

June 22, 2023

# Latest Updates in the Salesforce 2023 Summer Release



MEET

# Our Presenters



**Turner Jones**

Manager, Consulting  
Industry Experience: 10 years



**Moazzam Khan**

Senior Consultant, Consulting  
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

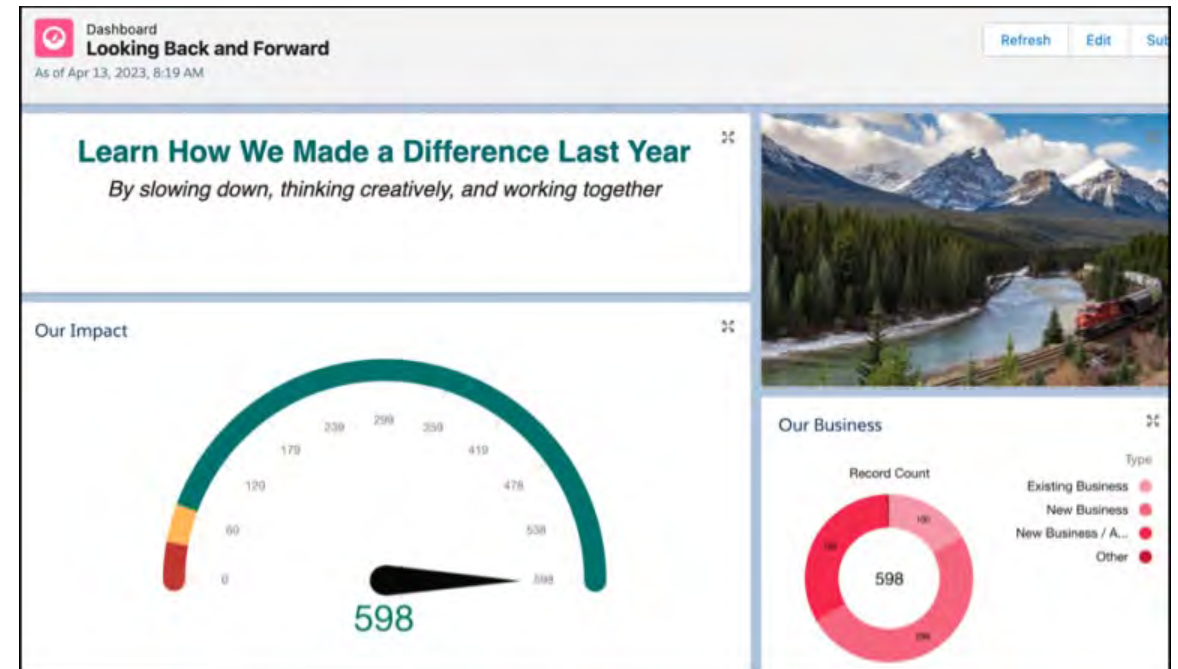
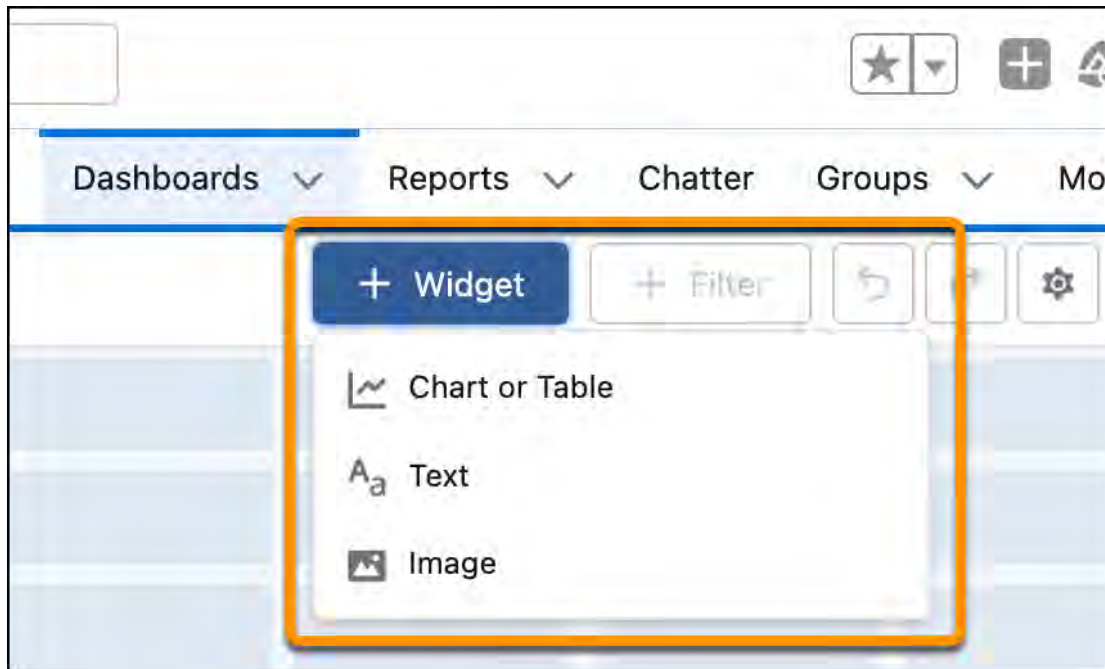


