February 23, 2023

Latest Updates in the Salesforce 2023 Spring Release

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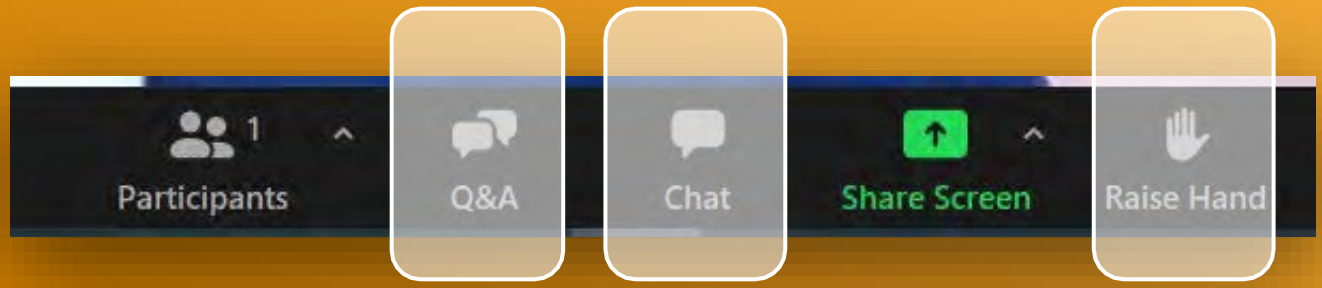
QUICK TIPS

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

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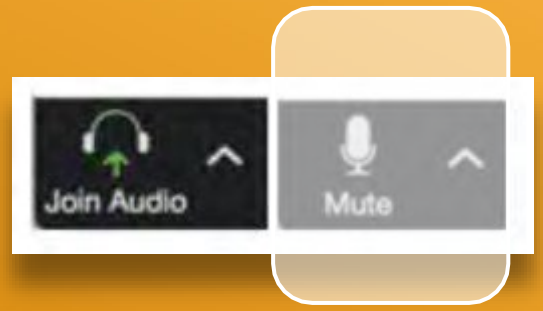
QUICK TIPS

Adjust Audio Speakers

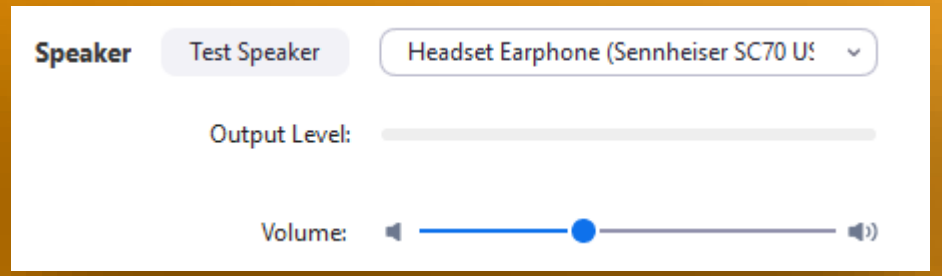


Mute | Unmute

- 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



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MEET

Our Presenters

Turner Jones

Manager,
Armanino Advisory LLC
Industry Experience: 10 years

Mark Forman

Senior Consultant,
Armanino Advisory LLC
Industry Experience: 10 years

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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

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#1

Polling Question

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#2

Polling Question

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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

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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

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More Salesforce User Focused

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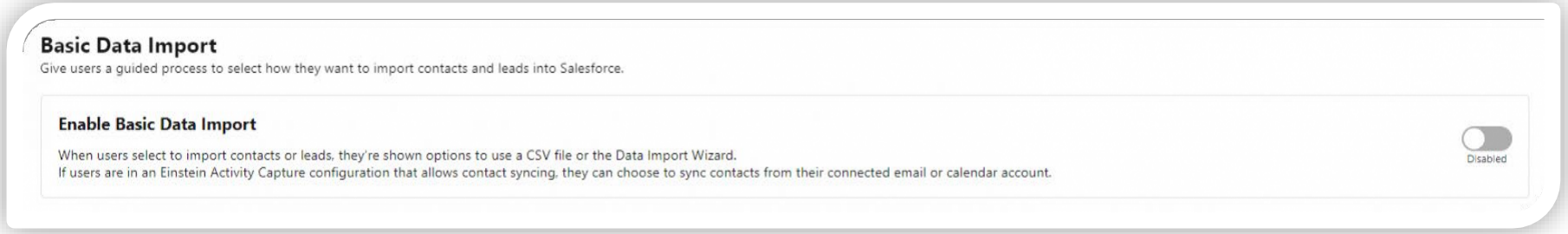
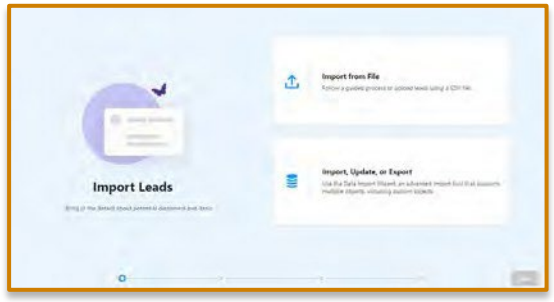
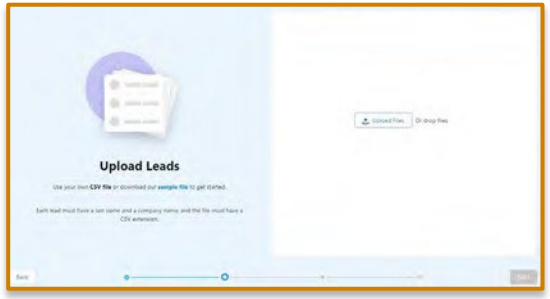
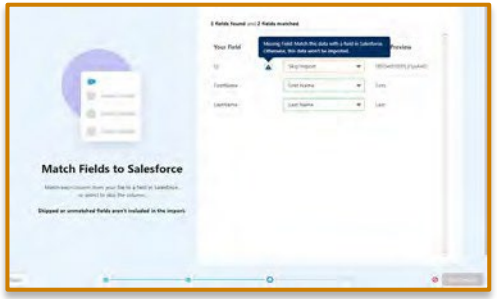
Import Contacts and Leads With a Guided Experience









