

June 22, 2023

Latest Updates in the Salesforce 2023 Summer Release



MEET

Our Presenters



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Industry Experience: 10 years



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



Exploring New Areas

Agenda – User Focused

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





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

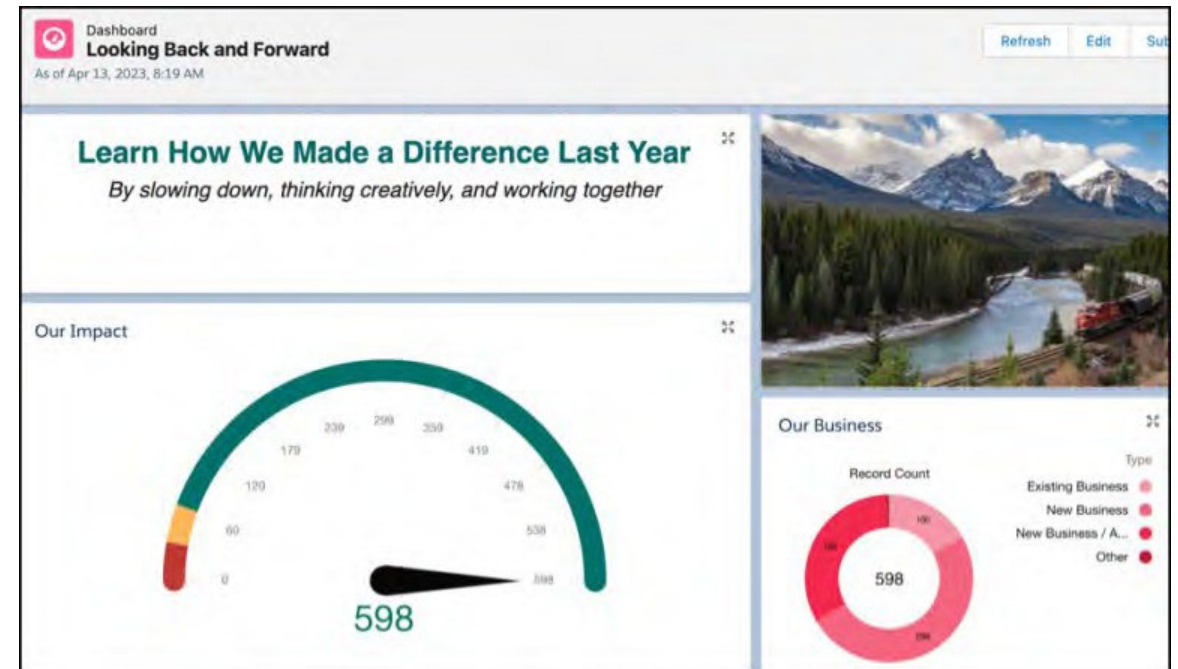
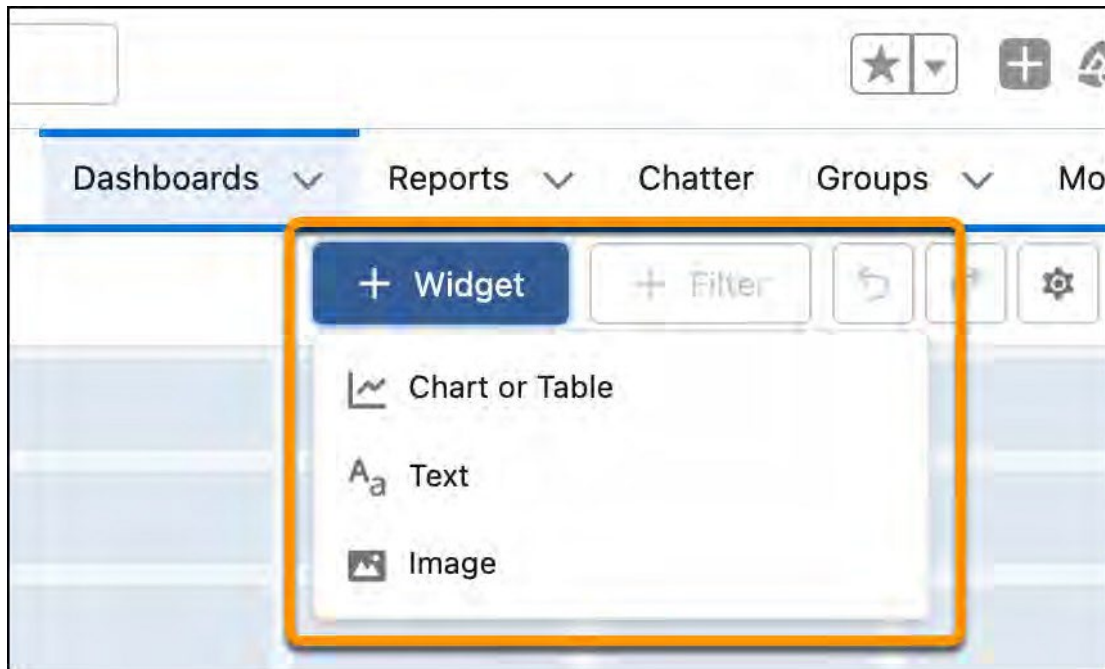


