October 4, 2023

Latest Updates in the Salesforce 2024 Winter Release

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MEET

Our Presenters

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Industry Experience: 10 years

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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

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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

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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

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More Salesforce User Focused

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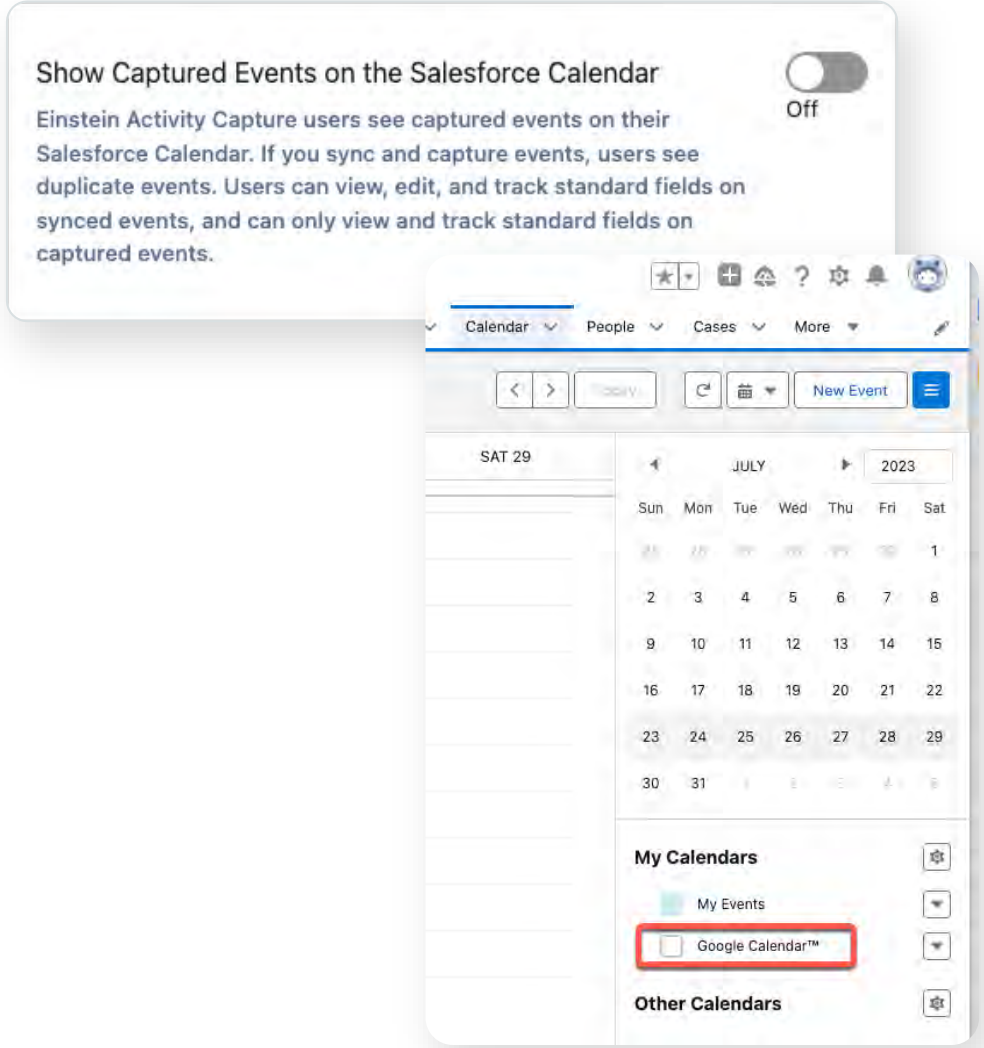
Display Only Salesforce Events on Calendar

- 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



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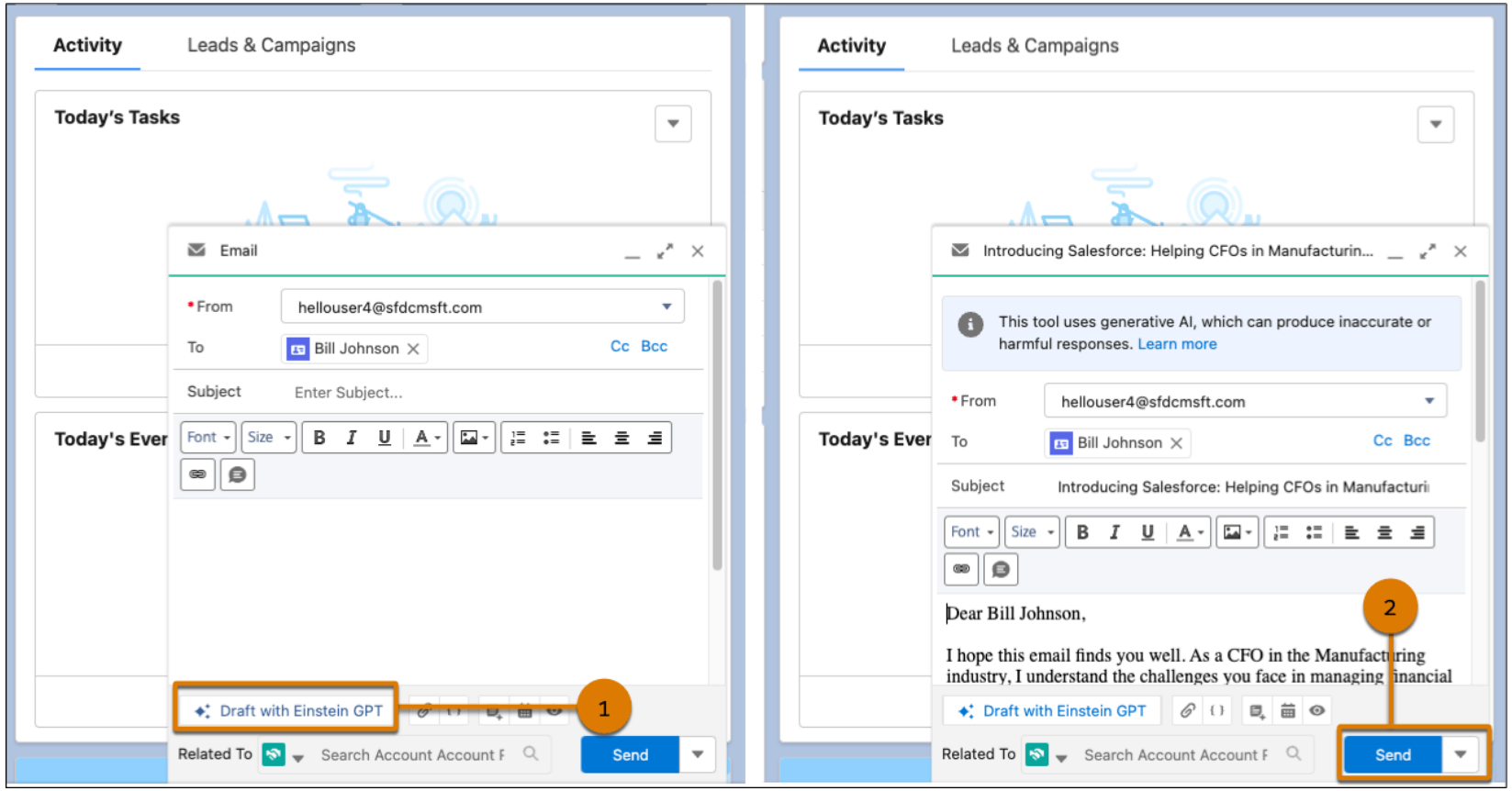
Personalize Sales Emails with Einstein GPT for Sales

