

October 4, 2023

Latest Updates in the Salesforce 2024 Winter Release



MEET

Our Presenters



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KNOWLEDGE

Learning Objectives



**Identify ways to
maximize the solution's
potential**



**Discover the updated
user experience to ease
adoption**



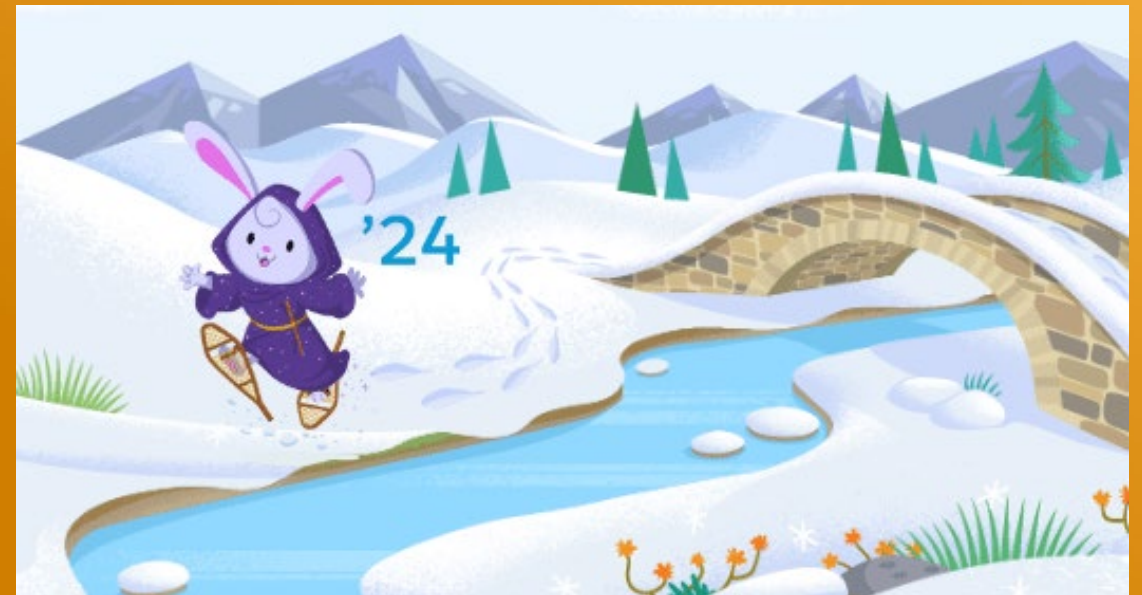
**Understand how to
manage the latest
improvements to work
more efficiently**



Exploring New Areas

Agenda – User Focused

- Display Only Salesforce Events on Calendar
- Personalize Sales Emails with Einstein GPT for Sales
- Transfer Dashboard Ownership
- Report on Members of a Public Group and Queue
- Asset Hierarchy

