

February 23, 2023

Latest Updates in the Salesforce 2023 Spring Release





QUICK TIPS

Zoom Webinars

Ask Questions in Q&A Box

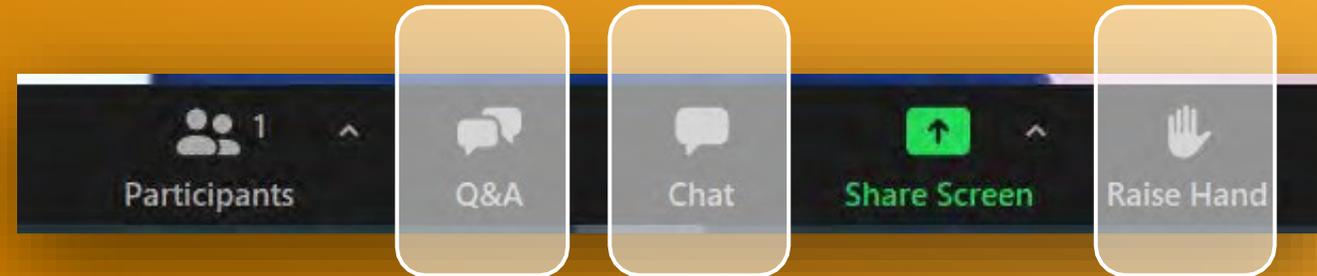
- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

Chat

- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

Raise Your Hand

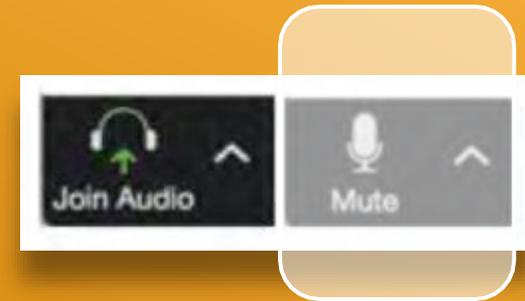
- Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance
- To lower your hand, click the Lower Hand button





QUICK TIPS

Adjust Audio Speakers

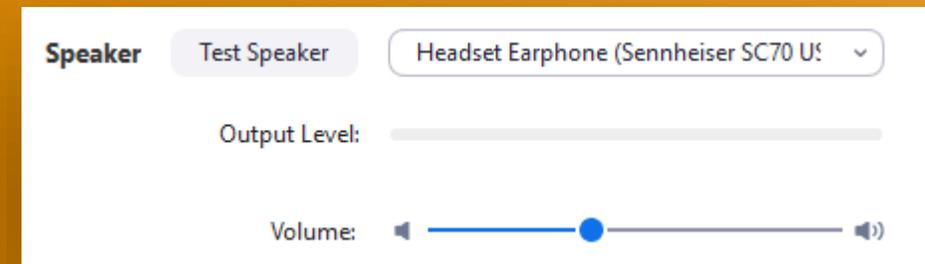


Mute | Unmute

- In the meeting controls, click the arrow next to Mute | Unmute in lower left corner

Audio Options

- Click Audio Options - this will open your audio settings
- Click Test Speaker to play a test tone
- If you cannot hear it, select a different speaker from the menu
- Try adjusting the Volume



MEET

Our Presenters



Turner Jones

Manager,
Armanino Advisory LLC
Industry Experience: 10 years



Mark Forman

Senior Consultant,
Armanino Advisory LLC
Industry Experience: 10 years



KNOWLEDGE

Learning Objectives



Explore the new release features and updates



Learn more about new enhancements that can improve your lead-to-cash cycle



Understand how to manage the latest release to maximize productivity

#1 Polling Question

#2
Polling Question



Exploring New Areas

Agenda – User Focused

- Import contacts and leads with a guided experience
- Subscribe to more reports and dashboards
- Personalized report filters
- Dynamic activity composer
- Collections for reports and dashboards





Exploring New Areas

Agenda – Admin Focused

- Permission sets that display field-level security
- Upgraded migrate to flow tool
- Field history tracking on events and tasks
- Picklist updates
- Dynamic forms for leads and cases



