

Syracuse Trailblazers

October 30
2024



Winter 25



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Winter 25



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'25



AgentForce/AI Stuff

Platform

Lightning

Flows

Monitoring



Winter 25



Release Notes

- https://help.salesforce.com/s/articleView?id=release-notes.salesforce_release_notes.htm&release=252&type=5

Trailhead

- <https://trailhead.salesforce.com/content/learn/modules/winter-25-release-highlights>





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AgentForce/AI Stuff

AgentForce

- Partially a rebranding of Einstein Copilot
- Build autonomous agents that can be deployed on and off platform
- Initial focus on Sales and Service agents
- Build agents with natural language processing
- Basically a generative AI chatbot with answers grounded by the CRM data
- Priced on a consumption model instead of concurrent usage
- Platform Login Licenses now available that are priced on a pay per login instead of per seat



https://help.salesforce.com/s/articleView?language=en_US&id=release-notes.rn_einstein_copilot_agent.htm&release=252&type=5

https://help.salesforce.com/s/articleView?id=release-notes.rn_general_salesforce_platform_usage_based_license.htm&release=252&type=5



AgentForce/AI Stuff

Free AI Training in 2024-2025

- Virtual Interactive Workshop: Get Started With Agentforce, How to Build Your First Agent, Get Started with Prompt Builder
- In person 3 day classes: Build Salesforce AI Solutions (SAI201)

Free Salesforce Certified Professional Exams in 2024-2025

- AI Associate - First try free, \$50 retakes
- AI Specialist - First try free, \$100 retakes
- Freely available in webassessor, no discount codes needed

Salesforce Certified Data Cloud Consultant Exam Prep

- Special 29% discount for SyrDevs (see zoom chat for discount link)
- <https://www.udemy.com/course/salesforce-certified-data-cloud-consultant/>



<https://www.salesforce.com/news/press-releases/2024/09/18/ai-training-opportunities/>
<https://trailhead.salesforce.com/en/help?article=AI-Training-and-Certifications-for-All-FAQ>

Get ready for Agentforce

Build your Customer 360 today



Salesforce Foundations

Free upgrade available for Enterprise Edition & higher

 Sales <ul style="list-style-type: none">✓ Deal Management✓ Quoting✓ Meetings✓ Sales Console	 Service <ul style="list-style-type: none">✓ Case Management✓ Knowledge✓ Macros✓ Service Console	 Agentforce GA Oct '24 <ul style="list-style-type: none">✓ Agents✓ Agent & Prompt Builders✓ 1K conversations & 1K leads & 1 Sales Coach to get started
 Marketing <ul style="list-style-type: none">✓ Email campaigns✓ Built-in analytics✓ 2K email sends (monthly)	 Commerce <ul style="list-style-type: none">✓ Pay Now✓ Storefront✓ Merchandising tools	 Data Cloud <ul style="list-style-type: none">✓ Unified profiles✓ Data Services & Storage✓ 10K Segmentation credits (annual)



Upgrade for free



Platform



Marketing Cloud Advanced Edition

- Includes everything in Growth Edition
- Einstein Send Time Optimization
- Conversational SMS messaging
- A/B testing
- Enhanced reporting and automation around Campaign Flows

Salesforce Buys Own

- Own Company (a.k.a. OwnBackup) is being acquired by Salesforce
- SF tried rolling out a backup solution twice, failed to make any inroads, so just bought them out
- No word on how this impacts current Salesforce Backup customers, Own customers or future integration plans



https://help.salesforce.com/s/articleView?id=release-notes.rn_mktg_advanced.htm&release=252&type=5

<https://www.salesforce.com/news/press-releases/2024/09/05/salesforce-signs-definitive-agreement-to-acquire-own-company/>



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Lightning

Dynamic Highlights Panel (Demo)

- Now up to 12 fields in the highlights panel
- Responsive design instead of truncating
- Supports visibility rules
- Deprecates the Compact Layout
- Requires using dynamic forms

Conditional Formatting (Demo)

- Display a color icon next to a field based on rules criteria
- Used to do this with a bunch of weird formula fields



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https://help.salesforce.com/s/articleView?id=release-notes.rn_lab_conditional_field_formatting.htm&release=252&type=5

Lightning



User List Views (Demo)

- Looks like other lightning list views
- Supports pinning, searching and in-line editing

Access Granted By (Demo)

- See what cause a user to get a permission

Custom Report Types UI Rebuild (Demo, Beta)

- Looks more lightning like
- Easier to create sections in the report type field list



