June 22, 2023

Latest Updates in the Salesforce 2023 Summer Release

© Armanino. All Rights Reserved

MEET

Our Presenters

Turner Jones

Manager,
Armanino Advisory LLC
Industry Experience: 10 years

Moazzam Khan

Senior Consultant,
Armanino Advisory LLC
Industry Experience: 10 years

© Armanino. All Rights Reserved

KNOWLEDGE

Learning Objectives

Identify the new release features and updates of your solution

Demonstrate the new user experience and navigation to ease adoption

Understand how to manage the latest release to maximize its capabilities

© Armanino. All Rights Reserved

Exploring New Areas

Agenda – User Focused

- Enhanced Lightning Dashboards
- Mass Quick Actions on Related Lists
- New Lightning Email Composer
- Calendar Enhancements
- Undo Field Changes

© Armanino. All Rights Reserved

Exploring New Areas

Agenda – Admin Focused

- Permission Sets: Field-Level Security
- In-App Guidance: Field Specific
- Migrate to Flow Supports Scheduled Actions
- Gender Neutral Salutations
- Dynamic Forms Horizontal Alignment
- Cloning Apps

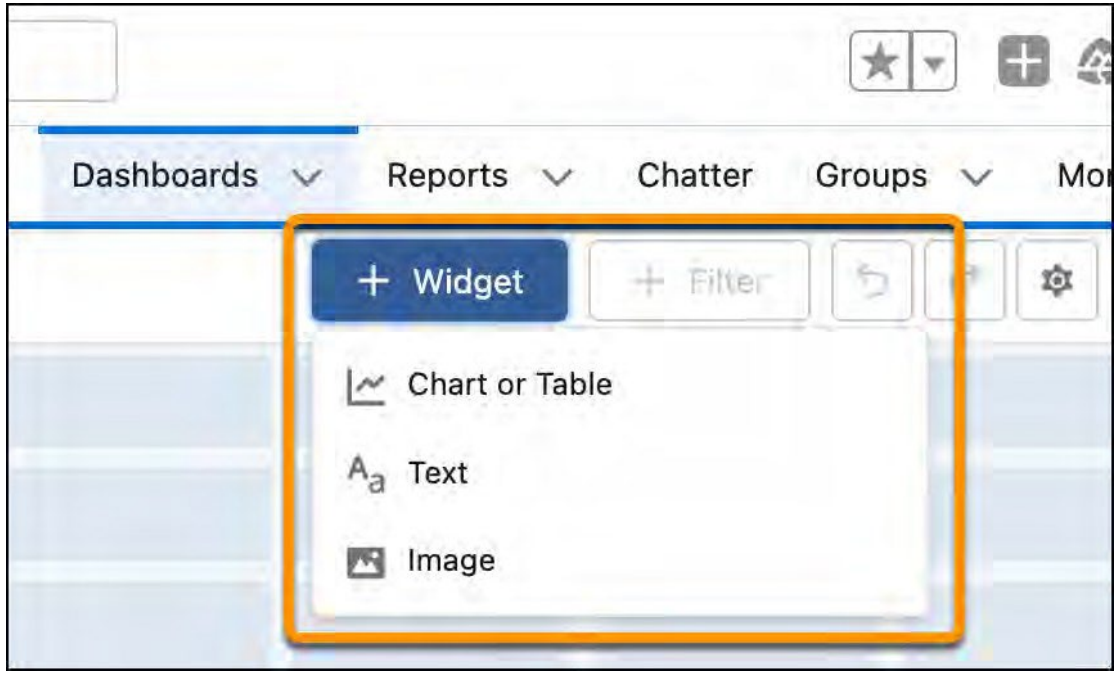
© Armanino. All Rights Reserved

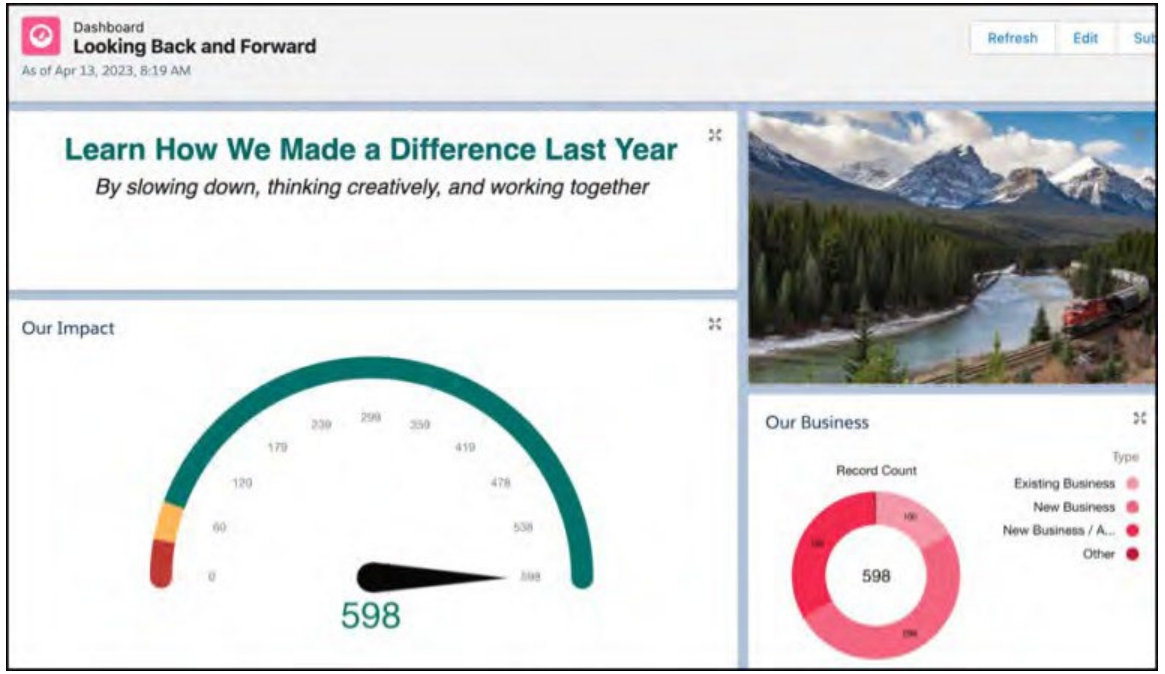
More Salesforce User Focused

© Armanino. All Rights Reserved

Enhanced Lightning Dashboards

- Images, Rich Text and Dashboard Widgets

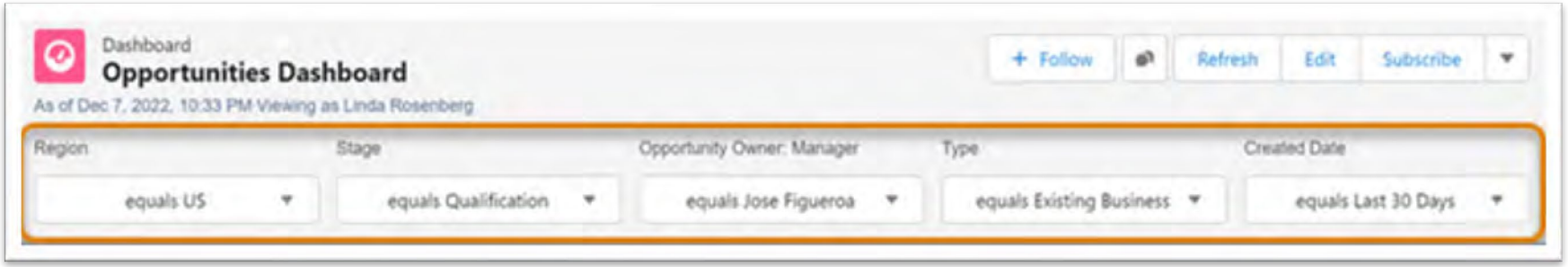


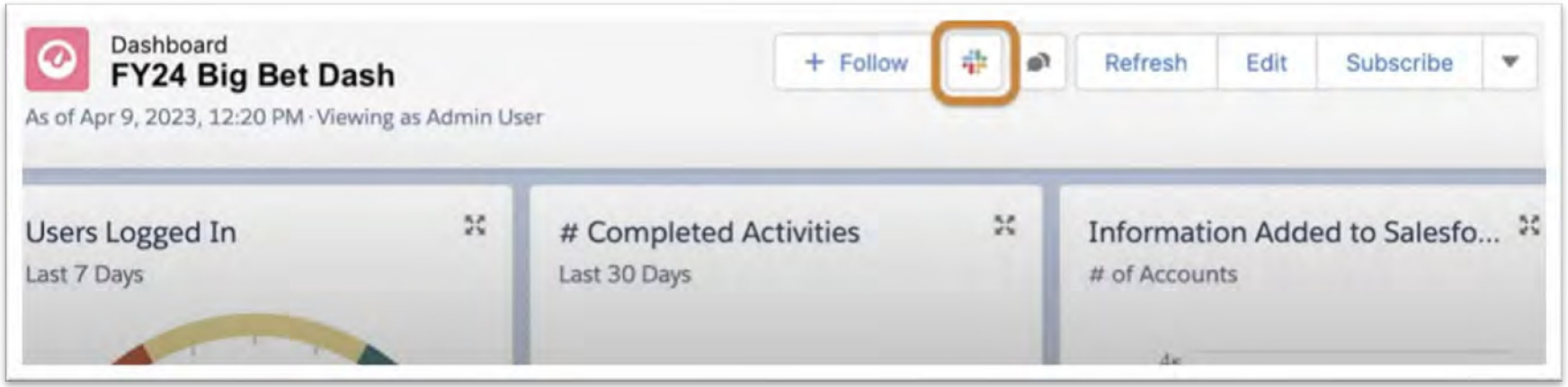


© Armanino. All Rights Reserved

Enhanced Lightning Dashboards

- Dashboard Filters
  - Updated from 3 Filters to 5 Filters
  - Added a new Region Filter
- Post Dashboards in Slack