More Salesforce User Focused



Enhanced Lightning Dashboards

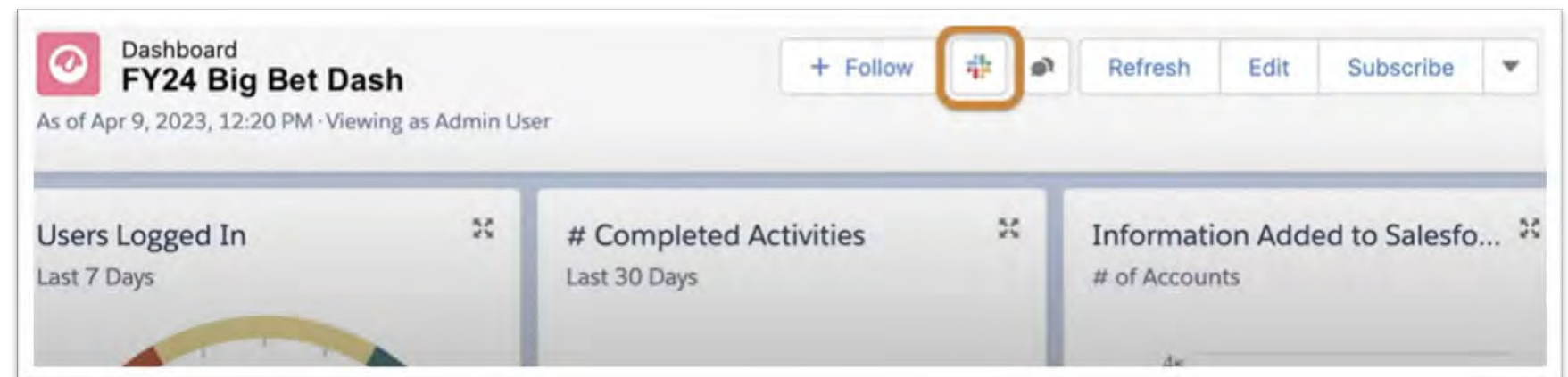
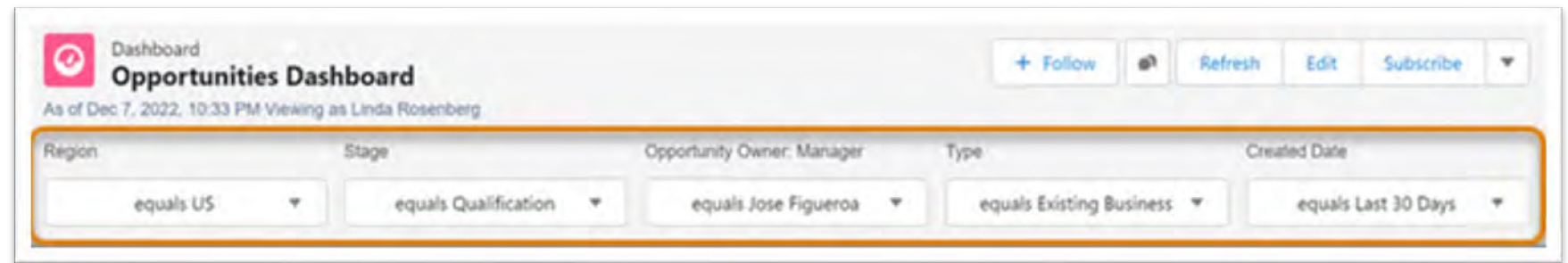
- Images, Rich Text and Dashboard Widgets