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https://help.salesforce.com/s/articleView?id=release-notes.rn_permissions_granted_by.htm&release=252&type=5

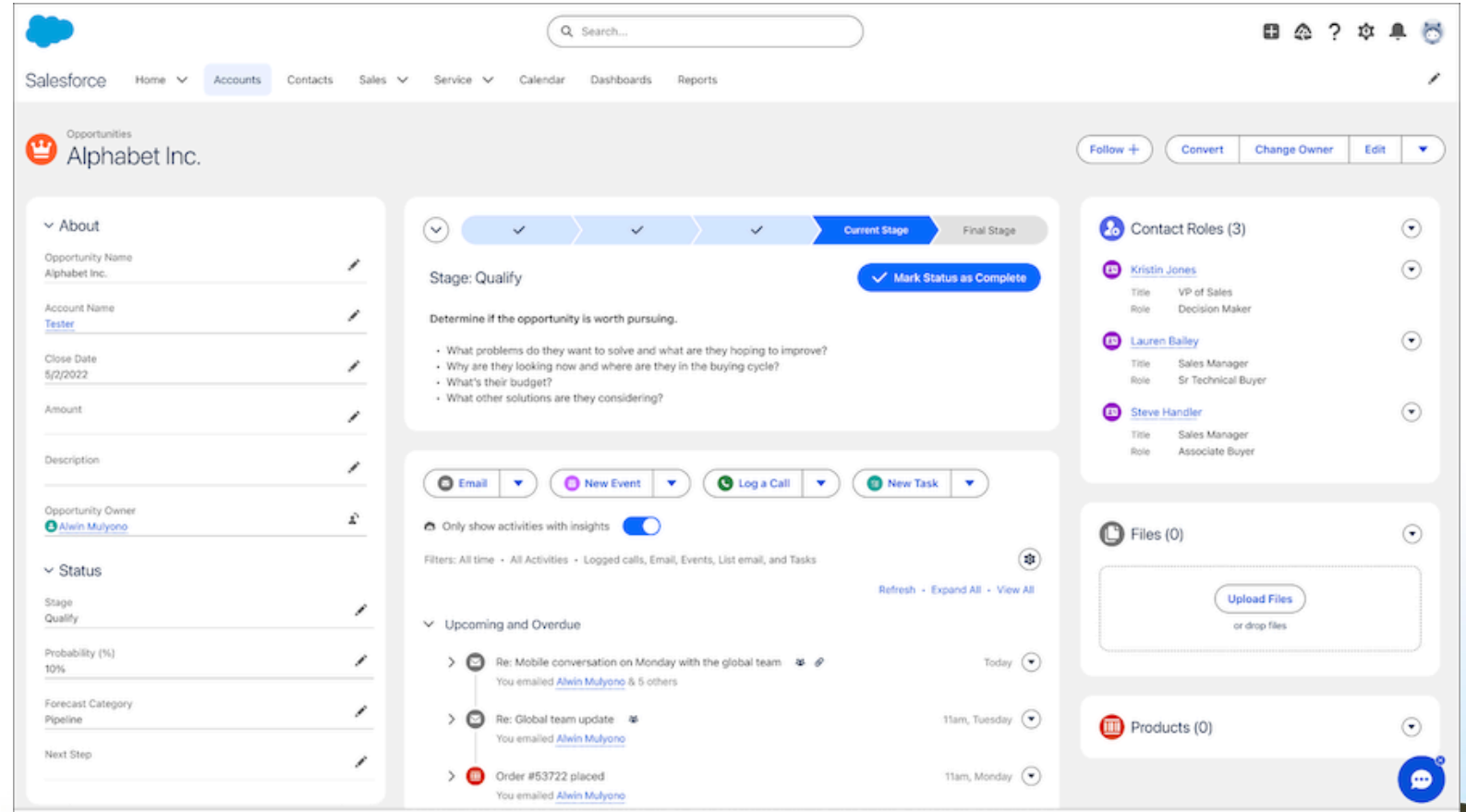
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Lightning



New Lightning UI

- Sales Cloud Unlimited Edition
- Einstein 1 Sales Edition
- Created after October 11, 2024
- Can opt out



