

October 4, 2023

Latest Updates in the Salesforce 2024 Winter Release



MEET

Our Presenters



James Moore

Sr. Consultant, Consulting
Industry Experience: 2 years



Moazzam Khan

Senior Consultant, Consulting
Industry Experience: 10 years



KNOWLEDGE

Learning Objectives



Identify ways to maximize the solution's potential



Discover the updated user experience to ease adoption



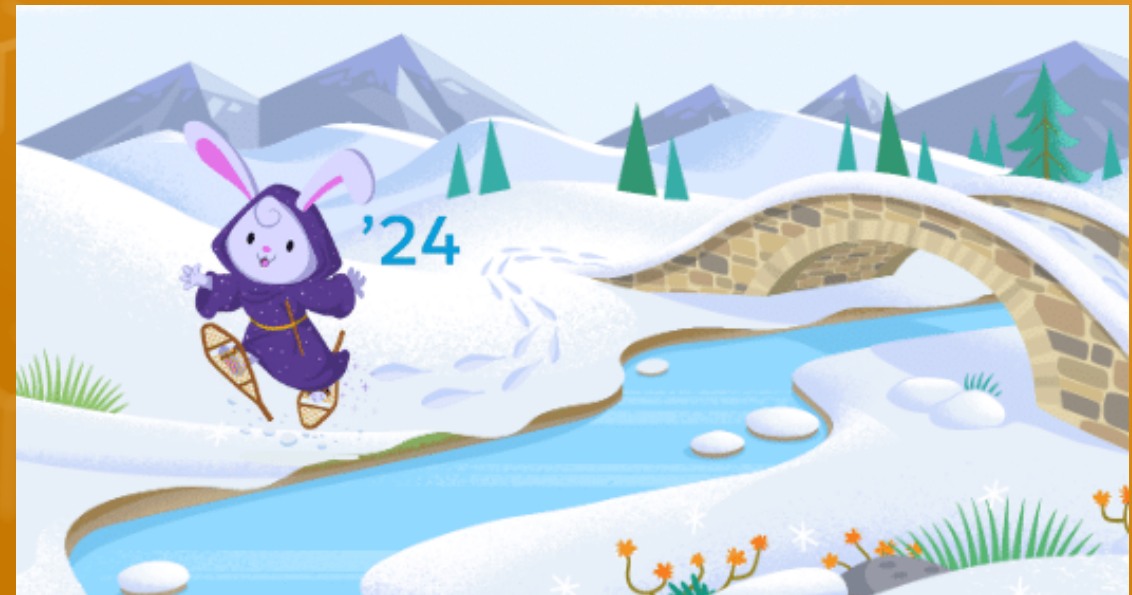
Understand how to manage the latest improvements to work more efficiently



Exploring New Areas

Agenda – User Focused

- Display Only Salesforce Events on Calendar
- Personalize Sales Emails with Einstein GPT for Sales
- Transfer Dashboard Ownership
- Report on Members of a Public Group and Queue
- Asset Hierarchy

