

Syracuse Trailblazers

October 18
2023



Northeast Dreamin'



Trailblazer
COMMUNITY GROUPS



Northeast Dreamin'



Northeast Dreamin'

October 15-16, 2024

Manchester
New Hampshire

<https://northeastdreamin.com>



Winter 24



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Winter 24



Trailblazer
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Generate AI
Lightning
Reports
Flows
Development



Winter 24



Release Notes

- https://help.salesforce.com/s/articleView?id=release-notes.salesforce_release_notes.htm&release=246&type=5

Trailhead

- <https://trailhead.salesforce.com/content/learn/modules/winter-24-release-highlights>

MFA Auto Enablement

- MFA rollout continues and will be required in Spring '24 for all direct logins
- SSO logins are contractually required to use MFA, but are not checked by Salesforce



Winter 24



New Certifications

- AI Associate (\$75)
- Data Cloud Consultant (\$200)

Free Data Cloud Provisioning for Enterprise or Unlimited Edition

- 2,500,000/year Data Service Credits
- 1TB data storage
- 1 Data Cloud admin
- 100 internal Data Cloud identity users
- 1000 Data Cloud PSL
- 5 Integration Users
- Includes Unify for Prospects for Targeted Selling and Unify Customers for Personalized Service



<https://help.salesforce.com/s/articleView?id=000396380&type=1>



Generative AI - Service

Einstein Work Summaries

- Predicts and creates a summary, issue and resolution based on chat conversation
- Unlimited edition with Service Cloud Einstein and Einstein GPT for Service add-on

Einstein Service Replies

- Drafts recommended replies to a customer during a chat session
- Unlimited edition with Service Cloud Einstein and Einstein GPT for Service add-on

Service Replies for Email

- Recommends knowledge base articles for a case and drafts an email from the article selected
- Unlimited edition with Service Cloud Einstein and Einstein GPT for Service add-on