More Salesforce User Focused



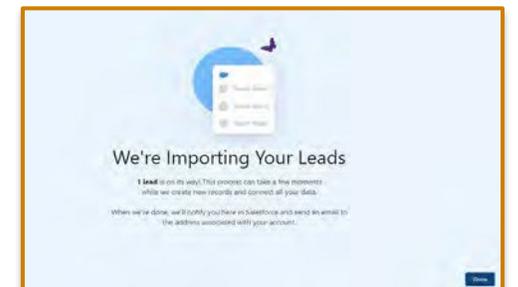
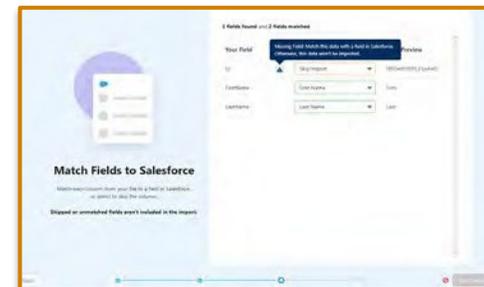
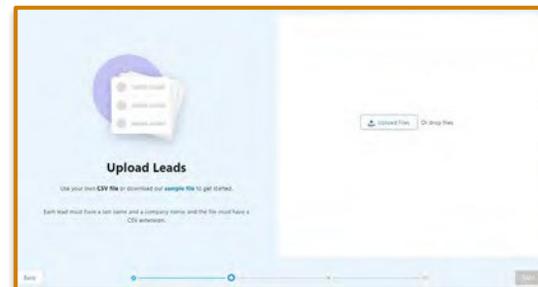
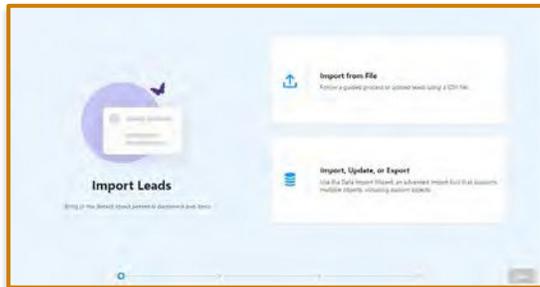
Import Contacts and Leads With a Guided Experience

Basic Data Import

Give users a guided process to select how they want to import contacts and leads into Salesforce.

Enable Basic Data Import

When users select to import contacts or leads, they're shown options to use a CSV file or the Data Import Wizard. If users are in an Einstein Activity Capture configuration that allows contact syncing, they can choose to sync contacts from their connected email or calendar account.





Import Leads

Bring in the details about potential customers and deals.

Import from File
Follow a guided process to upload leads using a CSV file.

Import, Update, or Export
Use the Data Import Wizard, an advanced import tool that supports multiple objects, including custom objects.

[Learn](#)

Upload Leads

Use your own **CSV file** or download our **sample file** to get started.

Each lead must have a last name and a company name, and the file must have a CSV extension.

[Upload Files](#) Or drop files

[Next](#)

Match Fields to Salesforce

Match each column from your file to a field in Salesforce, or select to skip the column.

Skipped or unmatched fields aren't included in the import.

3 fields found and 2 fields matched

Your Field	Preview
Id	0035e0000L25puAAD
FirstName	First
LastName	Last

Missing Field: Match this data with a field in Salesforce. Otherwise, this data won't be imported.

Id:

[Skip Import](#)

We're Importing Your Leads

1 lead is on its way! This process can take a few moments while we create new records and connect all your data.

When we're done, we'll notify you here in Salesforce and send an email to the address associated with your account.

[Done](#)