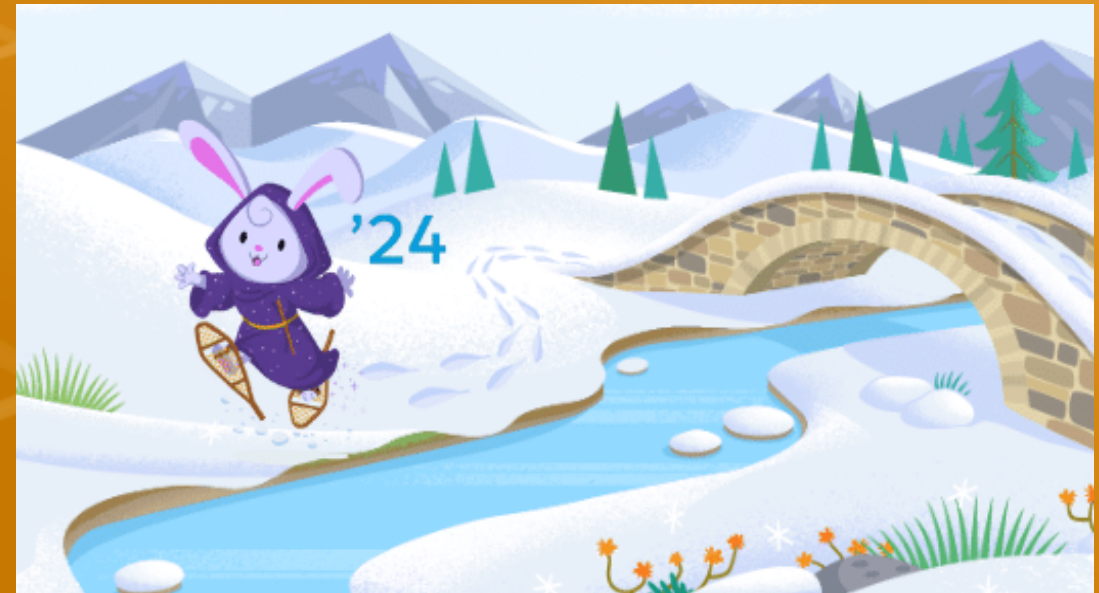




Exploring New Areas

Agenda – Admin Focused

- Migrate to Hyperforce with Hyperforce Assistant
- Permission Set Summary View
- Report on Permission Set Assignment
- Dynamic Forms (GA)
- API Names in Permission Sets
- Salesforce Backup and Restore



More Salesforce User Focused



Display Only Salesforce Events on Calendar

- Avoid displaying **duplicate or redundant event data** when multiple event sources are in play
- Prevent the **“Google Calendar”** or **“Microsoft Office 365”** overlay option from appearing in calendar view
- If desired to have the overlay option appear, it is not selected by default and needs to be **enabled manually**

Show Captured Events on the Salesforce Calendar Off

Einstein Activity Capture users see captured events on their Salesforce Calendar. If you sync and capture events, users see duplicate events. Users can view, edit, and track standard fields on synced events, and can only view and track standard fields on captured events.