- 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



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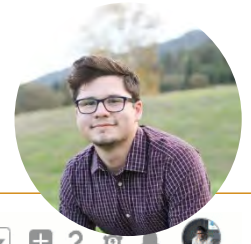
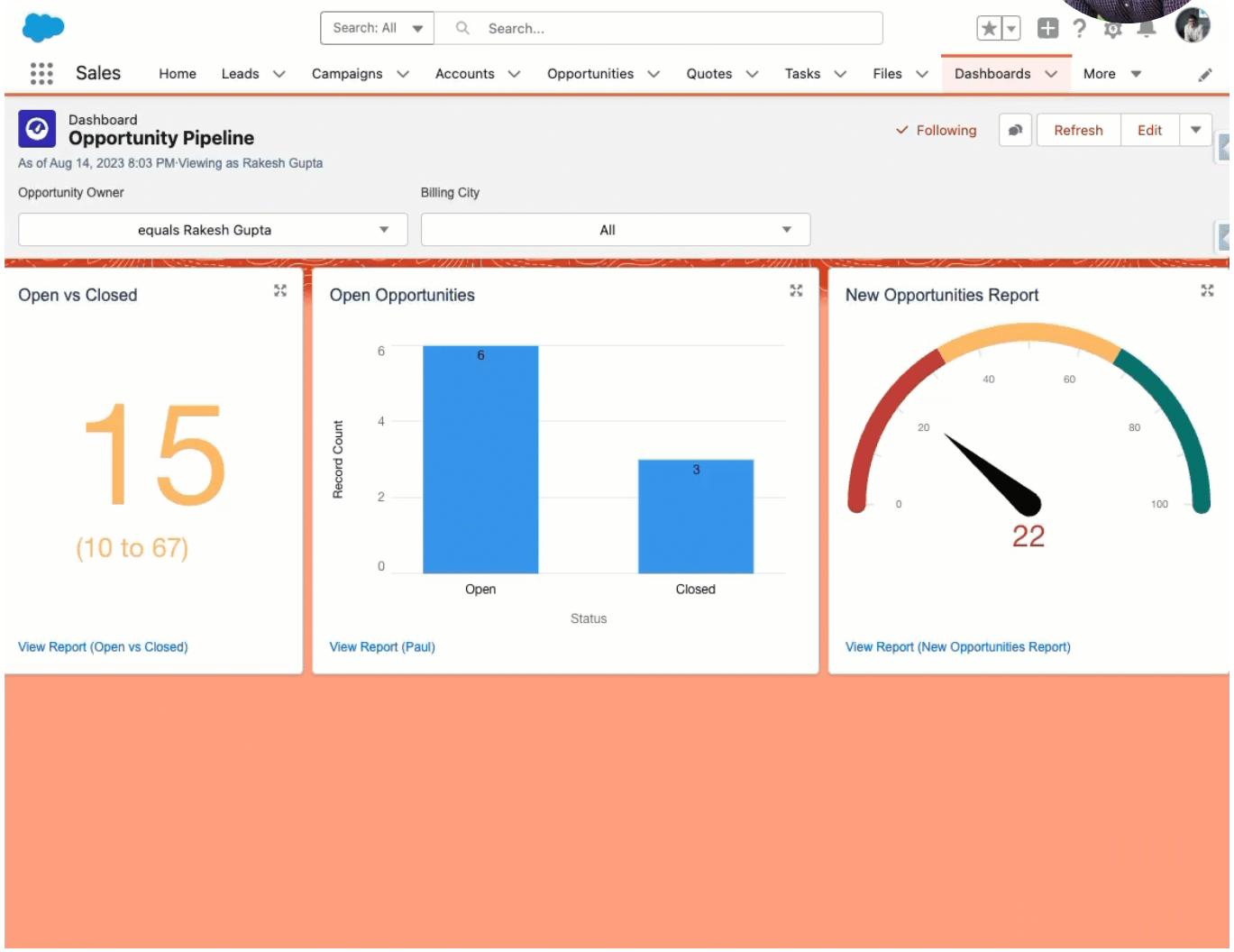