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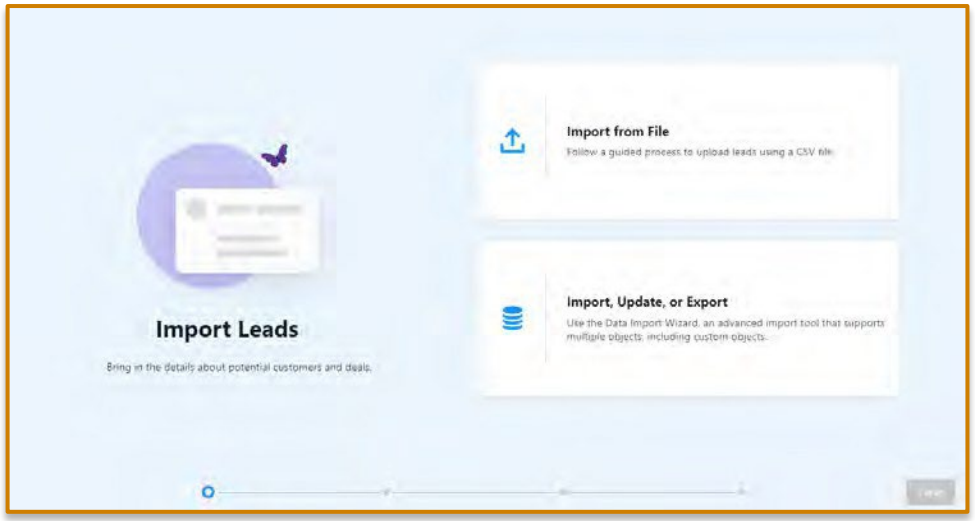