# More Salesforce User Focused



# Enhanced Lightning Dashboards

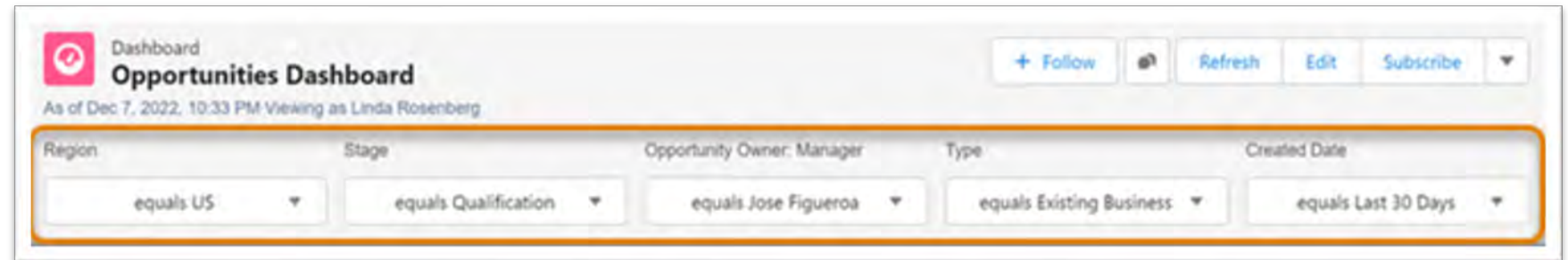
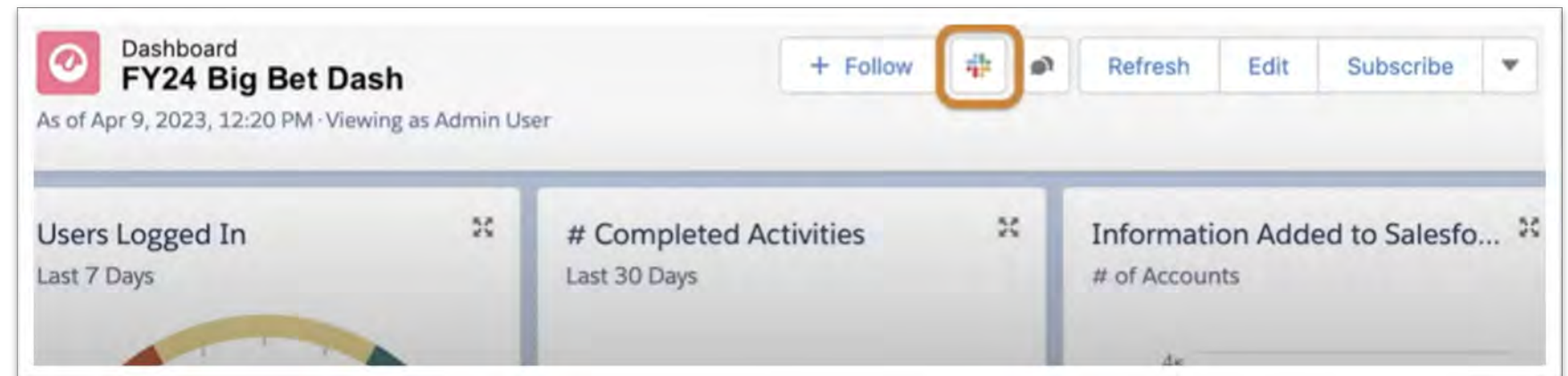
- Images, Rich Text and Dashboard Widgets





