Salesforce Administrator Team Sprint: Oct-Nov 2023.

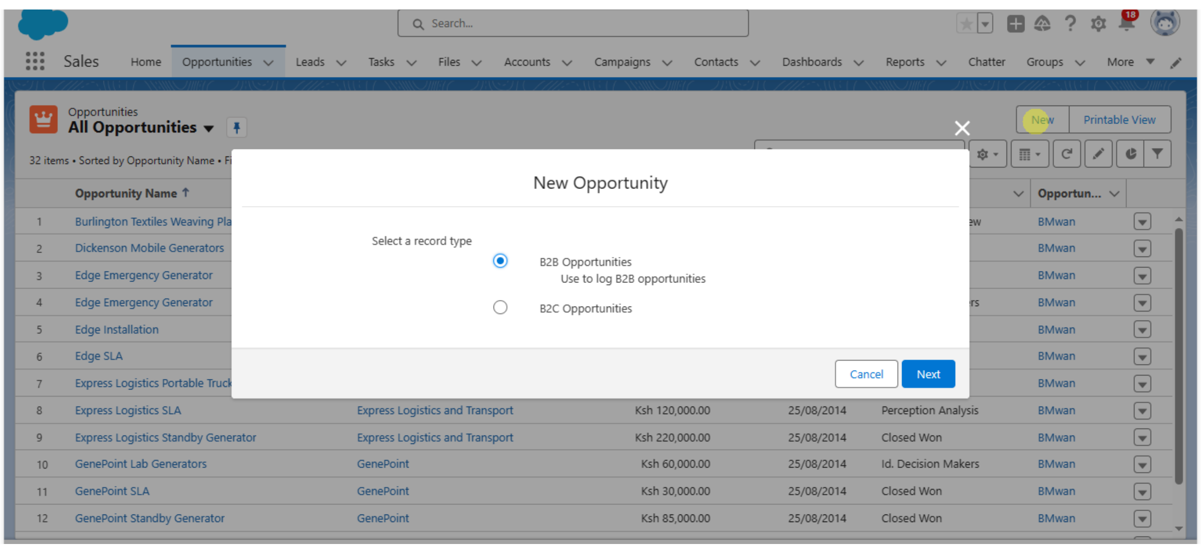
TASK 1: Config and Setup

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.

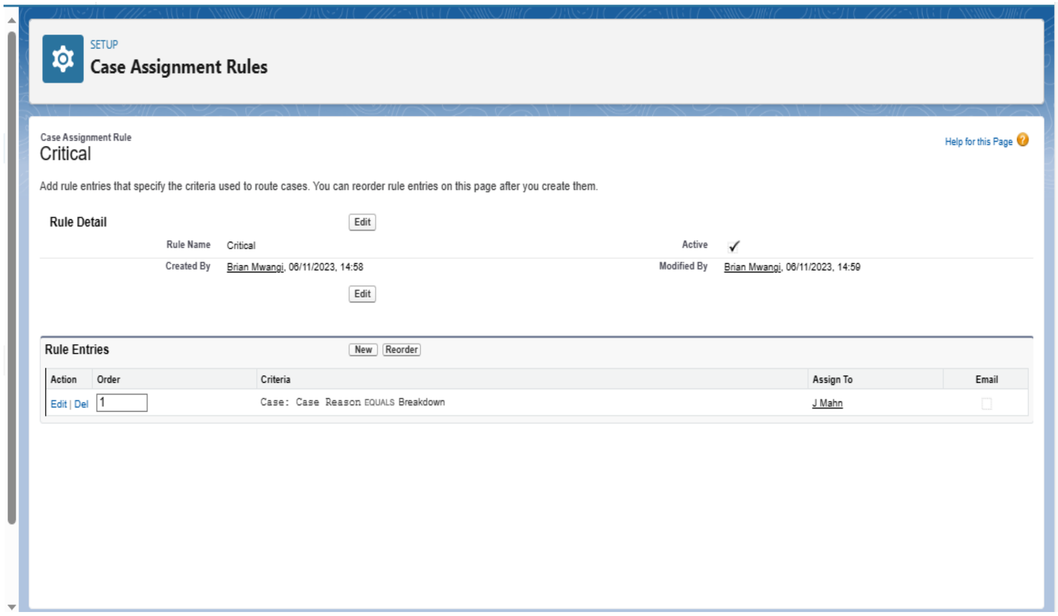
When a user wants to enter a new opportunity object, he is prompted to select a record type to use that is customized to that particular application.