Enhanced Lightning Dashboards

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





Mass Quick Actions on Related Lists

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

The screenshot displays the Salesforce interface for an Opportunity record titled 'Edge Installation'. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Notes', 'Accounts', 'Contacts', and 'More'. The Opportunity details section shows the Account Name as 'Edge Communications', Close Date as '5/19/2023', Amount as '\$40,000.00', and Opportunity Owner as 'Admin User'. Below this, a stage progression bar shows 'Id. Decisi...' as the current stage. The 'Contacts for Parent Account (3)' related list is expanded, showing three contacts. The 'Update Contacts' button is highlighted with an orange circle and labeled '1'. The 'Name' column header is highlighted with an orange circle and labeled '2'. The contacts listed are:

	Name	Title	Email	Phone
1	Tim Barrel	VP Sales	tim@edge.com	(415) 555-1212
2	Edna Frank	Sales Manager	edna@edge.com	(905) 555-1212
3	Rose Gonzalez	President	rose@edge.com	(415) 555-1213



New Lightning Email Composer

Lightning Editor - Features

Open Beta in
Summer '23

Text Formatting

- Change font (size, family, color)
- Align text (left/right/center)
- Text direction (left-to-right + right-to-left)
- Highlight text
- Bulleted + numbered lists
- Hyperlinks (to external URLs)
- Line Height
- Clear formatting
- Intra-email anchors
- Seamless copy/paste from external sources

Table Support

- Insert tables
- Add/remove table rows + columns
- Resize table cells
- Merge table cells
- Format table border
- Format table background

Media Support

- Upload images
- Embed videos
- Alt text support for images

Productivity

- Resize editor
- Full-screen mode
- Edit as HTML
- Code snippets
- Print
- Search & replace
- Word counter
- Export to PDF
- Accessibility checker