Subscribe to more reports and dashboards

Settings

Frequency

Days

Time

10:00 AM

Attachment

Recipients

Send email to
Me, Sarah Lewis

Run Report As

Me
 Another Person

Conditions

In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency

Days

Time

8:00 AM

Recipients

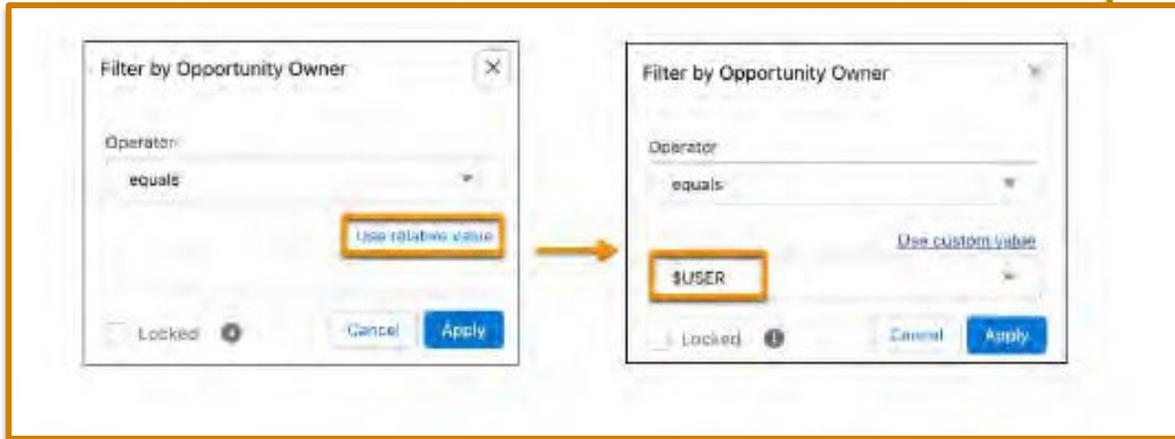
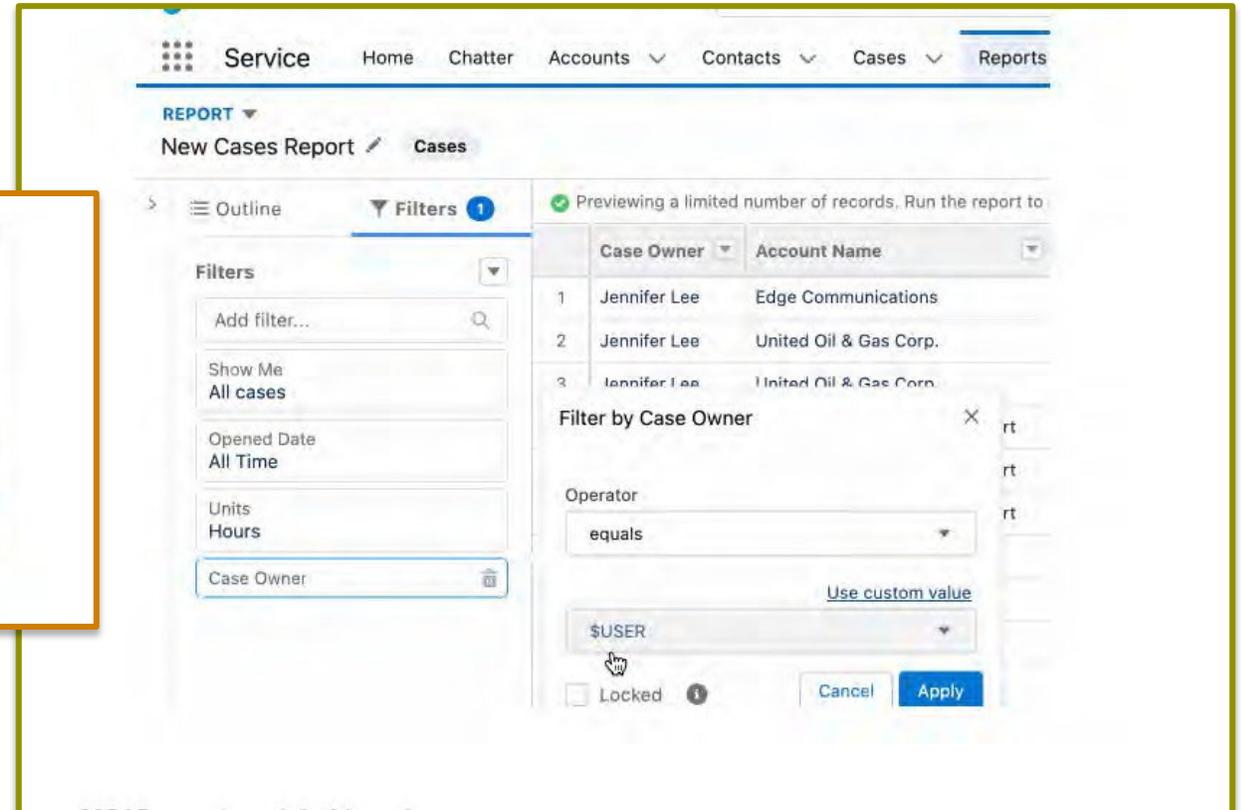
Receive new results by email when dashboard is refreshed. ⓘ