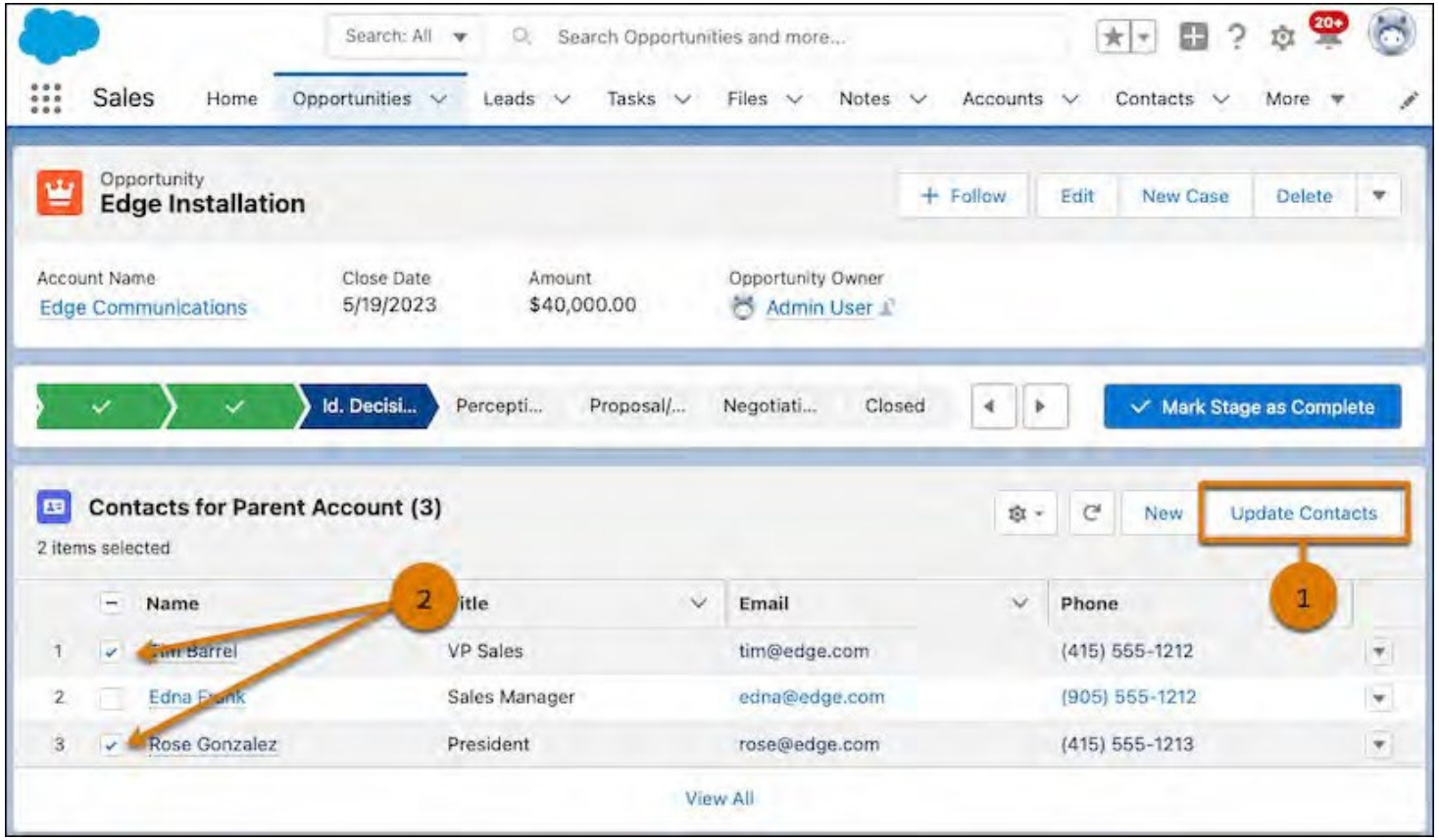




© Armanino. All Rights Reserved

Mass Quick Actions on Related Lists

- Create related records on the same page & mass update records all while staying in the related lists!



