

# Salesforce Administrator Team Sprint: Oct-Nov 2023.

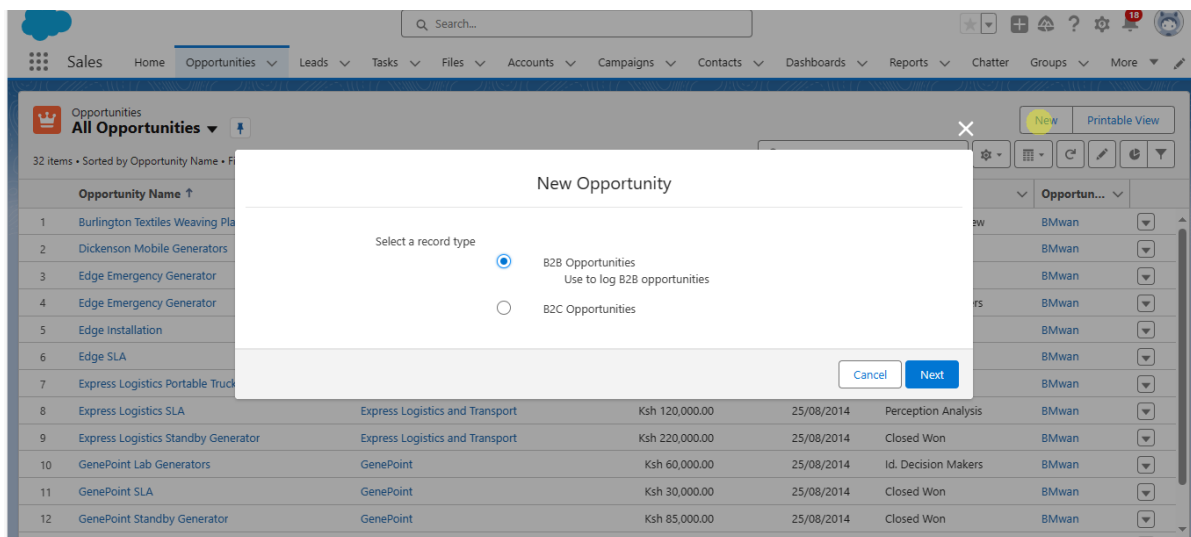
## TASK 1: Config and Setup

### REPORT TYPES

Record Types of opportunity, case, leads, and solutions objects have special picklist fields and business processes that let you track these records throughout their lifecycle. Depending on the business case, you can always create new processes that make the lives of your users easier as they are presented with only relevant picklist values and page layouts.

Record types are great for creating multiple views of a single object such that different user profiles get a view of the same objects but with displayed records that are of significance to them. These record types have custom page layouts and picklist values assigned to them.

When a user wants to enter a new opportunity object, he is prompted to select a record type to use that is customized to that particular application.



### CASE ASSIGNMENT RULES

Case assignment rules are used to automatically assign cases to a specific user or team based on certain criteria, such as the case type, priority, or assignee. This can help to ensure that cases are handled by the appropriate person or team and that they are not lost or forgotten. In the example below, the criterion is to route a case to J Mahn if the Case Reason equals Breakdown.

Case assignment rules can be a valuable tool for managing cases and ensuring that they are handled in a timely and efficient manner. By creating rules that are specific to your organization's needs, you can improve the customer experience and ensure that your cases are resolved quickly and effectively.

SETUP

Case Assignment Rules

Case Assignment Rule

Critical

Help for this Page

Add rule entries that specify the criteria used to route cases. You can reorder rule entries on this page after you create them.