# Enhanced Lightning Dashboards

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

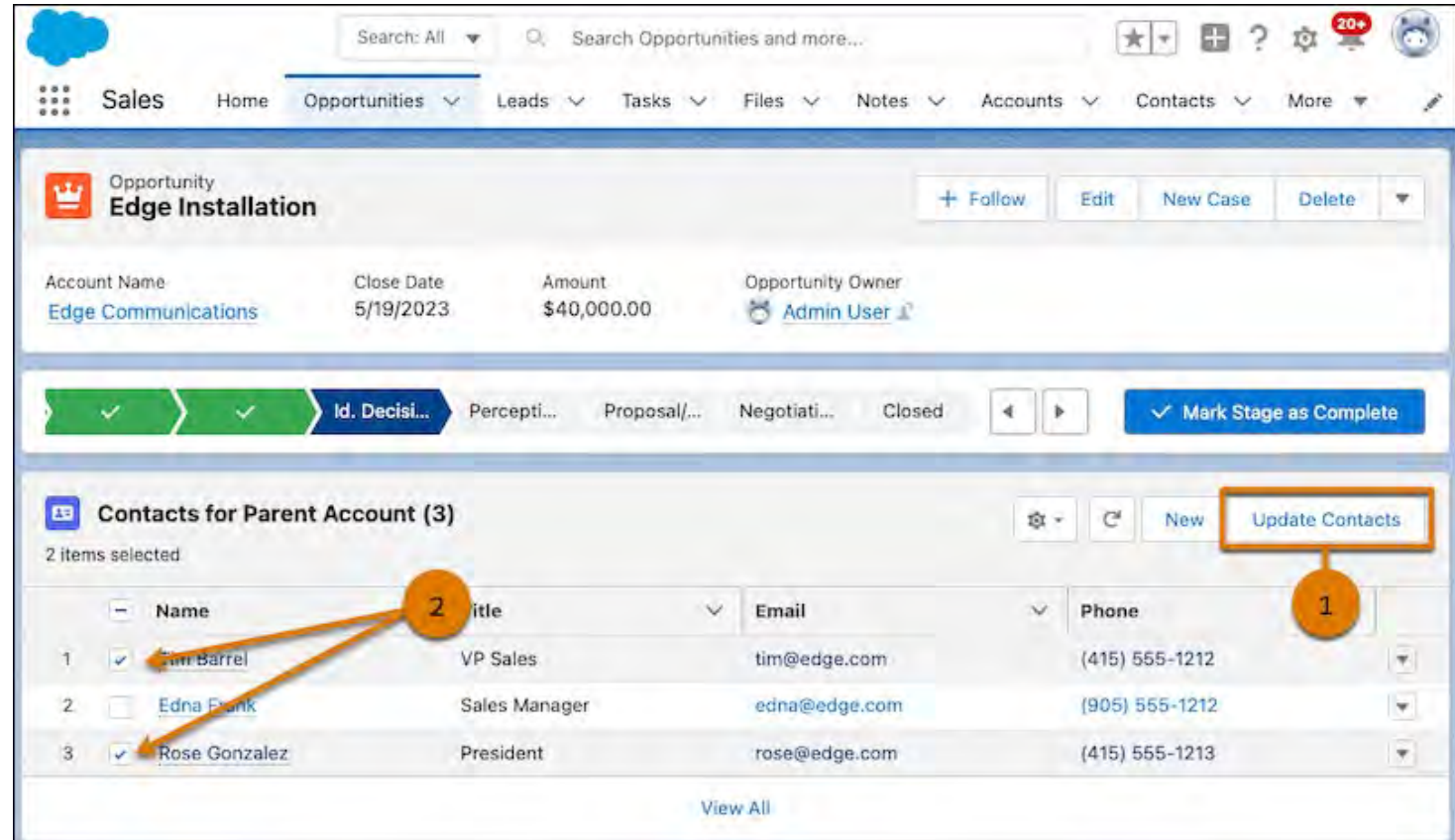







# Mass Quick Actions on Related Lists

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



The screenshot displays the Salesforce CRM interface for an Opportunity record titled "Edge Installation". The record details include Account Name (Edge Communications), Close Date (5/19/2023), Amount (\$40,000.00), and Opportunity Owner (Admin User). The opportunity is in the "Id. Decisi..." stage. Below the opportunity details, there is a related list for "Contacts for Parent Account (3)". The list shows 2 items selected. The "Update Contacts" button is highlighted with a red box and a callout '1'. The "Name" column in the table is highlighted with a red box and a callout '2', with arrows pointing to the first and third rows.

	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

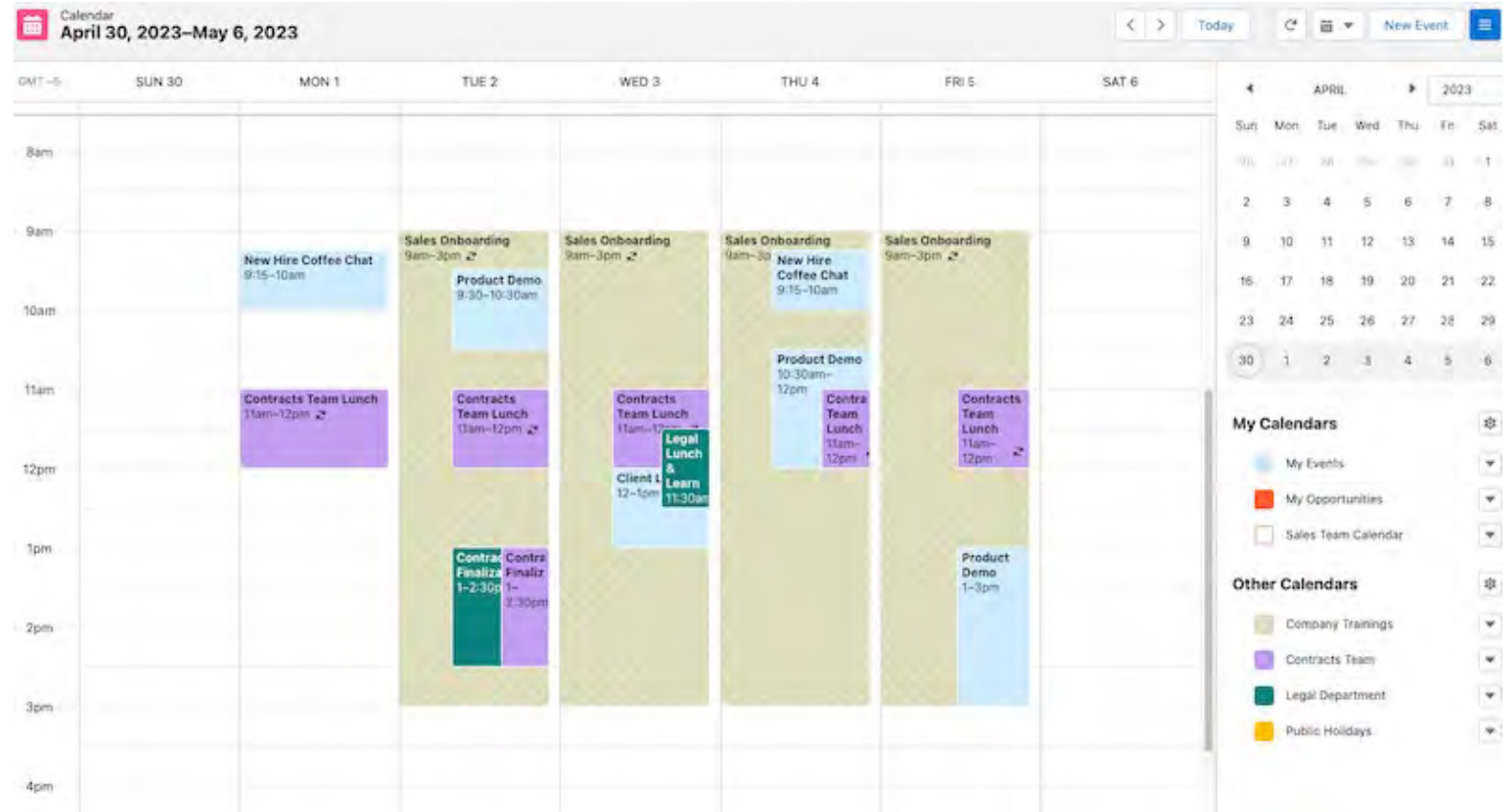
Backward compatible with all content created in the old editor!