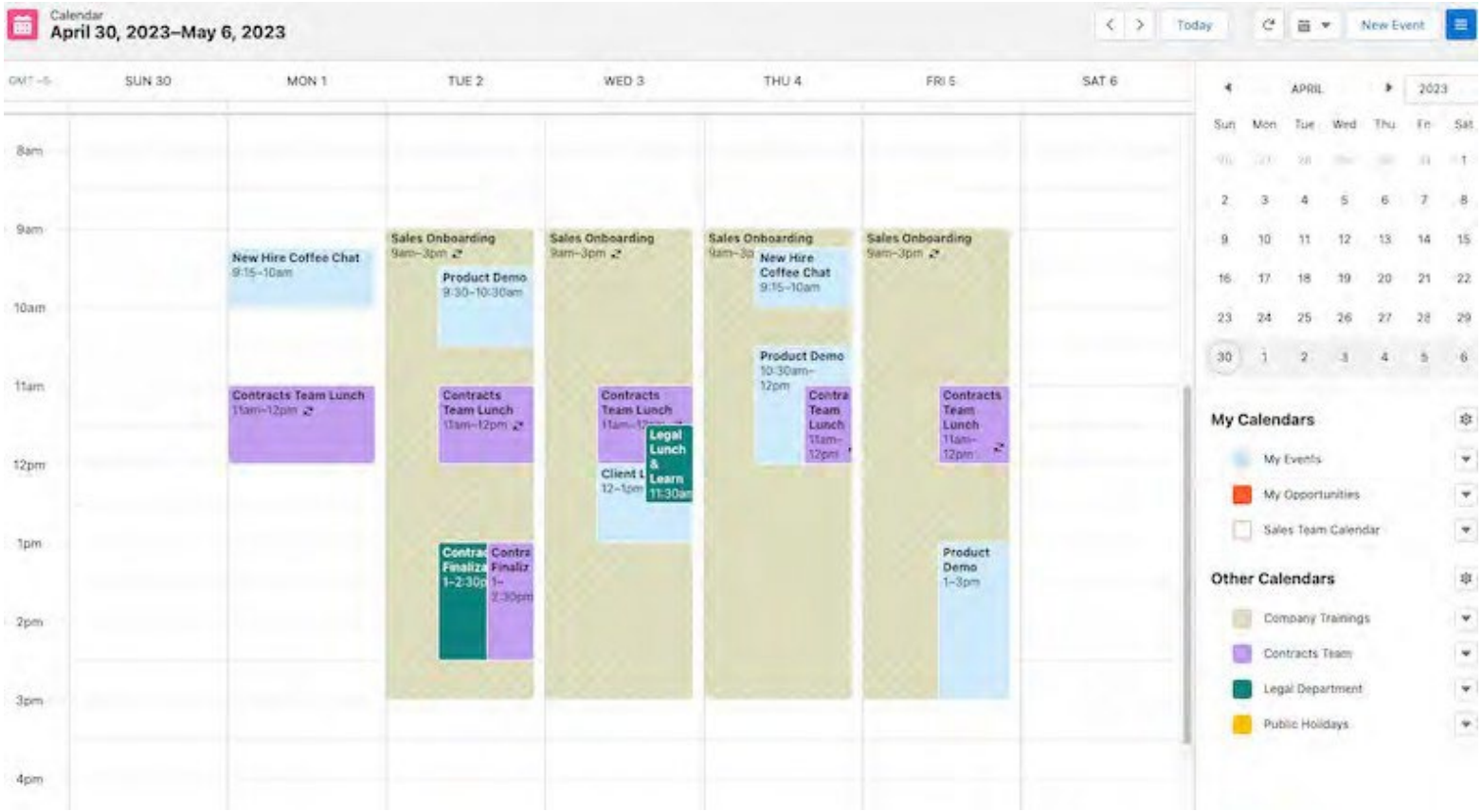
© Armanino. All Rights Reserved

New Lightning Email Composer

© Armanino. All Rights Reserved

Calendar Enhancements

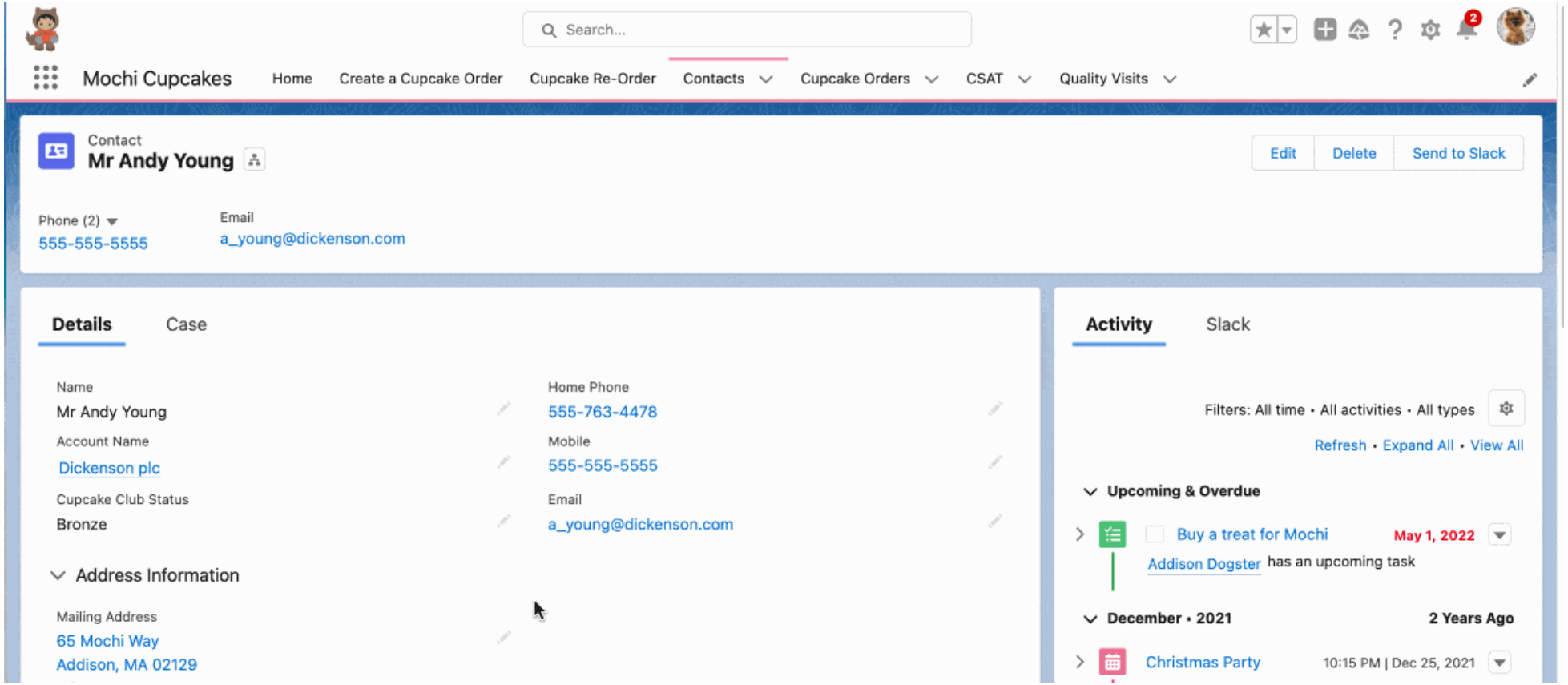
- View up to 500 events
- Drag Events to reschedule
- Click an Event to preview instead of hovering
- Events can now be shared with 50 calendars / resources