Rule Detail

Edit

Rule Name

Critical

Active

✓

Created By

Brian Mwango

06/11/2023, 14:58

Modified By

Brian Mwango

06/11/2023, 14:59

Edit

Rule Entries

New

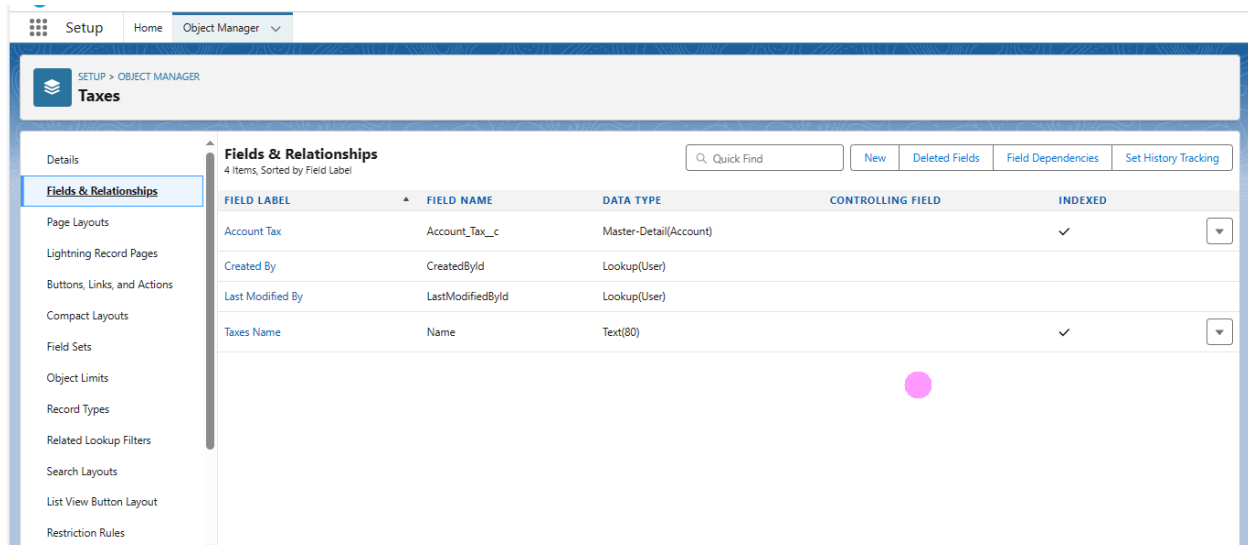
Reorder

Action	Order	Criteria	Assign To	Email
<a href="#">Edit</a>   <a href="#">Del</a>	1	Case: Case Reason EQUALS Breakdown	J. Mahn	<input type="checkbox"/>

## TASK 2: Object Manager and Lightning App Builder

### Master-Detail Relationships.

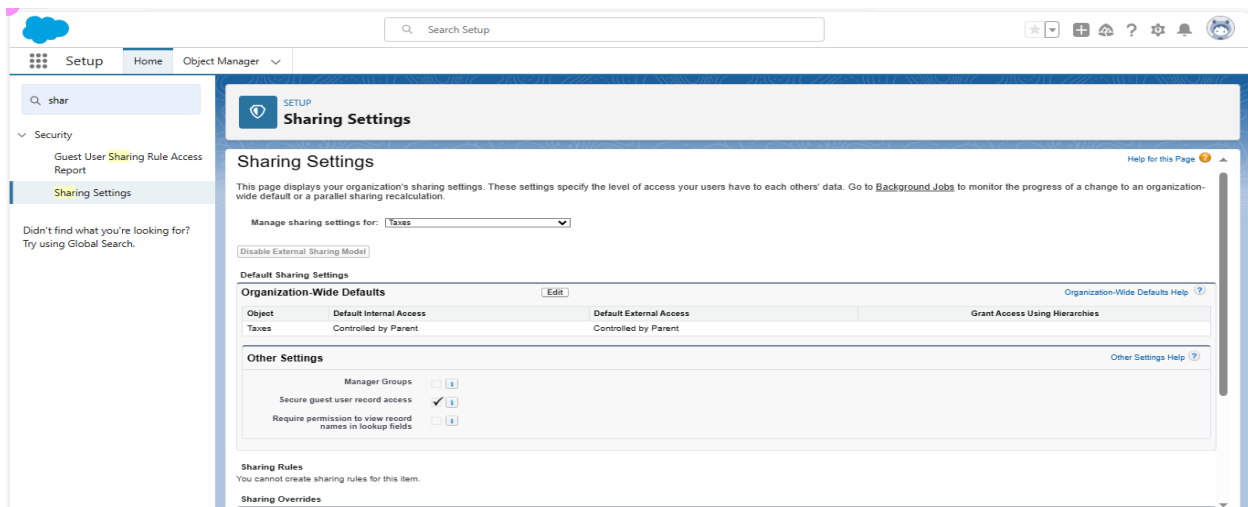
I created a custom object named Taxes and created a master-detail relationship with the Account object as the master, through the Account Tax field.



The screenshot shows the Salesforce Object Manager interface for the 'Taxes' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a table with 4 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The rows are: Account Tax (Account\_Tax\_c, Master-Detail(Account), checked), Created By (CreatedBy, Lookup(User)), Last Modified By (LastModifiedBy, Lookup(User)), and Taxes Name (Name, Text(80), checked). There are buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' at the top right of the table.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Tax	Account_Tax_c	Master-Detail(Account)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Taxes Name	Name	Text(80)		✓

It is impossible to change the Tax object's OWD as it is controlled by the parent, which in this case is the account object. The ownership and sharing settings of the master record may affect the child records. Changes in ownership or sharing rules on the master record might impact the child records' visibility and accessibility.



The screenshot shows the Salesforce Sharing Settings page for the 'Taxes' object. The left sidebar contains a navigation menu with options: Security, Guest User Sharing Rule Access Report, and Sharing Settings (selected). The main content area is titled 'Sharing Settings' and shows the following information: 'Manage sharing settings for: Taxes', 'Default Sharing Settings', 'Organization-Wide Defaults' (Default Internal Access: Controlled by Parent, Default External Access: Controlled by Parent, Grant Access Using Hierarchies), and 'Other Settings' (Manager Groups: unchecked, Secure guest user record access: checked, Require permission to view record names in lookup fields: unchecked). There is a 'Sharing Rules' section at the bottom stating 'You cannot create sharing rules for this item.' and a 'Sharing Overrides' section.

