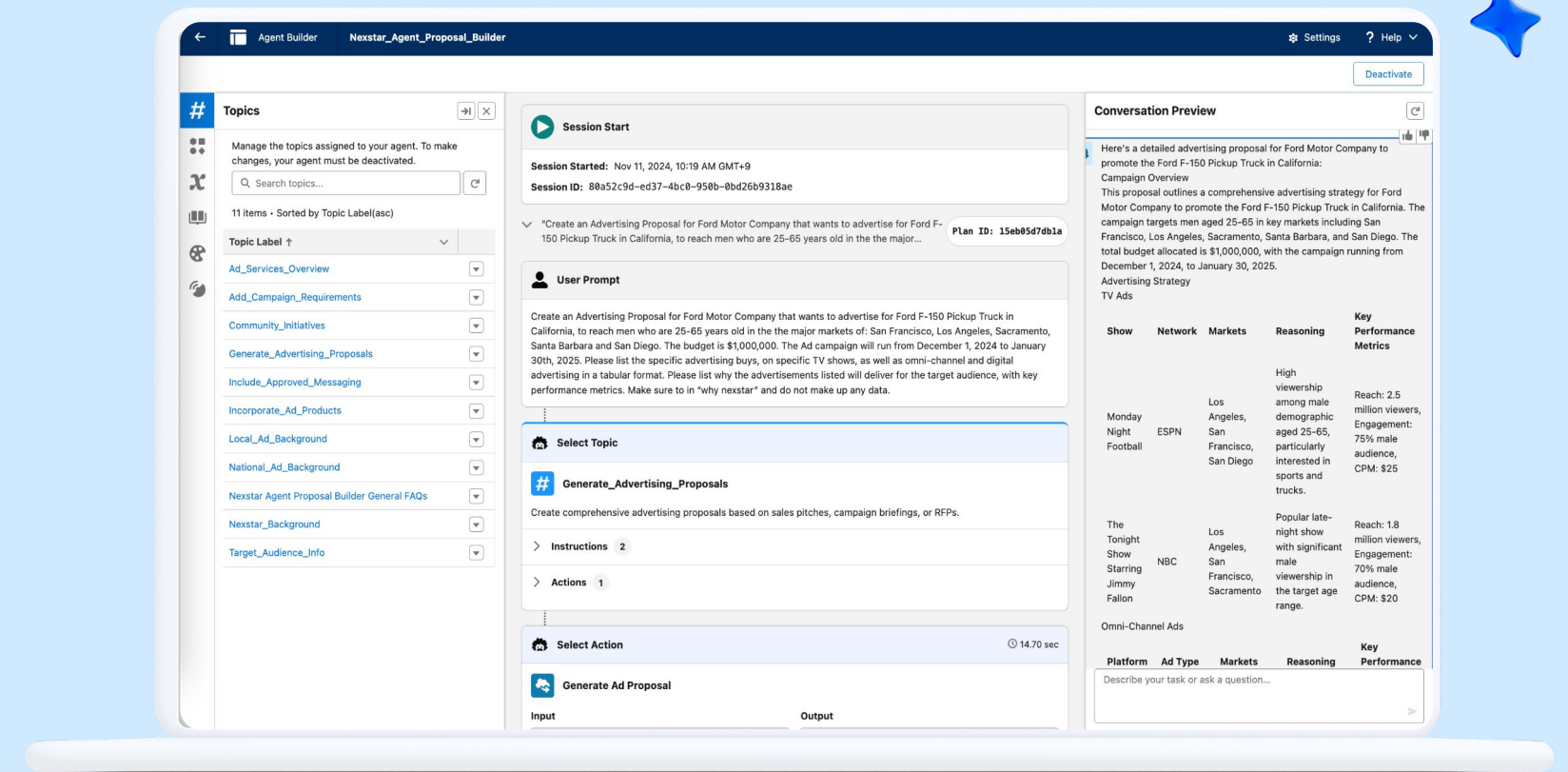
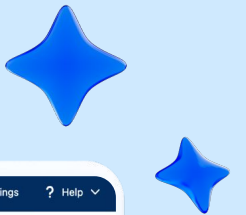


### Media Plan Bulk Editing

Editing media plans line by line is inefficient and error-prone. Bulk Editing enables updates across multiple placements to streamline campaign management, allowing reps to spend less time on plan creation and more time on selling and optimizations.



## Ad Proposal



## Release Notes



# Ad Proposal

salesforce

## What's Getting in Your Way

Sales reps spend hours and even days manually searching for information and clicking through multiple screens to build proposals and presentation decks proactively and in response to RFPs.

## How We Fix It

This AI agent uses agentic actions to find product, pricing, and packaging information relevant to the proposal across systems to build proposals. It can also populate pitch presentation templates with the information it gathers.

## Measurable Results You Can Expect

Reps reduce proposal creation time from days to minutes. This allows them to:

- Pitch more leads,
- Increase sales velocity
- Ensure presentation decks are ready to send instantly

## Why It's Worth Doing

Ad Proposal is the only productized AI agent purpose-built for ad sales proposal creation available on the market today. While other companies have released industry-agnostic sales proposal agents, Ad Proposal is the only agentic solution built to navigate the product, pricing, and packaging complexities inherent in crafting responses to ad sales RFPs and generating proactive proposals.



## Features by User



### Intelligent Data Gap Management

Increase data integrity across your supply chain with automated transitions. As utility data becomes apparent, the system prioritizes actual usage data over placeholders, ensuring your final reports are based on the most reliable facts.

X ✓ X

### Salesforce Go for Agentforce Net Zero

Boost operational efficiency by replacing manual setup scripts with one-click configuration. This automated “detect and repair” logic ensures all dependencies are active, removing the trial and error from rolling out new compliance updates.

✓ X X

### Supplier Data Ingestion and Analysis

Expand supply chain visibility by integrating third-party data from CDP and EcoVadis into a single record. This unified view helps you identify high-emitting hotspots and manage environmental risks across your entire network.