Transfer Dashboard Ownership

- 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



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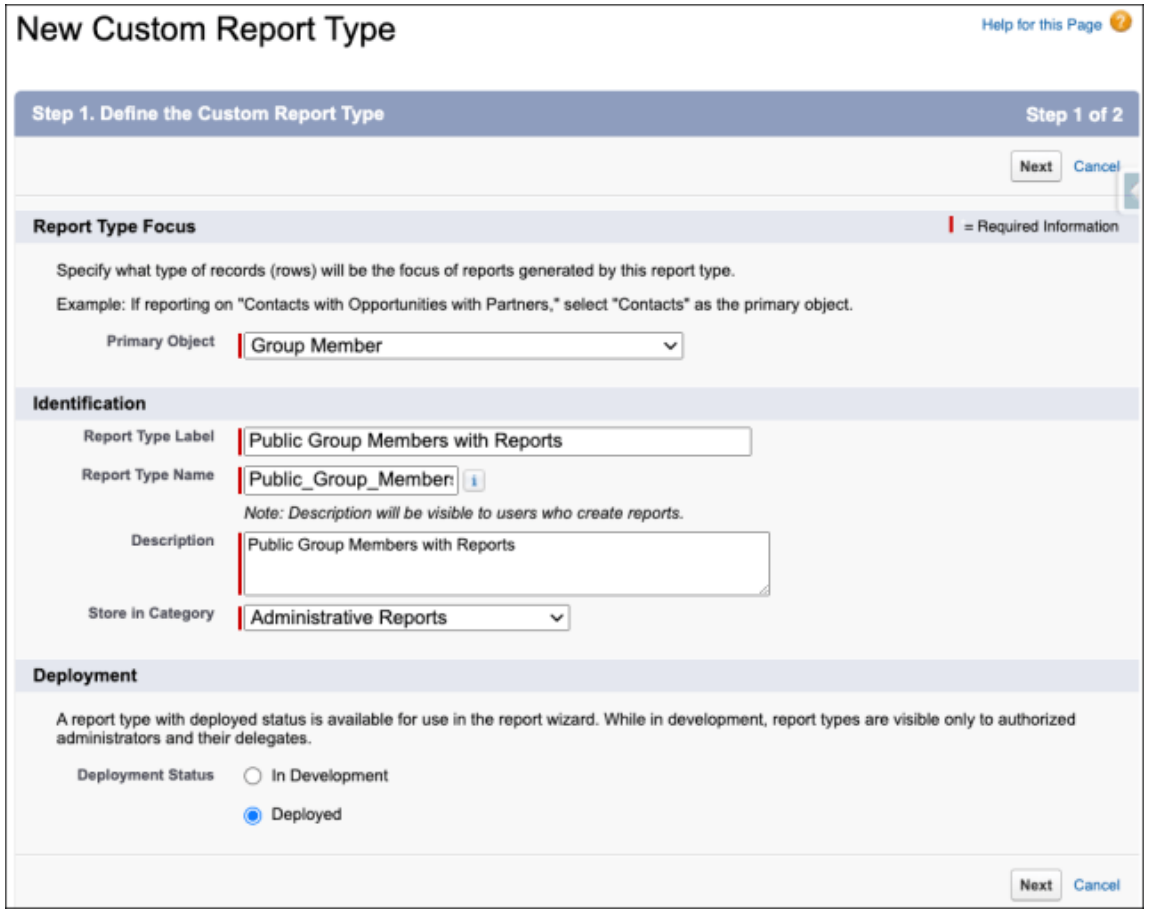
Report on Members of a Public Group and Queue

- 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 SQQL Queries to review the data
- Managers will easily be able to move reps in and out of queues and groups



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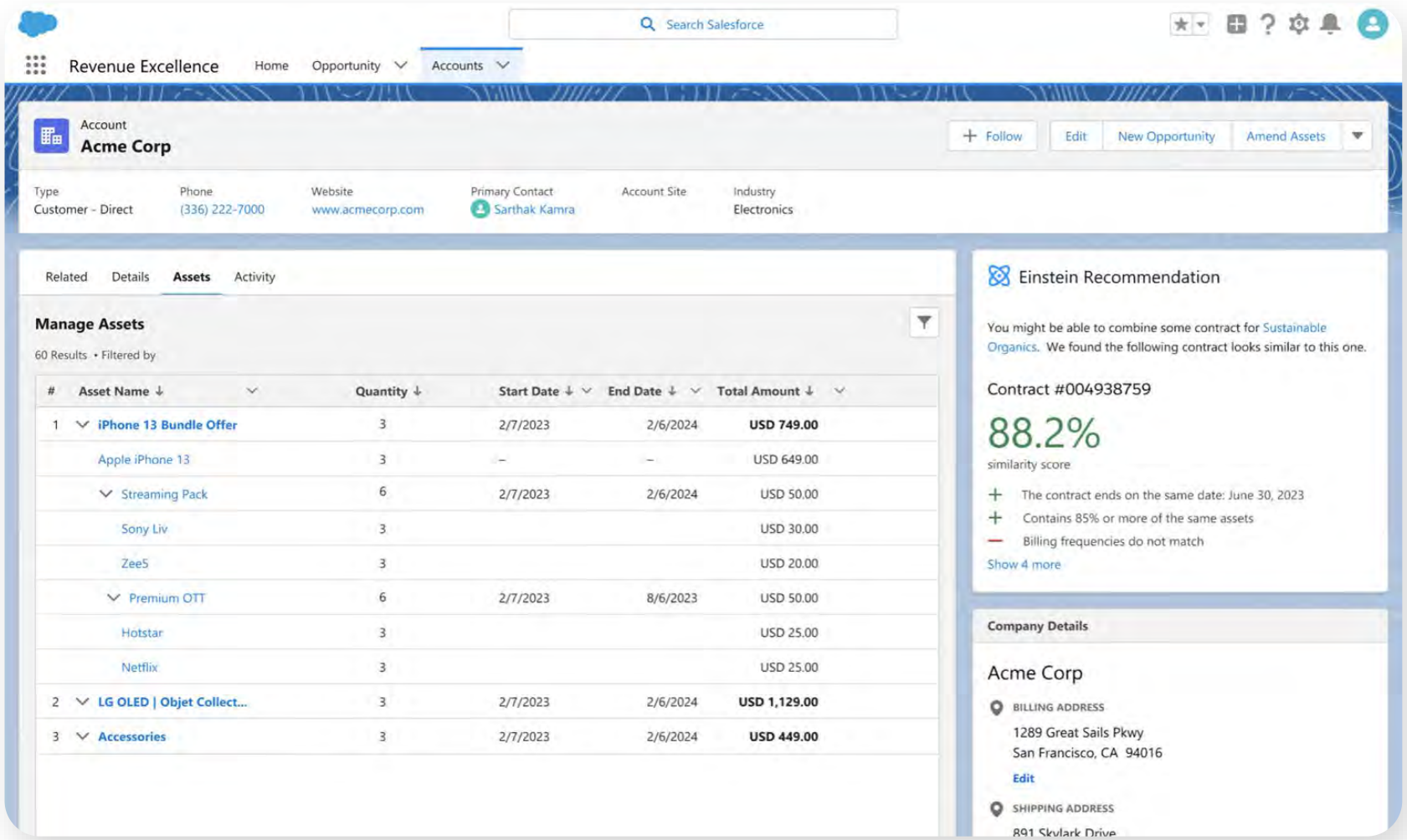
Asset Hierarchy