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.

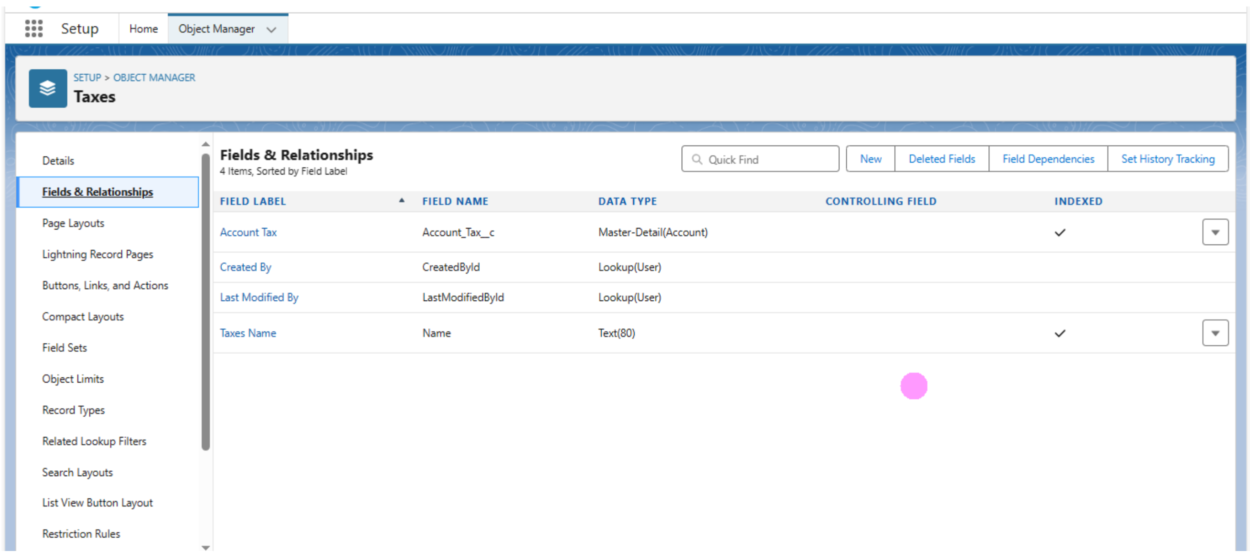
Case assignment rules can be a valuable tool for managing cases and ensuring that they are handled in a timely and efficient manner. By creating rules that are specific to your organization's needs, you can improve the customer experience and ensure that your cases are resolved quickly and effectively.



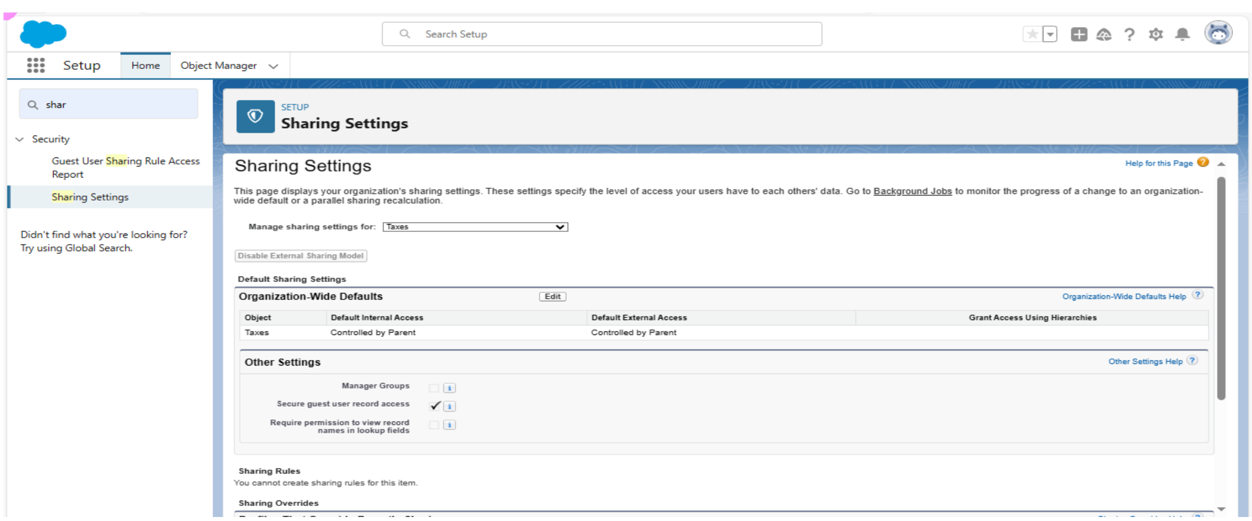
TASK 2: Object Manager and Lightning App Builder