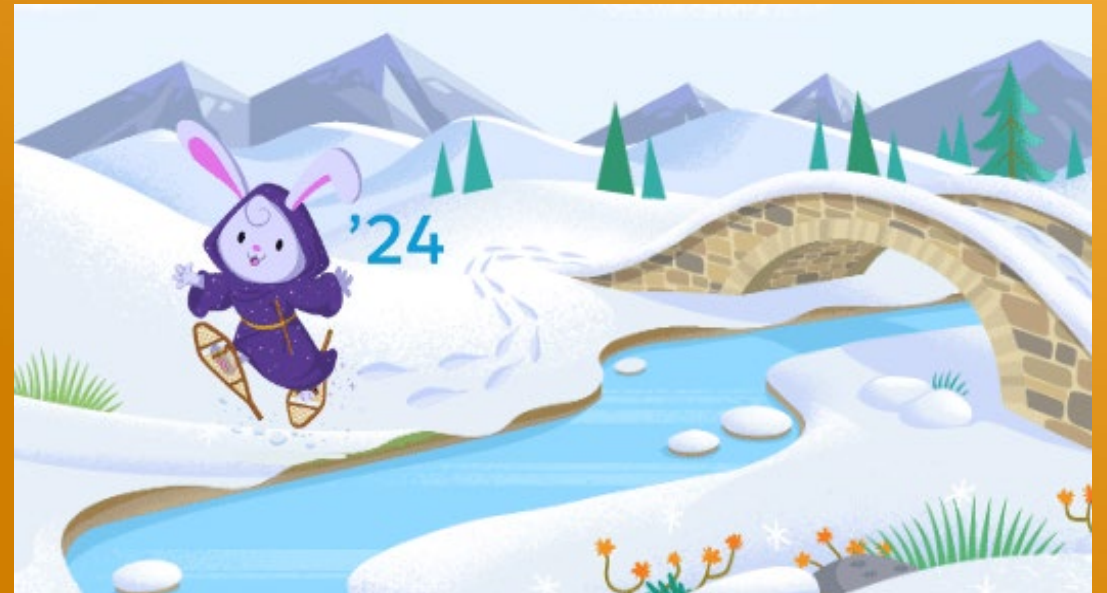




Exploring New Areas

Agenda – Admin Focused

- Migrate to Hyperforce with Hyperforce Assistant
- Permission Set Summary View
- Report on Permission Set Assignment
- Dynamic Forms (GA)
- API Names in Permission Sets
- Salesforce Backup and Restore

