

Overview of
Salesforce Updates
by Yaroslav Mazuryk

Summer
in the
air!

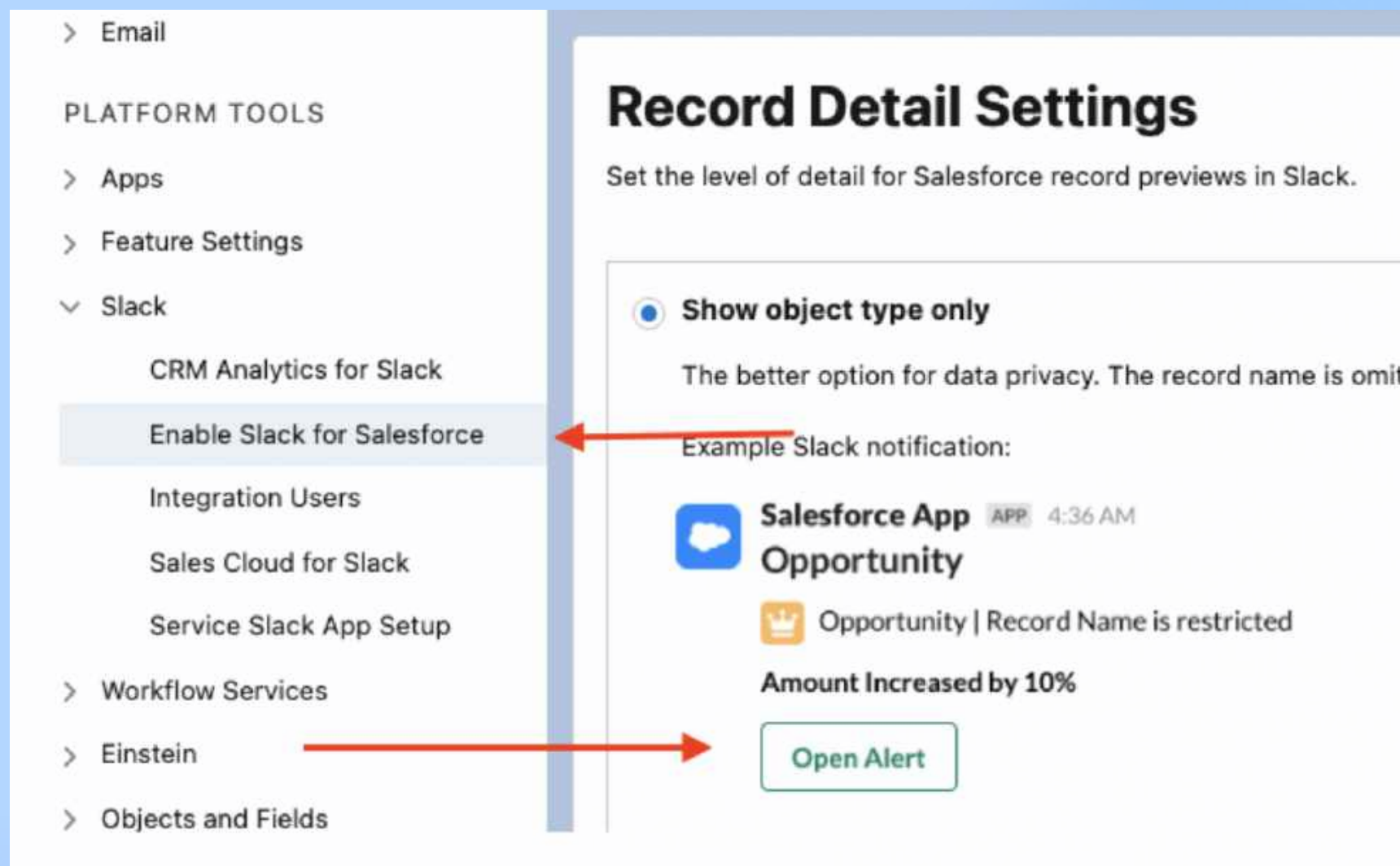


Hi mates! This is Yaroslav, Senior Salesforce Developer at Redtag. Let me share with you my overview of the new 13 Summer Salesforce Updates.

Let's go!

1/13

Slack Channels opened doors for Salesforce data.