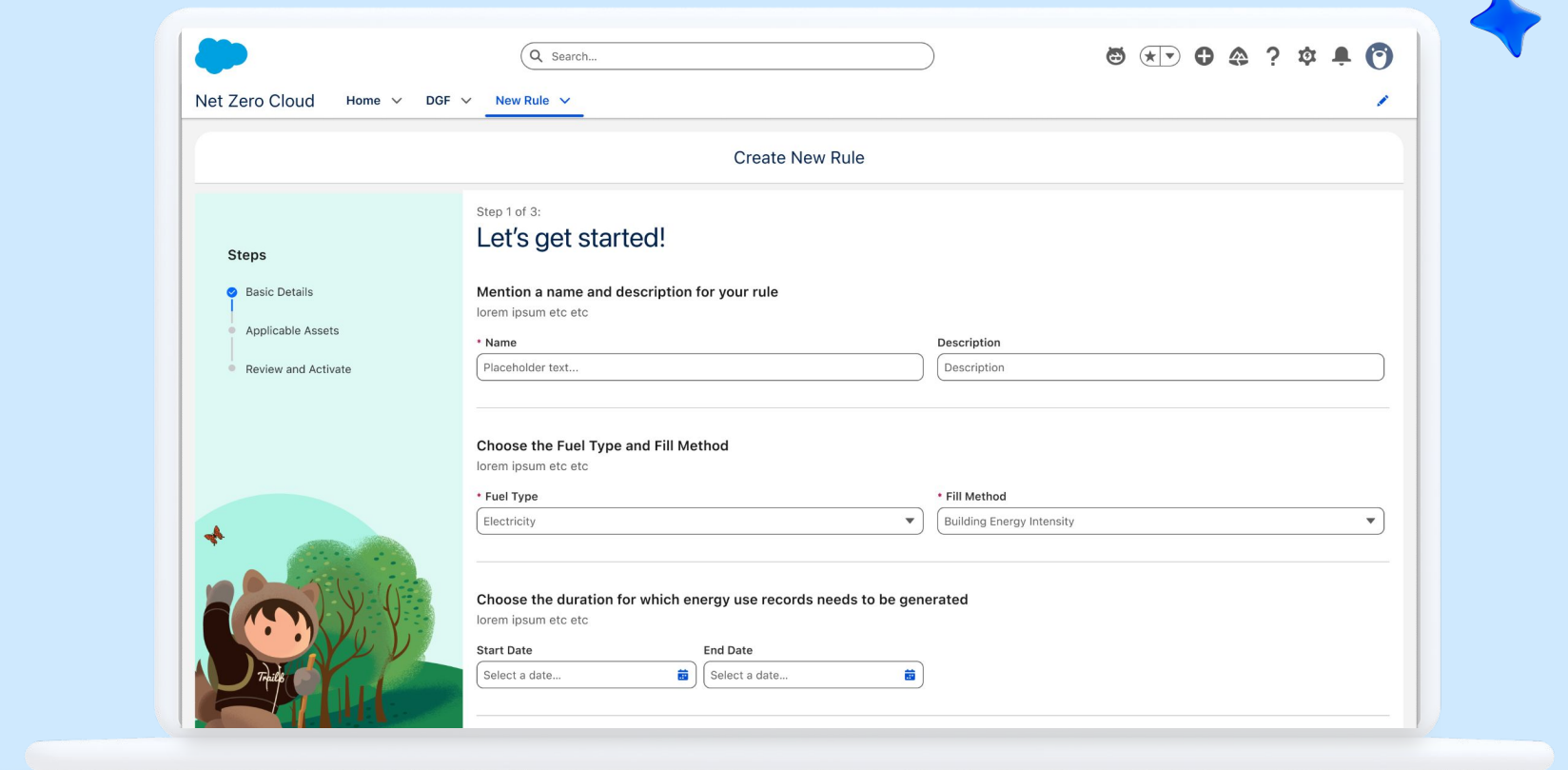
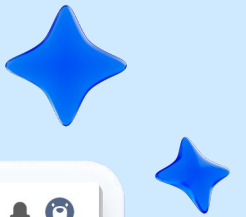
X ✓ X

### Market Based Emissions Enhancement

Boost administrative productivity by replacing manual data mapping with automated ingestion. This parses complex spreadsheets directly into your data model, saving weeks of technical configuration every year.

X ✓ X

## Intelligent Data Gap Management



[Release Notes](#)



# Supplier Data Ingestion and Analysis



## What's Getting in Your Way

Information about your suppliers is often scattered across different emails and systems, making it hard to see their true environmental impact.

## How We Fix It

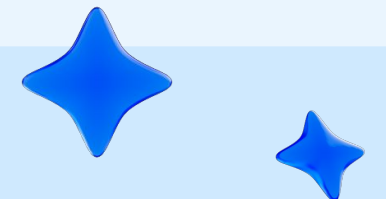
This feature pulls sustainability data from outside ratings agencies and your suppliers directly into one unified profile for every vendor.

## Measurable Results You Can Expect

You can easily spot high-risk suppliers and make smarter purchasing decisions that help lower your company's carbon footprint.

## Why It's Worth Doing

The solution uses a single source of truth (SSOT) that harmonizes third-party risk data with direct supplier inputs. Furthermore, there is availability through engagement models that removes the licensing cost barrier for suppliers, significantly increasing the likelihood that they will actually provide the primary data needed to reduce scope 3 reliance.



## Features by User



### Participant Summary

Prepare for meetings in minutes with AI-generated summaries of participant activity and notes. Catch up quickly for better discussions that build trust and enhance participant engagement.



### Donor Support

Empower donors to instantly manage recurring gifts and update profiles through an AI agent, reducing staff burnout and solidifying donor retention.



### Salesforce Go for Agentforce Nonprofit

Streamline setup and discovery for fundraising and program management with guided, intuitive configuration pages that reduce implementation time and drive faster ROI.



### Fundraising Enhancement: Configurable Gift Validations

Simplify your data migration by managing hidden gift validations to ensure a fast, frictionless transition of your fundraising records into Agentforce Nonprofit.

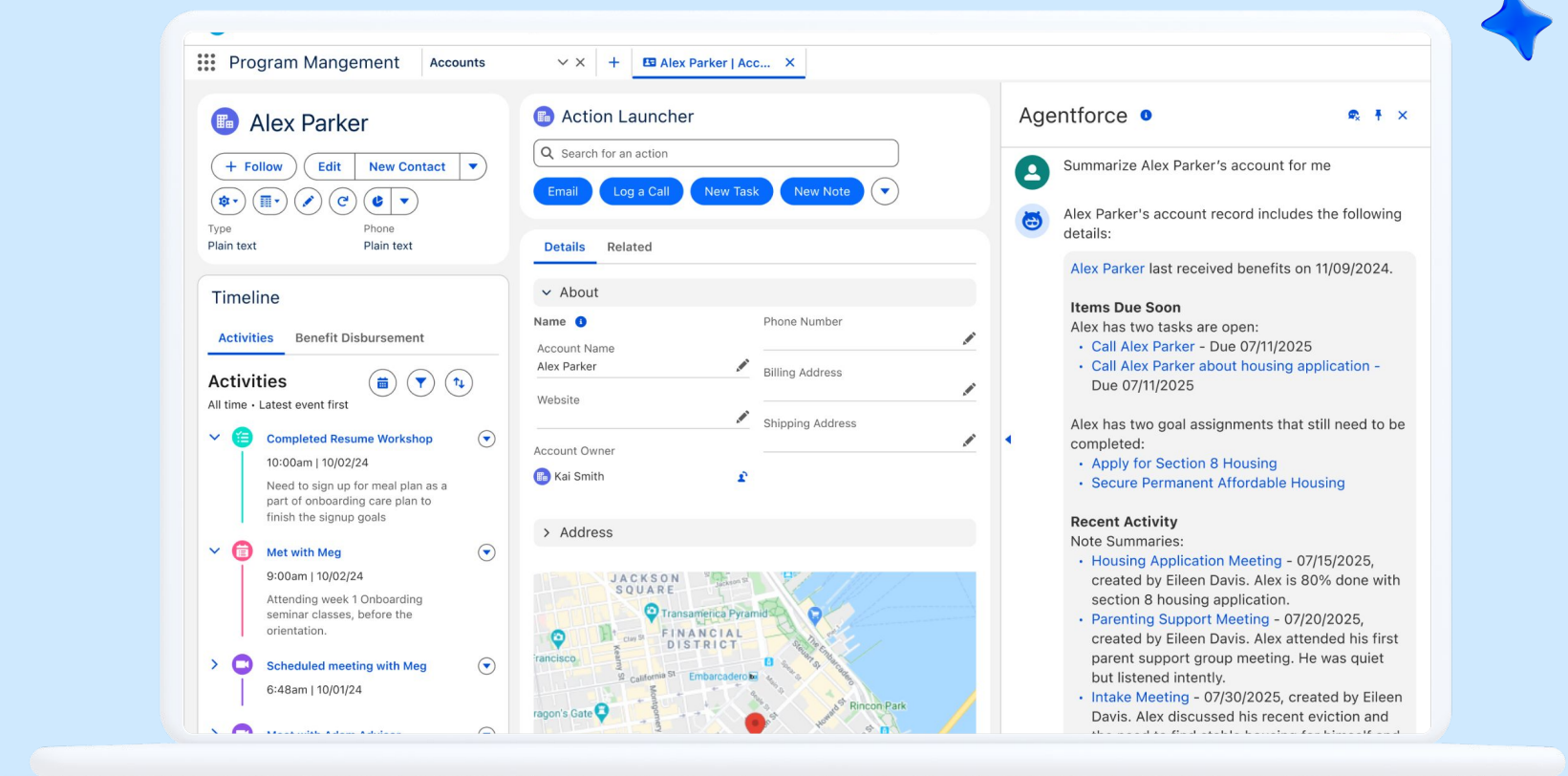
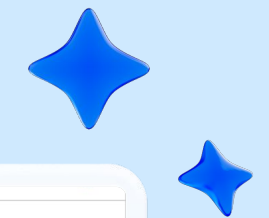


### Fundraising Enhancement: Nextgen Commitment Processing

Drive predictable revenue with a scalable engine that automates complex gift schedules and ensures every recurring donation is processed accurately to build donor trust.