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.



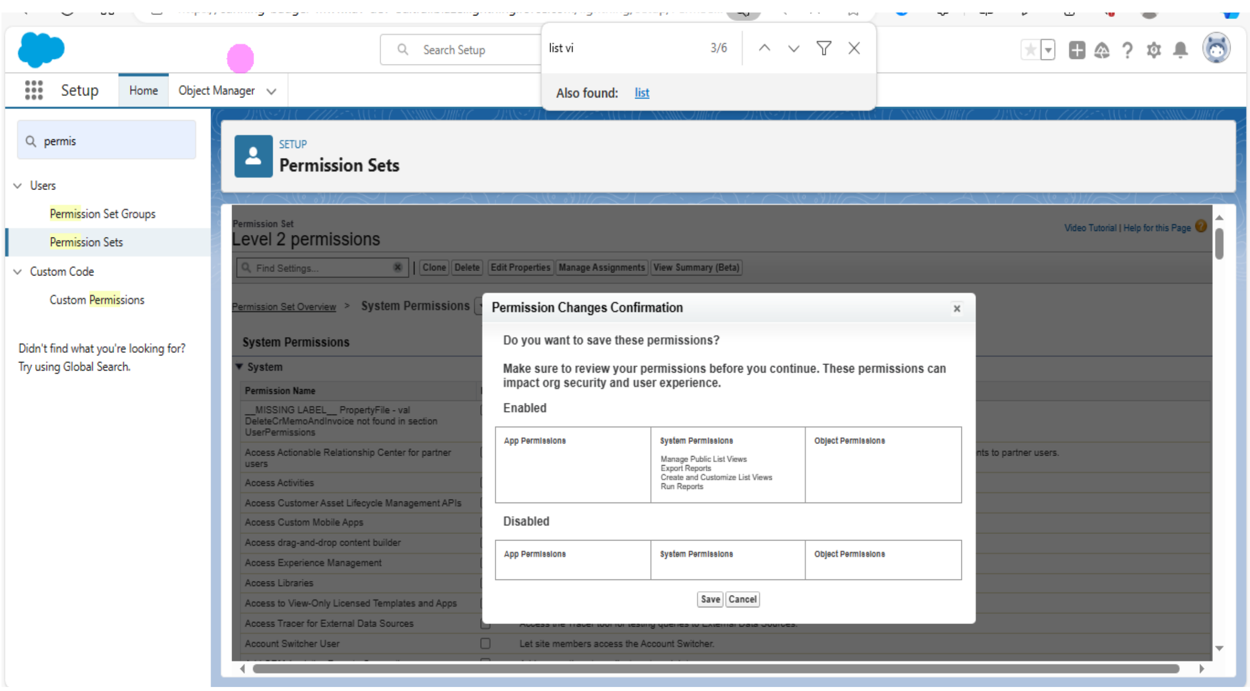
It is impossible to change the Tax object's OWD as it is controlled by the parent, which in this case is the account object. The ownership and sharing settings of the master record may affect the child records. Changes in ownership or sharing rules on the master record might impact the child records'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