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Taxes

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Taxes	Controlled by Parent	Controlled by Parent	

Other Settings

Manager Groups ☐ [\[k\]](#)

Secure guest user record access ☒ [\[k\]](#)

Require permission to view record names in lookup fields ☐ [\[k\]](#)

Sharing Rules

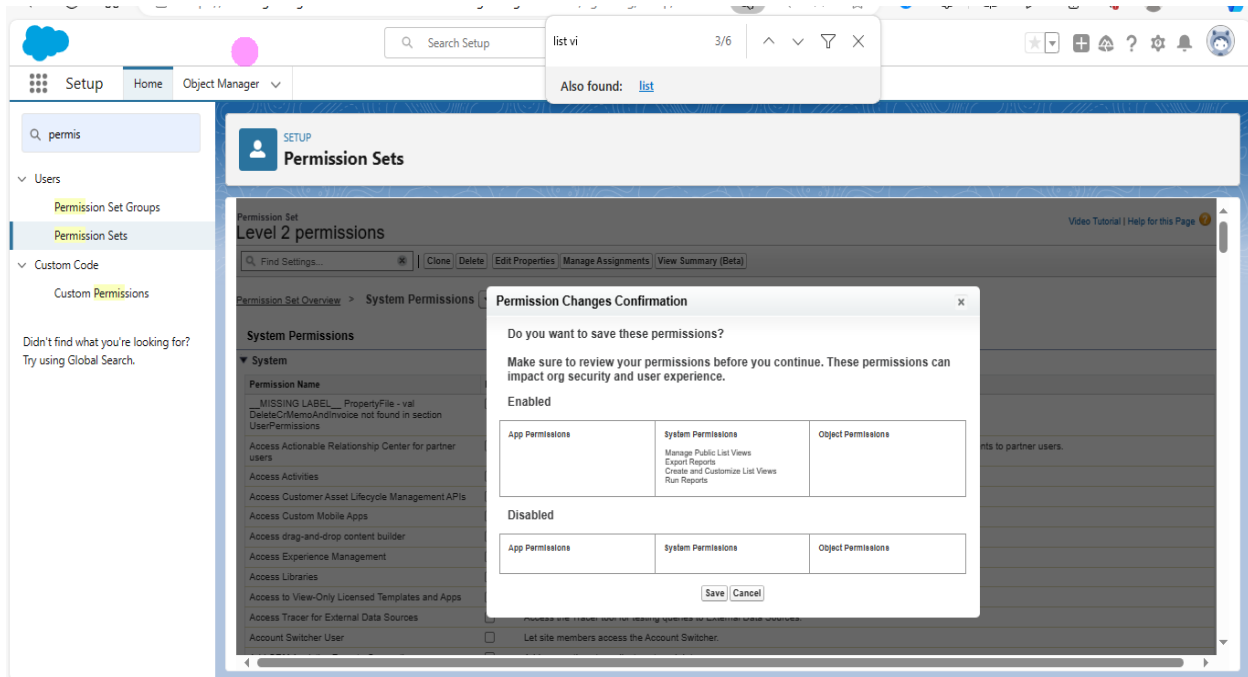
You cannot create sharing rules for this item.

Sharing Overrides

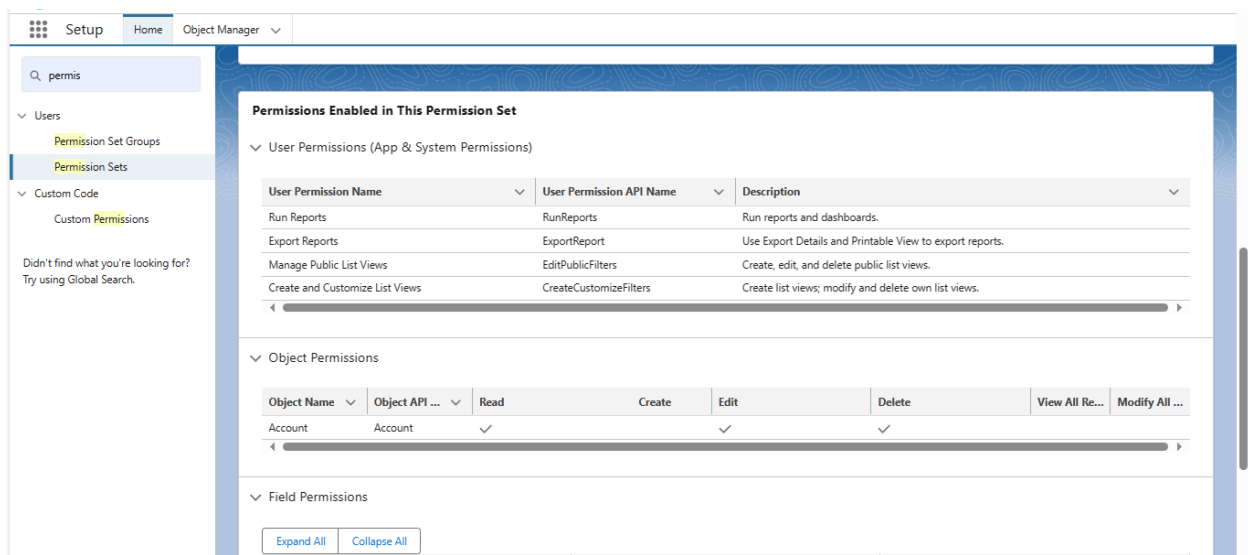
This implies that changing, updating, or deleting master records related to the detail records causes the deletion or updating of the child records.

## PERMISSION SETS

I created a new permission set and under system permissions, I enabled the Manage Public List views, this automatically checks the Create and Customize List views box as well. I also enabled Export Reports from the System Permissions.