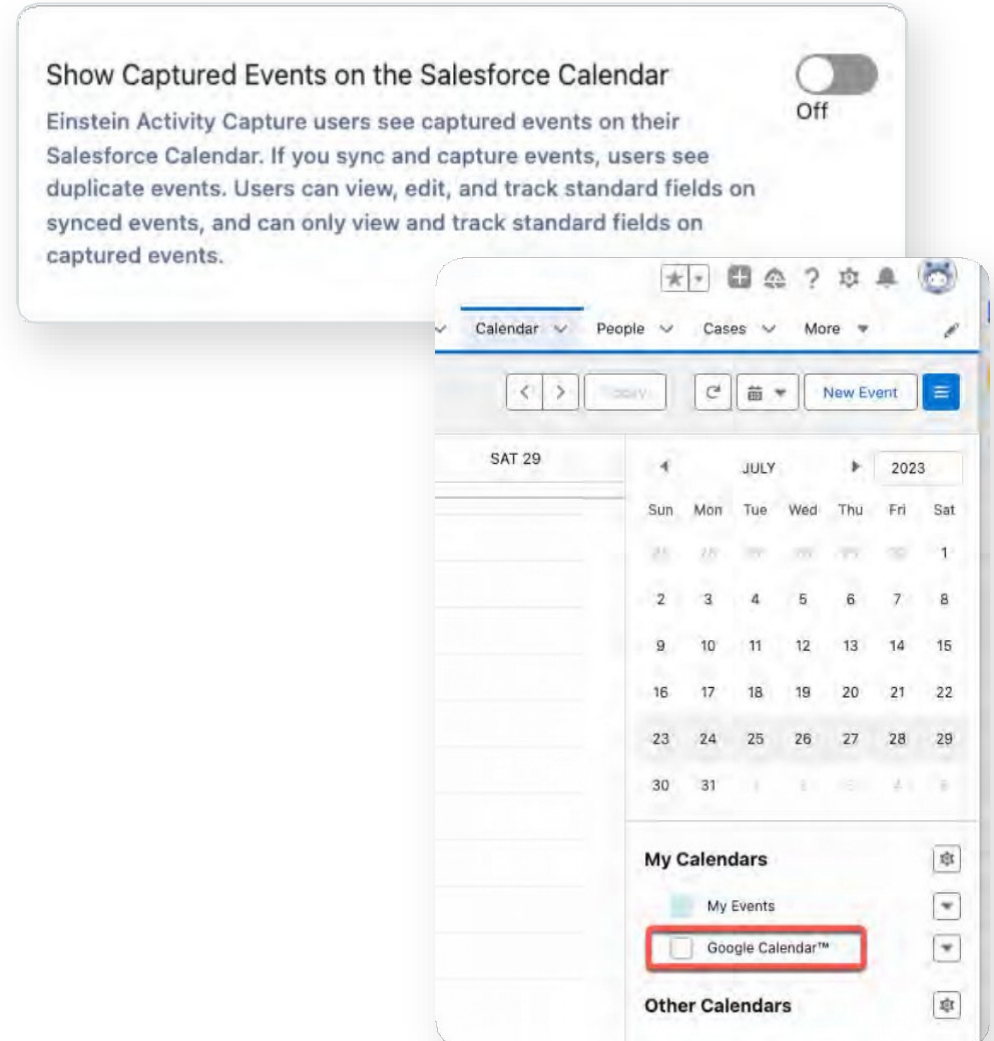


More Salesforce User Focused



Display Only Salesforce Events on Calendar

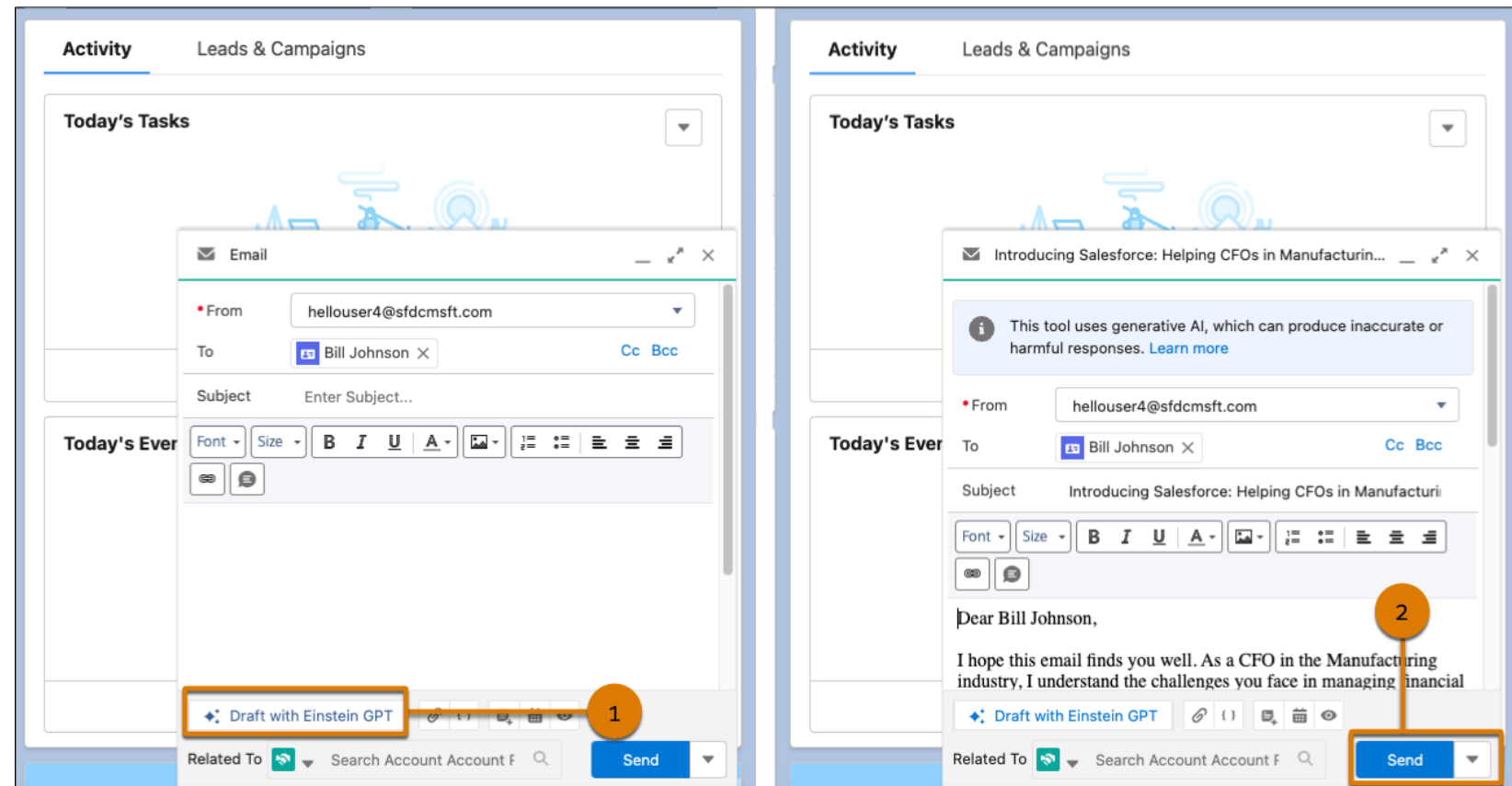
- Avoid displaying **duplicate or redundant event data** when multiple event sources are in play
- Prevent the “**Google Calendar**” or “**Microsoft Office 365**” overlay option from appearing in calendar view
- If desired to have the overlay option appear, it is not selected by default and needs to be **enabled manually**