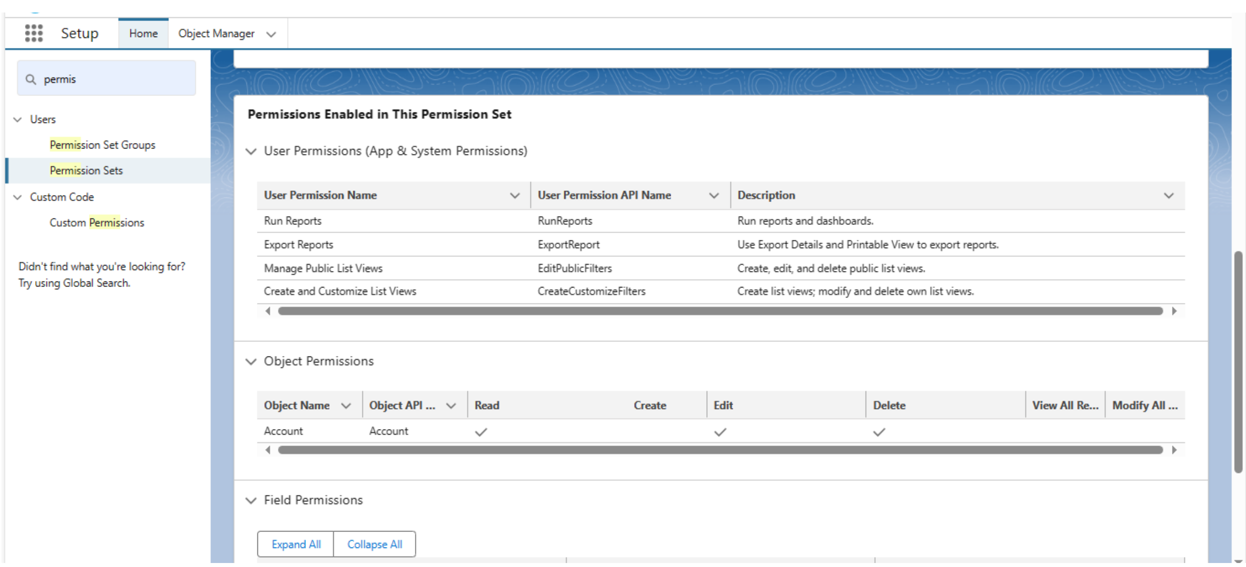
This implies that changing, updating, or deleting master records related to the detail records causes the deletion or updating of the child records.

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:



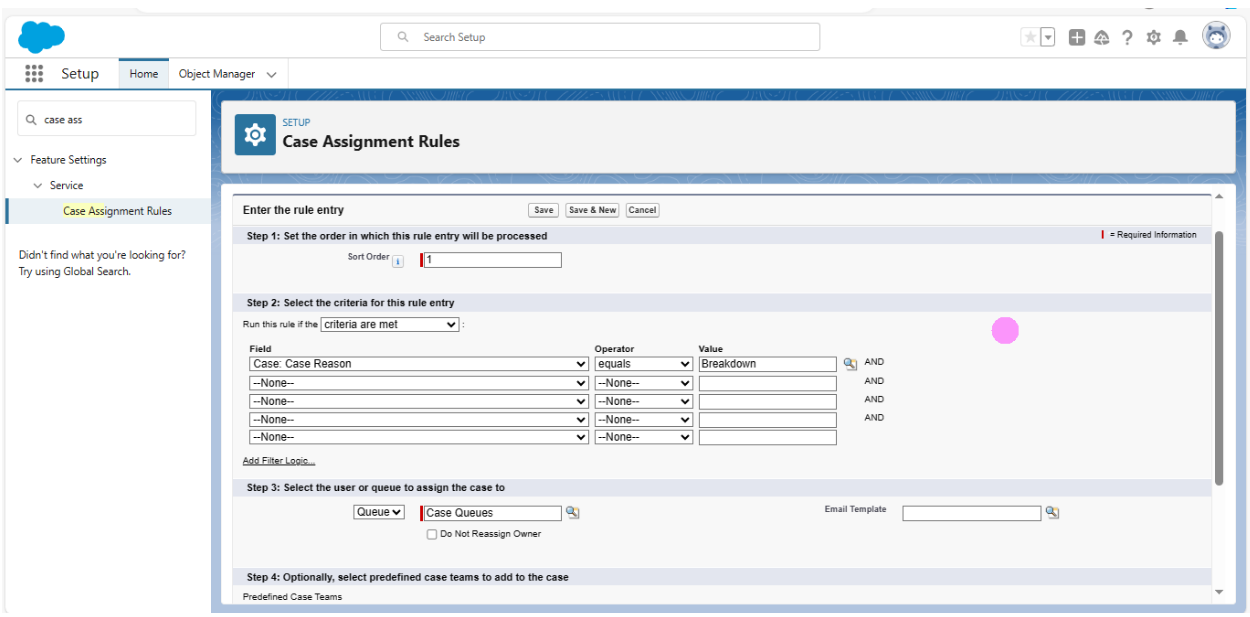
TASK 3: Sales and Service

QUEUES AND CASE ASSIGNMENT RULES

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

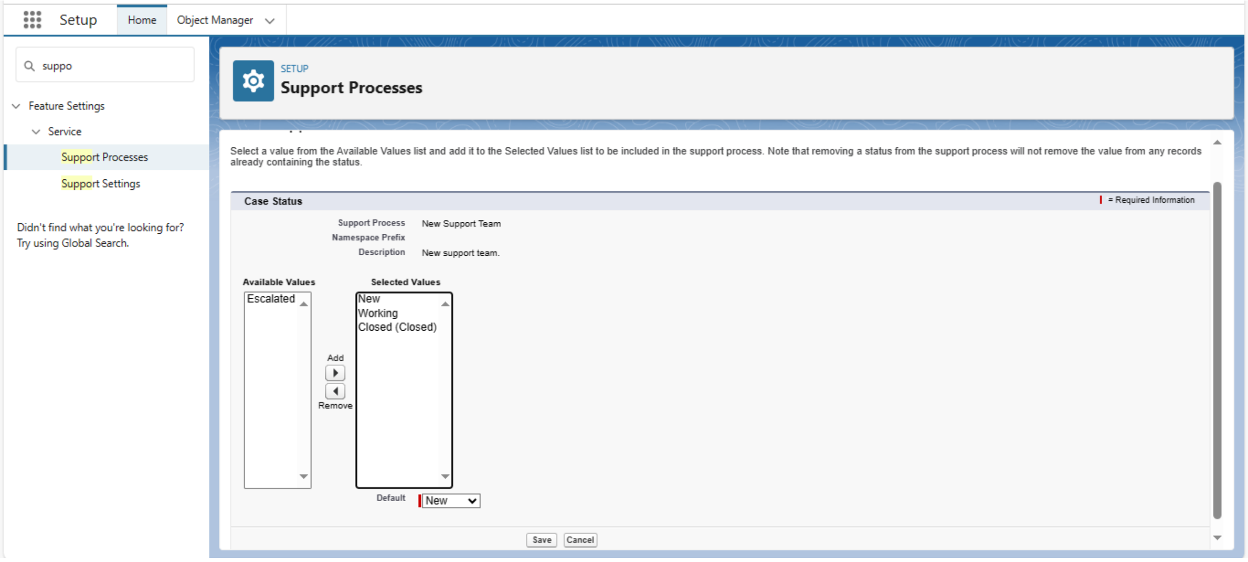
We can then assign queues to cases automatically via case assignment rules under Rule Entries where we specify the criteria that have to be met to achieve this assignment. Selecting queues, look up the available queues that are already set in our org enabling us to select the appropriate one with the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