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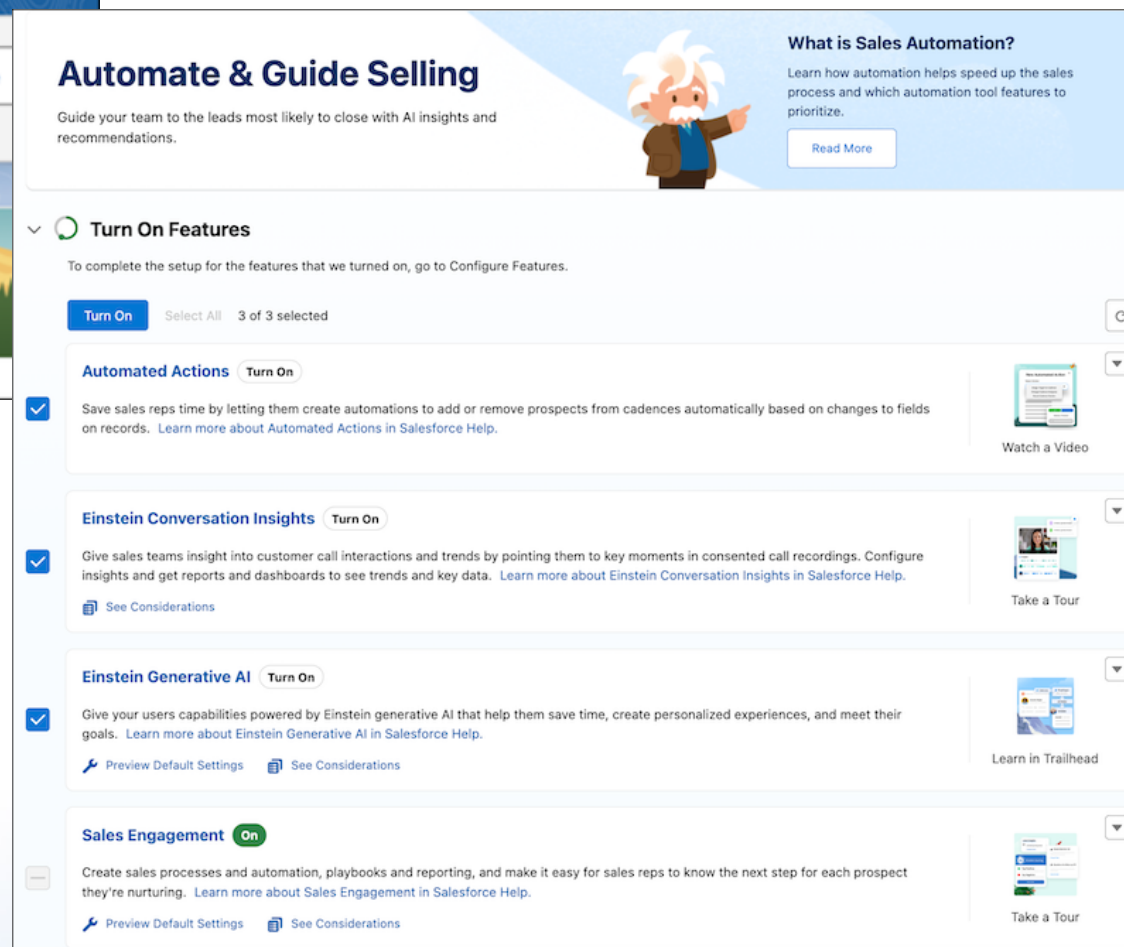
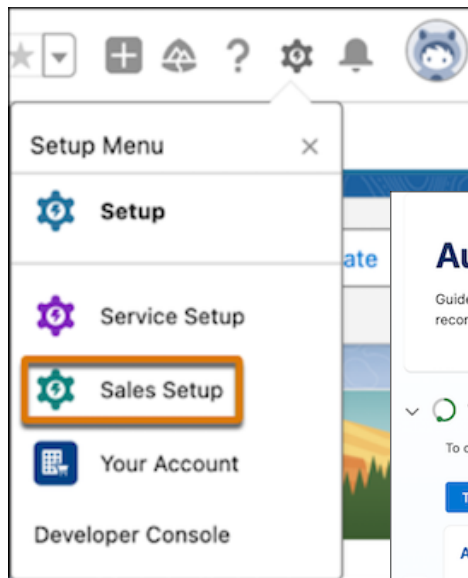
Lightning

New Sales Setup

- Salesforce acknowledges setup is inconsistent and getting worse
- They're working on it

Setup domain

- Setup domain is now salesforce-setup.com



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https://help.salesforce.com/s/articleView?id=release-notes.rn_general_allow_setup_domain.htm&release=252&type=5



Lightning

Salesforce Archive (Pilot)

- Archive off records to an external data store
- Automate data cleanup
- Add-on license
- Will this survive the Own acquisition?