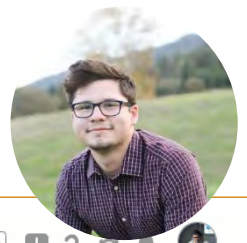
The screenshot shows the Salesforce calendar interface. At the top, there is a toggle switch for 'Show Captured Events on the Salesforce Calendar' which is currently turned off. Below this is a descriptive text box. The main calendar view shows a weekly grid for July 2023. In the bottom right corner, there is a 'My Calendars' section with a list of calendars: 'My Events' and 'Google Calendar™'. The 'Google Calendar™' entry has a red rectangular box around its checkbox, which is currently unchecked. Below this is an 'Other Calendars' section.



Personalize Sales Emails with Einstein GPT for Sales

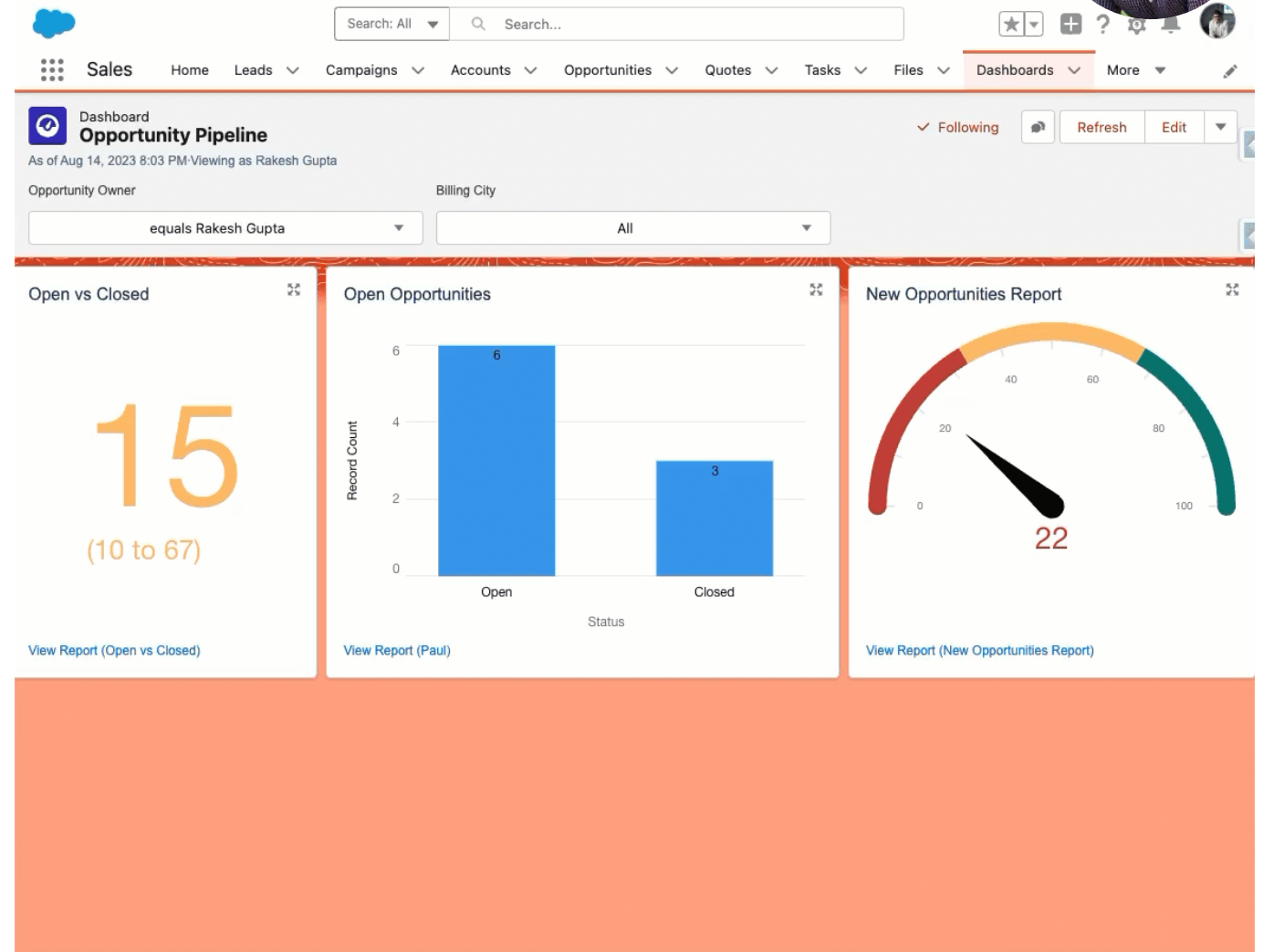
- Einstein GPT uses your sales data to generate personalized emails
- Sales reps can draft emails, like a follow-up or a meeting invite, by choosing from the preset email prompt types
- This feature is available in Lightning Experience in Performance and Unlimited editions