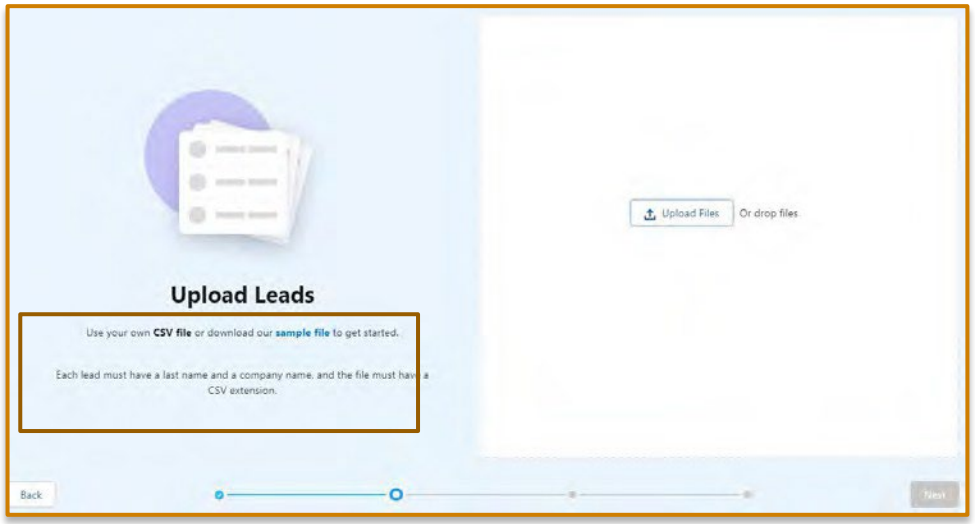

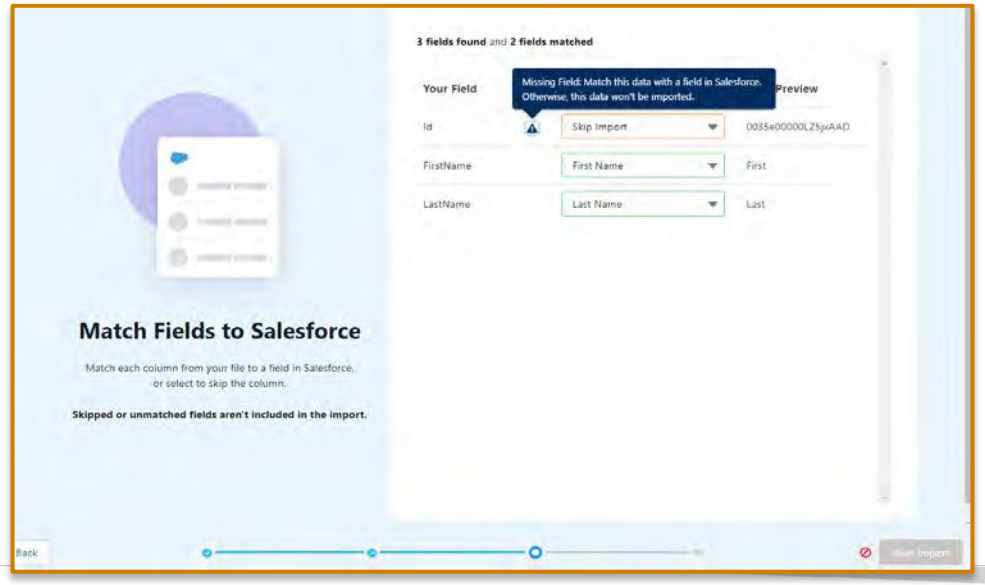

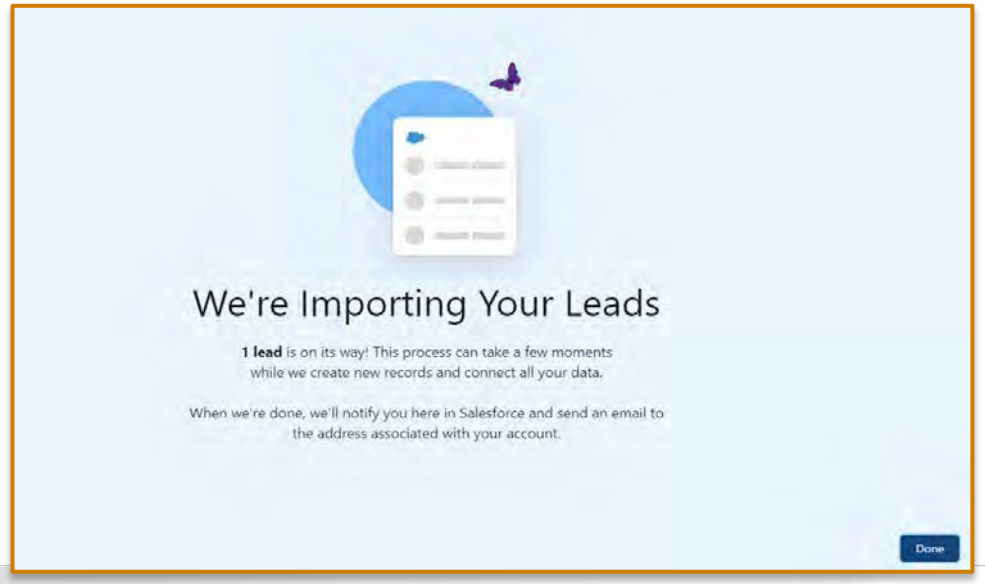

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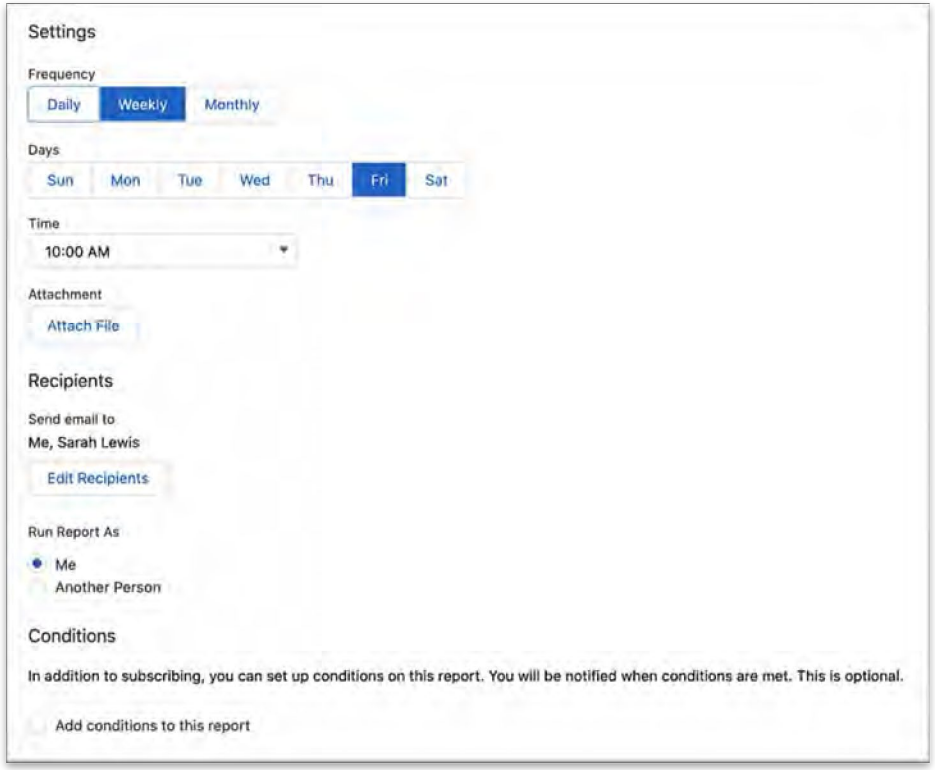
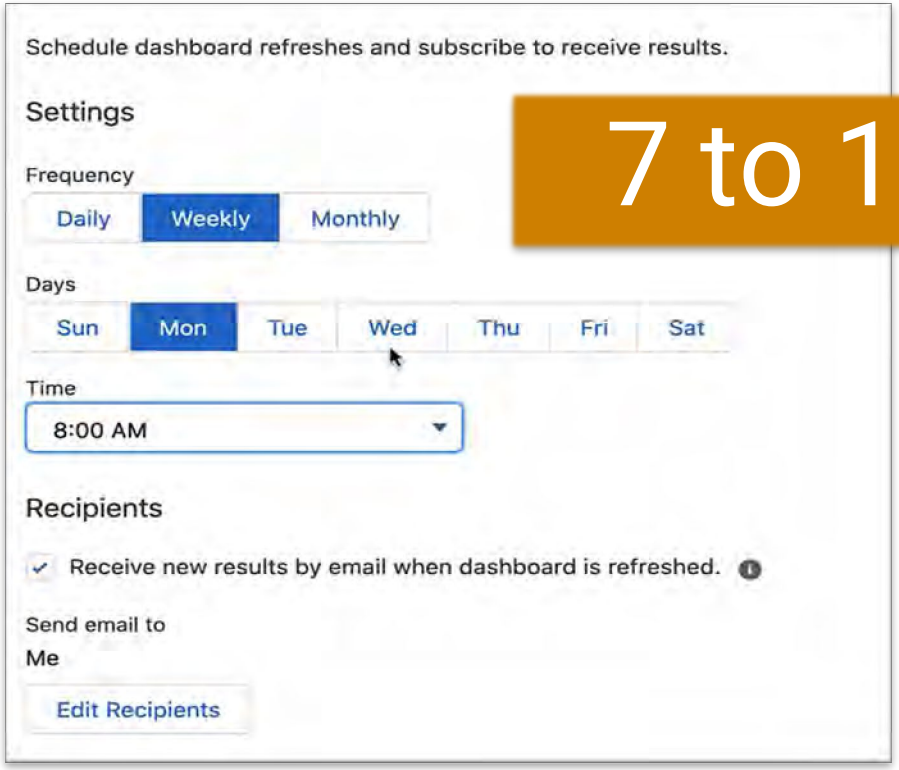
Subscribe to more reports and dashboards