## Participant Summary



**Release Notes**



# Participant Summary



## What's Getting in Your Way

Busy program staff struggles to carve out sufficient time for detailed meeting prep, resulting in inefficient discussions, missed topics, and frustrated participants.

## How We Fix It

A new Participant Summary Topic for our Participant Management Agentforce Template creates AI-driven summaries of a participant's program activity, recent notes, and upcoming tasks to help case managers quickly get up to speed before meeting with a client.

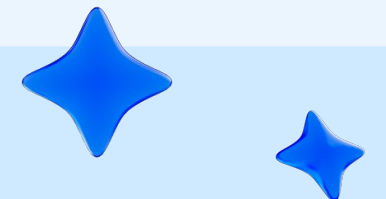
## Measurable Results You Can Expect

Better discussions, less prep. Save staff time with instant context.

## Why It's Worth Doing

Unlike fragmented point solutions offered by Blackbaud or CaseWorthy, Salesforce provides a unified agentic platform grounded in nonprofit data to deliver personalized insights for every participant.

This eliminates manual administrative prep, ensuring case managers walk into every interaction fully informed and ready to focus on what matters most: driving meaningful engagement and impact.





# Public Sector



## Features by User



### Tableau Next Enhancements

LPI, Benefits, and Investigative Case Management Tableau Next dashboards deliver modern, integrated insights with improved performance – all within a unified analytics experience.



### Simplified Setup Enhancements

Complex, unintuitive setup slows deployment. Salesforce Go provides out-of-the-box features and guided configuration for Agentforce for Public Sector, helping admins enable required capabilities quickly and go live faster – without added complexity.



### Employee Experience Enhancements

New prebuilt agent topics for applicant screening, leave, expense, and application tracking provide out-of-the-box templates that accelerate deployment and reduce custom development.



### Field Operations & Asset Management

Agencies struggle to coordinate complex field appointments across people, assets, and case records. Unified Scheduling introduces visit-based appointments and a mobile app for inspectors, enabling onsite scheduling within PSS workflows to reduce tool sprawl and operational complexity.

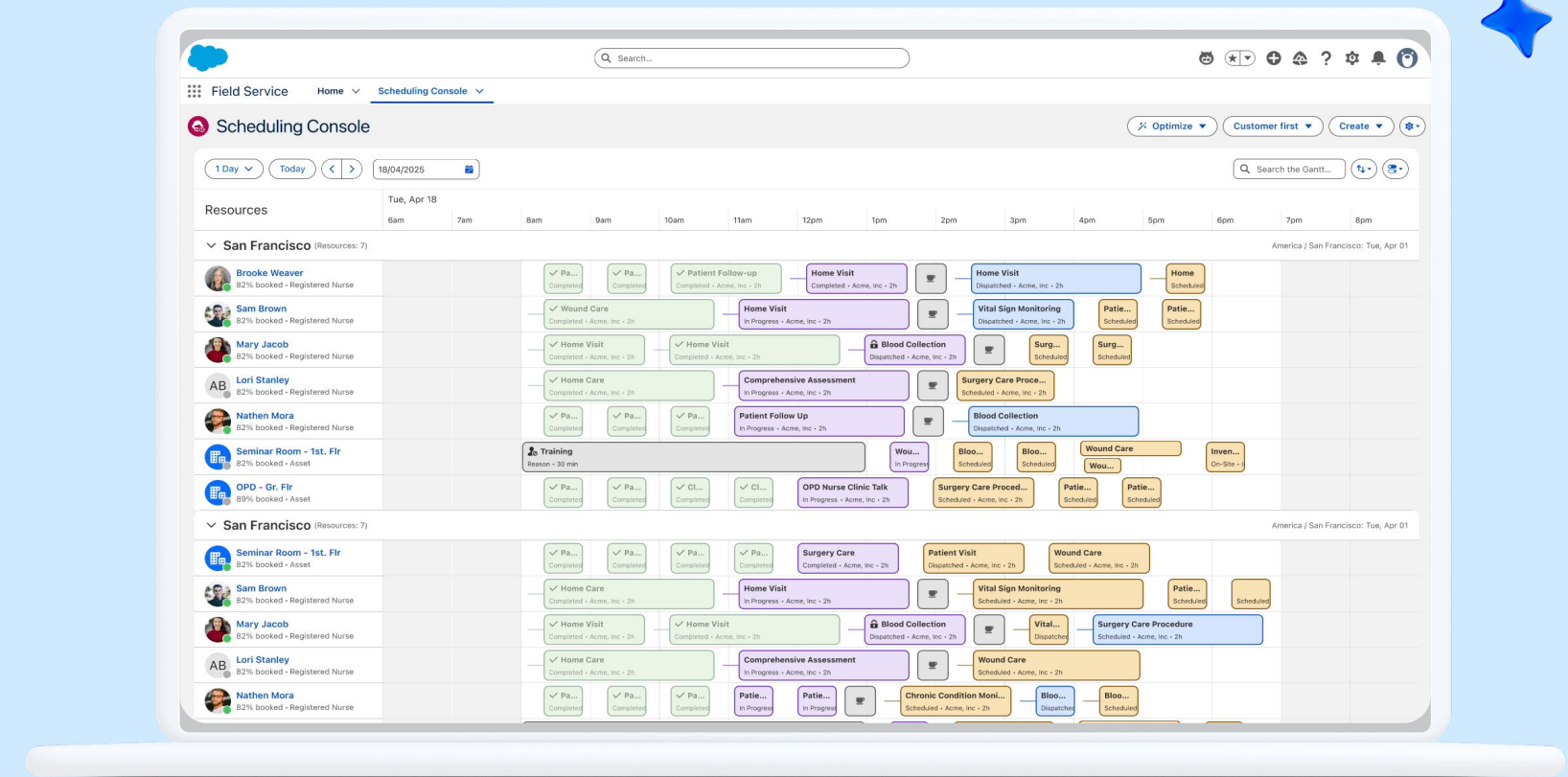
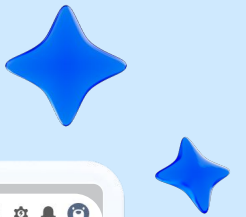


### Talent Recruitment Management Enhancements

Recruiting teams manage feedback and policy questions across disconnected tools, slowing decisions and shortlisting. Integrating Slack with Talent Recruitment Management centralizes collaboration, accelerates hiring, and improves the candidate experience.



## Field Operations & Asset Management



[Release Notes](#)



# Tableau Next Enhancements



## What's Getting in Your Way

Existing CRM analytics (CRMA) dashboards transition to Tableau for modern, integrated insights.