© Armanino. All Rights Reserved

Undo Field Changes

- With just one click, users will be able to undo the changes made to a field



© Armanino. All Rights Reserved

More Salesforce Administrator Focused

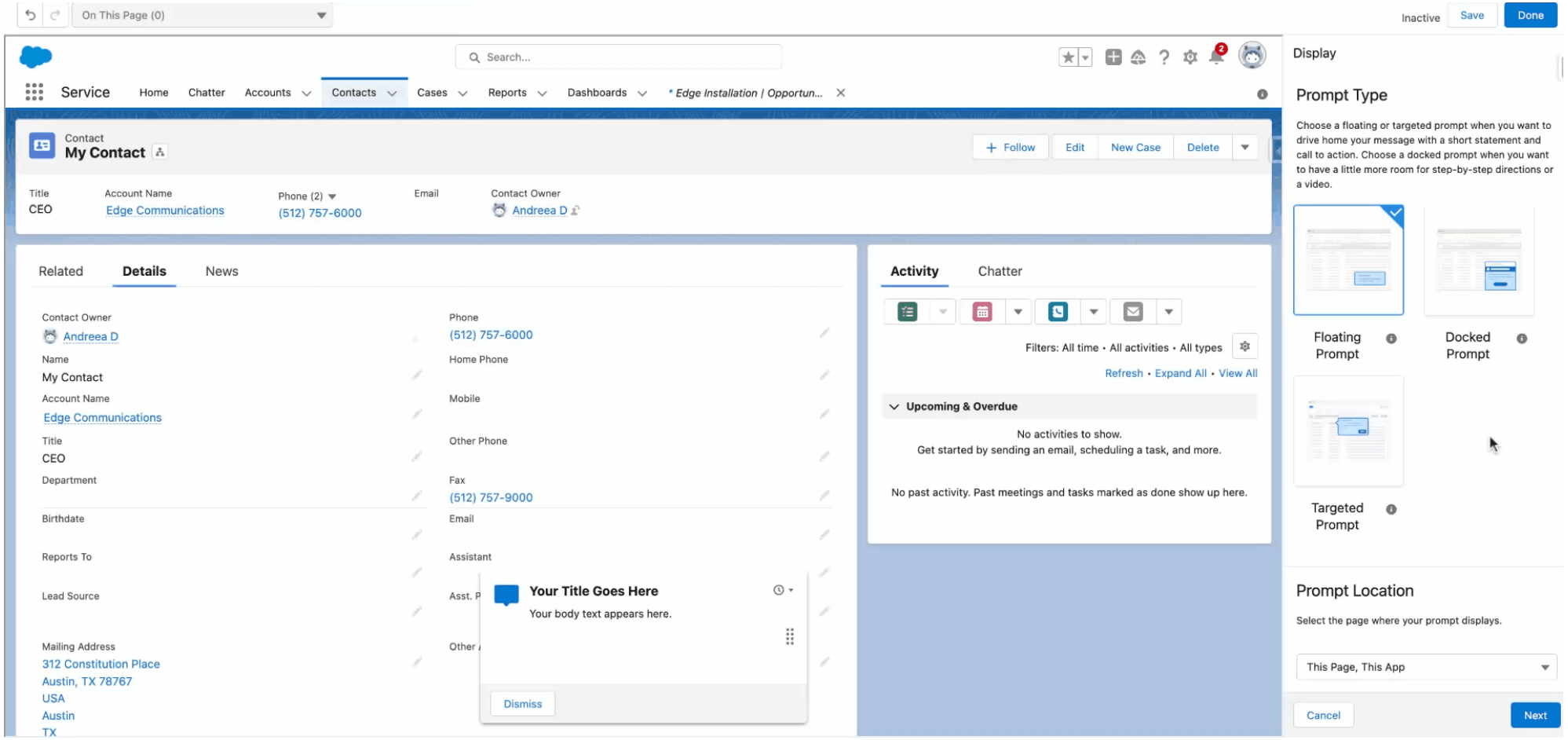
© Armanino. All Rights Reserved

Permission Sets: Field-Level Security

- Apply field level permissions directly from the permission set instead of profiles! (Generally available)