Bring Data into every discussion with CRM Analytics for Slack (Beta):

- CRM Analytics for Slack makes it easy to access your analytics right where collaboration happens.
- Salesforce allows making automated posts regarding new opportunities in channels.

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Use existing Report Types to create a new report.

The screenshot shows the 'Create Report' window in Salesforce. On the left, a sidebar lists various report categories. The main area displays a table of report types filtered by the search term 'Con'. The table has columns for 'Report Type Name' and 'Category'. The 'Details' panel on the right shows the selected report type, 'Contacts & Accounts Standard Report Type', and lists objects used in the report type: 'Account' and 'D&B Company'. Red arrows point from the 'Standard' category in the table to the 'Start Report' button and the 'Objects Used in Report Type' section.

| Report Type Name | Category |
|---|----------|
| Contacts & Accounts | Standard |
| Accounts with Contact Roles | Standard |
| Contacts with Assets | Standard |
| Contact History | Standard |
| Opportunities with Contact Roles | Standard |
| Opportunities with Contact Roles and Products | Standard |
| Cases with Contact Roles | Standard |
| Leads with converted lead information | Standard |
| Campaigns with Contacts | Standard |
| Campaigns with Leads and Converted Lead Information | Standard |
| Activities with Contacts | Standard |
| Activities with Contracts | Standard |

Create Reports Based on Selected Salesforce Objects (Beta): – It can be time-consuming and distracting to go through report types that you don't ever need. Now you can filter the list of report types in the Create Report window to display only those based on your selected Salesforce objects.

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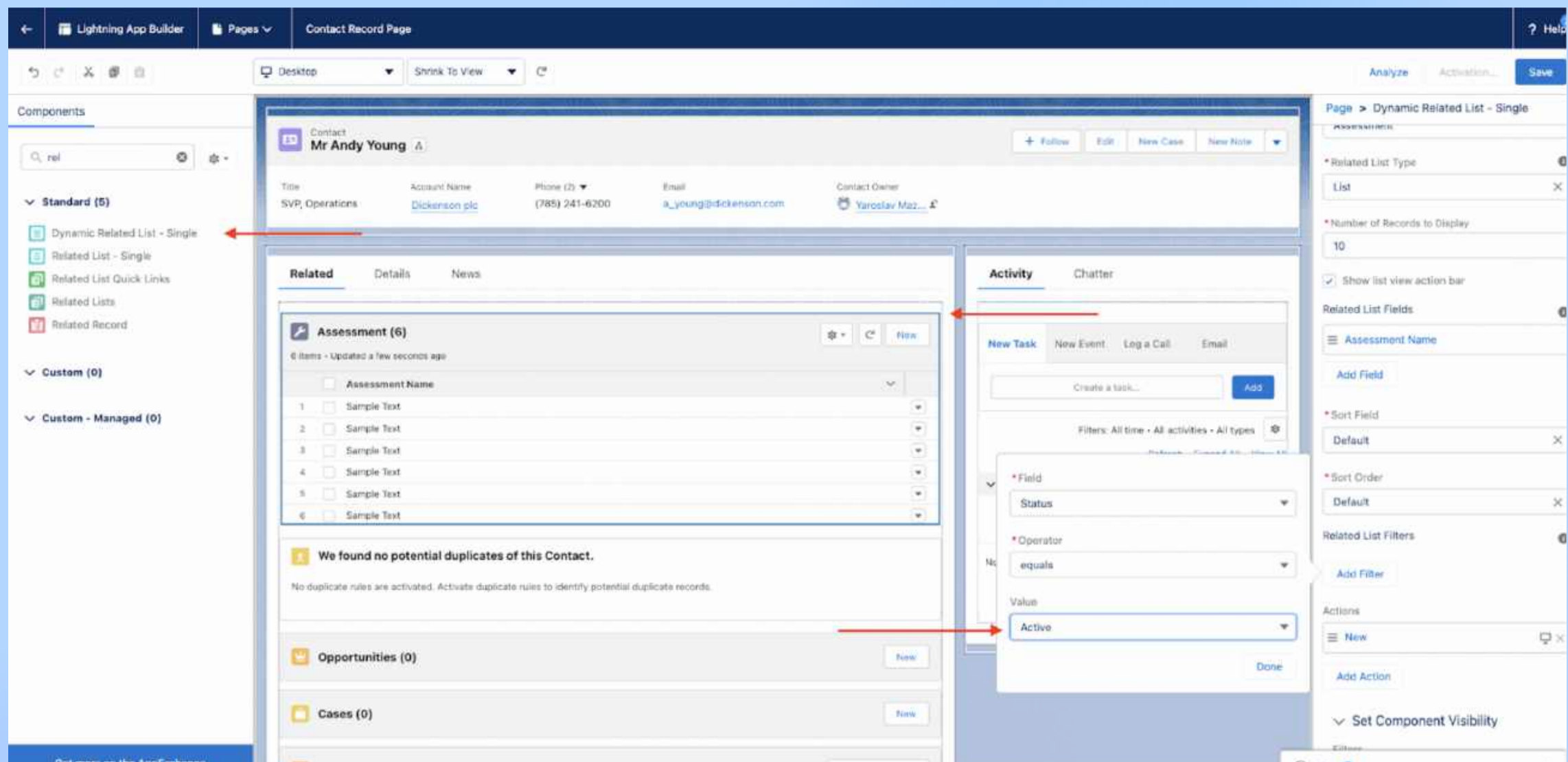
Customizable field address available.