 = 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

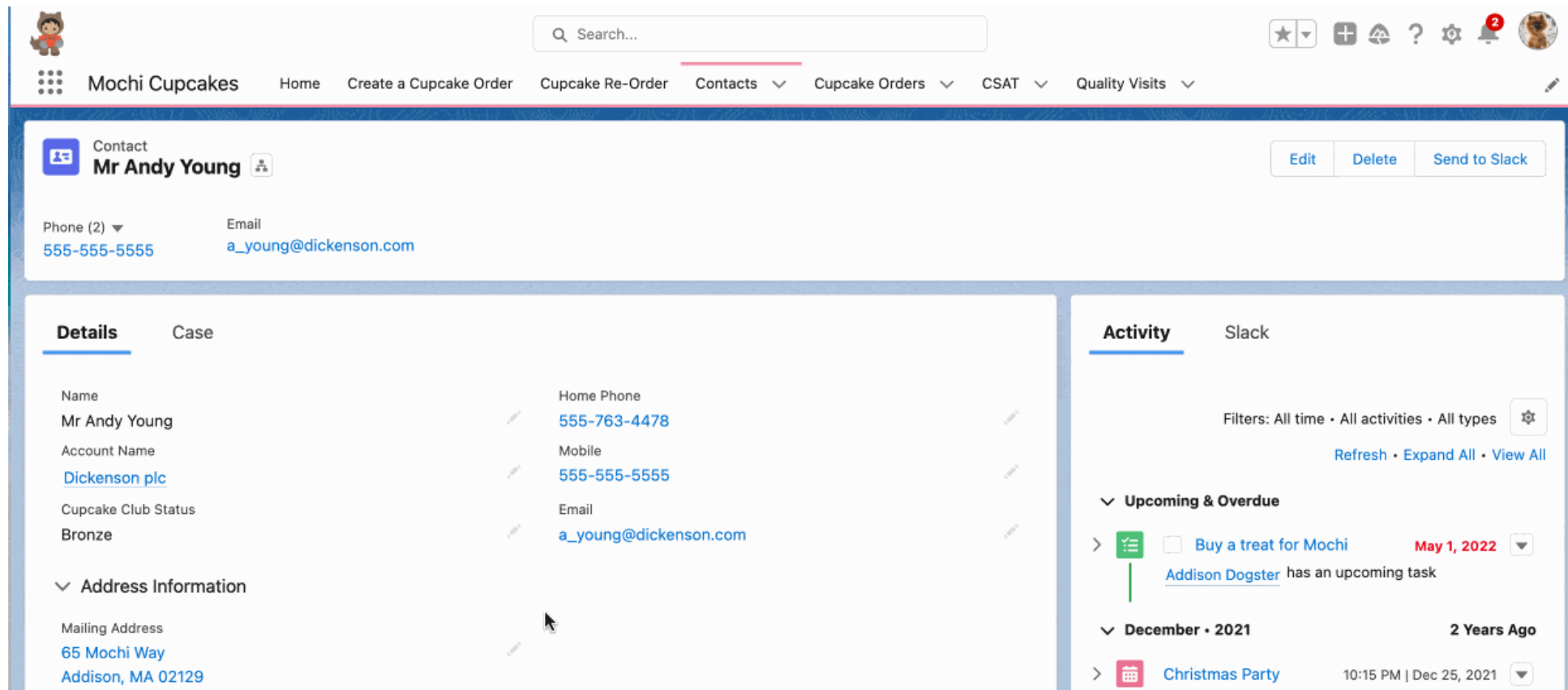


The screenshot displays a calendar application interface for the week of April 30, 2023, to May 6, 2023. The main view is a weekly grid with time slots from 8am to 4pm. Events are color-coded and include titles and times. For example, on Monday, there is a 'New Hire Coffee Chat' (9:15-10am) and a 'Contracts Team Lunch' (11am-12pm). On Tuesday, there are 'Sales Onboarding' (9am-3pm), 'Product Demo' (9:30-10:30am), 'Contracts Team Lunch' (11am-12pm), and 'Legal Lunch & Learn' (11:30am-12:30pm). On Wednesday, there is a 'Legal Lunch & Learn' (11:30am-12:30pm) and 'Client Lunch' (12-1pm). On Thursday, there is 'Sales Onboarding' (9am-3pm), 'New Hire Coffee Chat' (9:15-10am), 'Product Demo' (10:30am-12pm), and 'Contracts Team Lunch' (11am-12pm). On Friday, there is 'Sales Onboarding' (9am-3pm) and 'Contracts Team Lunch' (11am-12pm). On Saturday, there is a 'Product Demo' (1-3pm). The right sidebar shows 'My Calendars' (My Events, My Opportunities, Sales Team Calendar) and 'Other Calendars' (Company Trainings, Contracts Team, Legal Department, Public Holidays).



# Undo Field Changes

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



The screenshot shows a CRM interface for a contact named Mr Andy Young. The interface includes a navigation bar at the top with options like 'Home', 'Create a Cupcake Order', 'Cupcake Re-Order', 'Contacts', 'Cupcake Orders', 'CSAT', and 'Quality Visits'. The contact profile is displayed in a card format with fields for Name, Account Name, Cupcake Club Status, Home Phone, Mobile, and Email. Each field has a small pencil icon next to it, indicating it is editable. The 'Details' tab is active, showing the following information:

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

On the right side, there is an 'Activity' tab showing a list of tasks and events. The first activity is 'Buy a treat for Mochi' due on May 1, 2022, with a note that 'Addison Dogster' has an upcoming task. Below that, there is a section for 'December - 2021' with an event 'Christmas Party' on Dec 25, 2021 at 10:15 PM.



# More Salesforce Administrator Focused



# Permission Sets: Field-Level Security

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

The screenshot shows a web interface for configuring field-level security. At the top, a blue header bar reads "Step 3: Establish field-level security" and "Step 3 of 4". Below the header, there are navigation buttons for "Previous", "Next", and "Cancel".

The main content area displays the following field details:

- Field Label: Test Field
- Data Type: Text
- Field Name: Test\_Field
- Description: (empty)

Below the details, there is a text block: "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."

A checkbox labeled "Permission sets with object permissions" is checked. Below this, there is a table with the following columns:

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

At the bottom right of the table area, there are navigation buttons for "Previous", "Next", and "Cancel".



# In-App Guidance: Field Specific

The screenshot displays a CRM application interface with a contact profile and an in-app guidance configuration panel.

**Contact Profile:**

- Contact:** My Contact
- Title:** CEO
- Account Name:** Edge Communications
- Phone (2):** (512) 757-6000
- Contact Owner:** Andreea D.