- 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



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More Salesforce Administrator Focused

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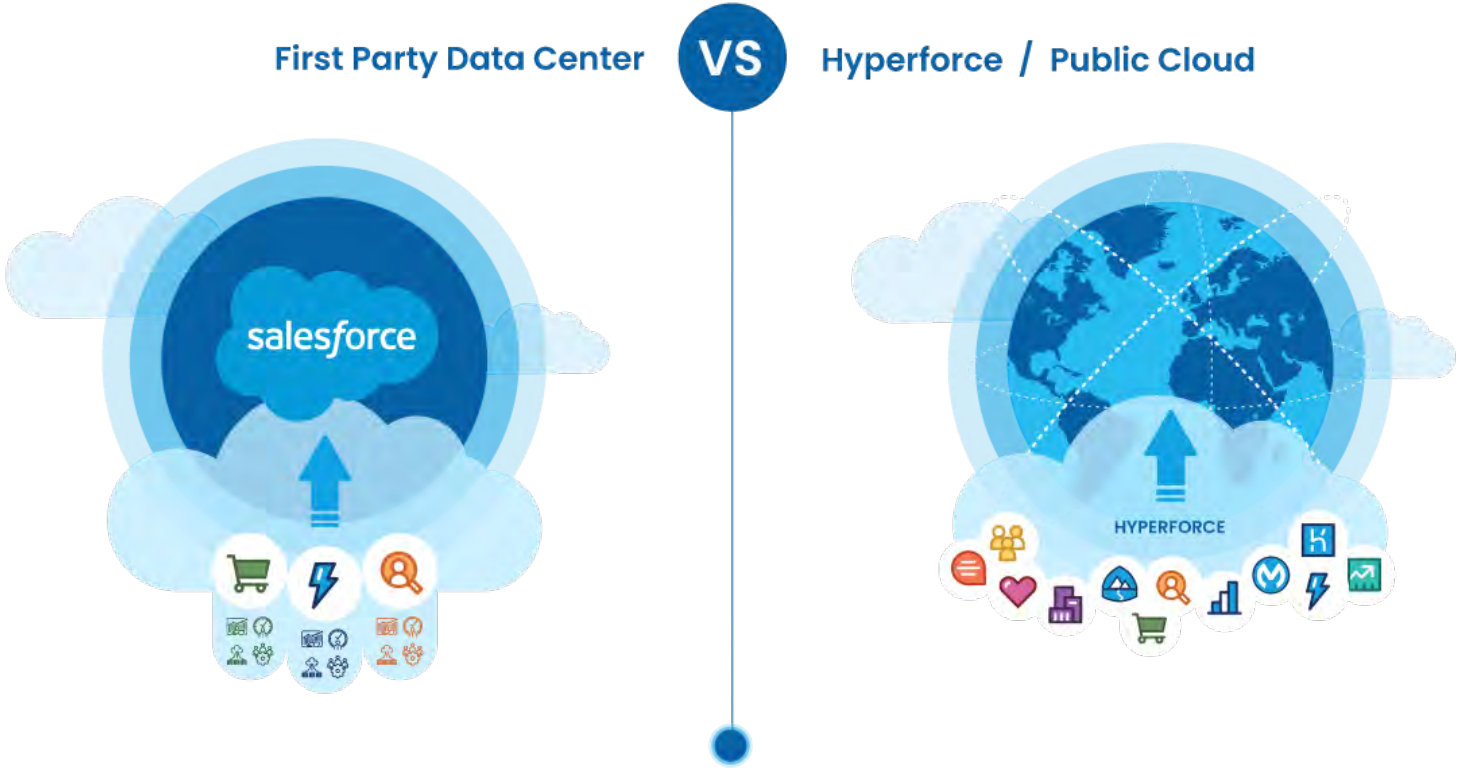
Migrate to Hyperforce with the Assistant

- 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.