Summary of the created permission sets:



## TASK 3: Sales and Service

### QUEUES AND CASE ASSIGNMENT RULES

Queue members can comprise users, public groups, roles and roles, and subordinates.

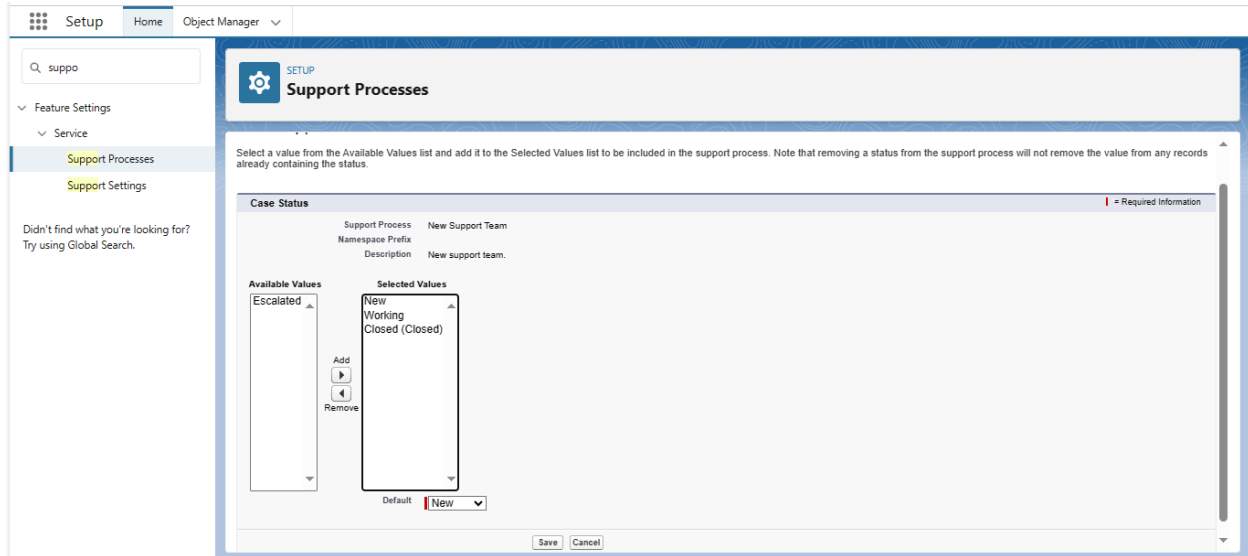
We can then assign queues to cases automatically via case assignment rules under Rule Entries where we specify the criteria that have to be met to achieve this assignment. Selecting queues, look up the available queues that are already set in our org enabling us to select the appropriate one with the right members.

One of the best practices for assigning cases to queues is defining precise criteria, this ensures that cases are routed to the appropriate individuals or teams based on their expertise and workload. Overly broad assignment rules that might lead to ambiguous or inconsistent case routing should be avoided. This helps in streamlining our case management processes.

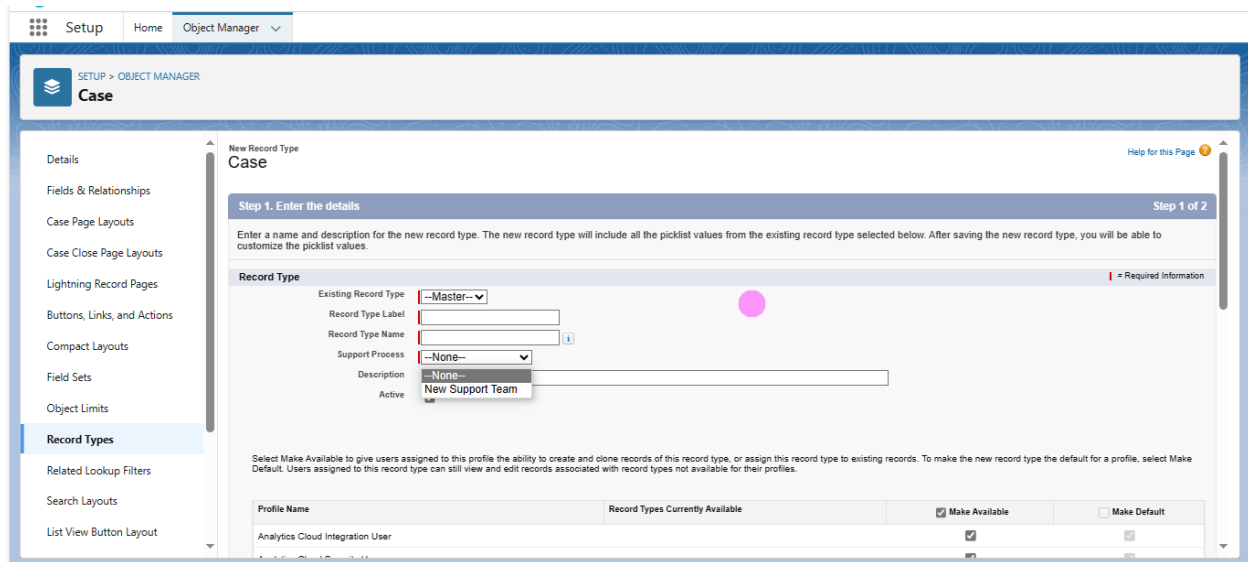
The screenshot shows the Salesforce 'Case Assignment Rules' setup page. The interface includes a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar is present at the top right. On the left sidebar, there is a search box with 'case ass' and a list of settings including 'Feature Settings', 'Service', and 'Case Assignment Rules'. The main content area is titled 'Case Assignment Rules' and contains a form for creating a rule entry. The form is divided into four steps: Step 1: Set the order in which this rule entry will be processed (Sort Order: 1); Step 2: Select the criteria for this rule entry (Run this rule if the criteria are met); Step 3: Select the user or queue to assign the case to (Queue: Case Queues, Email Template); and Step 4: Optionally, select predefined case teams to add to the case (Predefined Case Teams). The form includes various dropdown menus, input fields, and buttons like 'Save', 'Save & New', and 'Cancel'.