Send email to
Me

7 to 15



Personalized Report Filters

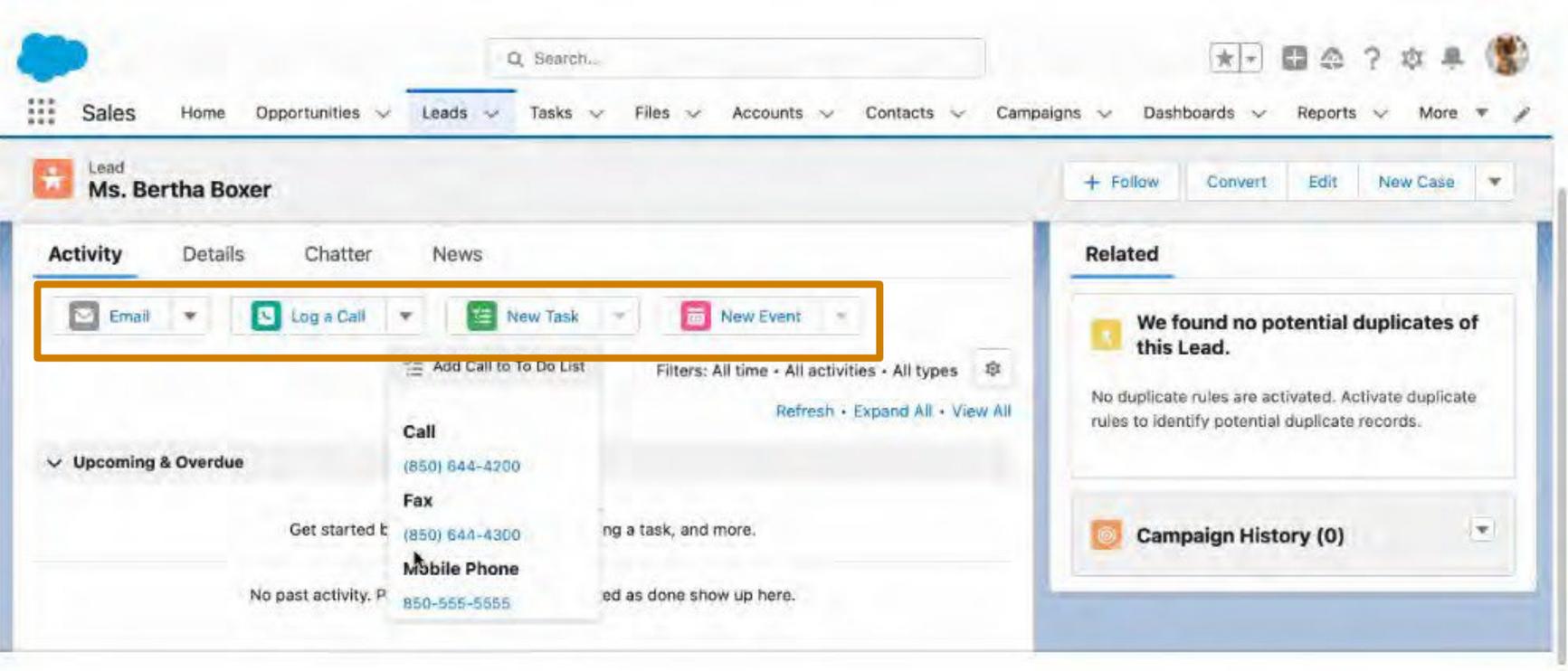



The screenshot shows the Salesforce Reports interface for "New Cases Report". The "Filters" section on the left lists several filters, with "Case Owner" selected. The "Filter by Case Owner" dialog is open, showing the "Operator" set to "equals" and the value field containing "\$USER".

Case Owner	Account Name
1 Jennifer Lee	Edge Communications
2 Jennifer Lee	United Oil & Gas Corp.
3 Jennifer Lee	United Oil & Gas Corp.