## How We Fix It

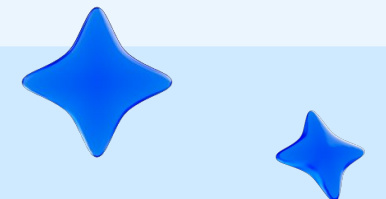
Existing dashboards across LPI, benefits, and investigative case management are being revamped for Tableau Next.

## Measurable Results You Can Expect

Existing CRM analytics dashboards migrate to Tableau Next.

## Why It's Worth Doing

LPI, Benefits, and Investigative Case Management Tableau Next dashboards deliver modern, integrated insights with improved performance – all within a unified analytics experience.



## Features by User



### Agentic Setup & Data Management

Democratize insights, accelerate time to value, and automate manual workflows at scale with agents. Transform the Data 360 journey from ingestion to activation. Use AI agents to harmonize data and build segments – all through natural language.



### Salesforce Catalog

A searchable view of all your Salesforce data—powered by metadata—helps users and agents find, understand, and trust the data they use.



### Identity Boost

Maximize ad reach by enriching customer profiles with partner data to significantly increase match rates across top ad platforms.

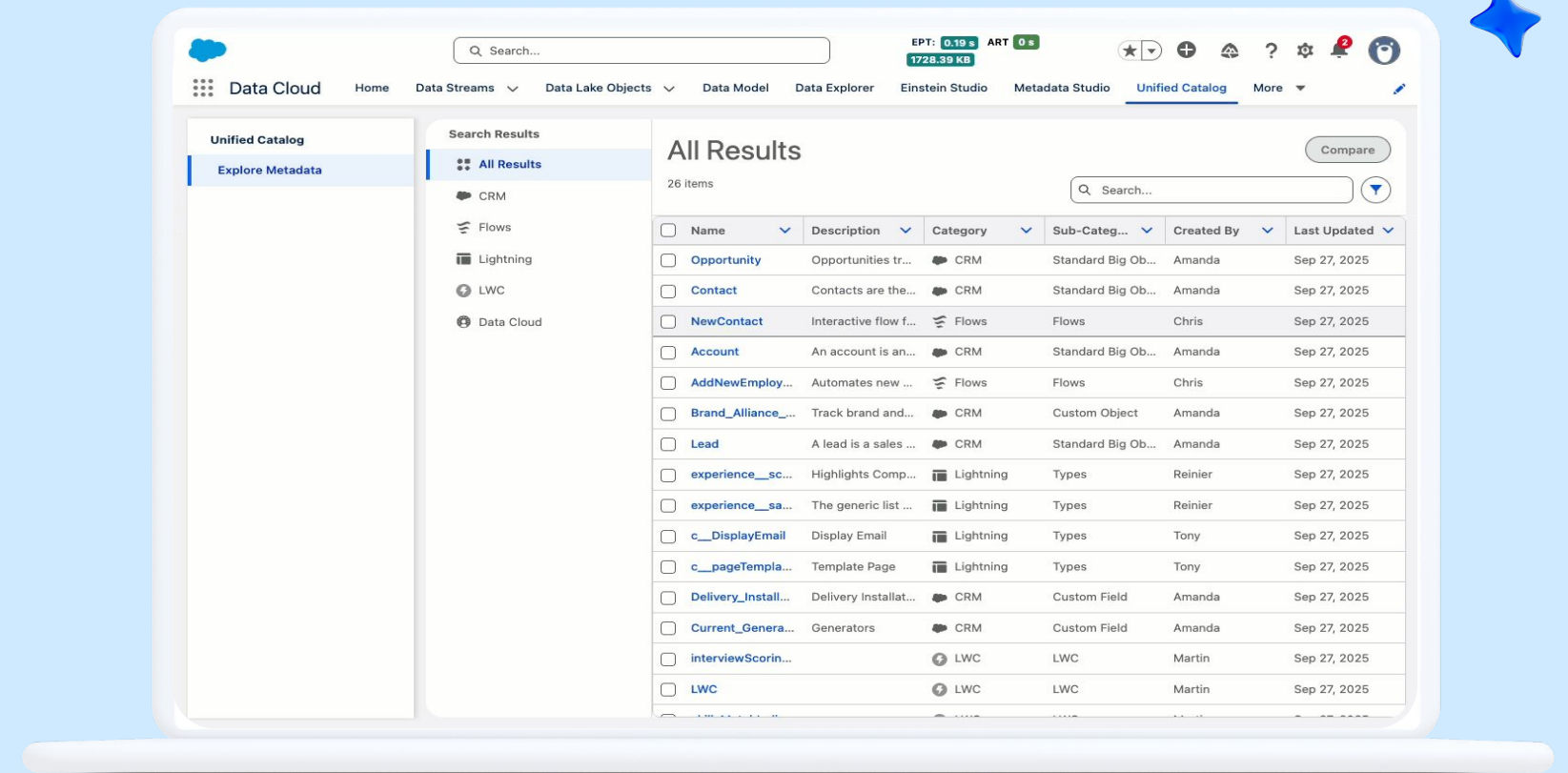
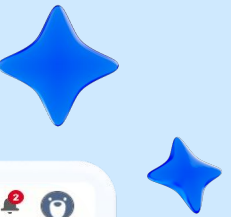


### Expanded Zero Copy Partner Network

Ground every interaction in your enterprise data. With 15 new Zero Copy sources, agents access live data from Snowflake, AWS, Microsoft, and IBM without moving a single byte. Always fresh, trusted, and ready for intelligent action.



## Salesforce Catalog



[Release Notes](#)



# Agentic Setup & Data Management



## What's Getting in Your Way

Data teams are drowning in manual pipelines, fragmented silos, and complex SQL tasks that create massive bottlenecks. This technical friction prevents businesses from using their information in real time, leaving AI grounded in incomplete or untrusted context.

## How We Fix It

Agentic Setup & Data Management places AI agents at the heart of the Data 360 journey to automate the entire lifecycle – from harmonizing messy fields to writing code and building segments – all through a natural-language interface.

## Measurable Results You Can Expect

Enterprises move from raw data to ready-to-use, actionable audiences in minutes instead of weeks. By using natural language to automate complex data tasks at scale, users across the enterprise can generate their own insights and segments instantly. This eliminates manual bottlenecks and allows data experts to shift from reactive troubleshooting to high-value strategic work.

## Why It's Worth Doing

Unlike our competitors – which offer general-purpose agentic infrastructure that requires stitching together separate governance, semantic, and activation layers – Our Agentic Setup & Data Management capabilities are purpose-built for the customer data lifecycle. They don't just query or classify data; they perform operational actions like creating identity resolution rulesets, diagnosing real-time data graph issues, generating segment filters from natural language, and producing executable SQL transforms – all within the same platform where the unified customer profile lives.





# Platform: Trusted Services



## Features by User



### Security Mesh

Security Mesh unifies disparate data sources into a cohesive data fabric, transforming disconnected alerts into intelligent risk scores to catch anomalies faster and surface security threats that may otherwise go undetected.



### Agentforce Threat Detection in Security Center

Agentforce Threat Detection in Security Center automatically correlates user activity to triage threats and take action on proposed remediation plans. This streamlines incident response and automates manual tasks, freeing up time for teams to focus on strategic initiatives.



### Archive on Hyperforce

Eliminate residency roadblocks with Hyperforce-backed archiving. This solution is now available globally and automates data retention within the Trust Layer. We provide regulated industries with secure, localized sovereignty that competitors can't match.