**Related Details:**

- 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

**Activity:**

- Filters:** All time · All activities · All types
- Upcoming & Overdue:** No activities to show. Get started by sending an email, scheduling a task, and more.
- Past Activity:** No past activity. Past meetings and tasks marked as done show up here.

**In-App Guidance Configuration Panel:**

- Display:** Inactive, Save, Done
- 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:** (Selected)
  - Docked Prompt:**
  - Targeted Prompt:**
- Prompt Location:** Select the page where your prompt displays.
  - Location:** This Page, This App
  - Buttons:** Cancel, Next

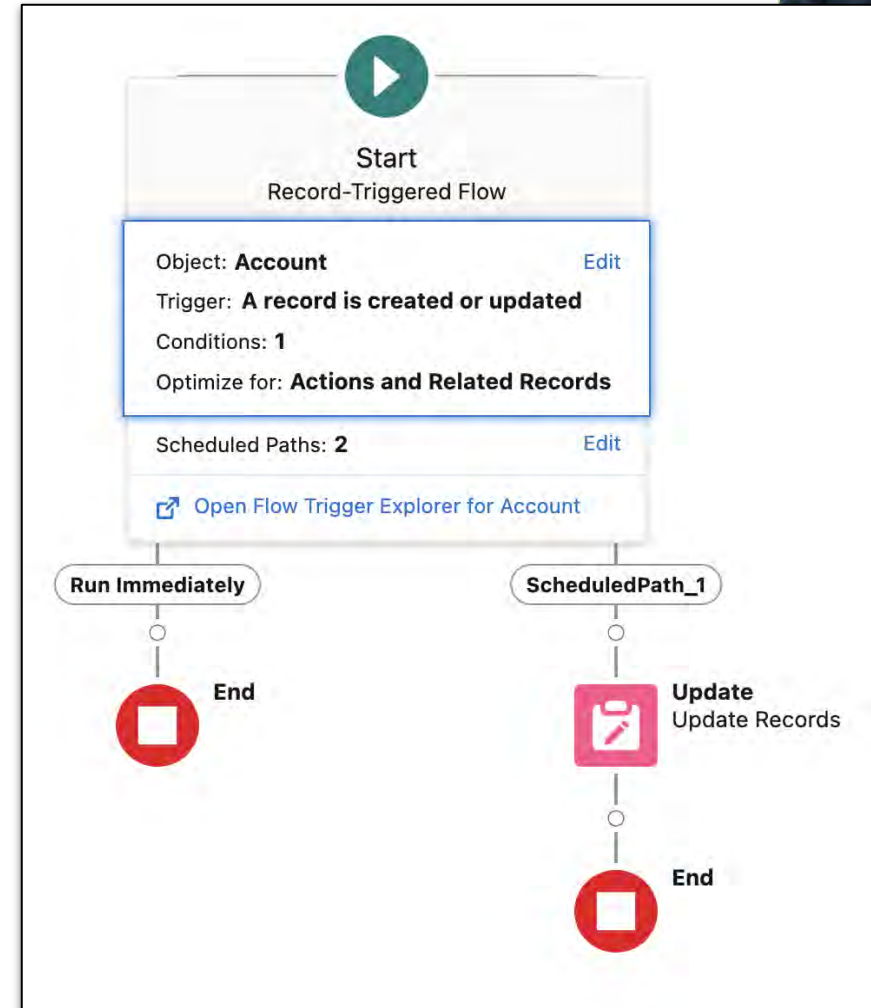
**Preview Prompt:**

- Title:** Your Title Goes Here
- Body:** Your body text appears here.
- Buttons:** Dismiss