The image displays two side-by-side screenshots of the Salesforce email composer interface. The left screenshot shows the 'Draft with Einstein GPT' button highlighted with a red box and a red circle labeled '1'. The right screenshot shows the generated email content, including a personalized greeting 'Dear Bill Johnson,' and a body paragraph, with the 'Send' button highlighted with a red box and a red circle labeled '2'.



Transfer Dashboard Ownership

- You can now **transfer ownership of your Lightning dashboard** to the user who's best suited to manage the dashboard access and content
- The new owner gets the **same access** as the original dashboard creator





Report on Members of a Public Group and Queue

- Using a custom report type, it is now possible to see who the members are in a Group or Queue via Reports
- Previously would have to run SSQL Queries to review the data
- Managers will easily be able to move reps in and out of queues and groups

New Custom Report Type [Help for this Page](#)

Step 1. Define the Custom Report Type Step 1 of 2

[Next](#) [Cancel](#)

Report Type Focus | = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object

Identification

Report Type Label

Report Type Name [i](#)

Note: Description will be visible to users who create reports.

Description

Store in Category

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

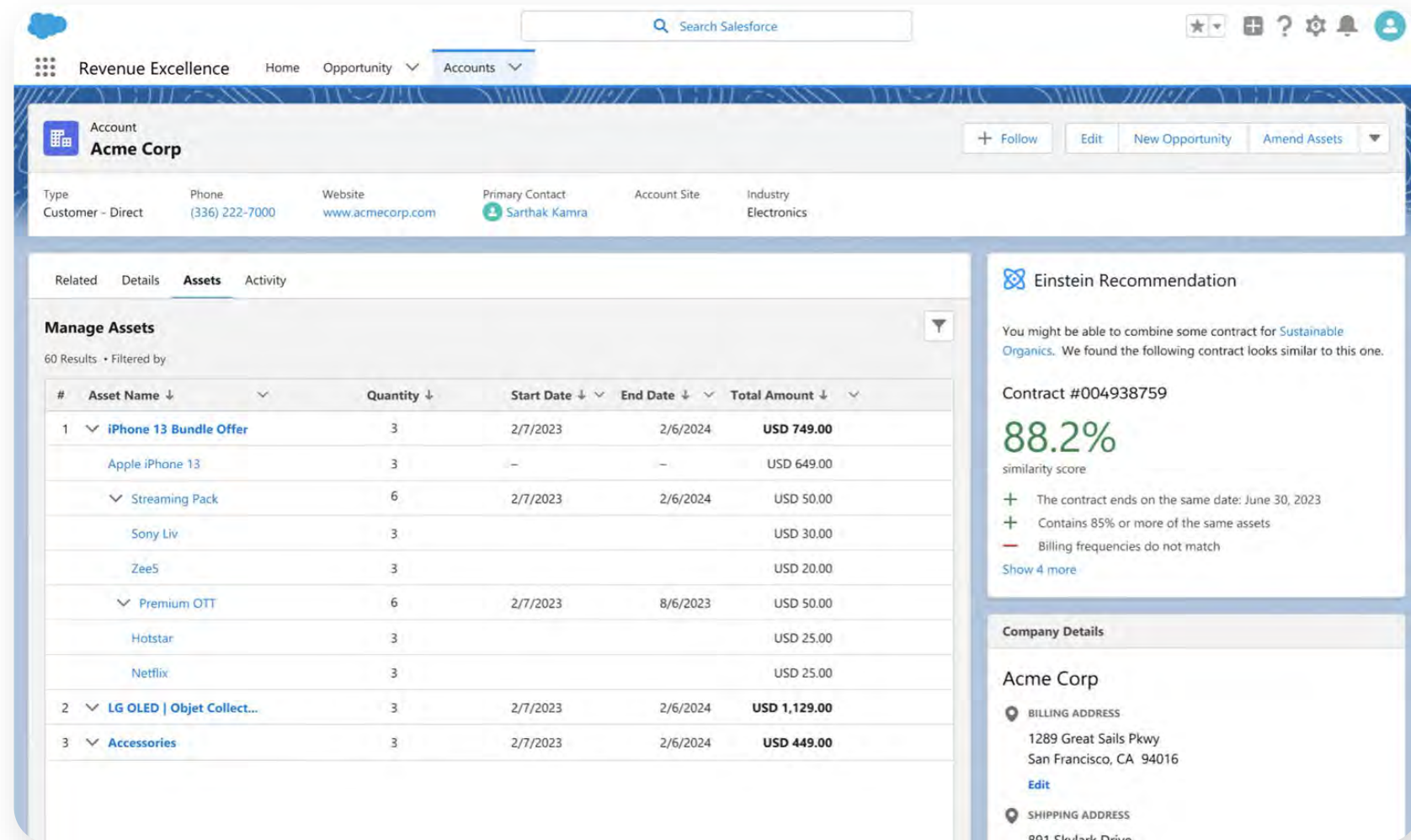
Deployment Status In Development Deployed

[Next](#) [Cancel](#)



Asset Hierarchy

- New asset will display **all assets** for the specific account being viewed
- Ability to **quickly browse** account specific assets in a single view without navigating to each asset to gather additional information
- Enabling a **new component** within the Lightning App Builder will show the hierarchy view



The screenshot shows the Salesforce interface for an account named "Acme Corp". The main section displays a table of assets under the "Manage Assets" tab. The table lists three main asset categories, each with a sub-hierarchy of items.

#	Asset Name	Quantity	Start Date	End Date	Total Amount
1	iPhone 13 Bundle Offer	3	2/7/2023	2/6/2024	USD 749.00
	Apple iPhone 13	3	—	—	USD 649.00
	Streaming Pack	6	2/7/2023	2/6/2024	USD 50.00
	Sony Liv	3			USD 30.00
	Zee5	3			USD 20.00
	Premium OTT	6	2/7/2023	8/6/2023	USD 50.00
	Hotstar	3			USD 25.00
	Netflix	3			USD 25.00
2	LG OLED Objet Collect...	3	2/7/2023	2/6/2024	USD 1,129.00
3	Accessories	3	2/7/2023	2/6/2024	USD 449.00

Additional details visible in the interface include:

- Account Information:** Type: Customer - Direct; Phone: (336) 222-7000; Website: www.acmecorp.com; Primary Contact: Sarthak Kamra; Account Site; Industry: Electronics.
- Einstein Recommendation:** Suggests combining contracts for "Sustainable Organics" with a similarity score of 88.2%.
- Company Details:** Billing Address: 1289 Great Sails Pkwy, San Francisco, CA 94016; Shipping Address: R91 Skulark Drive.

