Indiana Center of Excellence (CoE)
Salesforce Quarterly Release Overview

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Introduction

Salesforce delivers major platform updates three times each year — Spring (February), Summer (June), and Winter (October) — through its Quarterly Release Cycle.
Each release introduces innovative features, performance improvements, and security enhancements designed to help organizations continuously evolve and maximize the Salesforce investment.

Understanding how the release process works enables your teams to plan proactively, test effectively, and adopt new capabilities smoothly — minimizing disruption and ensuring ongoing business continuity.

How Salesforce Quarterly Releases Work

1. Pre-Release (6–8 Weeks Before Launch)

- Salesforce opens access to Pre-release orgs so users can explore upcoming features early.
- The official Release Notes are published to help admins review changes and plan.

2. Sandbox Preview (4–6 Weeks Before Launch)

- Eligible sandboxes are upgraded to the new release for testing.
- Admins can validate automations, integrations, and Apex code in advance.
- Review the official Sandbox Preview Guide to confirm eligibility and timing.

3. Production Release (Three-Weekend Rollout)

- Salesforce deploys the new release across production instances over three consecutive weekends.
- Agencies can track the instance's release date using the Maintenance Calendar.

Release Readiness Process

To ensure a smooth experience with each Salesforce release, follow these five essential readiness steps:

1. Stay Informed

- Check your org's release schedule via the Salesforce Trust Site and Maintenance Calendar.

- Subscribe to Release Readiness Communications, Admin Release Countdown for reminders, milestones, and announcements.

2. Review and Prioritize Features

- Explore the Salesforce Release Notes to identify updates relevant to your org.
- Filter by Edition, Cloud, Feature Impact, and Product Area to prioritize your testing and adoption roadmap.
- Focus on Quick Wins (auto-enabled or low-setup features) to maximize early value.

3. Test in Sandbox

- Use the Sandbox Preview Guide to determine if your sandbox will be upgraded.
- Refresh your sandbox before the preview cutoff date to align with the new release.
- Validate all automations, integrations, and custom configurations in a sandbox environment to ensure they function as expected with the new release updates. Confirm that any changes align with updated Salesforce security standards, data access policies, and compliance requirements before enabling them in production.
- Learn best practices via Trailhead's Release Readiness Module

4. Engage and Learn

- Join the Release readiness Trailblazers to collaborate with Salesforce experts, peers, join live Q&A sessions, and stay informed with the latest enablement materials, including.
    - *Release Overview Deck*
    - *Feature Matrix*
    - *Release-in-a-Box*

5. Communicate and Train

- Share key release highlights with stakeholders through email, newsletters, or all-hands meetings.
- Track adoption post-release and refine your enablement approach based on feedback.