# 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

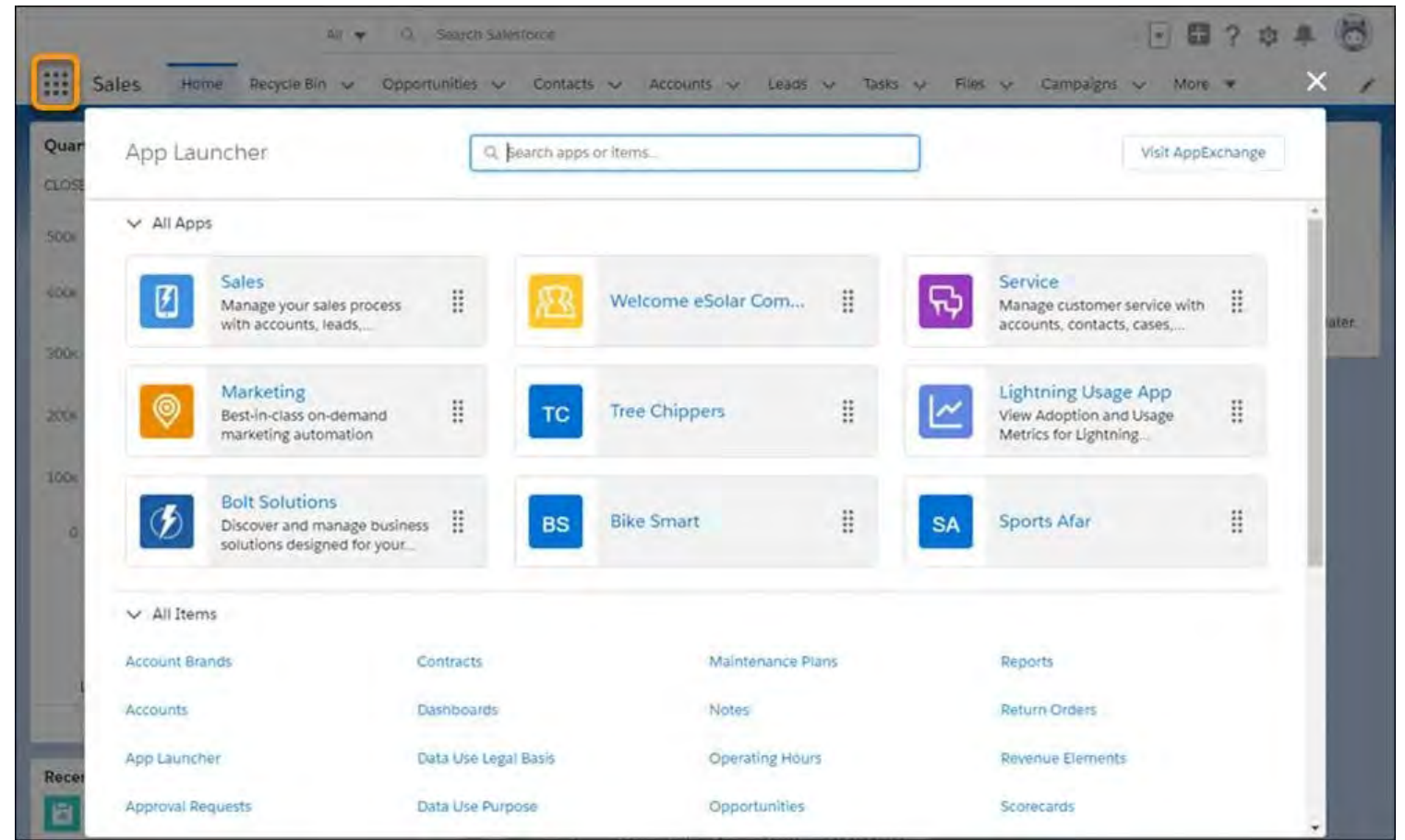
- Align fields across columns on lightning pages
- This feature enables admins to configure horizontal alignment of fields across columns in a field section component

Account Information	
Account Owner <a href="#">Tofu Admin</a>	Rating Hot
Account Name Edge Communications	Phone <a href="#">(512) 757-6000</a>
Parent Account	Fax <a href="#">(512) 757-9000</a>
Account Number CD451796	Website <a href="http://edgecomm.com">http://edgecomm.com</a>
Account Site	Ticker Symbol EDGE
Billing Address <a href="#">312 Constitution Place</a> <a href="#">Austin, TX 78767</a> <a href="#">USA</a> <a href="#">Austin, TX</a>	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](mailto:Experts@armanino.com)