7 to 15

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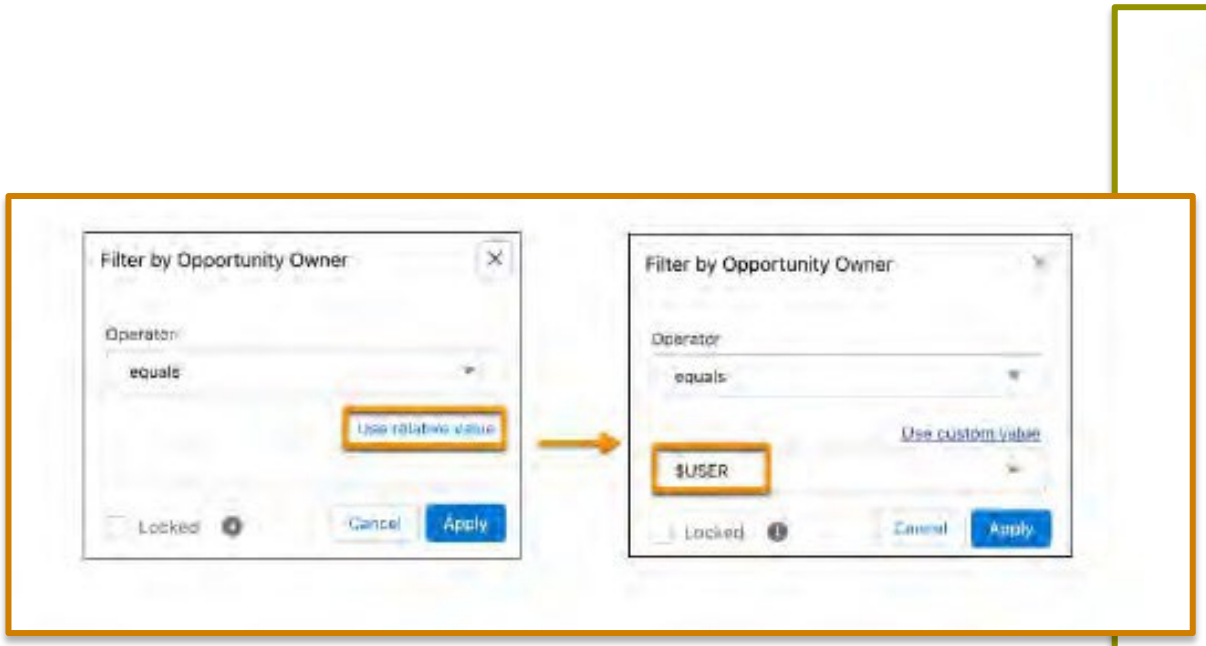
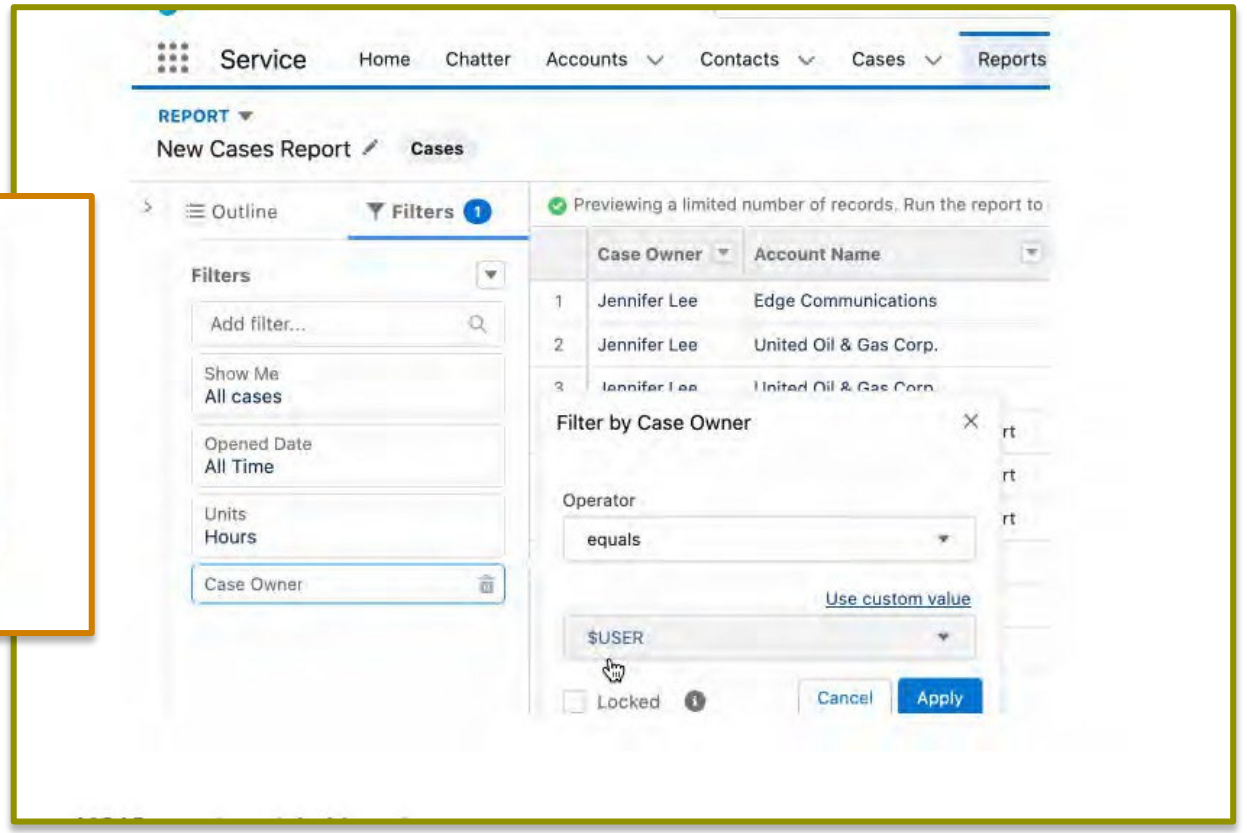
Personalized Report Filters