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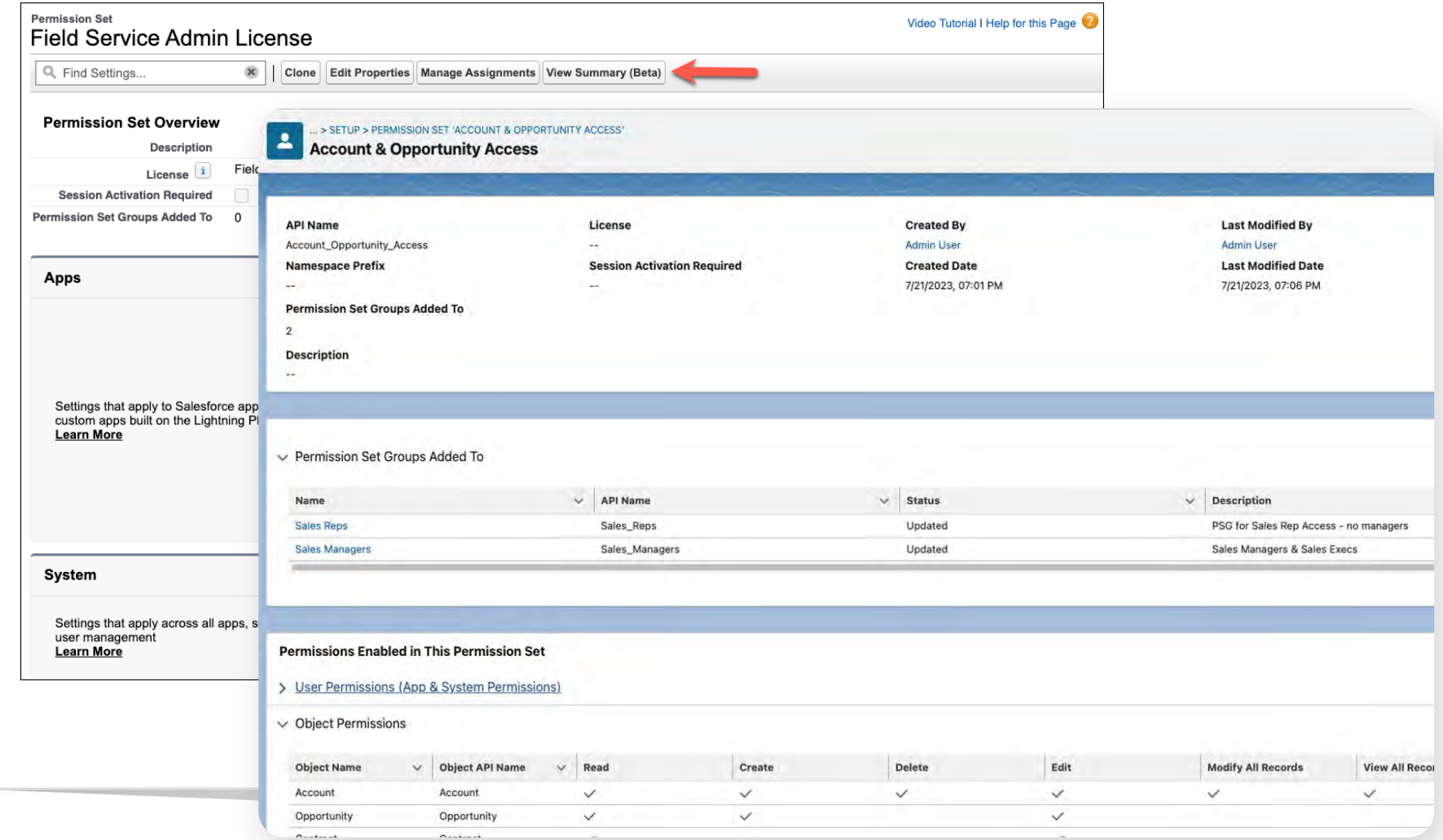
Permission Set Summary View

- 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



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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	Total User: Active
5	4

User: Full Name	Permission Set: Permission Set Name	Permission Set: Permission Set Type	User: Active
Admin User (1)	Account_Opportunity_Access	Regular	☑
Subtotal			1
Alyssa Admin (1)	Account_Opportunity_Access	Regular	☑
Subtotal			1
Jose Sales Manager (2)	Sales_Managers	Group	☑
	Account_Opportunity_Access	Regular	☑
Subtotal			1
Leslie Sales Rep (1)	Account_Opportunity_Access	Regular	☑
Subtotal			1
Total (5)			4