Customizable address fields would function in the same fashion as the standard address field. Finally!



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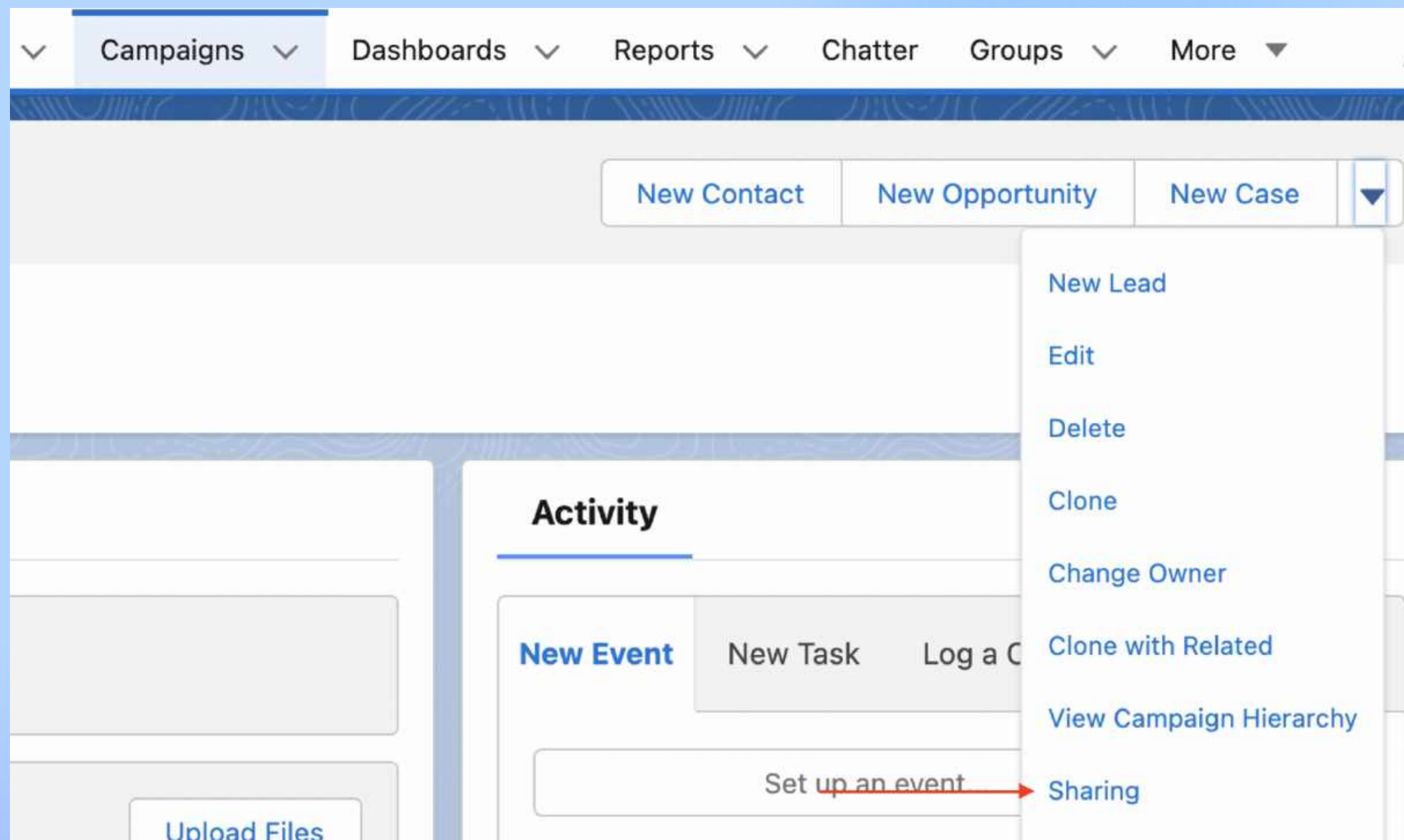
More flexible engagement with related lists.