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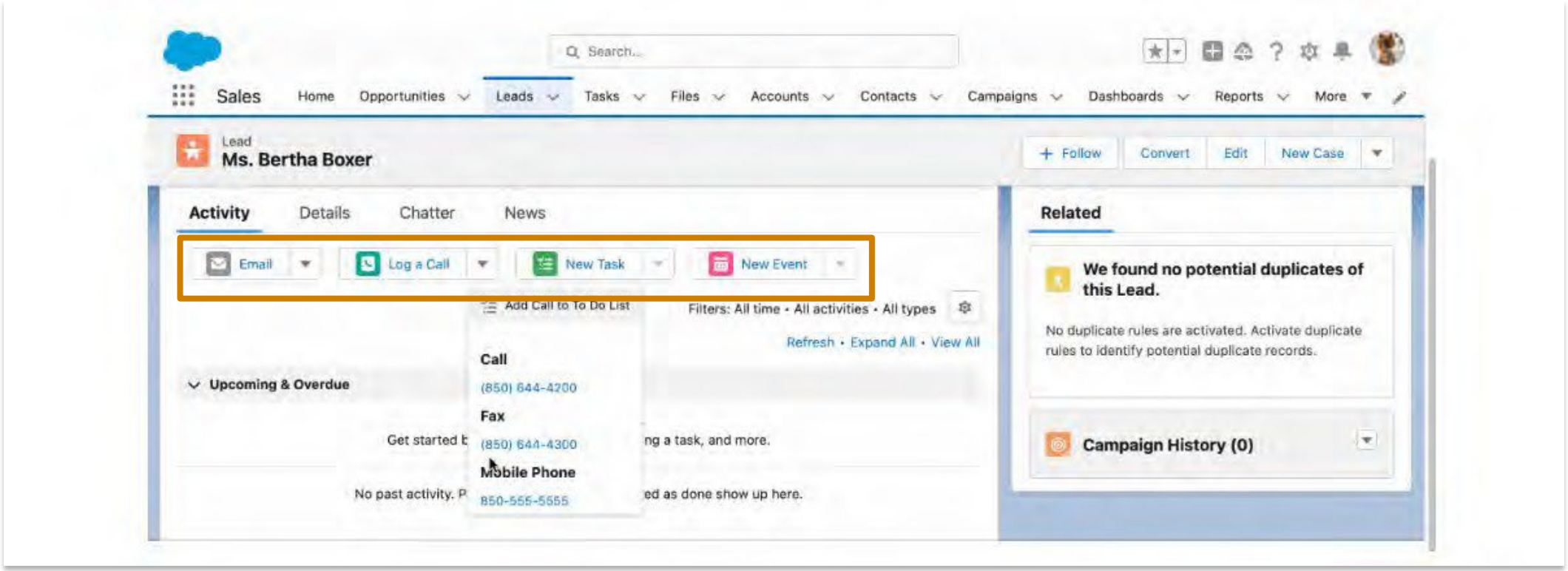
Dynamic Activity Composer



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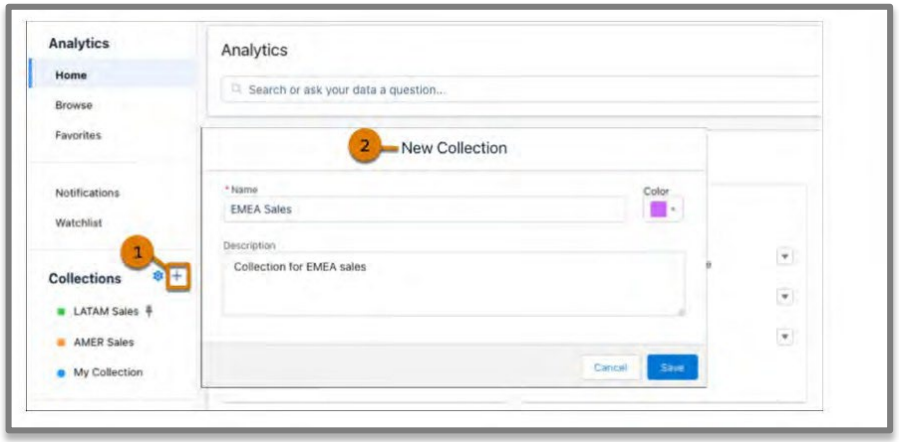
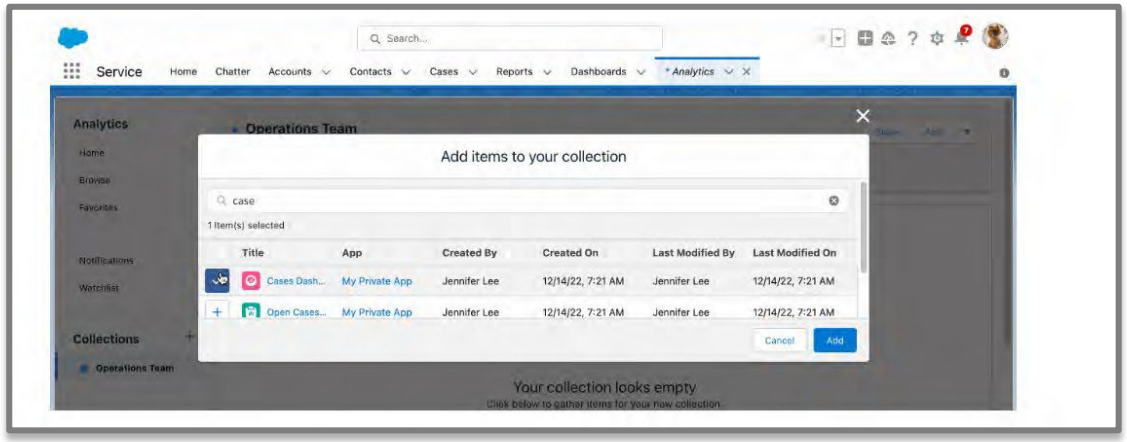
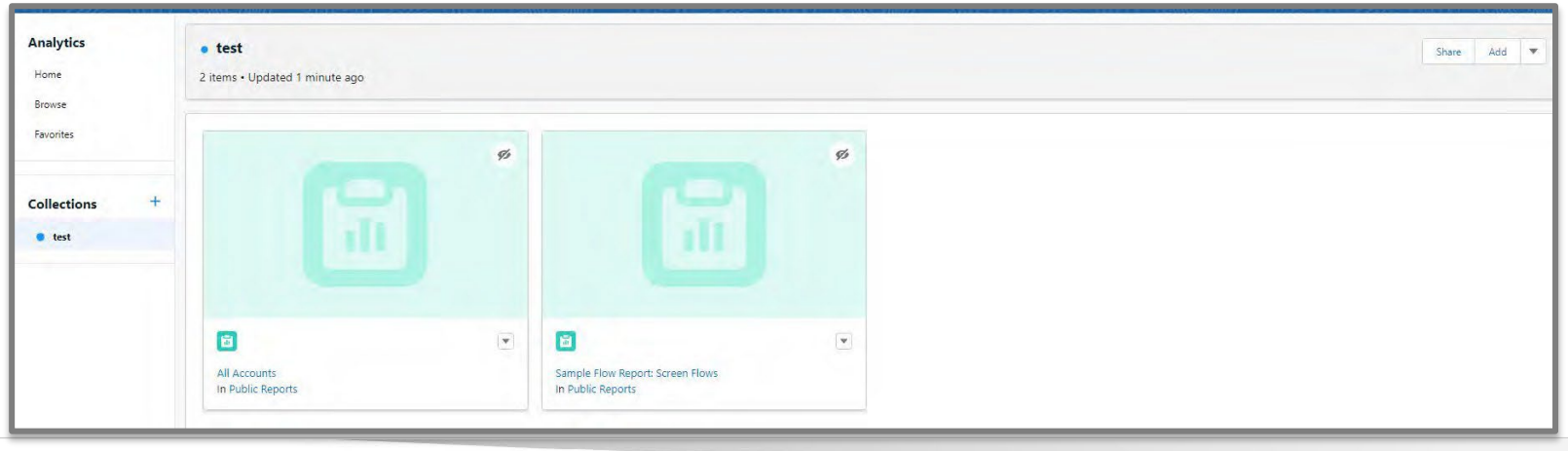
Collections for Reports and Dashboards