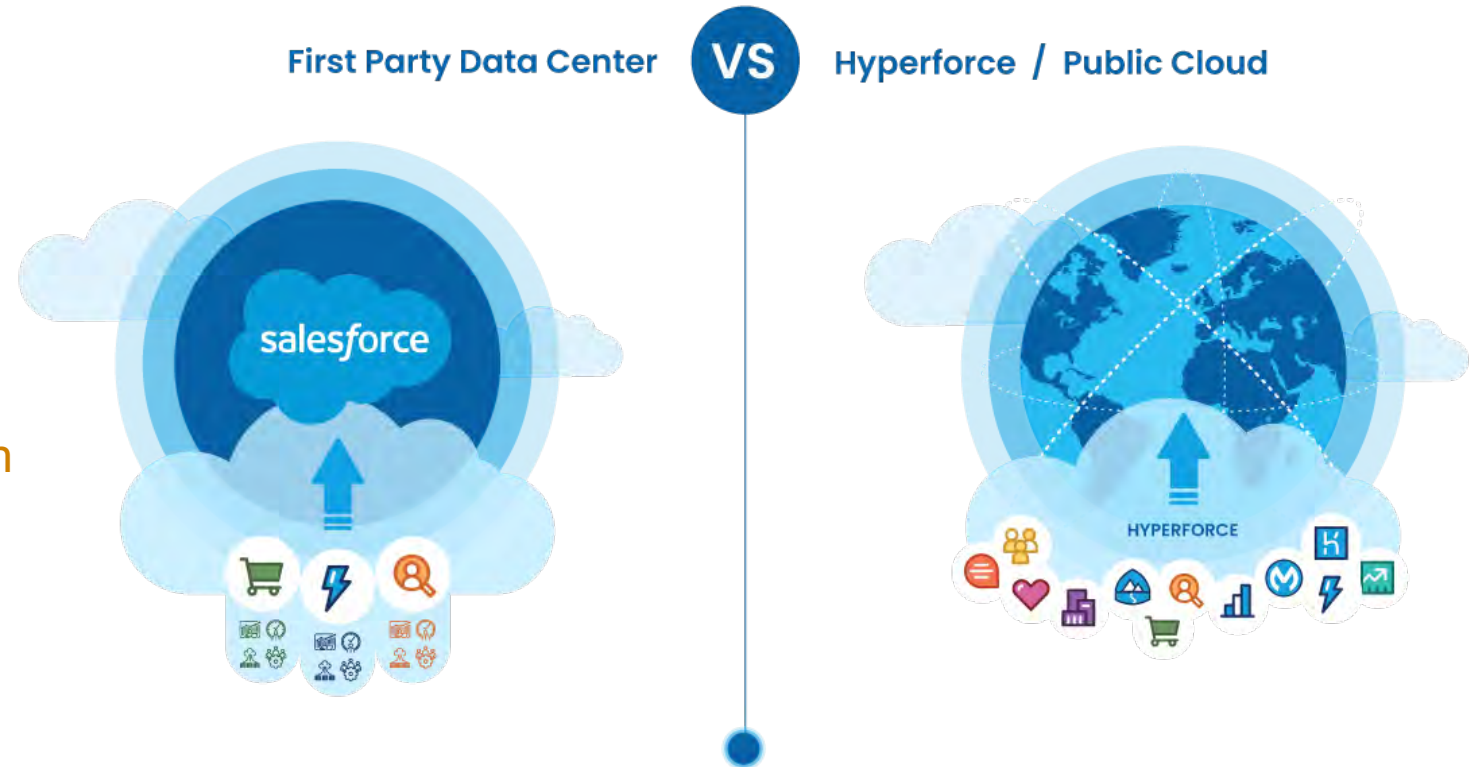


More Salesforce Administrator Focused



Migrate to Hyperforce with the Assistant

- Hyperforce Assistant is now available to help with the migration process
- Allows the platform to be deployed to your choice of cloud infrastructure providers, such as **Amazon Web Services (AWS)**, **Google Cloud Platform (GCP)** and **Microsoft Azure**
- Protects customer data and ensures compliance with industry standards and regulations. [Learn More.](#)






Permission Set Summary View

- Summary View shows all the details like the API Name, Created & Modified Date and more
- Shows what Permission Set Groups it has been added to
- Overview of Permissions that have been enabled in the permission set

Permission Set
Field Service Admin License [Video Tutorial](#) | [Help for this Page](#)

Find Settings... | Clone | Edit Properties | Manage Assignments | **View Summary (Beta)** 

Permission Set Overview

Description

License Field Service Admin License

Session Activation Required

Permission Set Groups Added To 0

Apps

Settings that apply to Salesforce app custom apps built on the Lightning Platform [Learn More](#)

System

Settings that apply across all apps, such as user management [Learn More](#)

... > SETUP > PERMISSION SET 'ACCOUNT & OPPORTUNITY ACCESS'

Account & Opportunity Access

API Name	License	Created By	Last Modified By
Account_Opportunity_Access	--	Admin User	Admin User
Namespace Prefix	Session Activation Required	Created Date	Last Modified Date
--	--	7/21/2023, 07:01 PM	7/21/2023, 07:06 PM
Permission Set Groups Added To	2		
Description	--		