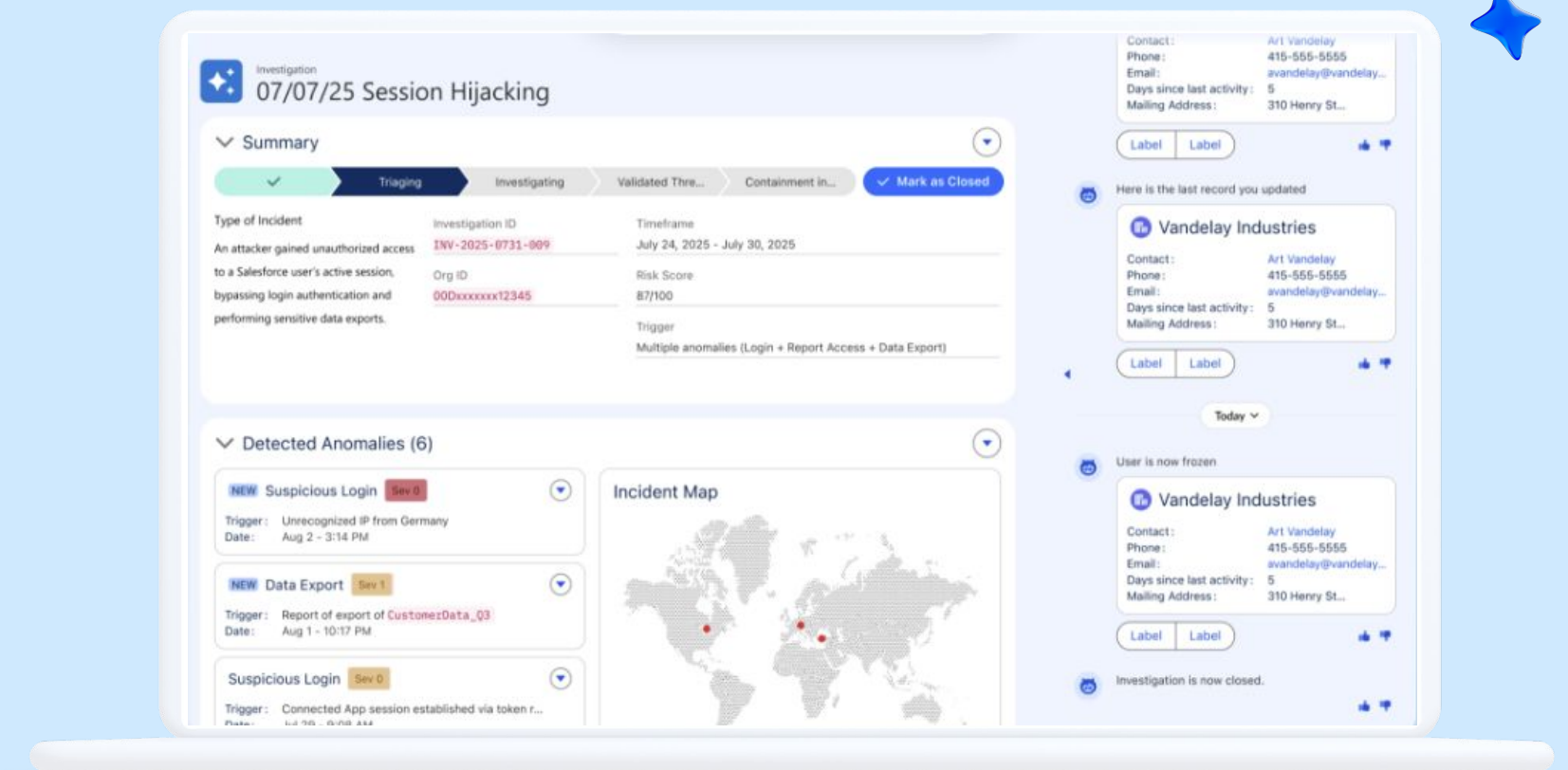


### Backup & Recover Next | Enhancements + India Launch

Meet strict residency needs with the release of Backup & Recover Next in India and tenant-specific Platform Encryption. This includes on-demand backups, new compare views, and file and data hierarchy restore tools for native, compliant business continuity.



Agentforce Threat Detection in Security Center



Release Notes



# Security Mesh



## What's Getting in Your Way

The proliferation of disconnected security tools has resulted in "vendor sprawl," making it impossible to maintain a centralized view of an organization's risk.

## How We Fix It

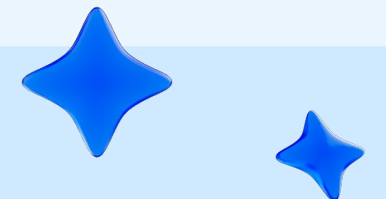
By unifying scattered security data (export anomaly, login without MFA, etc.) across disparate sources, Security Mesh enables customers to take meaningful, business-impacting actions based on derived insights.

## Measurable Results You Can Expect

Security Mesh transforms a flood of disconnected alerts into intelligent, automated risk scoring to catch anomalies faster and surface security threats that may otherwise go undetected.

## Why It's Worth Doing

Security Mesh unifies disparate data sources into a cohesive data fabric, transforming disconnected alerts into intelligent risk scores to catch anomalies faster and surface security threats that may otherwise go undetected.



## Features by User



### Agent Fabric

Fragmented agents across diverse platforms create unmanaged sprawl. MuleSoft Agent Fabric's new drag-and-drop experience helps manage this by enabling you to build Agent Brokers that can reason across multiple agentic loops and complex orchestration patterns. This results in a transparent, deterministic, and finely tuned agent network.



### MuleSoft Omni

Governing AI in silos creates risk and slows production rollout. MuleSoft Omni unifies lifecycle management across agents, LLMs, APIs, and MCP tools, operable from a new UI or directly through Vibes, Slack, Teams, and Claude, so enterprises can scale AI with real control.



### MuleSoft Vibes Enhancements

Inconsistent builds slow integration delivery. AI scaffolds custom connectors, enforces standardized templates, and promotes asset reusability, delivering faster time to value and higher software quality without treating speed and quality as trade-offs.



### MuleSoft for Flow: IDP Enhancements

Unstructured docs stall automation. New MuleSoft for Flow: IDP enhancements help fix this with nested JSON support, extended AI model support, and a new Config Page for total visibility and control.