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More Salesforce Administrator Focused

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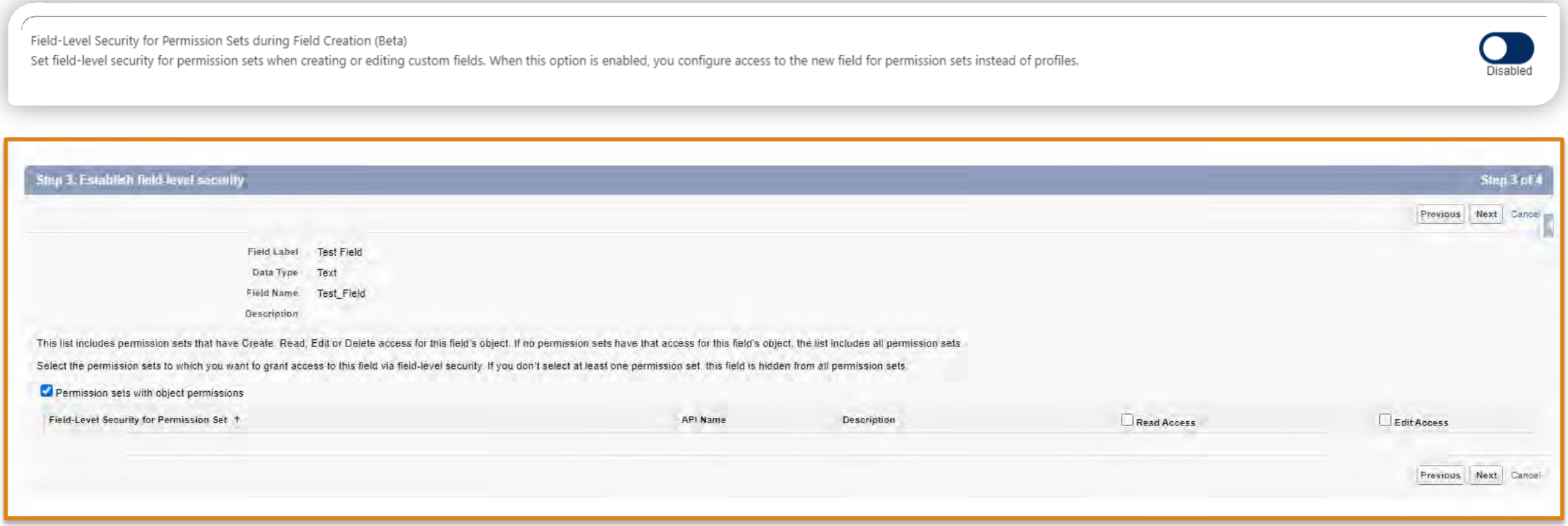
Permission Sets that display field-level security