### SUPPORT PROCESS

Creating a unique support process means that we define values that will be relevant to the new users. Once a support process is defined, we assign it to a record type where the new user will be able to work and will be presented with only the values that are defined in the support process.



We see that the support process created labeled 'New Support Team' is given as an option, below.



# TASK 4: Data Analytics Management and Productivity

## ROW-LEVEL FORMULAS IN REPORTS

Row-level formulas are important in reports. They reference specified fields and apply math formulas to calculate values. I used a row-level formula to calculate the 15% commission of the sale amount due to a sales rep.

The screenshot shows the 'Edit Row-Level Formula Column' dialog box. The 'Fields' tab is active, showing a list of fields including 'Amount'. The formula being entered is  $1 \text{ AMOUNT} * 0.15$ . The column name is 'Commission Due(15%)' and the description is 'Commission due to the s'. The formula output type is set to 'Number' with 2 decimal points. The dialog is valid and ready to be applied.

A Commission Due column is created with values corresponding to 15% of the opportunity amount (The last column below).

The screenshot shows the 'New Opportunities Report' with the following data:

Amount	Expected Revenue	Probability (%)	Close Date	Commission Due(15%)
Ksh 300,000.00	Ksh 30,000.00	10%	29/09/2023	45,000.00
Ksh 75,000.00	Ksh 75,000.00	100%	25/08/2014	11,250.00
Ksh 50,000.00	Ksh 50,000.00	100%	25/08/2014	7,500.00
Ksh 60,000.00	Ksh 60,000.00	100%	25/08/2014	9,000.00
Ksh 35,000.00	Ksh 21,000.00	60%	25/08/2014	5,250.00
Ksh 235,000.00	Ksh 235,000.00	100%	25/08/2014	35,250.00
Ksh 100,000.00	Ksh 10,000.00	10%	25/08/2014	15,000.00
Ksh 15,000.00	Ksh 0.00	0%	25/08/2014	2,250.00
Ksh 15,000.00	Ksh 9,000.00	60%	25/08/2014	2,250.00
Ksh 250,000.00	Ksh 125,000.00	50%	25/08/2014	37,500.00
Ksh 350,000.00	Ksh 350,000.00	100%	25/08/2014	52,500.00
Ksh 90,000.00	Ksh 90,000.00	100%	25/08/2014	13,500.00
Ksh 210,000.00	Ksh 210,000.00	100%	25/08/2014	31,500.00
Ksh 125,000.00	Ksh 112,500.00	90%	25/08/2014	18,750.00
Ksh 270,000.00	Ksh 202,500.00	75%	25/08/2014	40,500.00

## DATA IMPORT AND EXPORT

We can import data into our org using the Data Import Wizard. Specify the object we want to create these new records on, what we want to do with them and select the CSV file that contains these records. We then map the field in the file to the fields in our org and start our importation.

The screenshot shows the 'Choose data' step of the Salesforce Data Import Wizard. The progress bar at the top indicates the current step. The main content area is divided into three sections: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. In the first section, 'Leads' is selected under 'Standard objects'. In the second section, 'Add new records' is chosen, with 'Match Lead by' set to 'None'. In the third section, a CSV file 'Copy of Ad...t - Sheet1.csv' is selected, with 'Character Code' set to 'ISO-8859-1' and 'Values Separated By' set to 'Comma'. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

We get a summary of what was imported in the end.

The screenshot shows the 'Bulk Data Load Jobs' summary page in Salesforce. The page displays a table with job details and a 'Batches' section at the bottom.

Job ID	Job Type	Status	Closed
7508400000TaPZ2	Bulk V1	Closed	
Submitted By: Brian Mwambi	Operation: Insert	Total Processing Time (ms): 390	
Start Time: 27/11/2023, 10:51 EAT	Queued Batches: 0	API Active Processing Time (ms): 239	
End Time: 27/11/2023, 10:51 EAT	In Progress Batches: 0	Apex Processing Time (ms): 0	
Time to Complete (hh:mm:ss): 00:00	Completed Batches: 1		
Object: Lead	Failed Batches: 0		
External ID Field:	Progress: 100%		
Content Type: CSV	Records Processed: 20		
Concurrency Mode: Parallel	Records Failed: 0		
API Version: 59.0	Retries: 0		