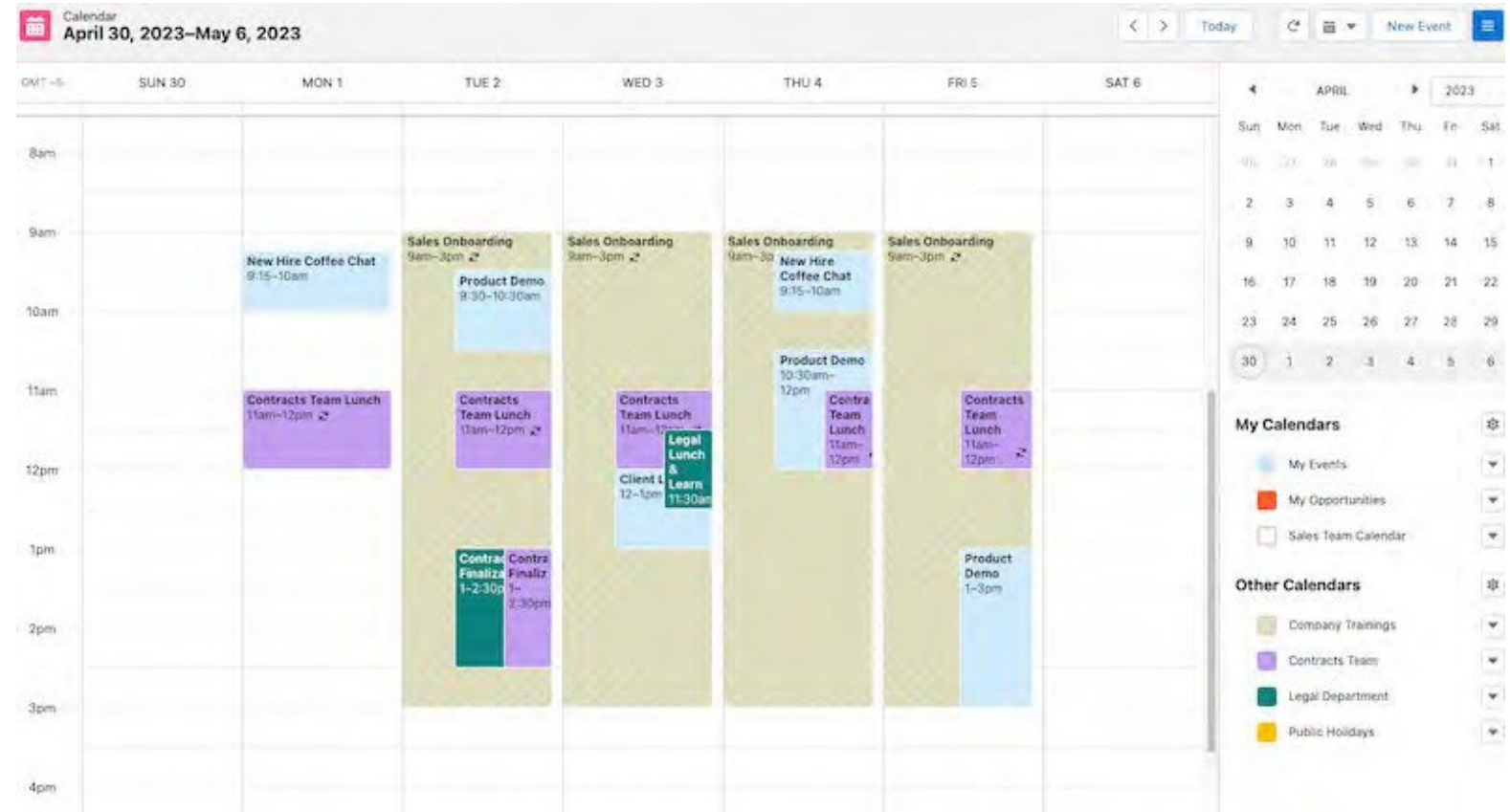
Backward compatible with all
content created in the old editor!

🌟 = new feature



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





Undo Field Changes

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

The screenshot displays the Mochi Cupcakes CRM interface. At the top, there's a navigation bar with a search bar and various icons. Below it, a contact profile for "Mr Andy Young" is shown. The profile includes fields for Name, Account Name, Cupcake Club Status, Address Information, Home Phone, Mobile, and Email. Each field has a small "undo" icon (a curved arrow) next to it, indicating that changes can be reversed with a single click. The "Details" tab is active, showing the contact's information. The "Activity" tab is also visible, showing a list of activities with filters and a "Refresh" button.

Contact: Mr Andy Young

Phone (2) ▼: 555-555-5555 | Email: a_young@dickenson.com

Details | Case

Field	Value	Undo
Name	Mr Andy Young	Yes
Account Name	Dickenson plc	Yes
Cupcake Club Status	Bronze	Yes
Address Information	65 Mochi Way Addison, MA 02129	Yes
Home Phone	555-763-4478	Yes
Mobile	555-555-5555	Yes
Email	a_young@dickenson.com	Yes

Activity | Slack

Filters: All time • All activities • All types | Refresh • Expand All • View All

Upcoming & Overdue

- Buy a treat for Mochi (May 1, 2022) - Addison Dogster has an upcoming task

December • 2021 | 2 Years Ago

- Christmas Party (10:15 PM | Dec 25, 2021)

More Salesforce Administrator Focused



Permission Sets: Field-Level Security

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

Step 3: Establish field-level security

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	<input type="checkbox"/> Read Access	<input type="checkbox"/> Edit Access
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In-App Guidance: Field Specific

On This Page (0)

Service Home Chatter Accounts **Contacts** Cases Reports Dashboards *Edge Installation | Opportun...*

Contact **My Contact**

Title CEO

Account Name [Edge Communications](#)

Phone (2) (512) 757-6000

Email

Contact Owner Andreea D.

Related

Details

News

Contact Owner Andreea D.