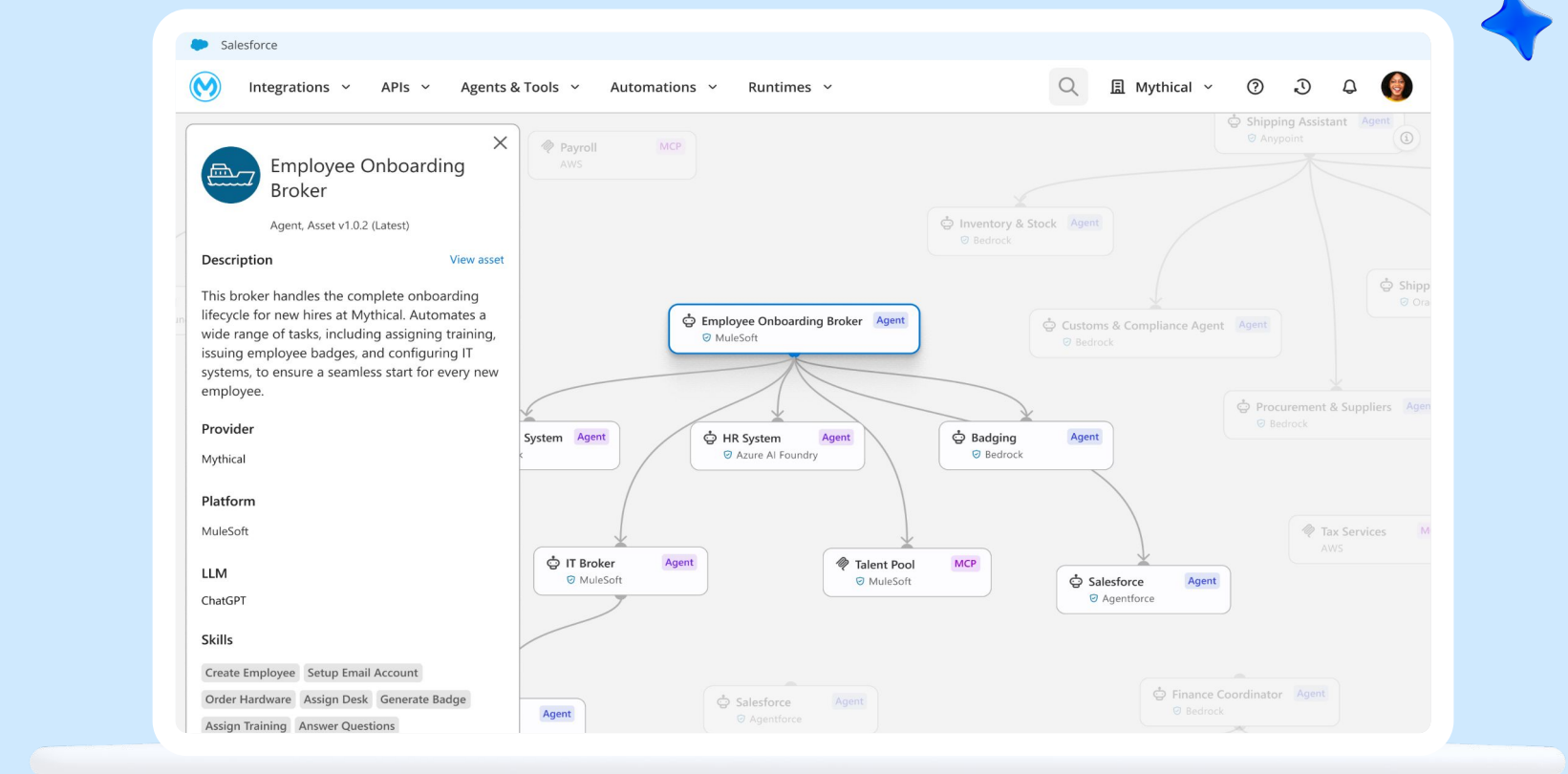


### Informatica Business 360 Connector

Eliminate duplicate, conflicting master data across your enterprise. The Anypoint Connector for Informatica MDM delivers bidirectional golden record sync – matching, deduplicating, and activating to Data Cloud – so AI can work with trusted data.



## Agent Fabric



**Release Notes**



# Agent Fabric



## What's Getting in Your Way

As enterprises move beyond the initial excitement of AI pilots, **agent sprawl** has emerged as a primary barrier to scale.

While organizations are deploying a diverse range of AI agents from various cloud providers and frameworks, few have the infrastructure to manage them as a cohesive workforce – **50% of AI agents operate in silos** rather than as part of a multi-agent system.

## How We Fix It

MuleSoft Agent Fabric moves beyond basic agent management to provide the **advanced operating system for your holistic Agentic Enterprise**, where AI agents from any vendor, framework, and LLM collaborate as a unified, governed, and high-velocity workforce.

This evolution delivers:

- **Advanced orchestration patterns** to ensure deterministic outcomes via a drag-and-drop interface
- **A unified gateway for model-agnostic governance** to ensure security and manage costs
- **Additional enhancements** to discover, orchestrate, govern, and observe agents and tools across your organization from a single control plane

## Measurable Results You Can Expect

With MuleSoft Agent Fabric as your agent operating platform, you can **securely coordinate any agent, tool, and model** with the consistent business logic required to operate at scale.

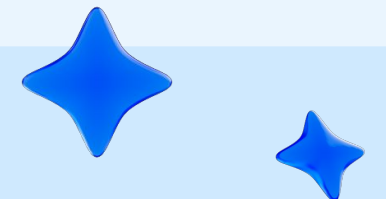
## Why It's Worth Doing

**Other vendors are limited to a single provider's ecosystem, linear orchestration, or decentralized solutions.**

MuleSoft Agent Fabric is platform-agnostic, supporting complex orchestration and unified governance across any agent, tool, or model.

Few vendors offer both in-depth developer tools and a drag-and-drop UI for configuring routing rules with advanced reasoning and orchestration capabilities.

Finally, other vendors require custom code or manual configuration to govern different LLMs. We provide a central point of control to normalize security and compliance, regardless of which LLM you use.



## Features by User



### Data 360 Connector

Fragmented customer data blocks AI success. The Data 360 Connector automates ingestion from any source into Salesforce Data 360, unifying profiles and powering smarter, more personalized AI.



### Comprehensive MCP Support

Accelerate AI development with no-code MCP support. Transform existing data into context-aware tools using metadata intelligence to ensure your agents make accurate, governed decisions.



### CLAIRE® Data Quality Agent

Automate trust at scale with the CLAIRE® Data Quality Agent. Generate and explain production-ready quality rules using natural language to remove technical bottlenecks and ensure trustworthy data.



### CLAIRE® Copilot for Data Stewards

High-volume MDM stewardship drains productivity. CLAIRE® Copilot surfaces relevant records and AI-guided recommendations in plain language – so stewards investigate faster and act with confidence.