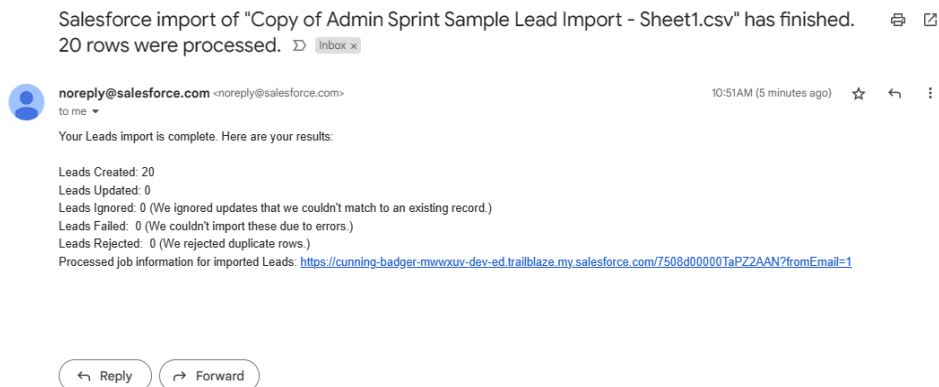
Reload

**Batches**

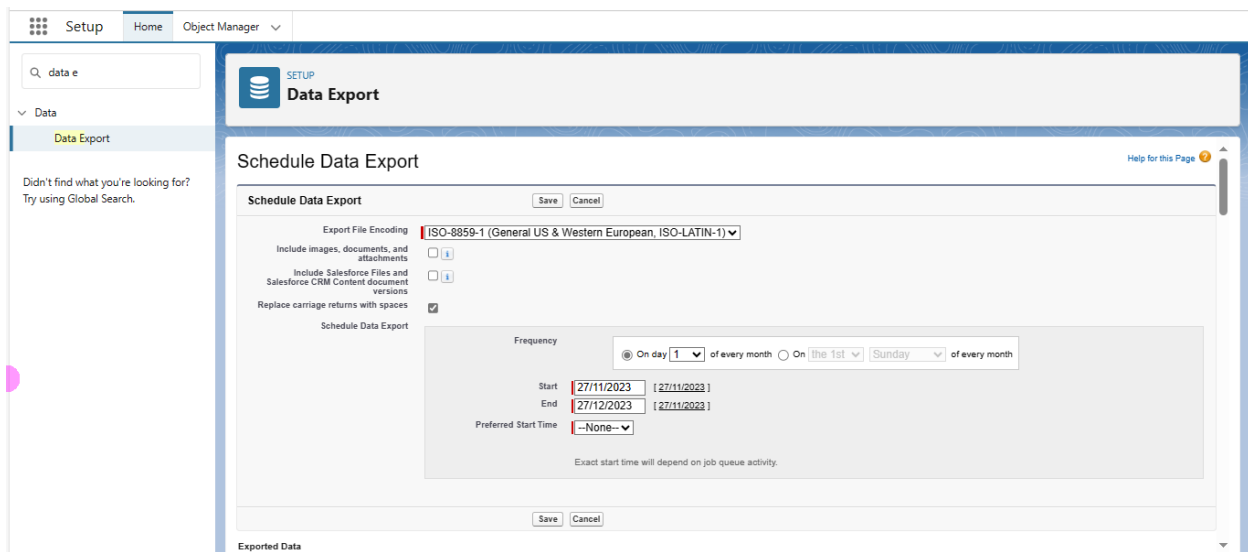
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	7518d00000bnwXZ	27/11/2023, 10:51	27/11/2023, 10:51	390	239	0	20	0	0		Completed



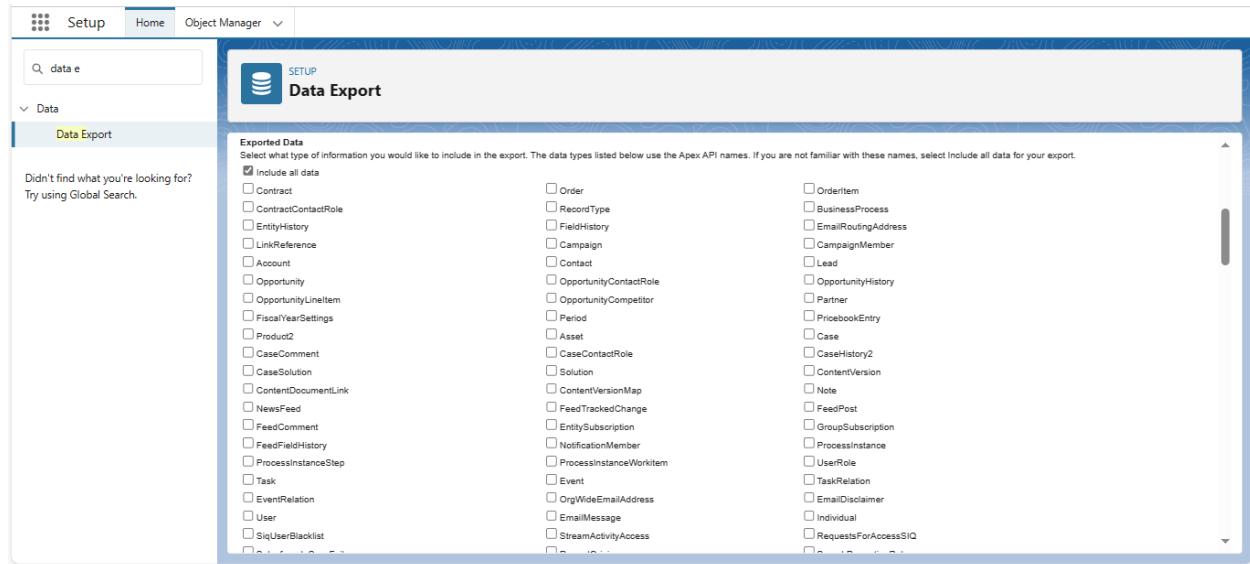
I also got an email, confirming that the importation was successful.