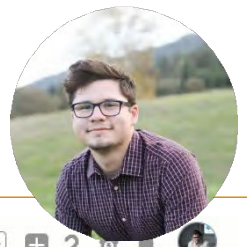




Personalize Sales Emails with Einstein GPT for Sales

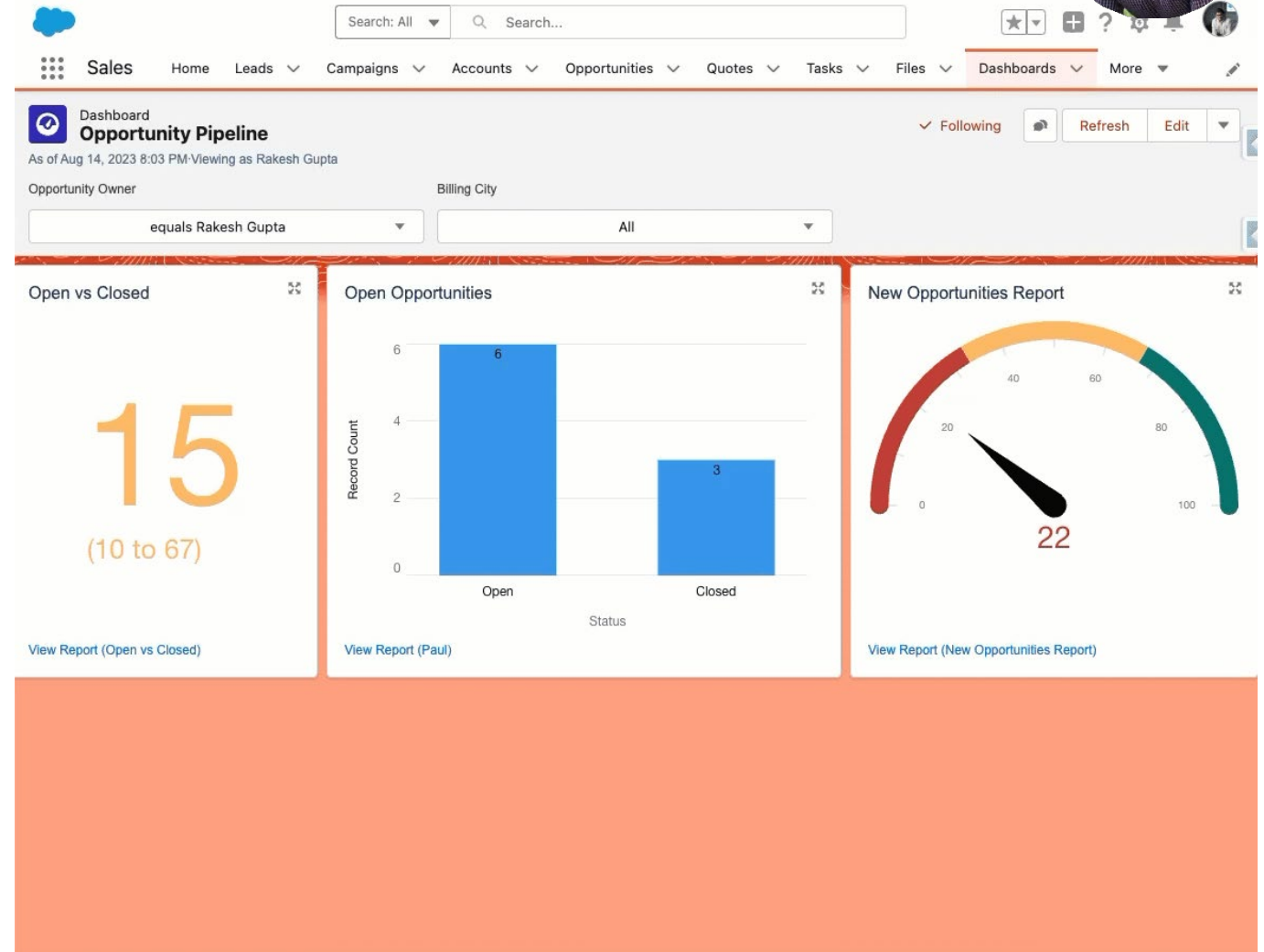
- Einstein GPT uses your sales data to generate personalized emails
- Sales reps can draft emails, like a follow-up or a meeting invite, by choosing from the preset email prompt types
- This feature is available in Lightning Experience in Performance and Unlimited editions





Transfer Dashboard Ownership

- You can now **transfer ownership of your Lightning dashboard** to the user who's best suited to manage the dashboard access and content
- The new owner gets the **same access** as the original dashboard creator





Report on Members of a Public Group and Queue

- Using a custom report type, it is now possible to see who the members are in a Group or Queue via Reports
- Previously would have to run SSQL Queries to review the data
- Managers will easily be able to move reps in and out of queues and groups

New Custom Report Type [Help for this Page](#)

Step 1. Define the Custom Report Type Step 1 of 2

[Next](#) [Cancel](#)

Report Type Focus = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object

Identification

Report Type Label

Report Type Name [?](#)

Note: Description will be visible to users who create reports.