Permission Set Groups Added To

Name	API Name	Status	Description
Sales Reps	Sales_Reps	Updated	PSG for Sales Rep Access - no managers
Sales Managers	Sales_Managers	Updated	Sales Managers & Sales Execs

Permissions Enabled in This Permission Set

> [User Permissions \(App & System Permissions\)](#)

Object Permissions

Object Name	Object API Name	Read	Create	Delete	Edit	Modify All Records	View All Records
Account	Account	✓	✓	✓	✓	✓	✓
Opportunity	Opportunity	✓	✓		✓		



Report on Permission Set Assignment

- Reports now allow you to see which permission sets are assigned to users, all in one view
- This would be achievable with a Custom Report Type. Utilizing the Permission Set Assignment object
- Run a report by a user or by permission set or permission set group to see who is assigned to what in one place

Report: Permission Set Assignment Report Type
Perm Set Assignments

Total Records: 5 Total User: Active: 4

<input type="checkbox"/> User: Full Name ↑ ▾	Permission Set: Permission Set Name ▾	Permission Set: Permission Set Type ▾	User: Active ▾
<input type="checkbox"/> Admin User (1)	Account_Oppportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
<input type="checkbox"/> Alyssa Admin (1)	Account_Oppportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
<input type="checkbox"/> Jose Sales Manager (2)	Sales_Managers	Group	<input checked="" type="checkbox"/>
	Account_Oppportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
<input type="checkbox"/> Leslie Sales Rep (1)	Account_Oppportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
Total (5)			4



Dynamic Forms for Standard Objects

- Dynamic Forms help display data **conditionally** and **dynamically**
- Previously only available on **custom objects**
- Now available on **standard objects**, **desktop**, and **mobile**
- Enhances experience** for the users as the page layouts will not be cluttered with unnecessary fields

The screenshot displays the Lightning App Builder interface for configuring a page layout for the 'Applicant Record Page'. The interface is divided into several sections:

- Header:** Shows 'Lightning App Builder', 'Pages', and 'Applicant Record Page'. It includes navigation icons, a 'Desktop' view selector, 'Shrink To View', and buttons for 'Analyze', 'Activation...', and 'Save'.
- Components Panel:** Located on the left, it shows 'Fields' as the active component. It includes a search bar and a list of available fields:
 - Fields Components (1):** Field Section
 - Universally Required Fields (0):** No fields available.
 - Fields (36):** A list of 36 fields including Age, Applicant ID, Applicant Source, Certifications Earned, Created By, Current Employer, Current Title, and Date of Birth.
- Main Canvas:** Shows a preview of the 'Applicant Record Page' layout. It features a 'Details' section with a 'Fields' list and a 'Related' section. A 'Dynamic Form' component is visible, displaying a form for 'Applicant Source' with fields like Name, Location, and Manager Experience.
- Right Sidebar:** Contains configuration options for the page:
 - Page:** Label (Applicant Record Page), Developer Name (Applicant_Record_Page).
 - Page Type:** Record Page.
 - Object:** Applicant.
 - Template:** Header and Right Sidebar (with a 'Change' button).
 - Description:** A text area for the page description.