Selective Sandbox Access

- Happens when creating or refreshing Dev and Dev Pro sandboxes
- Must specify a public group to grant access to
- All other users accounts will be frozen by default
- If you have a lot of public groups (over 50), no lookup icon, need to type in the group name



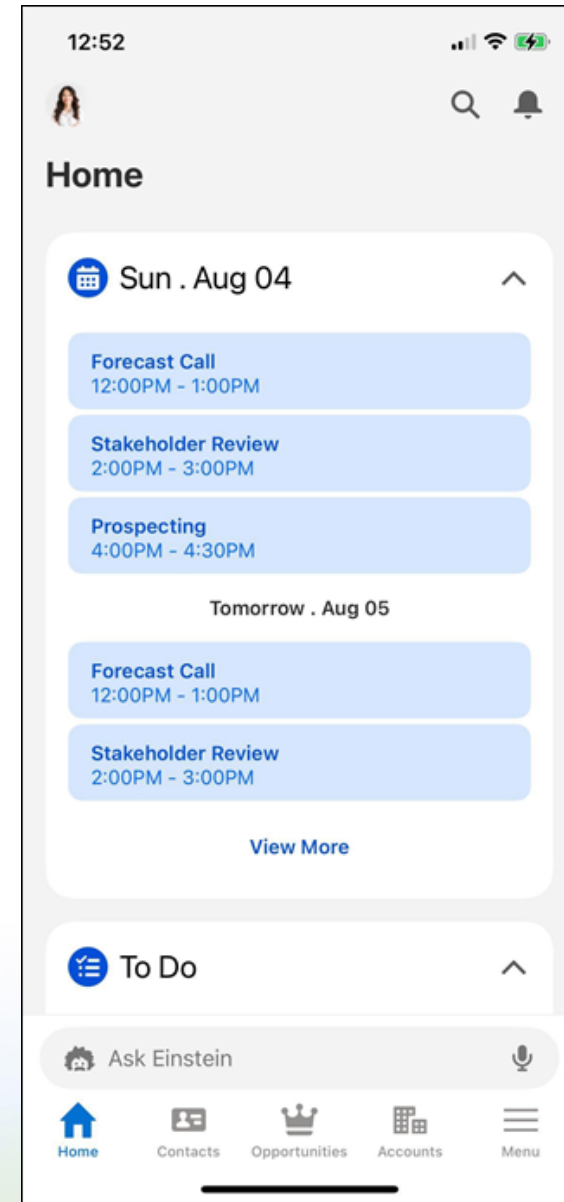
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https://help.salesforce.com/s/articleView?id=release-notes.rn_dev_environments_selective_access_changes.htm&release=252&type=5

Lightning

Seller Focused Mobile App

- Revamped mobile UI, again
- Requires permission Salesforce Mobile App: Native Seller Experience
- Supports Einstein Copilot (which is probably going to be rebranded)



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Flows

Flow Action Buttons

- Call a subflow with a screen flow
- Display the output inline




Flows

Flow Action Buttons

- Call a subflow with a screen flow
- Display the output inline

Select Contacts

Account


United Oil & Gas Corp.
✕

Get Contacts

Contacts

4 of 4 items • 0 items selected

<input type="checkbox"/> First Name ▼	Last Name ▼	Email ▼	Mobile Phone ▼
<input type="checkbox"/> Stella	Pavlova	✉ spavlova@uog.com	(212) 842-5501
<input type="checkbox"/> Lauren	Boyle	✉ lboyle@uog.com	(212) 842-5611
<input type="checkbox"/> Arthur	Song	✉ asong@uog.com	(212) 842-4535
<input type="checkbox"/> Avi	Green	✉ agreen@uog.com	(212) 842-2383