© Armanino. All Rights Reserved

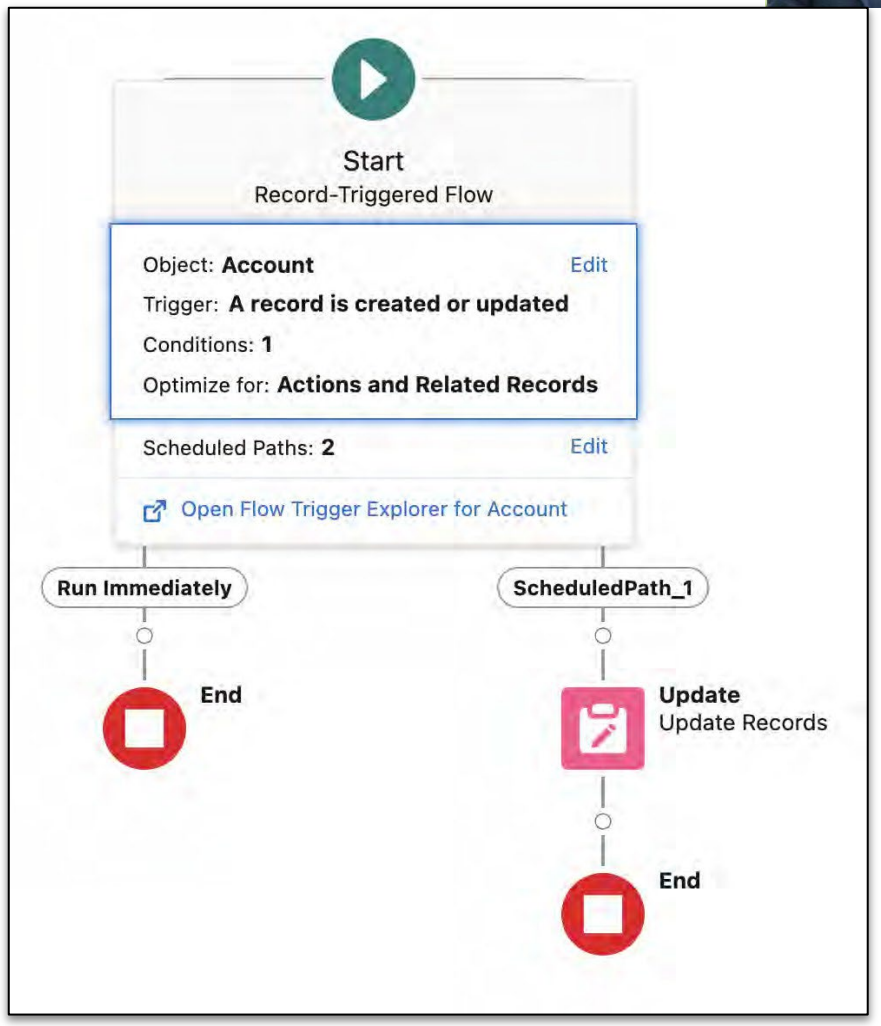
In-App Guidance: Field Specific



© Armanino. All Rights Reserved

Migrate to Flow Supports Scheduled Actions

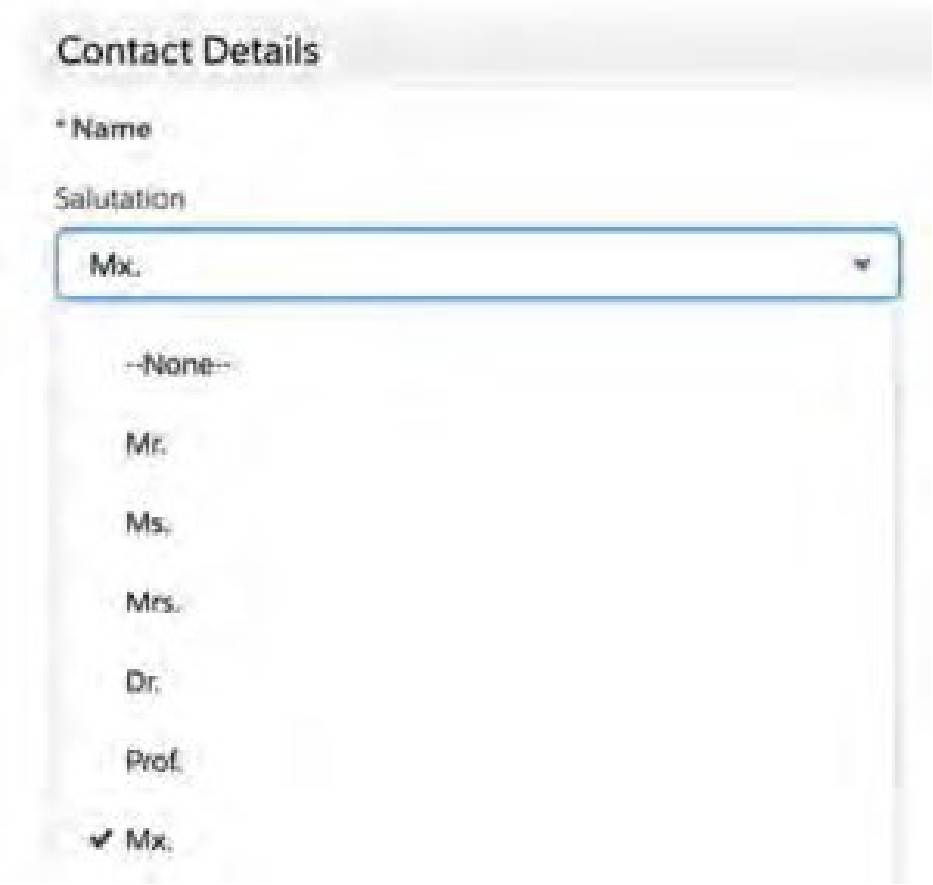
- This new feature allows for the Process Builder decision element to be migrated to an entry condition which will ensure the Scheduled Path runs correctly