API Names in Permission Sets

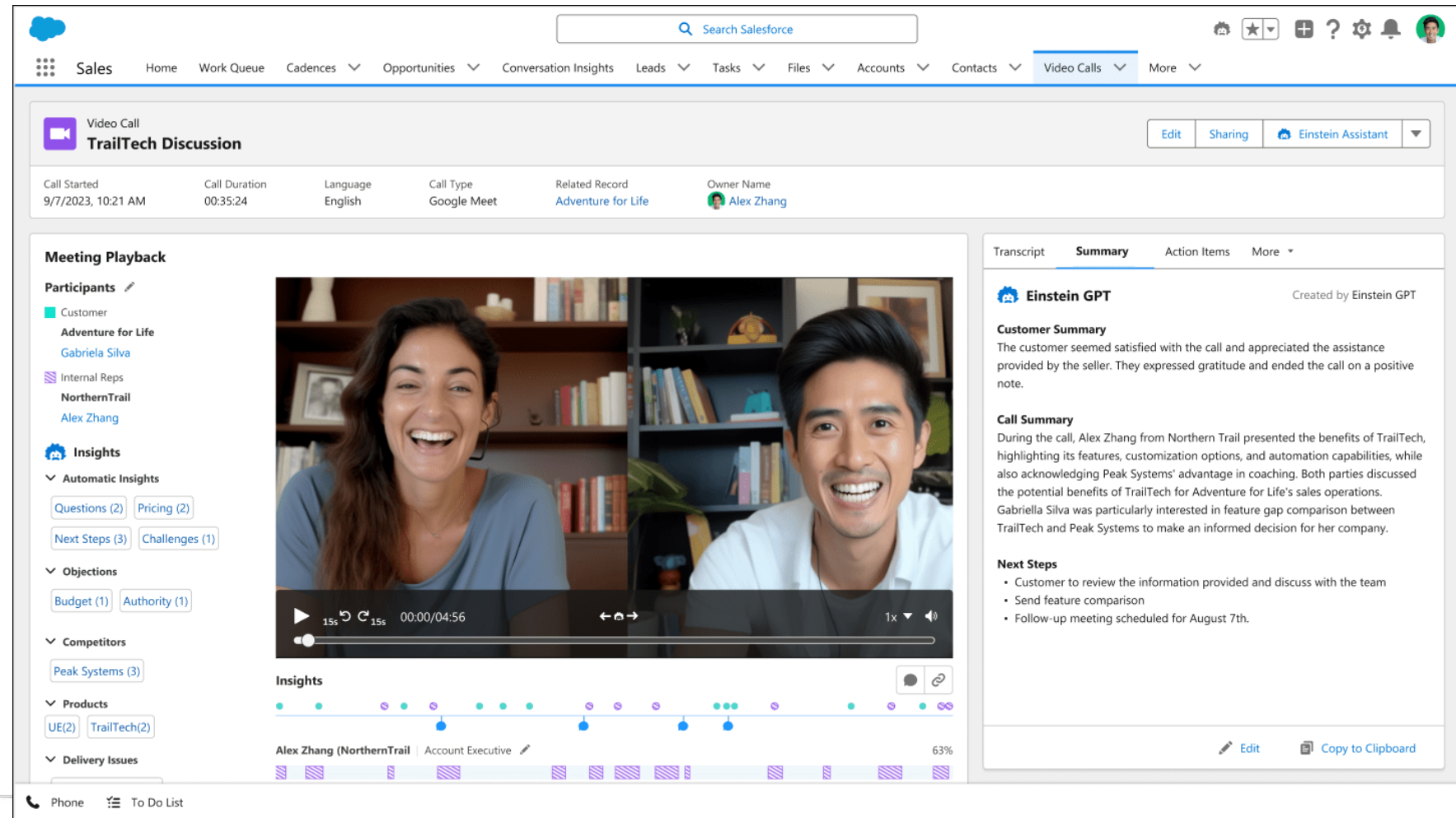
- You can now see API Names of Object and Field Permissions when configuring the Permission Sets
- This was an issue when admins were assigning objects in a permission set and two objects had the same label
- Admin experience with this update makes it easier to navigate and use permission sets

Object Name	Object API Name
Accounts	Account
App Analytics Query Requests	AppAnalyticsQueryRequest
Asset Relationships	AssetRelationship
Assets	Asset
Associated Locations	AssociatedLocation
Authorization Form Consents	AuthorizationFormConsent
Authorization Form Data Uses	AuthorizationFormDataUse
Authorization Forms	AuthorizationForm
Authorization Form Texts	AuthorizationFormText
Background Operations	BackgroundOperation
Badges	WorkBadgeDefinition
Badges Received	WorkBadge
Business Brands	BusinessBrand
Campaign Influence	CampaignInfluence
Campaign Members	CampaignMember
Campaigns	Campaign
Cases	Case
Communication Subscription Channel Types	CommSubscriptionChannelType
Communication Subscription Consents	CommSubscriptionConsent
Communication Subscriptions	CommSubscription
Communication Subscription Timings	CommSubscriptionTiming
Contact Point Addresses	ContactPointAddress
Contact Point Consents	ContactPointConsent



Create Call Summaries Powered by Einstein GPT

- Einstein can use its **generative AI talents** to write post call summaries on voice and video calls
- Will display in the **Summary tab** and includes next steps and customer feedback



The screenshot shows the Salesforce interface for a video call summary. The call is titled "TrailTech Discussion" and was held on 9/7/2023 at 10:21 AM. The call duration was 00:35:24, and the language was English. The call type was Google Meet, and the related record was "Adventure for Life". The owner name is Alex Zhang.

The interface includes a "Meeting Playback" section with a video player showing two participants: a customer (Gabriella Silva) and an internal rep (Alex Zhang). The video player has a progress bar and a play button. Below the video player is an "Insights" section with a timeline showing various topics discussed during the call, such as Questions, Pricing, Next Steps, Challenges, Objections, Budget, Authority, Competitors, Products, and Delivery Issues.