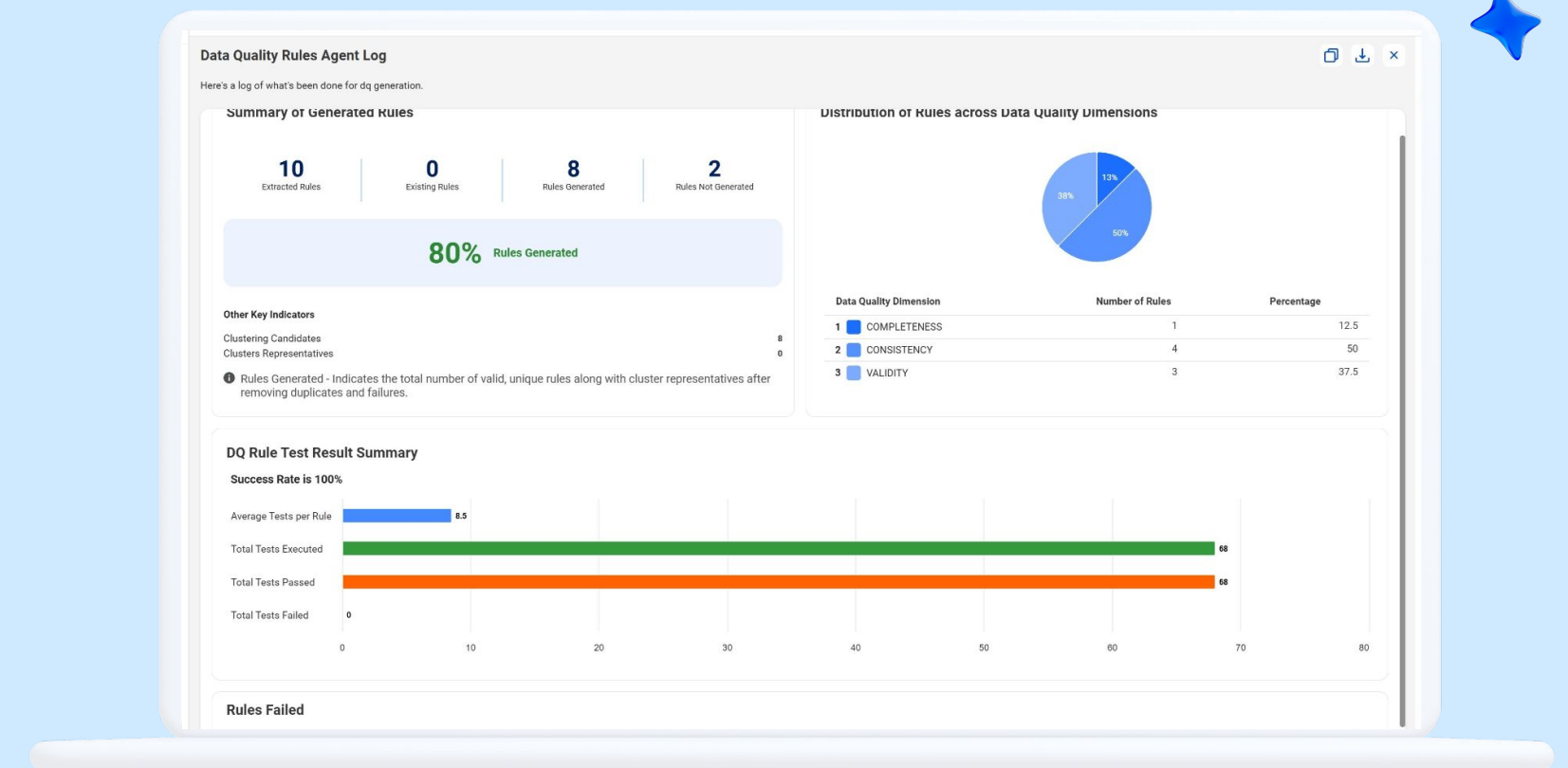


### Scanners for Salesforce Data 360 and Agentforce Marketing

Gaps in data lineage slow governance and root cause analysis. New scanners for Data 360 and Agentforce Marketing deliver end-to-end traceability – boosting data trust across the ecosystem.



## CLAIRE® Data Quality Agent





# Data 360 Connector



## What's Getting in Your Way

Enterprises struggle to move trusted, unified data from diverse sources into Salesforce Data 360, slowing AI initiatives and customer data activation.

## How We Fix It

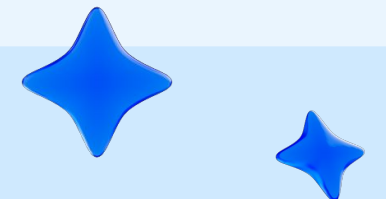
The Data 360 Connector automates data ingestion, replication, and extraction from on-premises, cloud, databases, IoT, and streaming sources directly into Salesforce Data 360 at scale.

## Measurable Results You Can Expect

Teams can build unified customer profiles and power smarter AI in Salesforce with trusted, comprehensive enterprise data – delivered automatically.

## Why It's Worth Doing

Fragmented customer data blocks AI success. The Data 360 Connector automates ingestion from any source into Salesforce Data 360, unifying profiles and powering smarter, more personalized AI.



## Features by User



### CRMA Recipes with Tableau Semantics

Translate existing CRMA Recipes metadata into trusted semantic models with just a few clicks. Automate the setup of data objects and relationships to eliminate manual steps and unlock agentic analytics fast.



### Inspector

Make smarter decisions with proactive insights. Inspector, an agentic capability in Tableau Next, proactively monitors the key metrics you care about and gives you alerts and actionable insights when critical thresholds are met or trends begin to change, ensuring you're always informed and ready to act.



### Tableau MCP

Transform your custom AI into data experts with Tableau MCP. This secure, open integration allows your AI to query Tableau's analytics engine directly, delivering accurate answers grounded in your business context while keeping your data protected by the Agentforce Trust Layer.

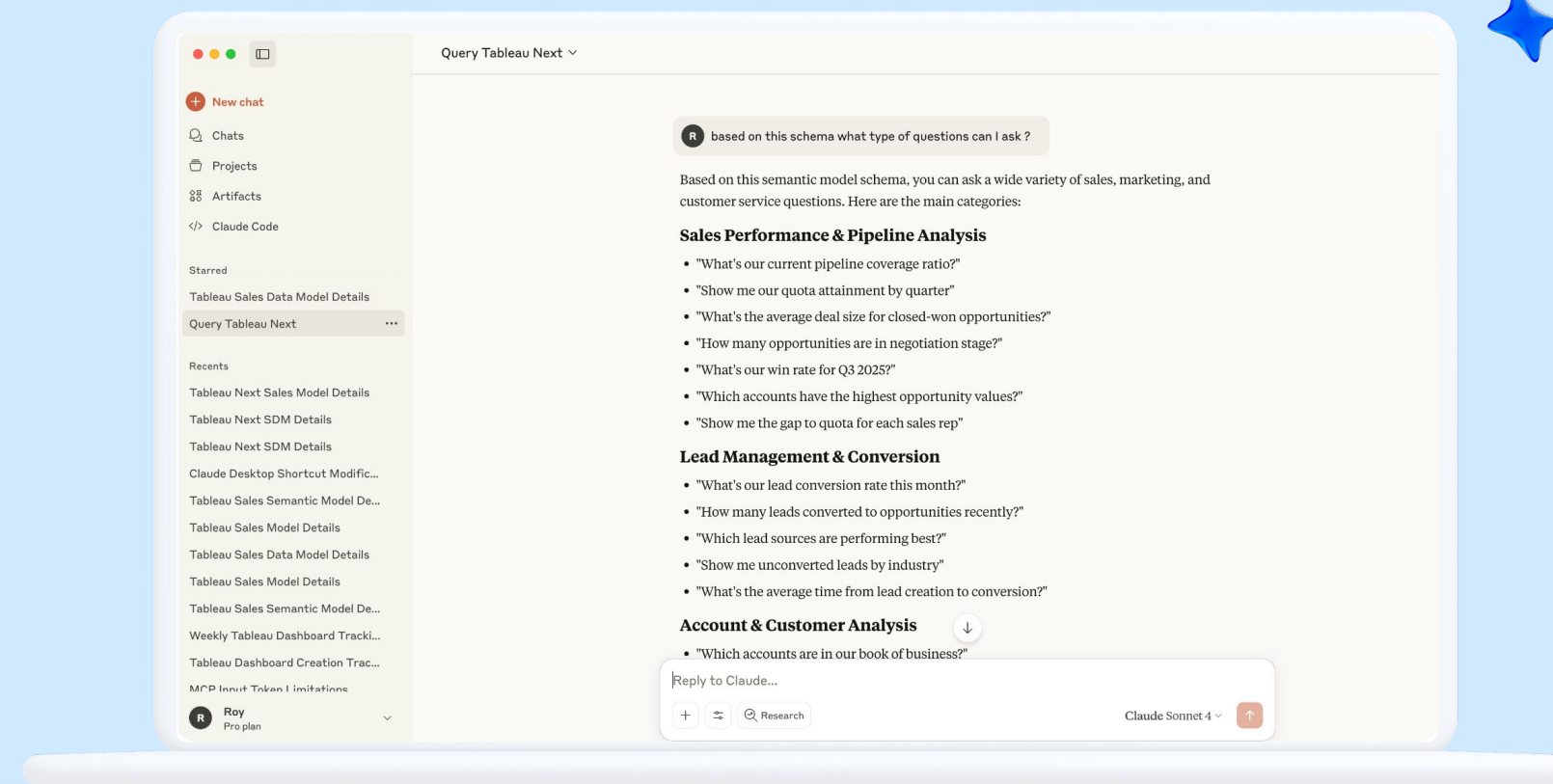


### Conversational Analytics

Stop waiting on manual reports and let Tableau perform the complex analysis for you. Now, every employee can get trusted responses to their dashboard follow-up questions. Propel your entire workforce to go from data to action with personalized insights woven into the fabric of work.