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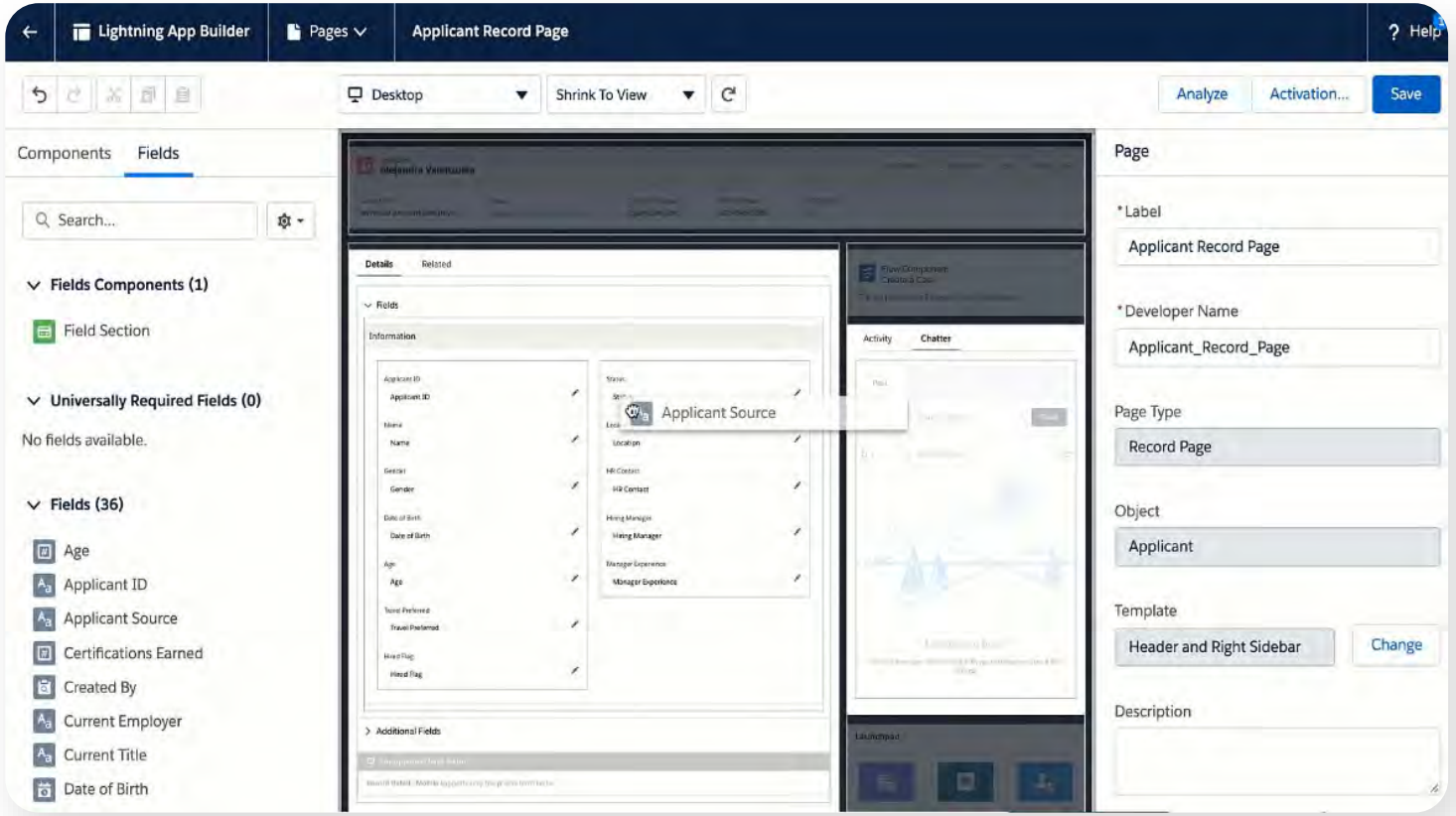
Dynamic Forms for Standard Objects

- 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



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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 Settings

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

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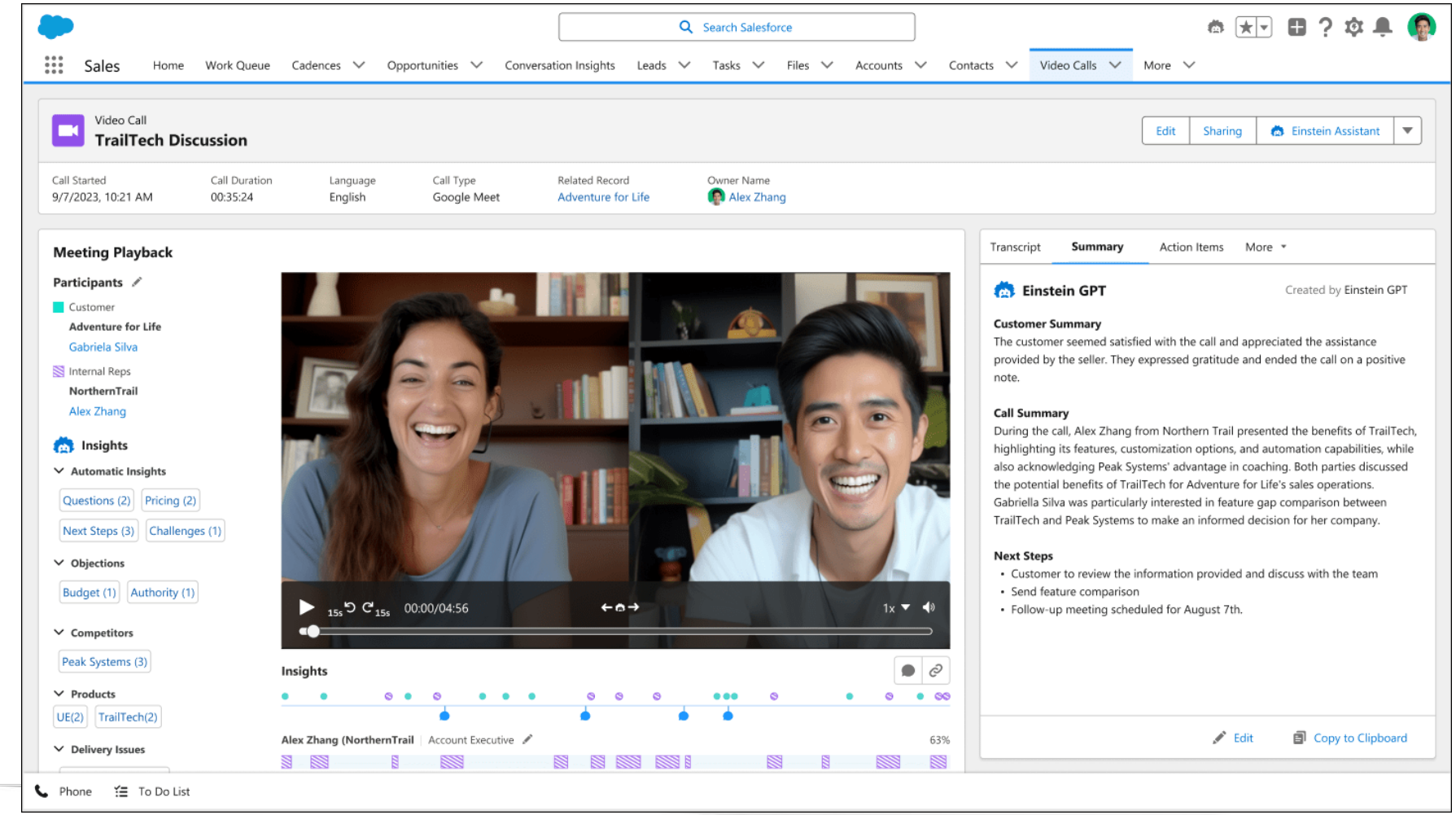
Create Call Summaries Powered by Einstein GPT