- This will only work for one row of criteria on the Process Builder



© Armanino. All Rights Reserved

Gender Neutral Salutations

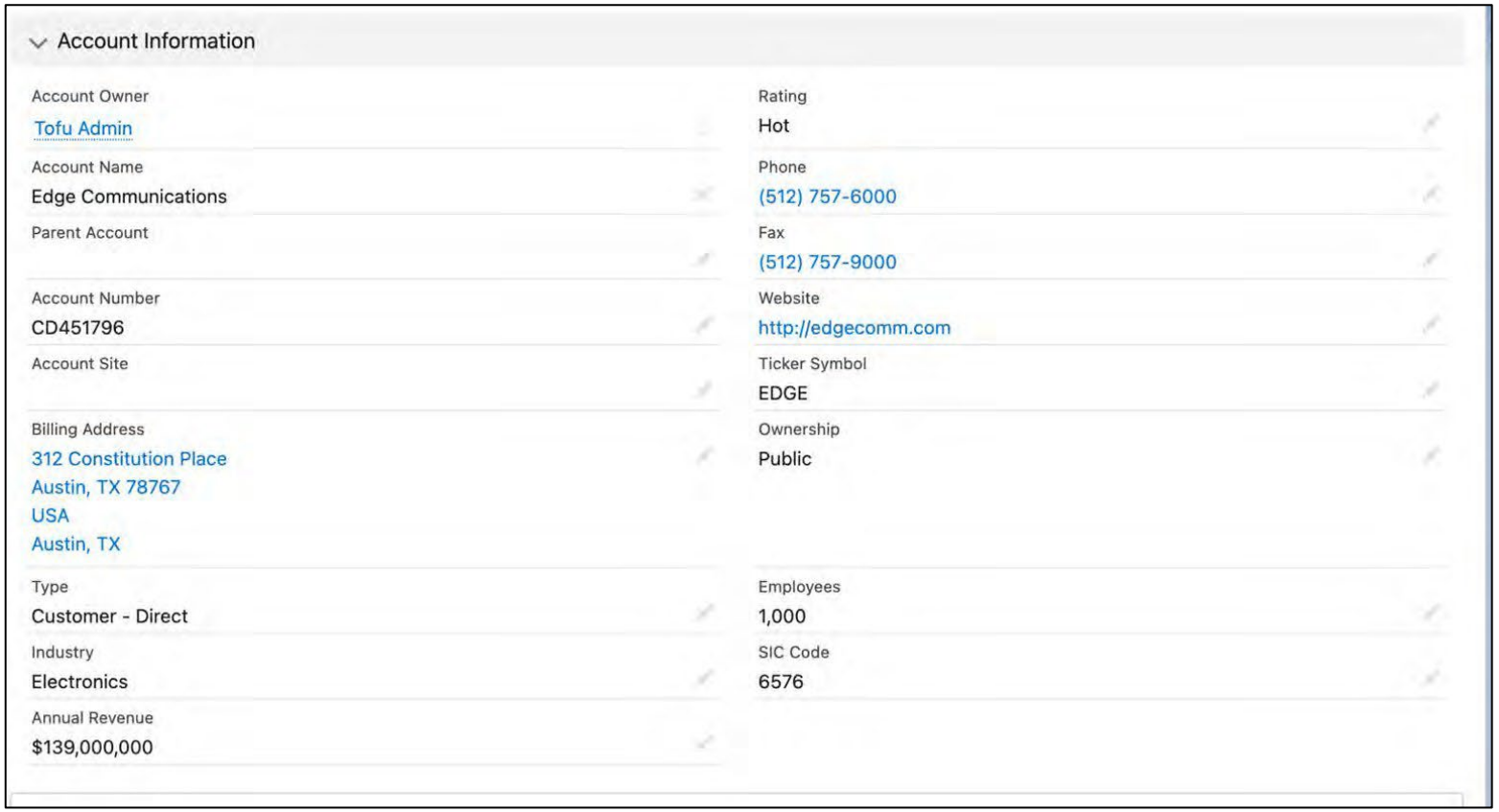
- Mx. is now a picklist option in the salutation field
- Default in new orgs after Summer ‘23
  - Admins will be able to add the Mx. salutation for older orgs