Description

Store in Category

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status ☐ In Development ☒ Deployed

[Next](#) [Cancel](#)



Asset Hierarchy

- New asset will display **all assets** for the specific account being viewed
- Ability to **quickly browse** account specific assets in a single view without navigating to each asset to gather additional information
- Enabling a **new component** within the Lightning App Builder will show the hierarchy view

The screenshot displays the Salesforce Lightning App Builder interface for the 'Acme Corp' account. The 'Assets' tab is active, showing a table of assets with columns for #, Asset Name, Quantity, Start Date, End Date, and Total Amount. The table lists three main asset groups: 'iPhone 13 Bundle Offer', 'Streaming Pack', and 'LG OLED | Objet Collect...'. Each group is expanded to show its sub-assets. To the right of the table, there is an 'Einstein Recommendation' section and a 'Company Details' section for 'Acme Corp'.

#	Asset Name	Quantity	Start Date	End Date	Total Amount
1	iPhone 13 Bundle Offer	3	2/7/2023	2/6/2024	USD 749.00
	Apple iPhone 13	3	-	-	USD 649.00
	Streaming Pack	6	2/7/2023	2/6/2024	USD 50.00
	Sony Liv	3			USD 30.00
	Zee5	3			USD 20.00
	Premium OTT	6	2/7/2023	8/6/2023	USD 50.00
	Hotstar	3			USD 25.00
	Netflix	3			USD 25.00
2	LG OLED Objet Collect...	3	2/7/2023	2/6/2024	USD 1,129.00
3	Accessories	3	2/7/2023	2/6/2024	USD 449.00

Einstein Recommendation

You might be able to combine some contract for [Sustainable Organics](#). We found the following contract looks similar to this one.

Contract #004938759

88.2%
similarity score

- + The contract ends on the same date: June 30, 2023
- + Contains 85% or more of the same assets
- Billing frequencies do not match

[Show 4 more](#)

Company Details

Acme Corp

BILLING ADDRESS
1289 Great Sails Pkwy
San Francisco, CA 94016
[Edit](#)