- Einstein can use it's 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



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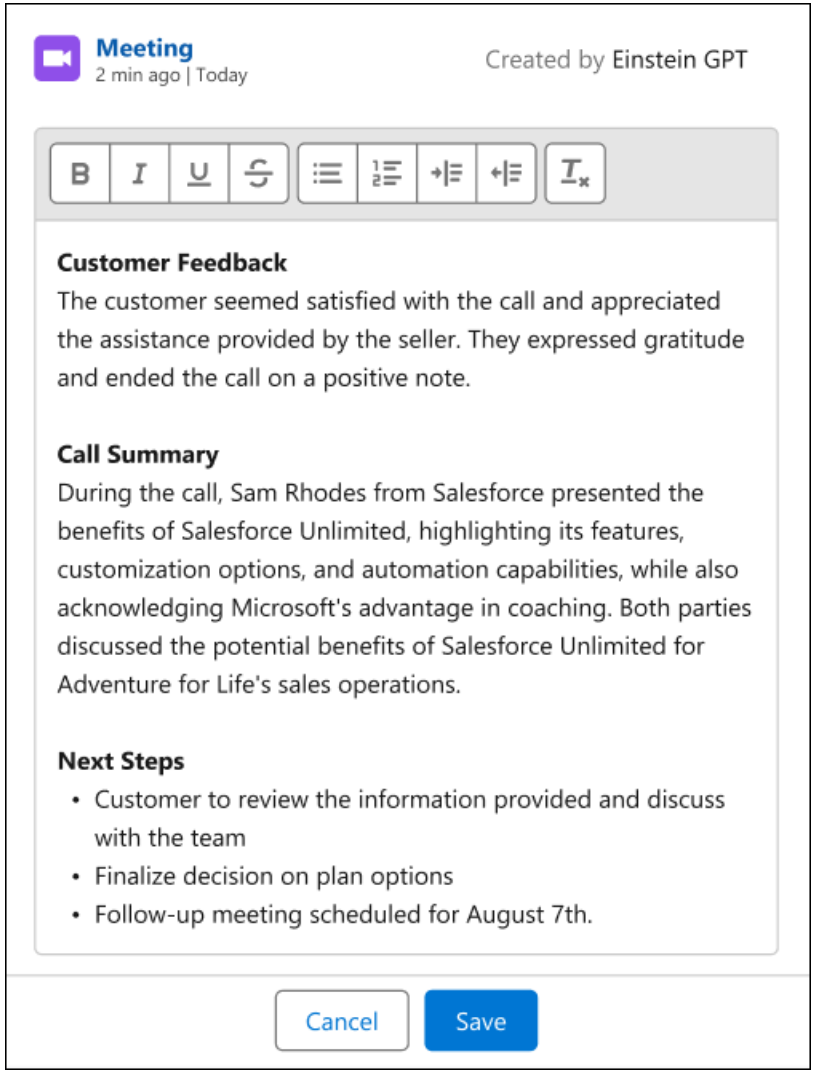