© Armanino. All Rights Reserved

Dynamic Forms Horizontal Alignment

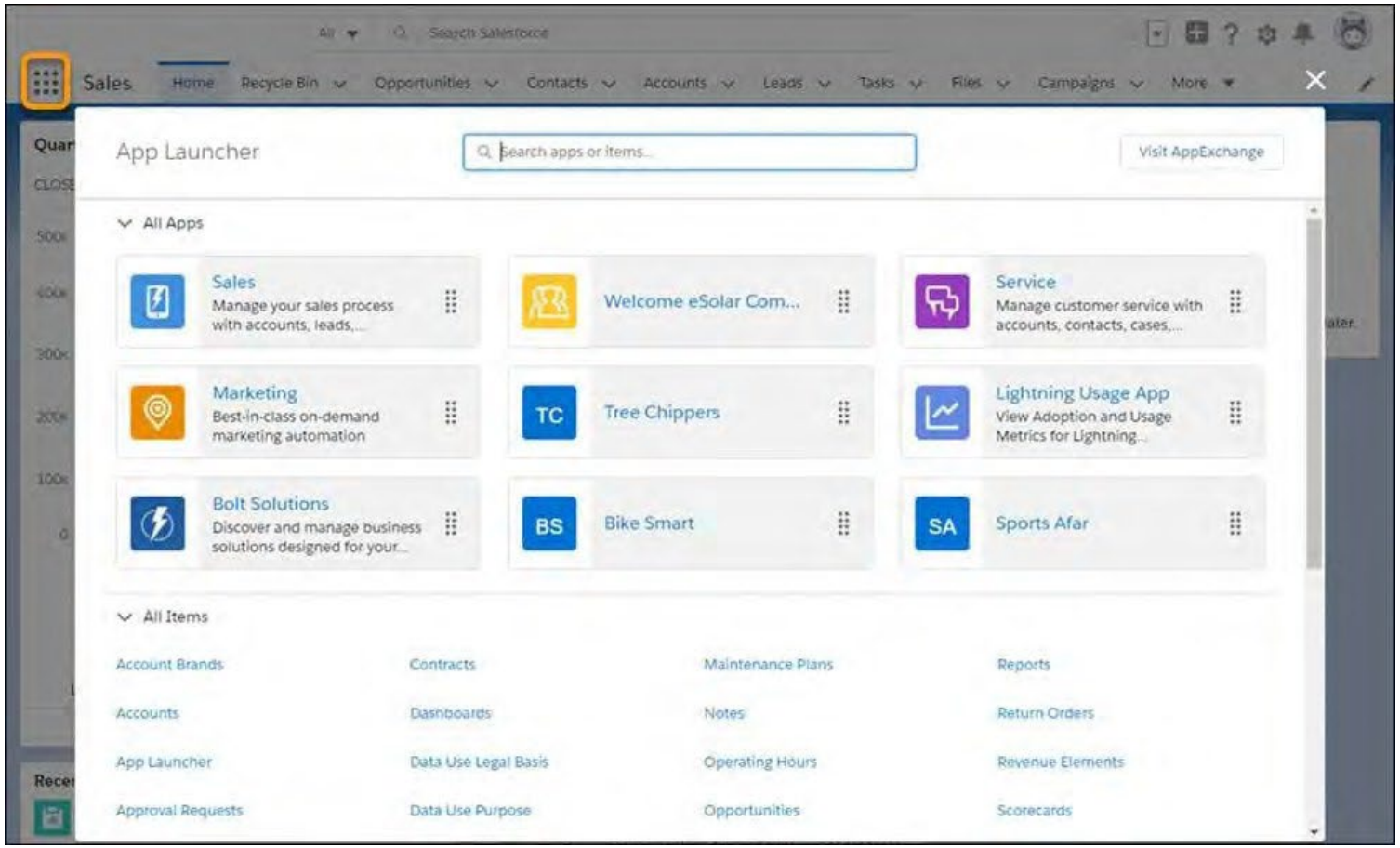
- Align fields across columns on lightning pages
- This feature enables admins to configure horizontal alignment of fields across columns in a field section component



© Armanino. All Rights Reserved

Cloning Apps

- This feature enables Admins to quickly clone an existing custom App
- Make changes like branding, navigation style, utility bar as well as app assignments without having to start from the beginning



© Armanino. All Rights Reserved

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!

© Armanino. All Rights Reserved

© Armanino. All Rights Reserved

Additional Questions?

Reach out to us at

Experts@armanino.com

© Armanino. All Rights Reserved

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.