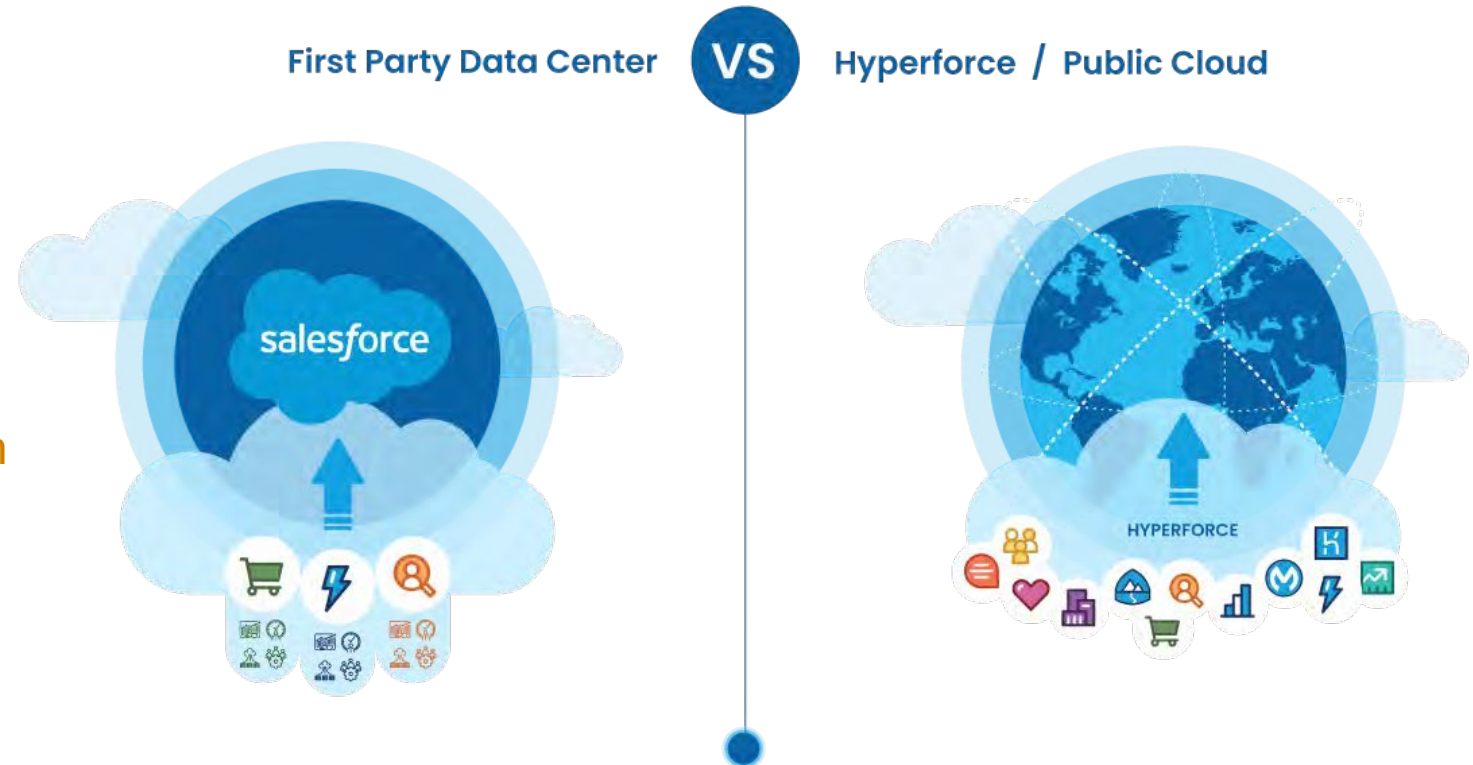
SHIPPING ADDRESS
R91 Skulark Drive

More Salesforce Administrator Focused



Migrate to Hyperforce with the Assistant

- Hyperforce Assistant is now available to help with the migration process
- Allows the platform to be deployed to your choice of cloud infrastructure providers, such as **Amazon Web Services** (AWS), **Google Cloud Platform** (GCP) and **Microsoft Azure**
- Protects customer data and ensures compliance with industry standards and regulations. [Learn More.](#)





Permission Set Summary View

- Summary View shows all the details like the API Name, Created & Modified Date and more
- Shows what Permission Set Groups it has been added to
- Overview of Permissions that have been enabled in the permission set

Permission Set
Field Service Admin License

Find Settings... Clone Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview

Description

License

Session Activation Required

Permission Set Groups Added To 0

Apps

Settings that apply to Salesforce app custom apps built on the Lightning Platform [Learn More](#)

System

Settings that apply across all apps, s user management [Learn More](#)

Account & Opportunity Access

API Name
Account_Opportunity_Access

License
--

Created By
Admin User

Last Modified By
Admin User

Namespace Prefix
--

Session Activation Required
--

Created Date
7/21/2023, 07:01 PM

Last Modified Date
7/21/2023, 07:06 PM

Permission Set Groups Added To
2

Description
--

Permission Set Groups Added To

Name	API Name	Status	Description
Sales Reps	Sales_Reps	Updated	PSG for Sales Rep Access - no managers
Sales Managers	Sales_Managers	Updated	Sales Managers & Sales Execs

Permissions Enabled in This Permission Set

> [User Permissions \(App & System Permissions\)](#)

Object Permissions

Object Name	Object API Name	Read	Create	Delete	Edit	Modify All Records	View All Records
Account	Account	✓	✓	✓	✓	✓	✓
Opportunity	Opportunity	✓	✓		✓		
Contact	Contact	✓					