Dynamic related lists now have a new component in the Lightning pages – ‘Dynamic Related List – Single’. Dynamic Related Lists allow you to create custom related lists that can be filtered to display only when particular criteria are met.

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Campaigns access is now shareable by the Owner.



Campaign Owners can now manually share individual Campaigns with other Salesforce users. This functionality was available in Classic mode, and is now also available in Lightning Experience.

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Delete all unused picklist values.

No dependencies defined.

Validation Rules New

No validation rules defined.

Values New Reorder Replace Pr

| Action | Values | API Name | Default | Chart Color |
|---|----------|----------|--------------------------|-------------|
| Edit Del Deactivate | Active | Active | <input type="checkbox"/> | Assigned dy |
| Edit Del Deactivate | InActive | InActive | <input type="checkbox"/> | Assigned dy |

Inactive Values → Delete Unused Values Beta!

No Inactive Values values defined.

Bulk Manage Picklist Values.

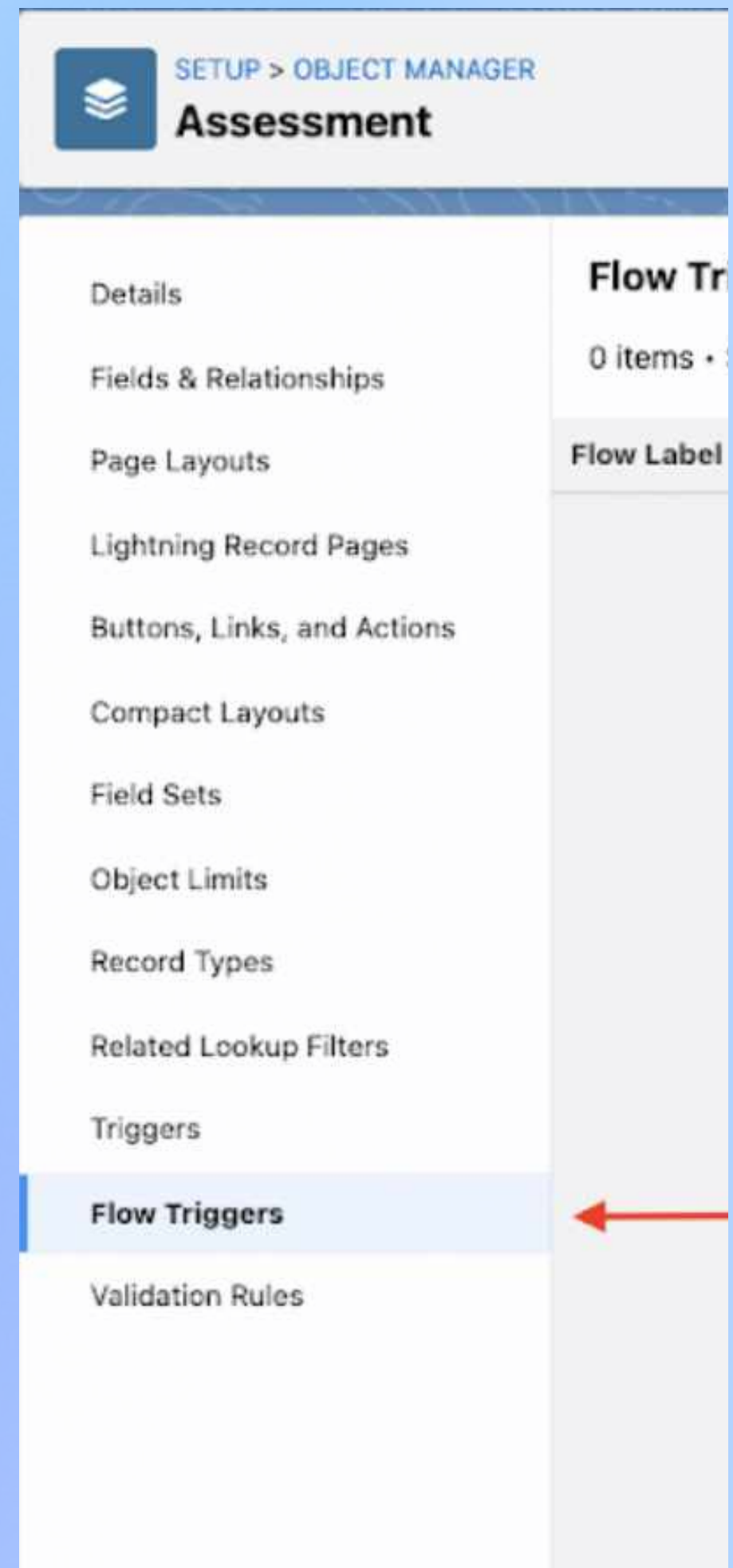
Users can now delete unused and deactivated values in one sitting.