**Data Export** is scheduled from setup as well. We select the Schedule export option. My developer org edition only allows monthly export but editions such as Enterprise and Unlimited editions allow weekly data export. It is best to select the export time at a time when no one is using the org, say late at night.



We also select the data that we need to be exported by ticking the checkboxes or selecting the include all values option.



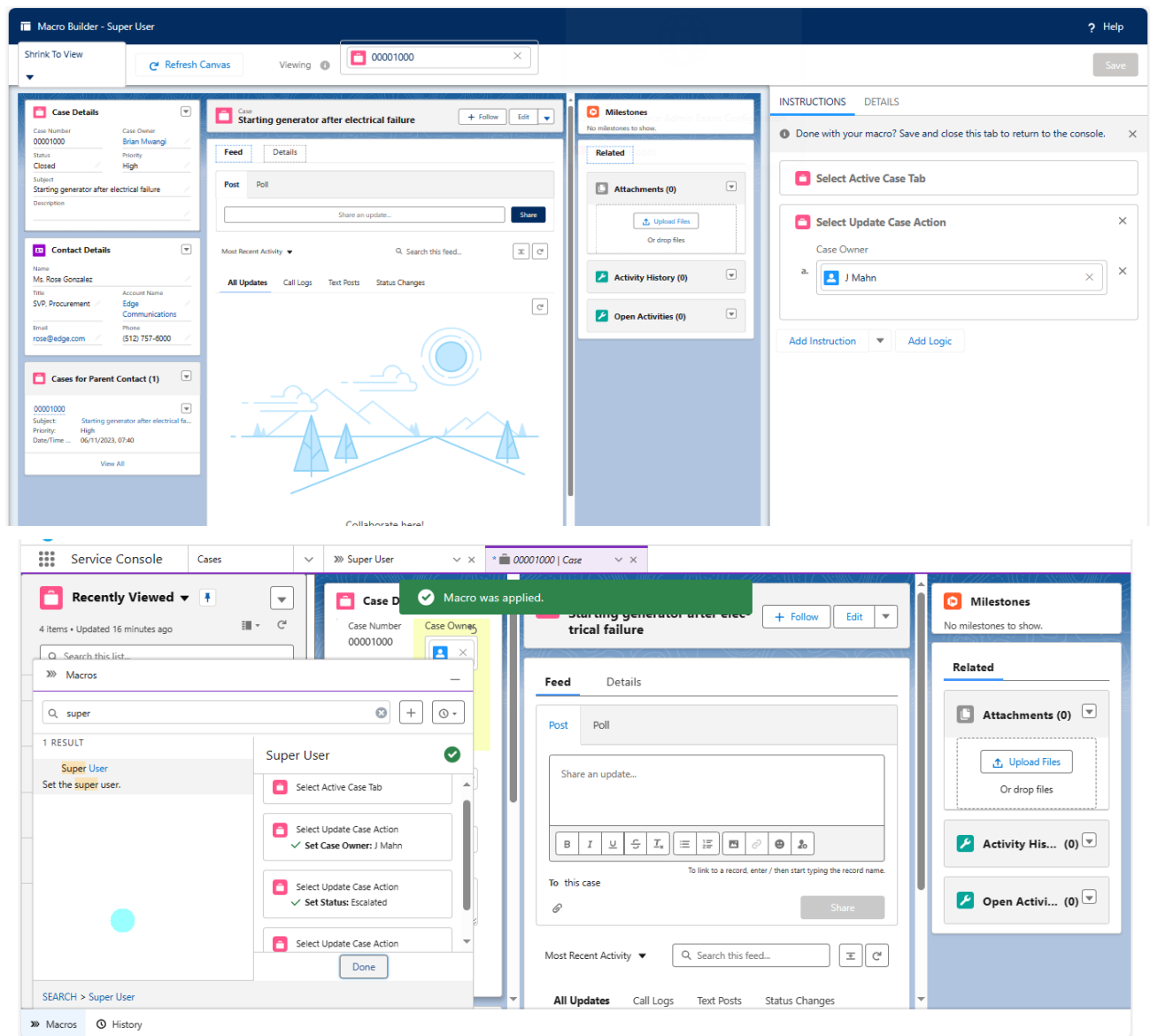
### Importance of Data Export in Salesforce(Source: ChatGPT):

- **Data Backups:** Regular data exports serve as a crucial element of your data backup strategy. In case of accidental data loss or corruption, having recent exports allows you to restore your data to a specific point in time.
- **Data Archiving:** Data exports facilitate data archiving efforts. By regularly exporting data, you can maintain historical records and comply with data retention policies.
- **Business Intelligence:** Exported data can be used for business intelligence purposes, providing insights into trends, customer behavior, and overall organizational performance.
- **Compliance and Auditing:** Data exports help in meeting regulatory compliance requirements and facilitate auditing processes. Having a clear record of data changes is essential for compliance with various industry standards.
- **Mergers and Acquisitions:** In scenarios involving mergers or acquisitions, having comprehensive data exports ensures a smooth transition of data between organizations.
- **Data Migration:** Data exports are valuable when migrating to a new Salesforce instance or integrating with other systems. They provide a structured way to move and synchronize data.
- **Disaster Recovery:** In the event of a system failure or disaster, having recent data exports allows for quicker recovery and minimizes data loss.
- **Historical Analysis:** Exported data can be used for historical analysis and reporting. It provides a record of how data has evolved.