Name **My Contact**

Account Name [Edge Communications](#)

Title CEO

Department

Birthdate

Reports To

Lead Source

Mailing Address [312 Constitution Place](#)
[Austin, TX 78767](#)
[USA](#)
[Austin](#)
[TX](#)

Phone (512) 757-6000

Home Phone

Mobile

Other Phone

Fax (512) 757-9000

Email

Assistant

Asst. P

Other

Your Title Goes Here

Your body text appears here.

Dismiss

Activity Chatter

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Display

Prompt Type

Choose a floating or targeted prompt when you want to drive home your message with a short statement and call to action. Choose a docked prompt when you want to have a little more room for step-by-step directions or a video.

Floating Prompt

Docked Prompt

Targeted Prompt

Prompt Location

Select the page where your prompt displays.

This Page, This App

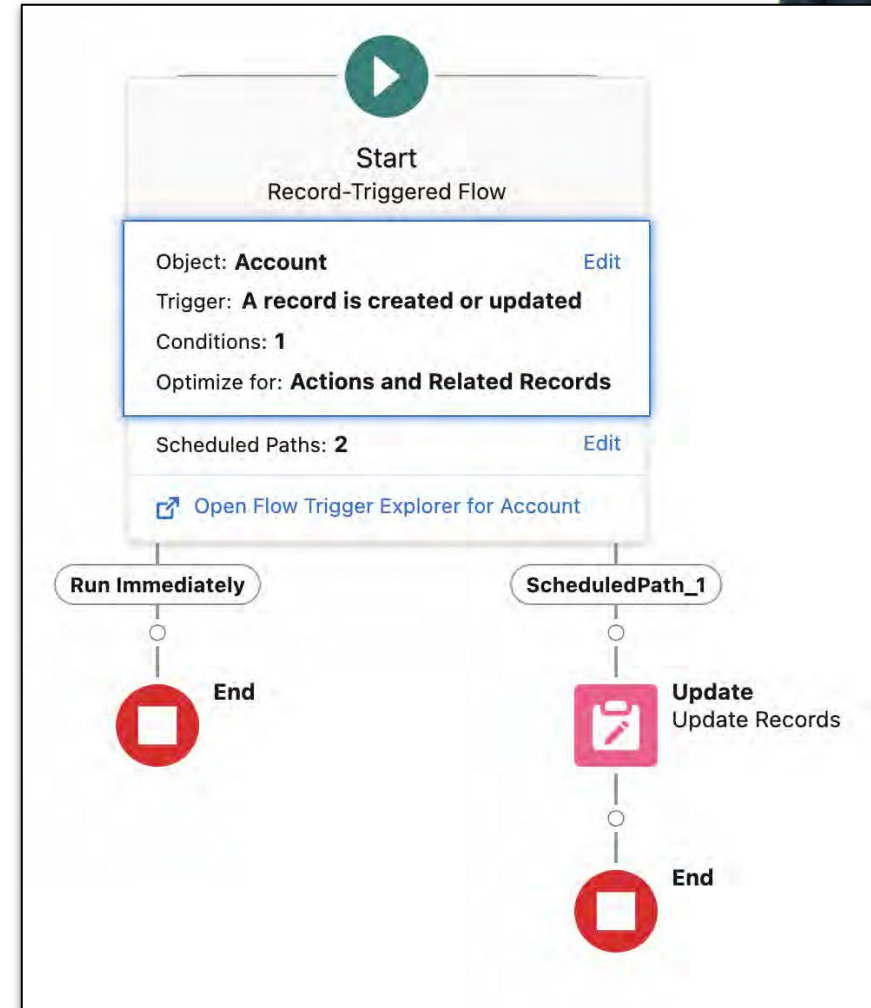
Cancel Next

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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





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

Contact Details

* Name

Salutation

Mx.

--None--

Mr.

Ms.

Mrs.

Dr.

Prof.

✓ Mx.