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All flows in one place.

It is no longer a problem that your flows are not named after the Name Conventions. As of now, it is easier to explore all your flows in one space and see which flows are using the specified objects.

You can now access the Flow Trigger Explorer from the Object Manager



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Explore in Query what records can be accessed by a single user. Create new records through a specific user.

The new Database methods support an `AccessLevel` parameter that lets you run database operations in user mode instead of using the default system mode.

```
List<Assessment__c> acc = [SELECT Id FROM  
Assessment__c WITH USER_MODE];
```

Database operation:

```
Contact c = new Contact(Name = 'test');  
insert as user c;
```

*This example would insert a new Contact in the user mode.

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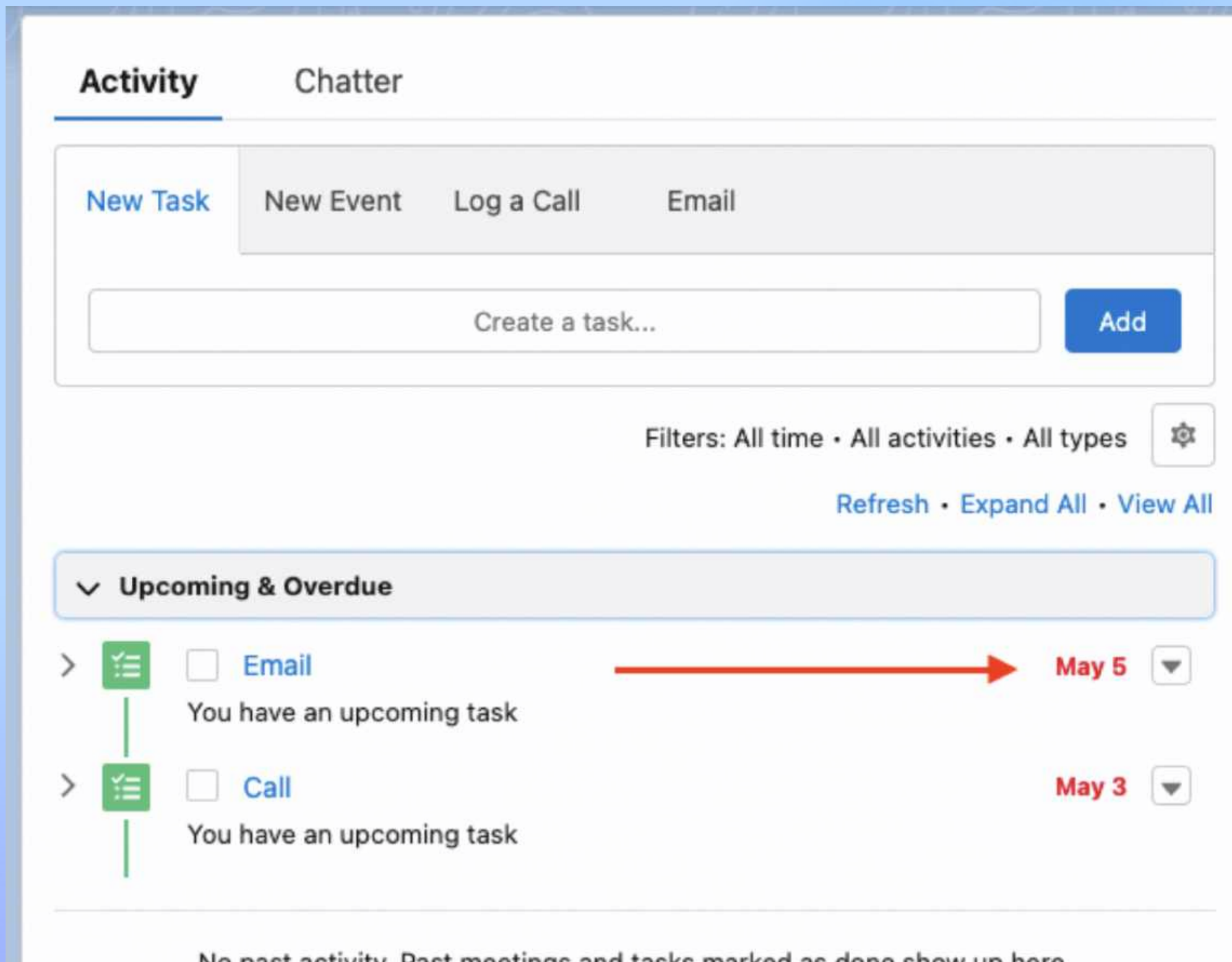
Set up Expiration date for given temporary permissions.