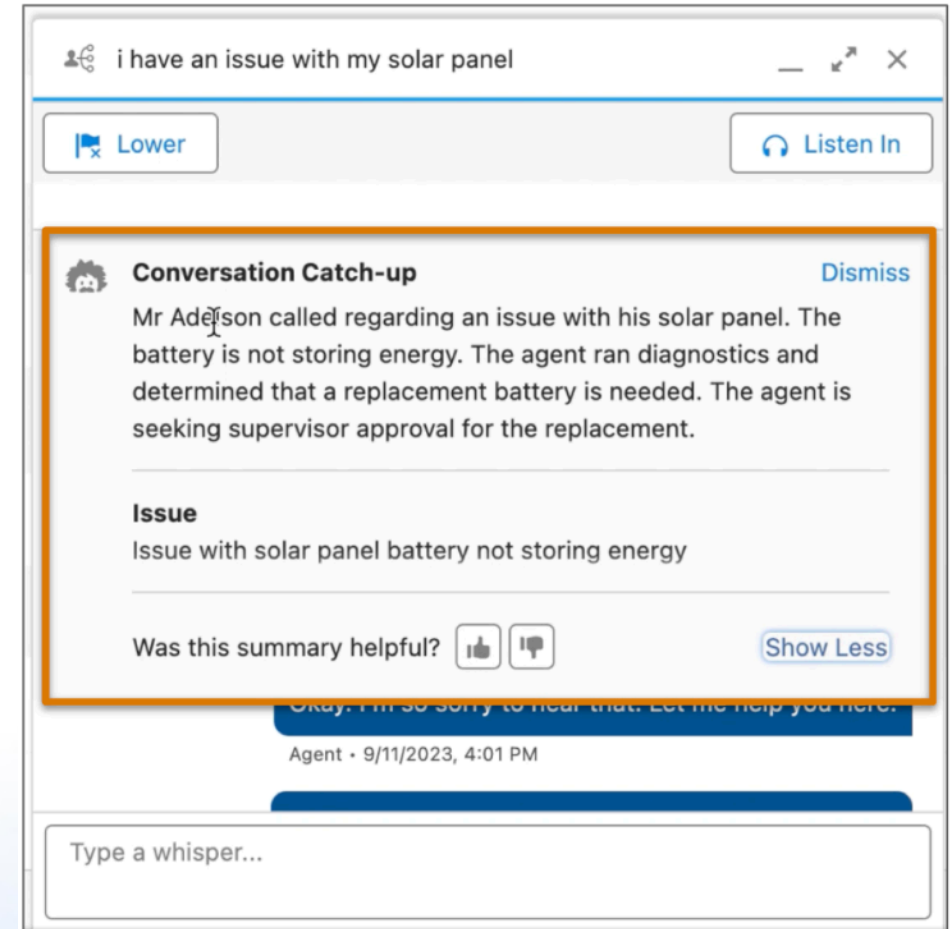


https://help.salesforce.com/s/articleView?id=release-notes.generative_ai_feature_overview.htm&release=246&type=5

Generative AI - Service

Mid Conversation Summaries

- When a voice call or messaging session is transferred to another agent
- Generates a summary of the issue and detailed description
- Uses WhatsApp, Facebook Messenger, Messaging for In-App/Web or Service Cloud Voice on Unlimited edition with Service Cloud Einstein and Einstein GPT for Service add-on





Trailblazer
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Generative AI - Sales

Product Info in Sales Emails

- Sales rep select a product from the email composer window and Einstein embeds product information
- Performance or Unlimited edition with Einstein for Sales

Personalize Sales Emails

- Select a type of email (check in, introduction, meeting invite) and it auto generates for leads and contacts
- Performance or Unlimited edition with Einstein for Sales



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Generative AI - Sales



Call Summaries

- Creates summary customer impression and next steps for voice or video calls
- Performance or Unlimited edition with Einstein for Sales

Meeting Created by Einstein
2 min ago | Today

B I U **☰ ☲ ☱ ☴** **I_x**

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

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Generative AI - Sales



Sales Summaries

- Summaries of opportunities, accounts, contacts and leads
- Performance or Unlimited edition with Einstein for Sales

Summary for Borderfree GW

Einstein Opportunity Summary ⓘ

Created Oct 12 at 12:50 PM

The deal named **Borderfree GW** is currently in the Negotiation/Review stage and is associated with the account **Intermediate Chanticleer Inc.**. The deal amount is \$78,660.82 and the deal is expected to close on January 9, 2023.

Who's Involved

The deal involves two contacts, including the CEO. There is one internal team member involved in the deal.

Activities

In the past 30 days, there have been 2 meetings and 1 call related to the deal.

[Copy to Clipboard](#)



Lightning

Maps Lite

- Select 50 accounts, contacts or leads and plot them on a map
- A limited version of the full Salesforce Maps, which includes route and schedule optimizers

Contacts Intelligence View (Demo)

- Add button to list view layout

Leads Intelligence View (Demo)

- Add button to list view layout

The screenshot shows the Salesforce Maps Lite interface. At the top, the navigation bar includes 'Sales', 'Home', 'Maps Lite' (highlighted with a red box), 'Analytics', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Assets', 'Dashboards', 'Reports', and 'More'. The main area displays a map of the United States with numerous red location pins. Below the map, there is a table with columns: Billing City, Billing State/Province, Phone, Type, and Account Owner Alias. A dropdown menu for 'AVAILABLE OBJECTS' is open, showing 'Account', 'Leads', and 'Contacts' (with 'Leads' highlighted by a red box). A pagination control shows '1 - 50 of 1543' (with '50' highlighted by a red box).

Billing City	Billing State/Province	Phone	Type	Account Owner Alias
Beaverton	OR	(800) 333-3343	Customer	kpren
San Francisco	CA	(800) 994-4499	Customer	kpren
Maywood	IL	(800) 211-1117	Customer	kpren
Atlanta	GA	(888) 455-5555	Prospect	kpren
Comanche	OK	(888) 533-4433	Customer	kpren



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https://help.salesforce.com/s/articleView?id=release-notes.rn_sales_contacts_intelligence_view.htm&release=246&type=5
https://help.salesforce.com/s/articleView?id=release-notes.rn_sales_leads_intelligence_view.htm&release=246&type=5

Lightning

Icon Color Change, Again

- Icon changes made in Summer 23 to promote better accessibility weren't accessible enough.