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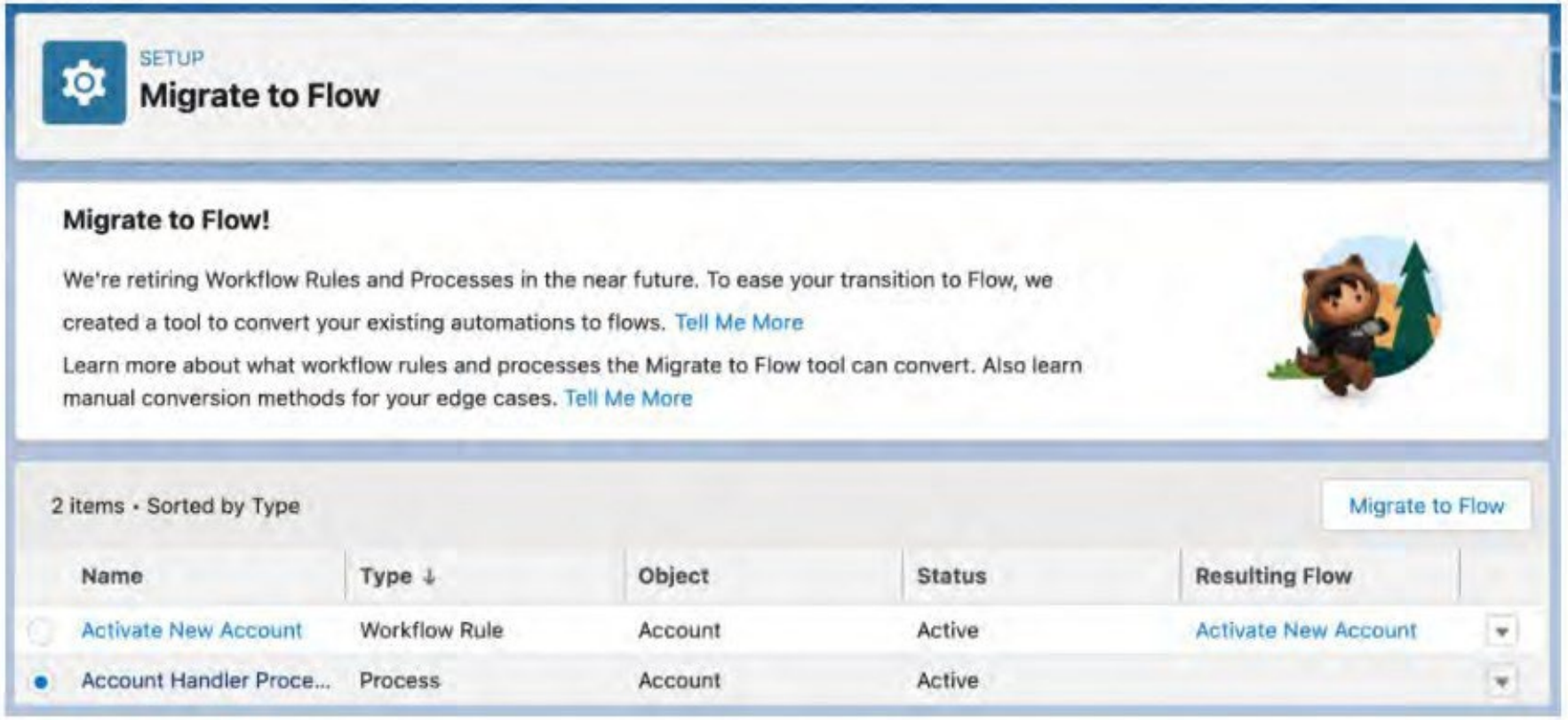
Upgraded Migrate to Flow Tool



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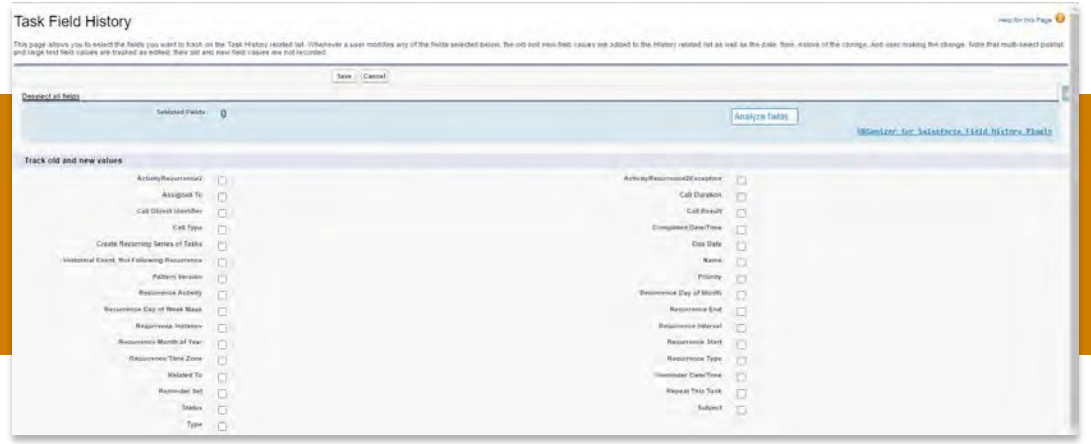
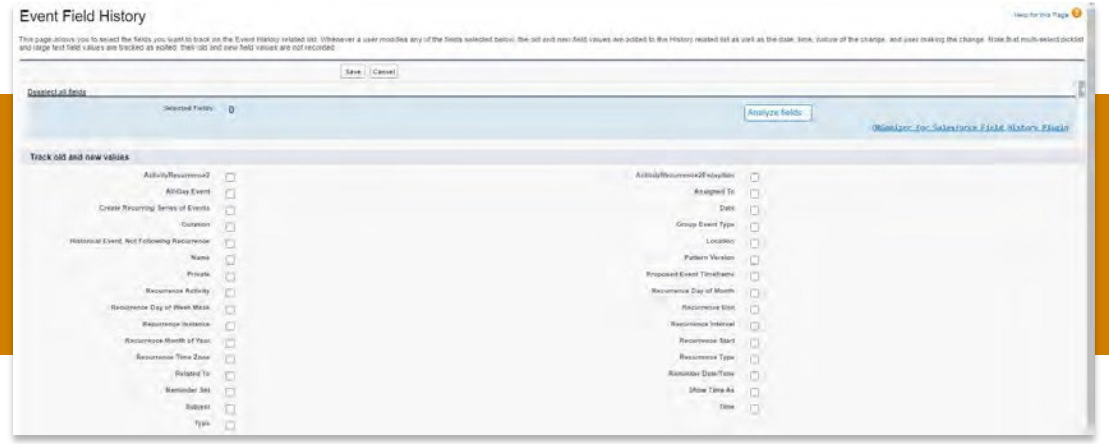
Field History Tracking on Events and Tasks