The image shows two screenshots from the Salesforce interface. The top screenshot displays the 'User Management Settings' page. The 'Permission Set & Permission Set Group Assignments with Expiration Dates' setting is highlighted with a red arrow and is currently disabled. The bottom screenshot shows the 'Buyer' profile configuration page. The 'Specify the expiration date' option is selected, and the '1 Week' button is highlighted. A red arrow points from the 'Specify the expiration date' option in the top screenshot to the 'Specify the expiration date' option in the bottom screenshot.

With this update enabled, one can assign an expiration date to each permission set or a permission set group. When they have an expiration date, defined users can lose access to functionality after that date comes. By default, permission set and permission set group assignments don't expire.

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More prominent overdue tasks view.




Due dates for overdue tasks are now marked red.

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Inline editing report.

Total Records
1

| | Assessment: Assessment Name <input type="text"/> | Contact: Last Name <input type="text"/> | Status <input type="text"/> |
|---|--|---|--|
| 1 | AS-0000001 | Young | Active  |

Status

Active

The new release allows the reports inline editing.

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Handle success/failure platform event.

Get the final result of an event to publish operation through Apex callback that was implemented. Before Summer 22 release, you would be able get the intermediate queueing result only for the event publish operation, but not for the final result.

```
public class PlatformEventCallbackResult implements
EventBus.EventPublishCallback {
    public void onSuccess(EventBus.SuccessResult
successResult) {
        // handle success
    }

    public void onFailure(EventBus.FailureResult
failureResult) {
        // handle failure
    }
}
```

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Enable Person Accounts on your own.

You can now use the Person Accounts without needign to reach out to Salesforce Support.

Person Accounts
Person Accounts store information about people by combining certain account and contact fields into a single record. [Learn More](#)

Set Up Person Accounts Check Readiness

Complete these steps prior to enabling person accounts. Run the readiness check to make sure you've finished all the requirements.

- 1 Org Impact Acknowledgement**
Review the impact of turning on and using person accounts. View Org Impacts
- > 2 Create Accounts Record Type**
To use person accounts, you need at least one record type set up for business accounts. Salesforce creates a record type for person accounts when they're enabled. [Show Steps](#) Set Up
- ✓ Set Read Permissions**
Permissions are set up properly. [View Permissions](#)
- ✓ Set Organization-Wide Sharing**
Organization-wide sharing set to: **Controlled By Parent**
Current status: **Done**