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Reports

New Reports Available (Demo)

- Account Share
- Public Group Members
- Permission Set Assignment

Transfer Dashboard Ownership (Demo, Beta)

- Instead of cloning/recreating a dashboard owned by an inactivated user, you can transfer it
- Can transfer ownership of dashboards created by members under you in the role hierarchy



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https://help.salesforce.com/s/articleView?id=release-notes.rn_sharing_crt_group_membership.htm&release=246&type=5

https://help.salesforce.com/s/articleView?id=release-notes.rn_permissions_perm_set_crt.htm&release=246&type=5

Flows

Custom Error Messages (Demo)

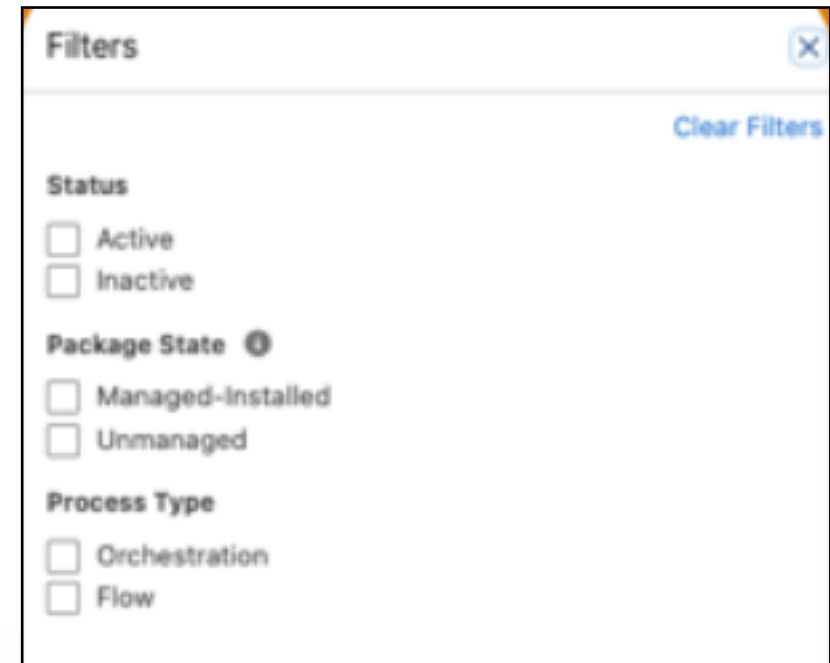
- It's like `addError()` in Apex, but in a flow!
- Use it to make a create, edit or delete attempt fail

Save partially completed flows

- Before, if an element was not fully configured, you couldn't save. Now you can.

More Flow Explorer filtering options

- Filter on status, package state and process type





Development

Monitor Async Apex Usage (Demo)

- Apex Jobs in Setup now shows percentage of 24 hour asynchronous processing used

Queueable Duplicate Signatures

- Use `QueueableDuplicateSignature.Builder()` to avoid enqueueing the same job twice

Database Permission Check

- `AccessLevel.withPermissionSetId()` to perform DML with object/FLS permissions of a particular PermSet

Bulk API 2.0

- Supports larger PK Chunking, querying in batches and removed 32,000 character select SOQL clause limit



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https://help.salesforce.com/s/articleView?id=release-notes.rn_api_bulk_2.htm&release=246&type=5



Development

getSalesforceBaseUrl() deprecated

- This function no longer works in Apex class API 59.0 or later. Use getOrgDomainUrl() instead

Apex Auto Complete Retired

- Full autocomplete no longer available in the dev console
- Available for custom Apex classes and Subjects, as well as in VSCode and Code Builder

Salesforce Functions Retired

- Designed to allow you to perform data processing off platform is retired
- Introduced October 2021, deprecated October 2023, disabled January 2025



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<https://developer.salesforce.com/docs/platform/functions/guide/release-notes-intro.html>

Thank You For Coming!



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