Report on Permission Set Assignment

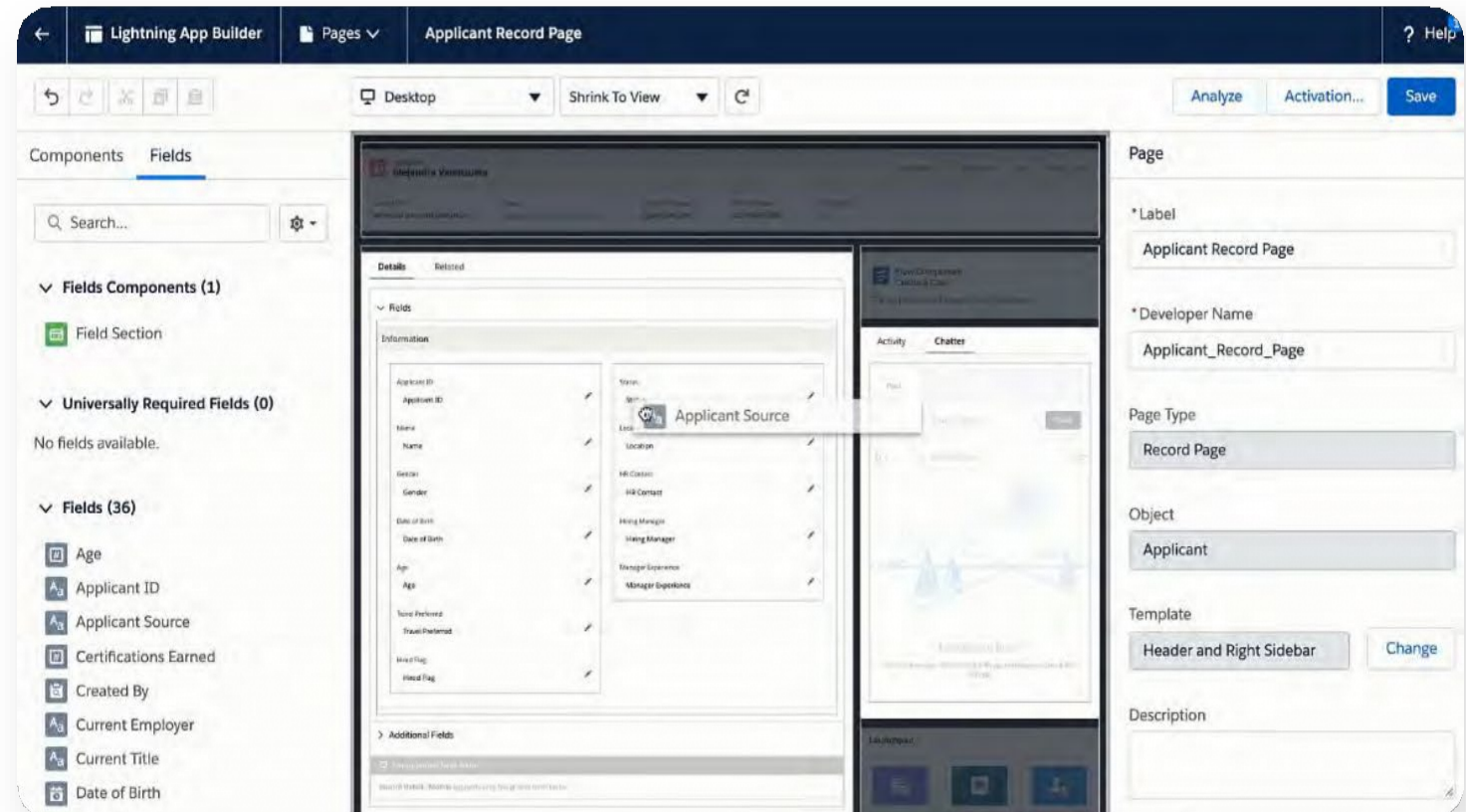
- Reports now allow you to see which permission sets are assigned to users, all in one view
- This would be achievable with a Custom Report Type. Utilizing the Permission Set Assignment object
- Run a report by a user or by permission set or permission set group to see who is assigned to what in one place

Report: Permission Set Assignment Report Type Perm Set Assignments			
Total Records	Total User: Active		
5	4		
<input type="checkbox"/> User: Full Name ↑	Permission Set: Permission Set Name	Permission Set: Permission Set Type	User: Active
<input type="checkbox"/> Admin User (1)	Account_Opportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
<input type="checkbox"/> Alyssa Admin (1)	Account_Opportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
<input type="checkbox"/> Jose Sales Manager (2)	Sales_Managers	Group	<input checked="" type="checkbox"/>
	Account_Opportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
<input type="checkbox"/> Leslie Sales Rep (1)	Account_Opportunity_Access	Regular	<input checked="" type="checkbox"/>
Subtotal			1
Total (5)			4



Dynamic Forms for Standard Objects

- Dynamic Forms help display data **conditionally** and **dynamically**
- Previously only available on **custom objects**
- Now available on **standard objects**, **desktop**, and **mobile**
- **Enhances experience** for the users as the page layouts will not be cluttered with unnecessary fields





API Names in Permission Sets

- You can now see API Names of Object and Field Permissions when configuring the Permission Sets
- This was an issue when admins were assigning objects in a permission set and two objects had the same label
- Admin experience with this update makes it easier to navigate and use permission sets

Object Settings	
Object Name	Object API Name
Accounts	Account
App Analytics Query Requests	AppAnalyticsQueryRequest
Asset Relationships	AssetRelationship
Assets	Asset
Associated Locations	AssociatedLocation
Authorization Form Consents	AuthorizationFormConsent
Authorization Form Data Uses	AuthorizationFormDataUse
Authorization Forms	AuthorizationForm
Authorization Form Texts	AuthorizationFormText
Background Operations	BackgroundOperation
Badges	WorkBadgeDefinition
Badges Received	WorkBadge
Business Brands	BusinessBrand
Campaign Influence	CampaignInfluence
Campaign Members	CampaignMember
Campaigns	Campaign
Cases	Case
Communication Subscription Channel Types	CommSubscriptionChannelType
Communication Subscription Consents	CommSubscriptionConsent
Communication Subscriptions	CommSubscription
Communication Subscription Timings	CommSubscriptionTiming
Contact Point Addresses	ContactPointAddress
Contact Point Consents	ContactPointConsent