Pause

Finish

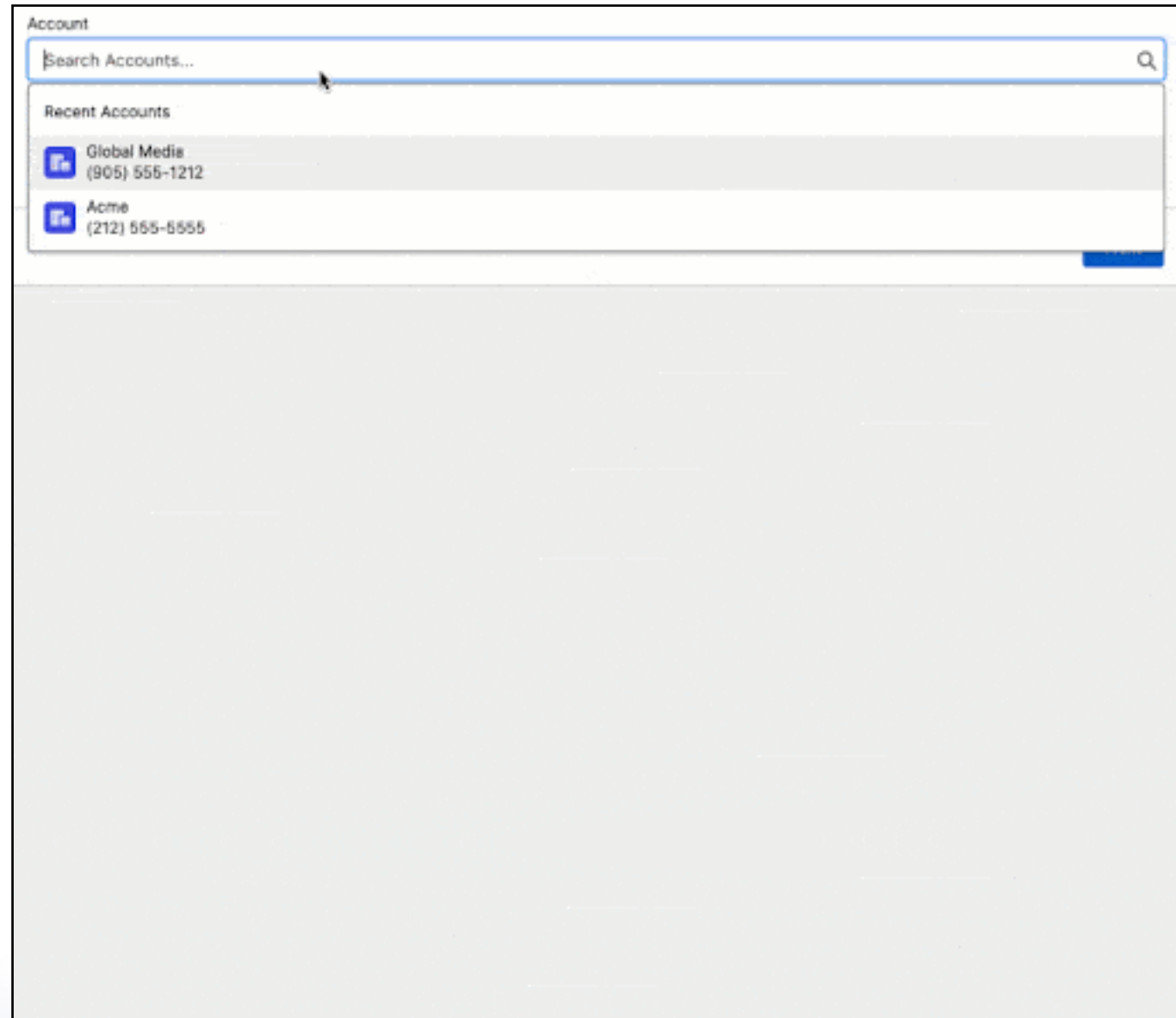
https://help.salesforce.com/s/articleView?id=release-notes.rn_automate_flow_builder_action_buttons_generally_available.htm&release=252&type=5
<https://admin.salesforce.com/blog/2024/screen-flows-and-action-buttons-summer-24-be-release-ready>



Flows

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- Call a subflow with a screen flow
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<https://admin.salesforce.com/blog/2024/screen-flows-and-action-buttons-summer-24-be-release-ready>



Flows

Upserts (Demo)

- Create Element supports upsert
- Now can match on record id, external id or select standard fields

Flow's Clippy (Demo)

- It looks like you're doing a DML inside a loop. Are you sure?



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Monitoring

Permission Changes

- Permission change to a profile or permission set
- New Permission Update event type in the EventLogFile object
- Available in the API but not the Event Monitoring Analytics app

Login As

- Notify or block when a user does a Login As
- Requires Shield or Event Monitoring add-on

Apex Exceptions

- View Apex Unexpected Exception events in the event monitoring log
- Can use this instead of reviewing the Apex exception emails
- Available in all editions, no add-on required



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https://help.salesforce.com/s/articleView?id=release-notes.rn_apex_freetier_eventmonitoring.htm&release=252&type=5

Thank You For Coming!



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