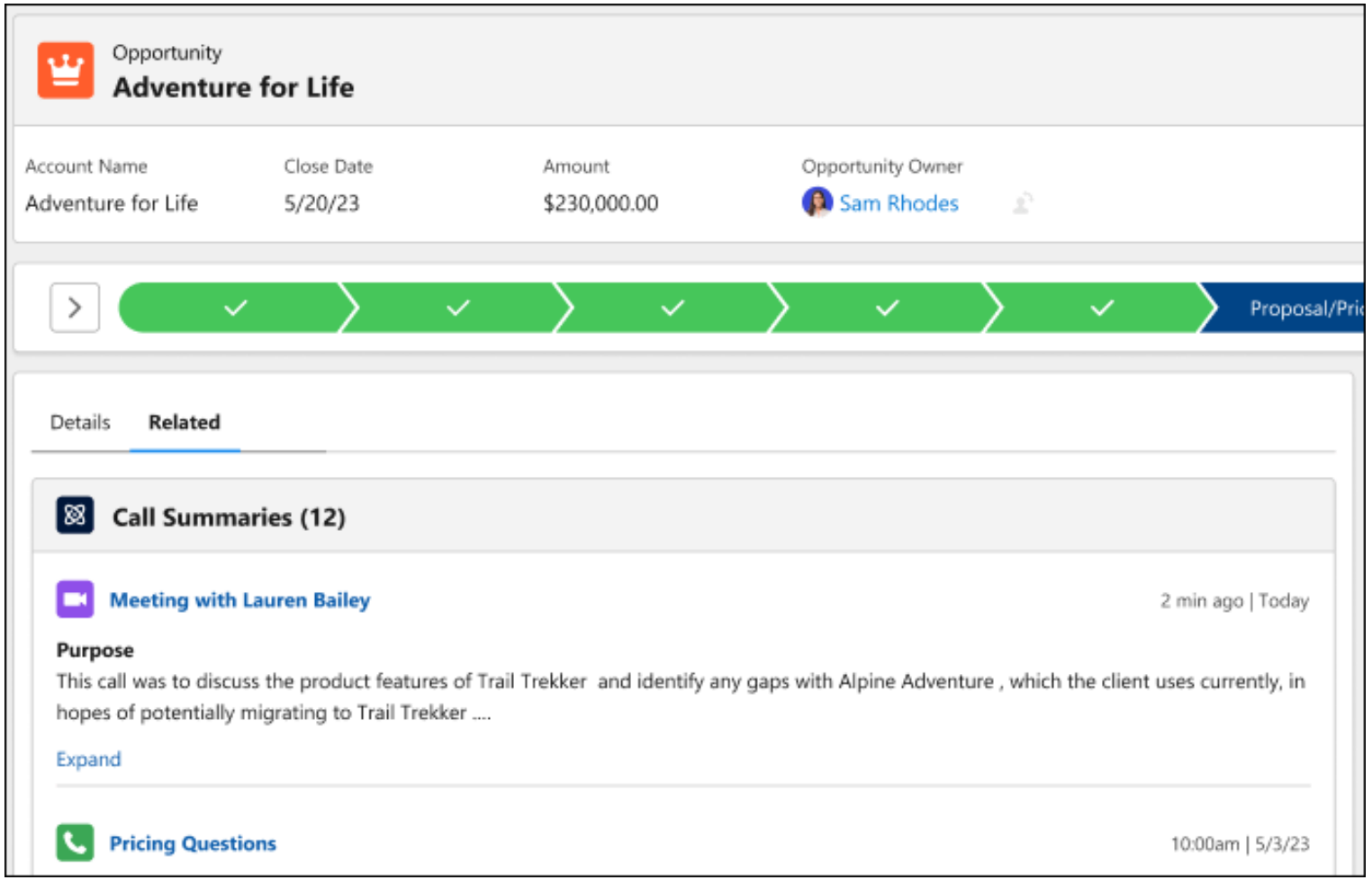

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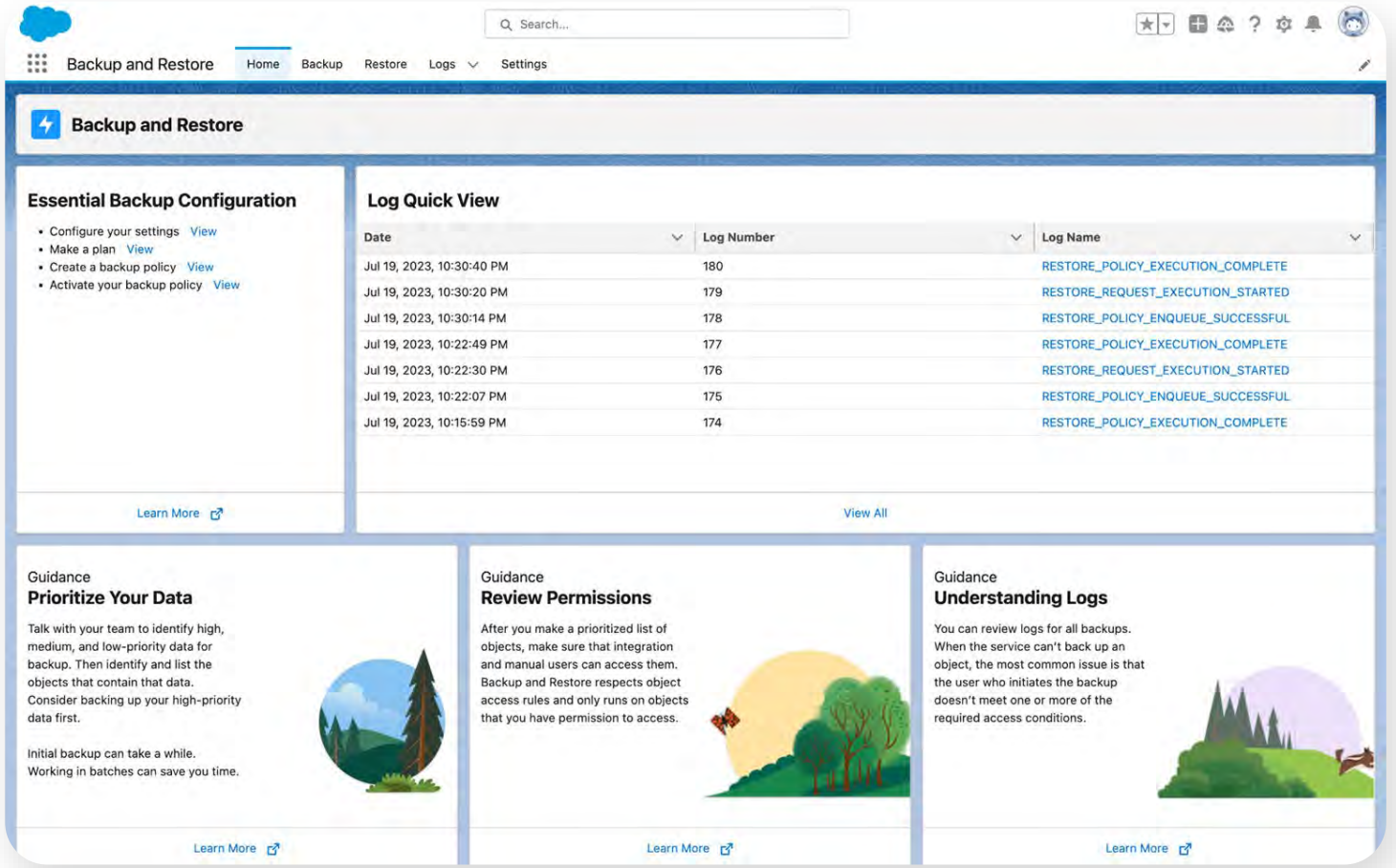
Salesforce Backup & Restore

- 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



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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

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