Dynamic Activity Composer



The screenshot displays a CRM interface for a lead named Ms. Bertha Boxer. The 'Activity' tab is selected, and a dynamic activity composer is highlighted with an orange box. The composer includes buttons for 'Email', 'Log a Call', 'New Task', and 'New Event'. Below the composer, there are sections for 'Upcoming & Overdue' and 'Related' information.

Activity Details Chatter News

Related

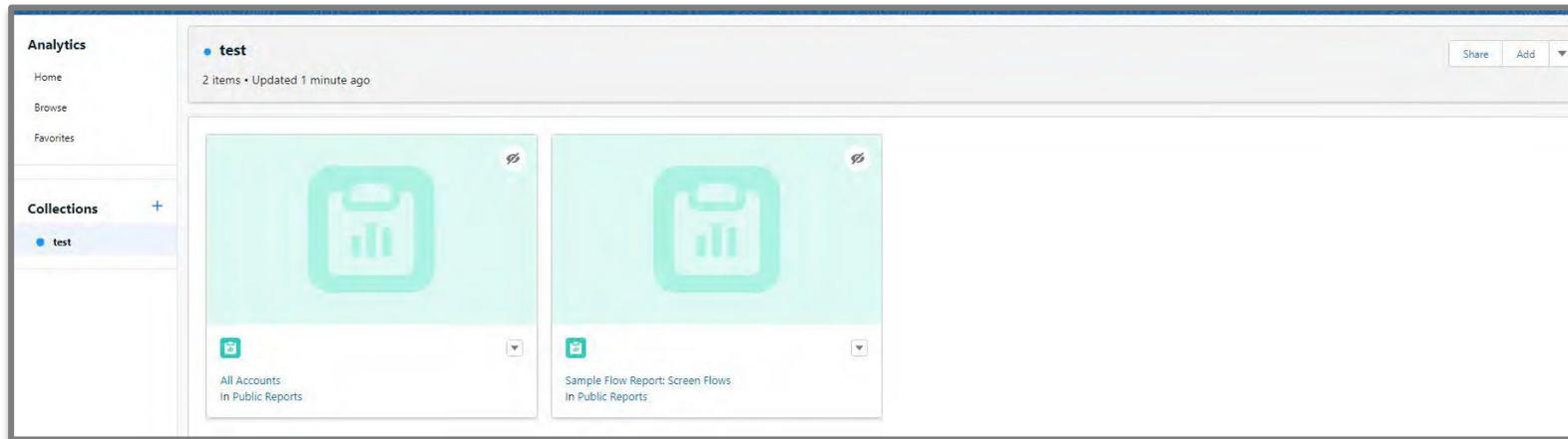
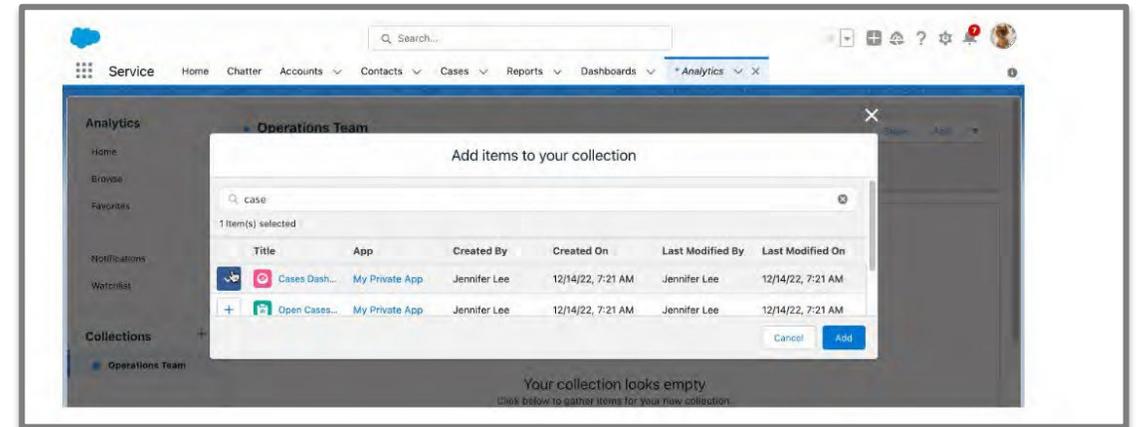
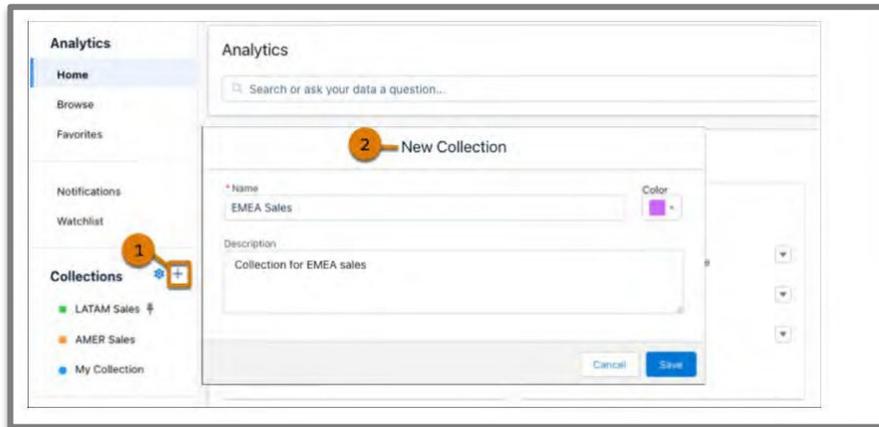
We found no potential duplicates of this Lead.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Campaign History (0)