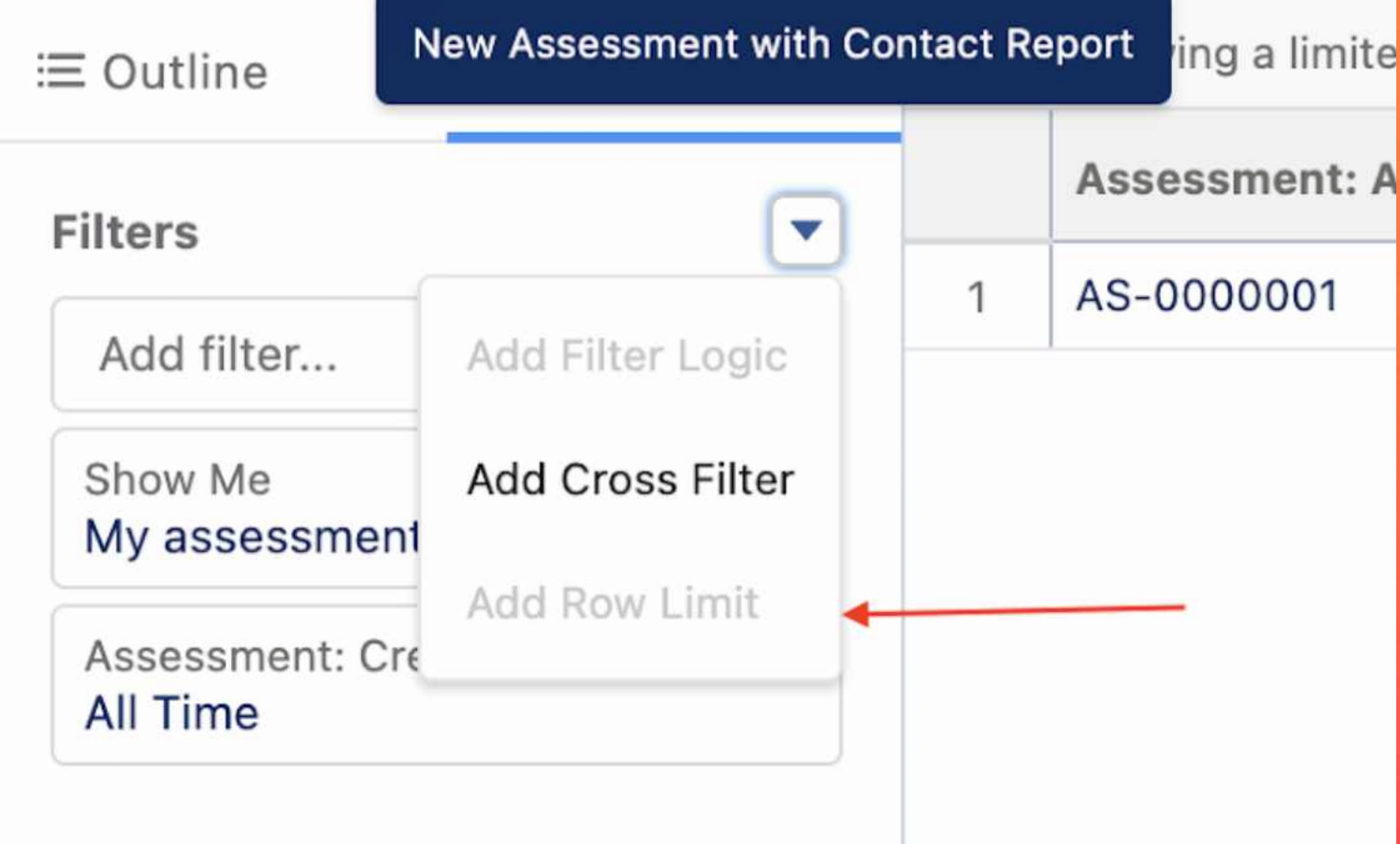
Enable Person Accounts Enable Person Accounts

Turn on person accounts after you complete all the required steps.

And Extra One

Reports without gazillion unused rows.

Setting up the custom row limit for the reports is now available.



The screenshot shows a software interface with a 'Filters' dropdown menu open. The menu options are:

- Add filter...
- Show Me My assessment
- Assessment: Create All Time
- Add Filter Logic
- Add Cross Filter
- Add Row Limit

A red arrow points to the 'Add Row Limit' option. In the background, a table is visible with the following data:

| New Assessment with Contact Report | | ing a limite |
|------------------------------------|--|---------------|
| | | Assessment: A |
| 1 | | AS-0000001 |