## Tableau MCP



[Release Notes](#)



# Tableau MCP



## What's Getting in Your Way

AI agents today are often unaware of governed business context. They're forced to rely on fragile, one-off integrations that work around security instead of respecting it. The result is a gap between powerful AI models and the trusted data they need to make real decisions.

## How We Fix It

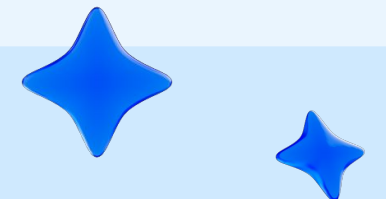
Tableau MCP makes it easy and safe for AI agents to work with your data. It's an open, platform-hosted integration that gives any MCP-compatible agent a secure way to explore your data, understand it through an AI-ready semantic layer, and rely on a built-in Analytics Agent to do the heavy reasoning – all without your data ever leaving your security perimeter.

## Measurable Results You Can Expect

Custom agents evolve into domain-specific analysts that speak your business's language. They gain immediate access to your KPIs and metadata, delivering accurate, live-data insights and visualizations that your team can actually trust.

## Why It's Worth Doing

Tableau Next becomes the governed analytics engine at the heart of your AI strategy. By grounding every interaction in rich business context and the Agentforce Trust Layer, agents can go deeper than general-purpose AI – answering real business questions like what's driving sales or what's actually causing change.





# Customer Success



## Features by User



### Customer Success Score Enhancements

Gain visibility into Salesforce adoption and technical health with expanded signals in the Customer Success Score, providing a more comprehensive view of Product Adoption and Technical Health.



### Customer Success Score Enhancements for Agentforce

New signals provide deeper visibility into Agentforce usage and flex credit spending, helping you optimize costs, make data-driven decisions, and confidently expand your AI-powered capabilities.



### Proactive Monitoring Enhancements for Data 360 and Agentforce

New alerts in Proactive Monitoring deliver greater visibility into Data 360 and Agentforce performance issues, helping you identify and resolve problems quickly, minimize disruptions, and scale with confidence.

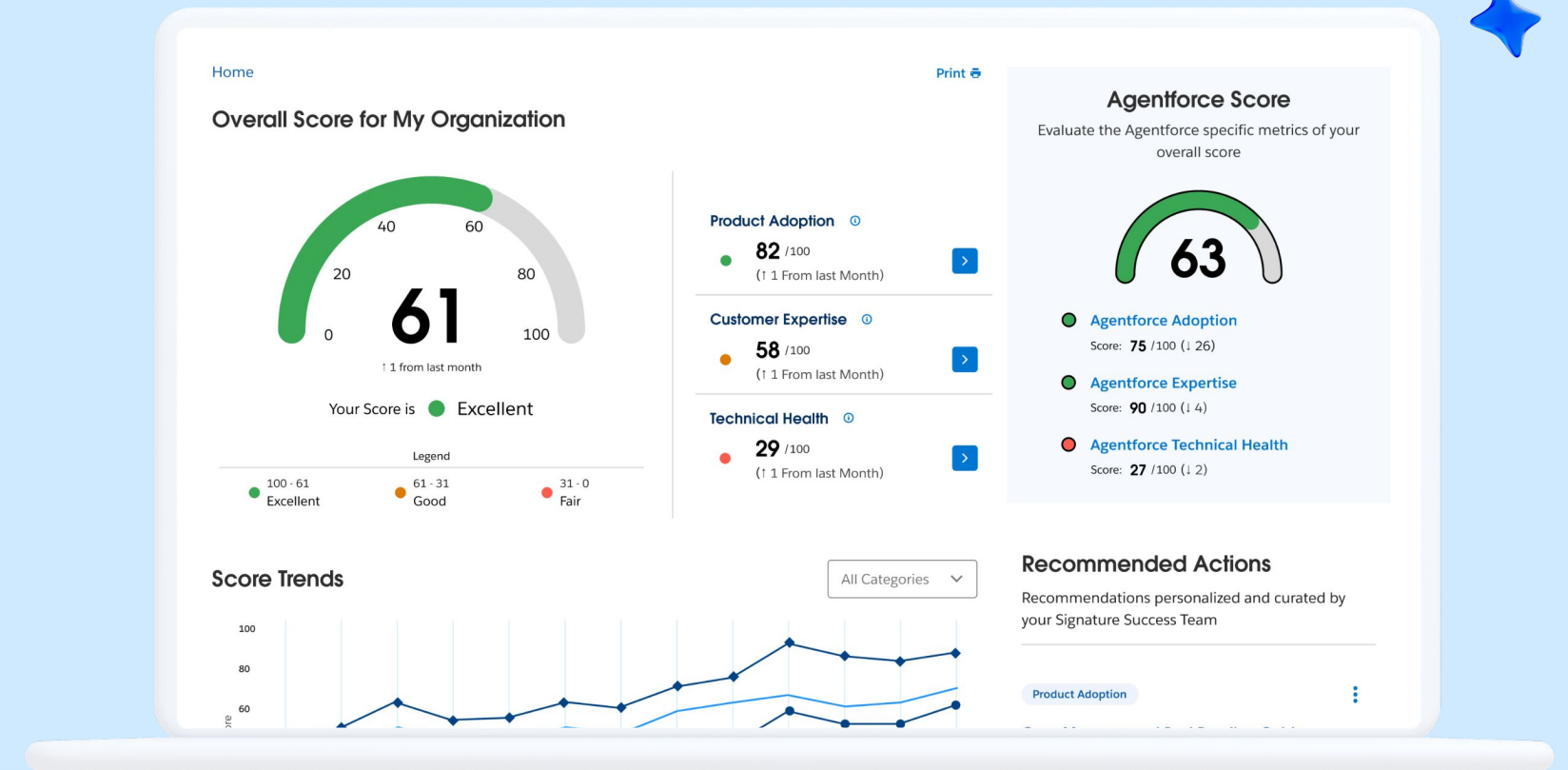


### Signature Success Plan for MuleSoft Private Cloud Edition (PCE)

Signature Success Plan expands to MuleSoft PCE, giving you a proactive partnership with expert guidance, specialized programs, and faster support to accelerate adoption and maximize your MuleSoft investment.



## Customer Success Score



[Release Notes](#)



# Signature Success Plan for MuleSoft Private Cloud Edition (PCE)



## What's Getting in Your Way

Today, MuleSoft PCE customers are limited to legacy Titanium Support, a model that lacks the proactive customer success resources needed to help them fully adopt, optimize, and accelerate the value of their MuleSoft investment.

## How We Fix It

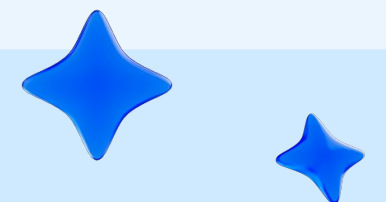
Signature Success Plan provides MuleSoft PCE customers with enhanced support experiences, dedicated access to customer success experts, and the resources needed to accelerate adoption and maximize the value of their MuleSoft PCE investment.

## Measurable Results You Can Expect

Customers with access to the right success and support resources achieve a significantly higher ROI than those without.

## Why It's Worth Doing

Signature Success Plan is now available for MuleSoft PCE customers, offering a proactive partnership with expert guidance, specialized programs, and enhanced support to accelerate adoption and maximize the value of your MuleSoft investment.





Thank You ✨