Collections for Reports and Dashboards



More Salesforce Administrator Focused



Permission Sets that display field-level security

Field-Level Security for Permission Sets during Field Creation (Beta)

Set field-level security for permission sets when creating or editing custom fields. When this option is enabled, you configure access to the new field for permission sets instead of profiles.



Step 3: Establish field-level security
Step 3 of 4

Previous Next Cancel

Field Label: Test Field
 Data Type: Text
 Field Name: Test_Field
 Description:

This list includes permission sets that have Create, Read, Edit or Delete access for this field's object. If no permission sets have that access for this field's object, the list includes all permission sets. Select the permission sets to which you want to grant access to this field via field-level security. If you don't select at least one permission set, this field is hidden from all permission sets.

Permission sets with object permissions

Field-Level Security for Permission Set ↑	API Name	Description	Read Access	Edit Access
			<input type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel



Upgraded Migrate to Flow Tool



SETUP

Migrate to Flow

Migrate to Flow!

We're retiring Workflow Rules and Processes in the near future. To ease your transition to Flow, we created a tool to convert your existing automations to flows. [Tell Me More](#)

Learn more about what workflow rules and processes the Migrate to Flow tool can convert. Also learn manual conversion methods for your edge cases. [Tell Me More](#)

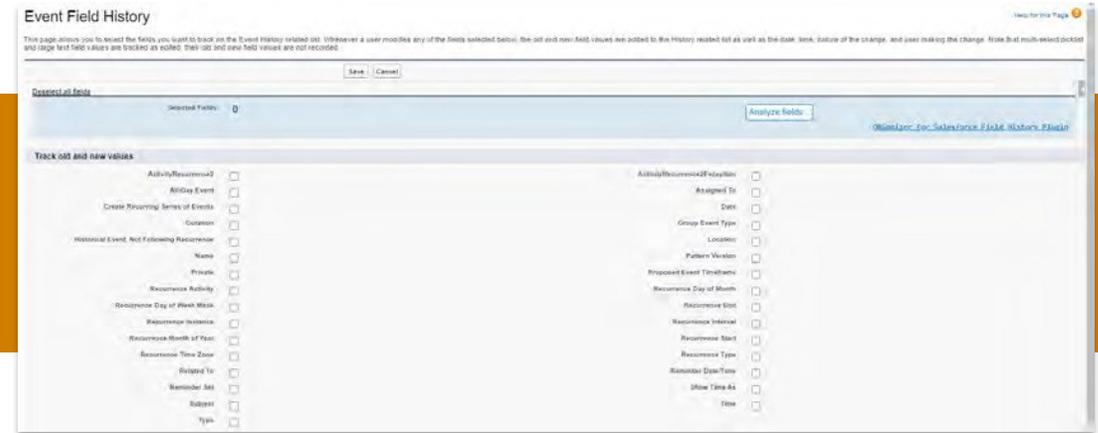
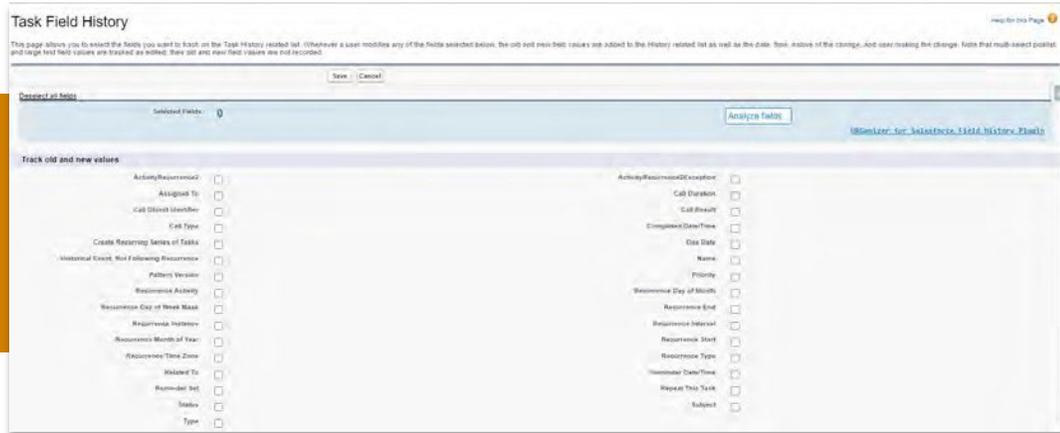


2 items • Sorted by Type
Migrate to Flow

Name	Type ↓	Object	Status	Resulting Flow
<input type="radio"/> Activate New Account	Workflow Rule	Account	Active	Activate New Account ▼
<input checked="" type="radio"/> Account Handler Proce...	Process	Account	Active	▼



Field History Tracking on Events and Tasks





Picklist Updates

- **Clean up** inactive picklist values
- **Bulk manage** picklist values
- **Capture** inclusive data with gender identity and pronouns fields