Dynamic Forms Horizontal Alignment

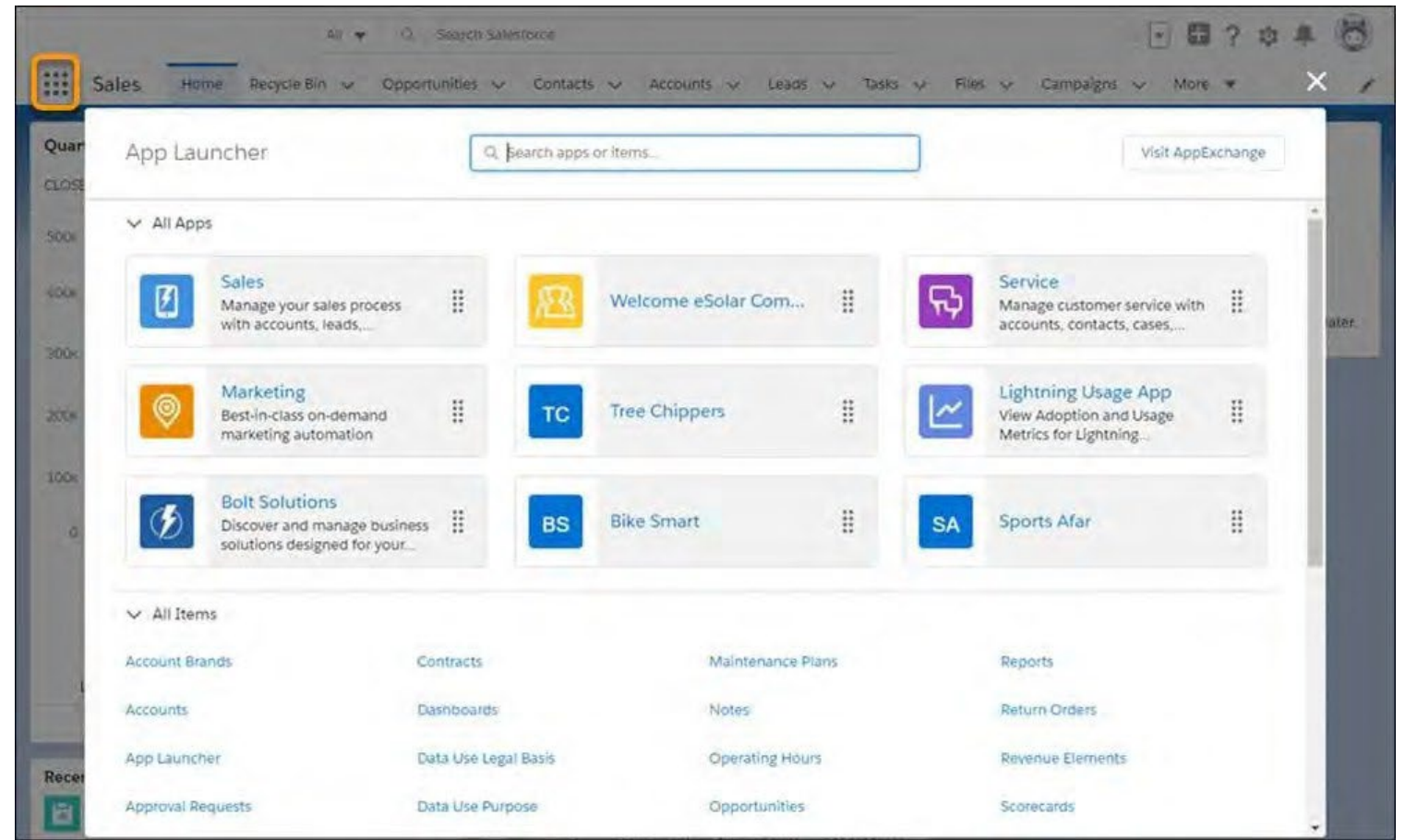
- Align fields across columns on lightning pages
- This feature enables admins to configure horizontal alignment of fields across columns in a field section component

Account Information	
Account Owner Tofu Admin	Rating Hot
Account Name Edge Communications	Phone (512) 757-6000
Parent Account	Fax (512) 757-9000
Account Number CD451796	Website http://edgecomm.com
Account Site	Ticker Symbol EDGE
Billing Address 312 Constitution Place Austin, TX 78767 USA Austin, TX	Ownership Public
Type Customer - Direct	Employees 1,000
Industry Electronics	SIC Code 6576
Annual Revenue \$139,000,000	



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 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

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