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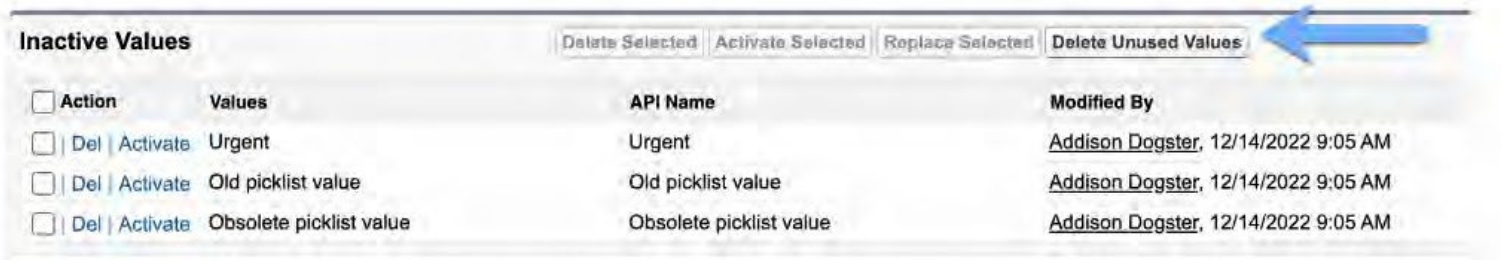
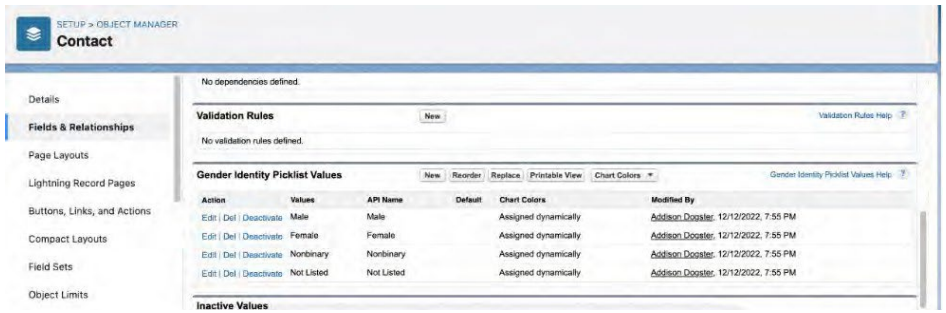
Picklist Updates

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





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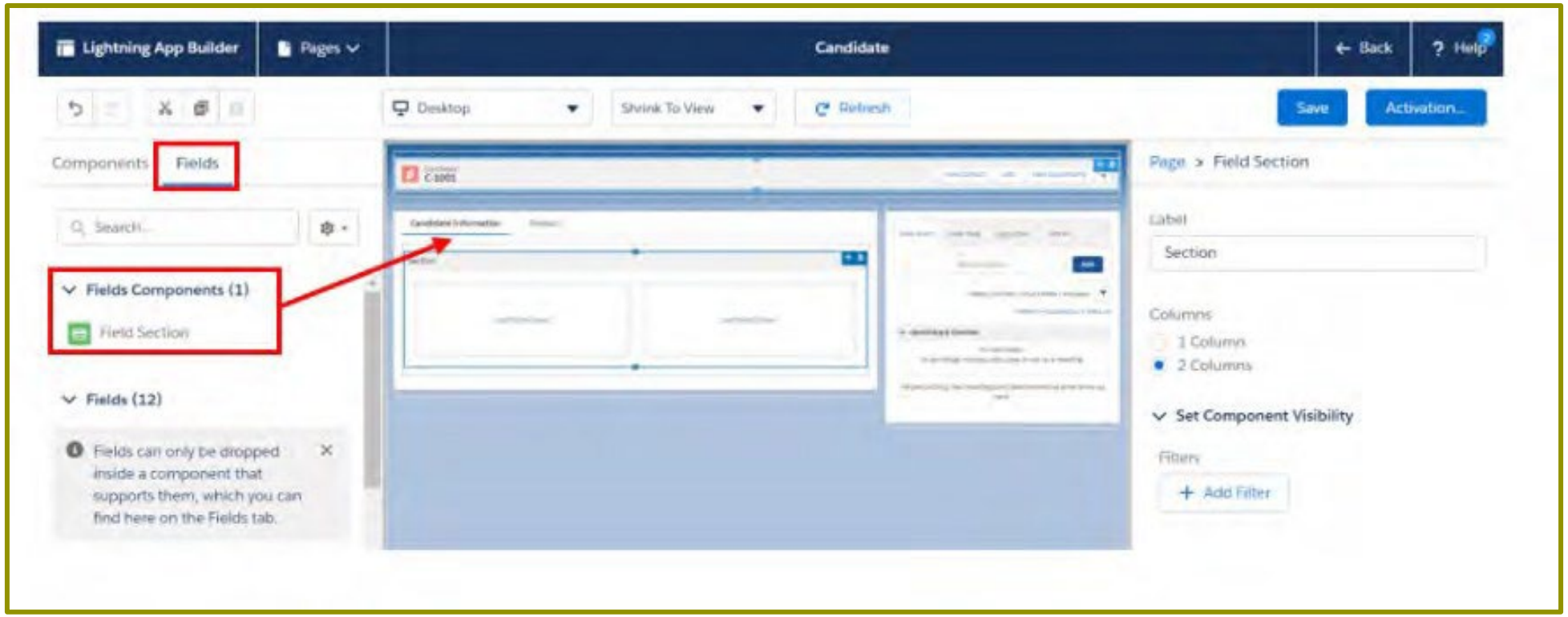
Dynamic Forms for Leads and Cases



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#3

Polling Question

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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!

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Additional Questions?

Reach out to us at

Experts@armanino.com

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