Inactive Values Delete Selected Activate Selected Replace Selected Delete Unused Values 

Action	Values	API Name	Modified By
<input type="checkbox"/> Del Activate	Urgent	Urgent	Addison Dogster , 12/14/2022 9:05 AM
<input type="checkbox"/> Del Activate	Old picklist value	Old picklist value	Addison Dogster , 12/14/2022 9:05 AM
<input type="checkbox"/> Del Activate	Obsolete picklist value	Obsolete picklist value	Addison Dogster , 12/14/2022 9:05 AM

SETUP > OBJECT MANAGER
Contact

No dependencies defined.

Validation Rules New Validation Rules Help

No validation rules defined.

Gender Identity Picklist Values New Reorder Replace Printable View Chart Colors Gender Identity Picklist Values Help

Action	Values	API Name	Default	Chart Colors	Modified By
Edt Del Deactivate	Male	Male	Assigned dynamically		Addison Dogster , 12/12/2022, 7:55 PM
Edt Del Deactivate	Female	Female	Assigned dynamically		Addison Dogster , 12/12/2022, 7:55 PM
Edt Del Deactivate	Nonbinary	Nonbinary	Assigned dynamically		Addison Dogster , 12/12/2022, 7:55 PM
Edt Del Deactivate	Not Listed	Not Listed	Assigned dynamically		Addison Dogster , 12/12/2022, 7:55 PM

Inactive Values



Dynamic Forms for Leads and Cases

The screenshot displays the Salesforce Lightning App Builder interface for configuring a dynamic form for a 'Candidate' record. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Candidate'. Below this is a toolbar with 'Desktop' view, 'Shrink To View', and 'Refresh' buttons. The main workspace shows a form layout with a 'Candidate Information' section. On the left, the 'Components' pane is open to the 'Fields' tab, showing a 'Field Section' component selected. On the right, the 'Field Section' configuration panel is visible, showing options for 'Label', 'Columns', and 'Set Component Visibility'.

#3
Polling Question

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@armanino.com

Armanino Operates in an Alternative Practice Structure:

“Armanino” is the brand name under which Armanino LLP, Armanino CPA LLP, and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.