The "Summary" tab is selected, showing a summary generated by Einstein GPT. The summary is titled "Einstein GPT" and was created by Einstein GPT. It includes a "Customer Summary" and a "Call Summary".


Customer Summary
 The customer seemed satisfied with the call and appreciated the assistance provided by the seller. They expressed gratitude and ended the call on a positive note.

Call Summary
 During the call, Alex Zhang from Northern Trail presented the benefits of TrailTech, highlighting its features, customization options, and automation capabilities, while also acknowledging Peak Systems' advantage in coaching. Both parties discussed the potential benefits of TrailTech for Adventure for Life's sales operations. Gabriella Silva was particularly interested in feature gap comparison between TrailTech and Peak Systems to make an informed decision for her company.

Next Steps

- Customer to review the information provided and discuss with the team
- Send feature comparison
- Follow-up meeting scheduled for August 7th.

The summary also includes an "Edit" button and a "Copy to Clipboard" button.



Meeting
2 min ago | Today

Created by Einstein GPT

B I U C
☰ ☰ ☰ ☰
↵

Customer Feedback

The customer seemed satisfied with the call and appreciated the assistance provided by the seller. They expressed gratitude and ended the call on a positive note.

Call Summary


During the call, Sam Rhodes from Salesforce presented the benefits of Salesforce Unlimited, highlighting its features, customization options, and automation capabilities, while also acknowledging Microsoft's advantage in coaching. Both parties discussed the potential benefits of Salesforce Unlimited for Adventure for Life's sales operations.

Next Steps


- Customer to review the information provided and discuss with the team
- Finalize decision on plan options
- Follow-up meeting scheduled for August 7th.

Cancel

Save



Opportunity
Adventure for Life

Account Name	Close Date	Amount	Opportunity Owner
Adventure for Life	5/20/23	\$230,000.00	 Sam Rhodes

>

✓

✓


✓

✓


✓

Proposal/Pric

Details
Related



Call Summaries (12)




Meeting with Lauren Bailey

2 min ago | Today

Purpose

This call was to discuss the product features of Trail Trekker and identify any gaps with Alpine Adventure, which the client uses currently, in hopes of potentially migrating to Trail Trekker

Expand



Pricing Questions

10:00am | 5/3/23

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Salesforce Backup & Restore

- Protect CRM data against permanent data loss and corruption with daily backups and the ability to restore data from backup
- An integration or user error may cause data loss or corruption in your org, but Backup & Restore can restore lost or corrupted data from a prior backup

Backup and Restore

Home Backup Restore Logs Settings

Backup and Restore

Essential Backup Configuration

- Configure your settings [View](#)
- Make a plan [View](#)
- Create a backup policy [View](#)
- Activate your backup policy [View](#)

Log Quick View

Date	Log Number	Log Name
Jul 19, 2023, 10:30:40 PM	180	RESTORE_POLICY_EXECUTION_COMPLETE
Jul 19, 2023, 10:30:20 PM	179	RESTORE_REQUEST_EXECUTION_STARTED
Jul 19, 2023, 10:30:14 PM	178	RESTORE_POLICY_ENQUEUE_SUCCESSFUL
Jul 19, 2023, 10:22:49 PM	177	RESTORE_POLICY_EXECUTION_COMPLETE
Jul 19, 2023, 10:22:30 PM	176	RESTORE_REQUEST_EXECUTION_STARTED
Jul 19, 2023, 10:22:07 PM	175	RESTORE_POLICY_ENQUEUE_SUCCESSFUL
Jul 19, 2023, 10:15:59 PM	174	RESTORE_POLICY_EXECUTION_COMPLETE

[Learn More](#)

Guidance

Prioritize Your Data

Talk with your team to identify high, medium, and low-priority data for backup. Then identify and list the objects that contain that data. Consider backing up your high-priority data first.

Initial backup can take a while. Working in batches can save you time.

[Learn More](#)

Guidance

Review Permissions

After you make a prioritized list of objects, make sure that integration and manual users can access them. Backup and Restore respects object access rules and only runs on objects that you have permission to access.

[Learn More](#)

Guidance

Understanding Logs

You can review logs for all backups. When the service can't back up an object, the most common issue is that the user who initiates the backup doesn't meet one or more of the required access conditions.

[Learn More](#)

Armanino Led Salesforce Virtual Classes

Whether you have new employees that need to get up to speed quickly, or simply need to learn more about the features and functionality of Salesforce, check out our [Armanino Academy!](#)





Additional Questions?

Reach out to us at

Experts@armaninoLLP.com