Create Call Summaries Powered by Einstein GPT

- Einstein can use it's **generative AI talents** to write post call summaries on voice and video calls
- Will display in the **Summary tab** and includes next steps and customer feedback

The screenshot displays the Salesforce interface for a video call summary. The top navigation bar includes 'Sales', 'Home', 'Work Queue', 'Cadences', 'Opportunities', 'Conversation Insights', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Video Calls', and 'More'. The main content area is titled 'Video Call TrailTech Discussion' and includes a search bar and buttons for 'Edit', 'Sharing', and 'Einstein Assistant'. Below this, a table shows call details: 'Call Started' (9/7/2023, 10:21 AM), 'Call Duration' (00:35:24), 'Language' (English), 'Call Type' (Google Meet), 'Related Record' (Adventure for Life), and 'Owner Name' (Alex Zhang). The 'Meeting Playback' section features a video player with a progress bar at 00:00/04:56. To the left of the video player is a sidebar with 'Participants' (Customer: Adventure for Life, Gabriela Silva; Internal Reps: NorthernTrail, Alex Zhang) and 'Insights' (Automatic Insights: Questions (2), Pricing (2), Next Steps (3), Challenges (1); Objections: Budget (1), Authority (1); Competitors: Peak Systems (3); Products: UE(2), TrailTech(2); Delivery Issues). Below the video player is an 'Insights' timeline showing a sequence of events. The right sidebar contains the 'Summary' tab, which includes an 'Einstein GPT' section titled 'Customer Summary' (The customer seemed satisfied with the call and appreciated the assistance provided by the seller. They expressed gratitude and ended the call on a positive note.) and a 'Call Summary' (During the call, Alex Zhang from Northern Trail presented the benefits of TrailTech, highlighting its features, customization options, and automation capabilities, while also acknowledging Peak Systems' advantage in coaching. Both parties discussed the potential benefits of TrailTech for Adventure for Life's sales operations. Gabriella Silva was particularly interested in feature gap comparison between TrailTech and Peak Systems to make an informed decision for her company.) and 'Next Steps' (Customer to review the information provided and discuss with the team; Send feature comparison; Follow-up meeting scheduled for August 7th.). At the bottom of the summary section are 'Edit' and 'Copy to Clipboard' buttons.

Meeting

2 min ago | Today

Created by Einstein GPT

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Customer Feedback

The customer seemed satisfied with the call and appreciated the assistance provided by the seller. They expressed gratitude and ended the call on a positive note.

Call Summary

During the call, Sam Rhodes from Salesforce presented the benefits of Salesforce Unlimited, highlighting its features, customization options, and automation capabilities, while also acknowledging Microsoft's advantage in coaching. Both parties discussed the potential benefits of Salesforce Unlimited for Adventure for Life's sales operations.

Next Steps

- Customer to review the information provided and discuss with the team
- Finalize decision on plan options
- Follow-up meeting scheduled for August 7th.

Cancel

Save

Opportunity

Adventure for Life

Account Name

Close Date

Amount

Opportunity Owner

Adventure for Life

5/20/23

\$230,000.00

Sam Rhodes

>

✓

✓

✓

✓

✓

Proposal/Pric

Details

Related

Call Summaries (12)

Meeting with Lauren Bailey

2 min ago | Today

Purpose

This call was to discuss the product features of Trail Trekker and identify any gaps with Alpine Adventure , which the client uses currently, in hopes of potentially migrating to Trail Trekker

Expand

Pricing Questions

10:00am | 5/3/23



Salesforce Backup & Restore

- Protect CRM data against permanent data loss and corruption with daily backups and the ability to restore data from backup
- An integration or user error may cause data loss or corruption in your org, but Backup & Restore can restore lost or corrupted data from a prior backup

Date	Log Number	Log Name
Jul 19, 2023, 10:30:40 PM	180	RESTORE_POLICY_EXECUTION_COMPLETE
Jul 19, 2023, 10:30:20 PM	179	RESTORE_REQUEST_EXECUTION_STARTED
Jul 19, 2023, 10:30:14 PM	178	RESTORE_POLICY_ENQUEUE_SUCCESSFUL
Jul 19, 2023, 10:22:49 PM	177	RESTORE_POLICY_EXECUTION_COMPLETE
Jul 19, 2023, 10:22:30 PM	176	RESTORE_REQUEST_EXECUTION_STARTED
Jul 19, 2023, 10:22:07 PM	175	RESTORE_POLICY_ENQUEUE_SUCCESSFUL
Jul 19, 2023, 10:15:59 PM	174	RESTORE_POLICY_EXECUTION_COMPLETE

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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