# TASK 5: Workflow and Process Automation

## MACROS

Macros are automated sequences of actions that allow users to perform repetitive tasks with a single click. These actions can include updating fields, creating records, or sending emails. They are useful in streamlining and expediting common processes, such as updating the status of a record or logging interactions. They are particularly valuable for enhancing user productivity by reducing the need for manual, repetitive steps. They are configurable and can be applied to various objects and processes within the platform, providing a time-saving solution for users to execute complex tasks efficiently.



## VALIDATION RULES

Validation rules prevent the user from saving a record if some specified conditions or instructions are not met. This improves data quality. In this case, we want the user to specify the next step before moving an opportunity down the pipeline.

The screenshot shows the 'Opportunity Validation Rule' configuration page in Salesforce's Object Manager. The page has a top navigation bar with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Opportunity Validation Rule' with a 'Back to Opportunity Validation Rules' link. Below the title, there are 'Edit' and 'Clone' buttons. The configuration details are as follows:

Field	Value
Rule Name	Fill_next_step
Error Condition Formula	IF( ISBLANK( NextStep ), TRUE, FALSE) && ISCHANGED( StageName )
Error Message	Fill in the Next step before proceeding.
Description	A validation rule on Opportunity that prevents a stage change if the next step is blank.
Created By	Brian Mwangi, 27/11/2023, 08:02
Modified By	Brian Mwangi, 27/11/2023, 08:02

There are also 'Edit' and 'Clone' buttons at the bottom of the configuration details. The 'Active' checkbox is checked.

When we save this validation rule and try to save a record without filling in the next steps field, an error message appears, telling the user what the problem is.

The screenshot shows the Salesforce Opportunity record page for 'Dickenson Mobile Generators'. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', and 'More'. A red error message banner at the top states: 'You encountered some errors when trying to save this record. Next Step: Fill in the Next step before proceeding.' Below the banner, the opportunity is in the 'Qualification' stage. The 'Details' tab is active, showing fields like 'Opportunity Owner' (Brian Mwangi), 'Amount' (Ksh 15,000.00), 'Expected Revenue' (Ksh 1,500.00), 'Close Date' (25/08/2014), 'Account Name' (Dickenson plc), 'Type' (New Customer), 'Lead Source' (Purchased List), and 'Product Class' (10%). The 'Related' section on the right shows 'Products (0)', 'Notes & Attachments (0)', and 'Contact Roles (0)'. A 'To Do List' is visible at the bottom left.

## TOP EXPLORATIONS AND TAKEAWAYS

1. **User Management:** We created user, assigning appropriate profiles for their roles. Granted access to records they don't own through various sharing rules, and granted users with various profiles extra powers through permission sets. This exploration was important in identifying user management processes and best practices to ensure data security and integrity.
2. **Efficient data capture using custom fields:** We created custom fields of various types using the object manager such as picklists, multi-select picklists, checkboxes, formula fields, roll-up summary, lookup and master-detail fields. The key exploration was discovering our org's capabilities for capturing, organizing and utilizing data efficiently ensuring that users have all the data they need in the format they need to solve business problems.
3. **Business Processes and Record types:** We examined the concept of business processes and how we can leverage them to create record types that capture the defined business requirements. The combination of the two gives users the ability to do their job efficiently without having to worry if they are feeding in data in the wrong place as they are getting a tailored customer experience.
4. **Data import, export and reports and dashboards:** We explored Salesforce's data import wizard which was able to import data as leads, the data was in CSV format and data export capability where we scheduled periodic data export schedules. We also explored the report feature where we were able to add a row-level formula column and also added various components to our dashboard to get a wide view of our business.
5. **Automation:** We explored various automations in salesforce such as approval processes, flows and macros. They are key in automating and streamlining complex business processes. Additionally, we explored lead assignment rules that distribute leads to certain users or queues based on set criteria and also escalation rules that can be used for case management of unresolved cases.

## NEXT STEPS

1. This was my first sprint and it offered me a chance to understand how user interviews are done in order to gather business requirements and offer the customer a solution that will solve their problem. I will gather more knowledge in using tools such as *Jira* for compiling and managing user stories and acceptance criteria, and *Lucidchart* for drawing business process maps.
2. I will study more on process automations to get a robust skillset as I was quite struggling on that front. I will do this by reviewing trailhead content and help articles so that I can be able to roll out automation solutions using flows to automate repetitive tasks and streamline complex processes.
3. I will refine my skills on user management and access control. Data is a very sensitive asset that should be handled very carefully. It is important to understand the implications of giving access to data to people who should not have access to it.