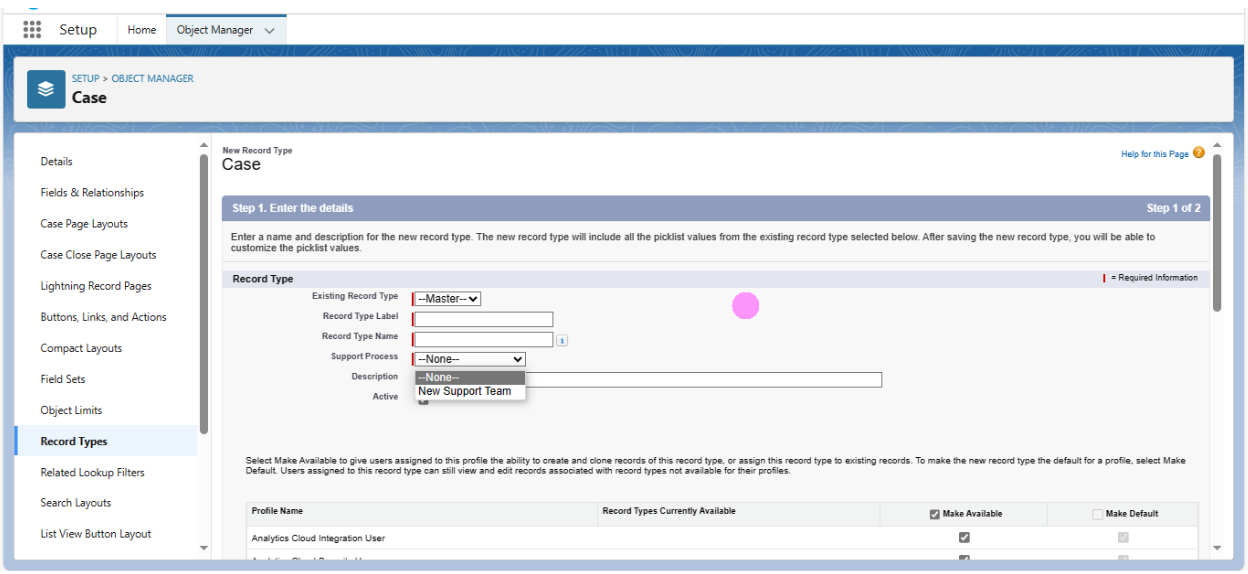


SUPPORT PROCESS

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.



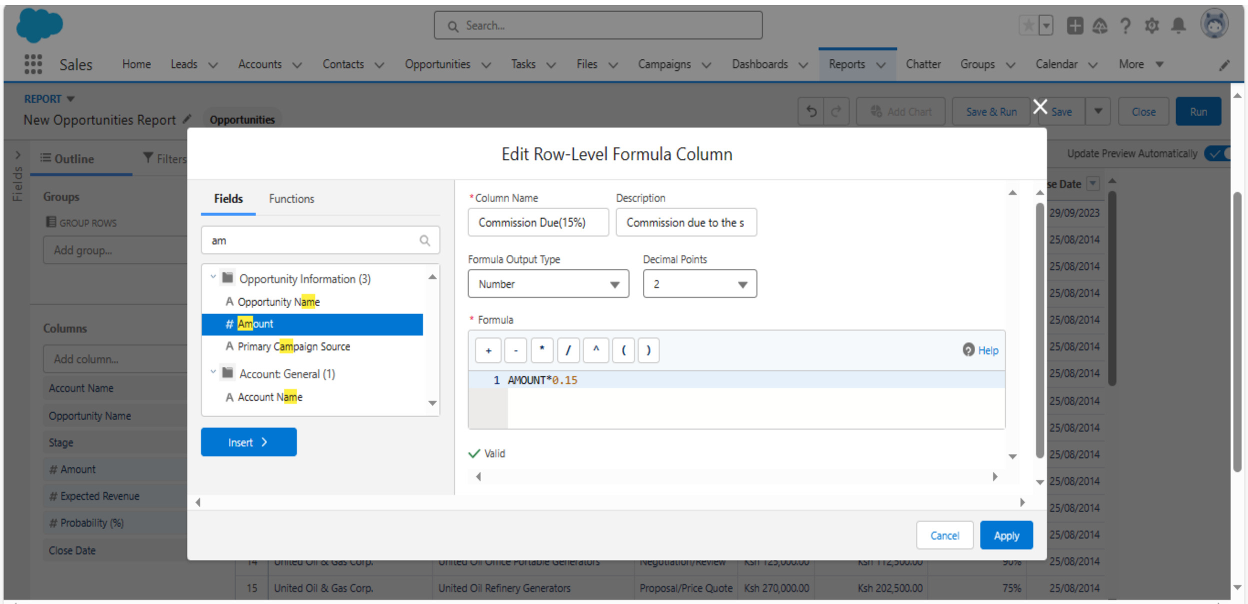
We see that the support process created labeled ‘New Support Team’ is given as an option, below.



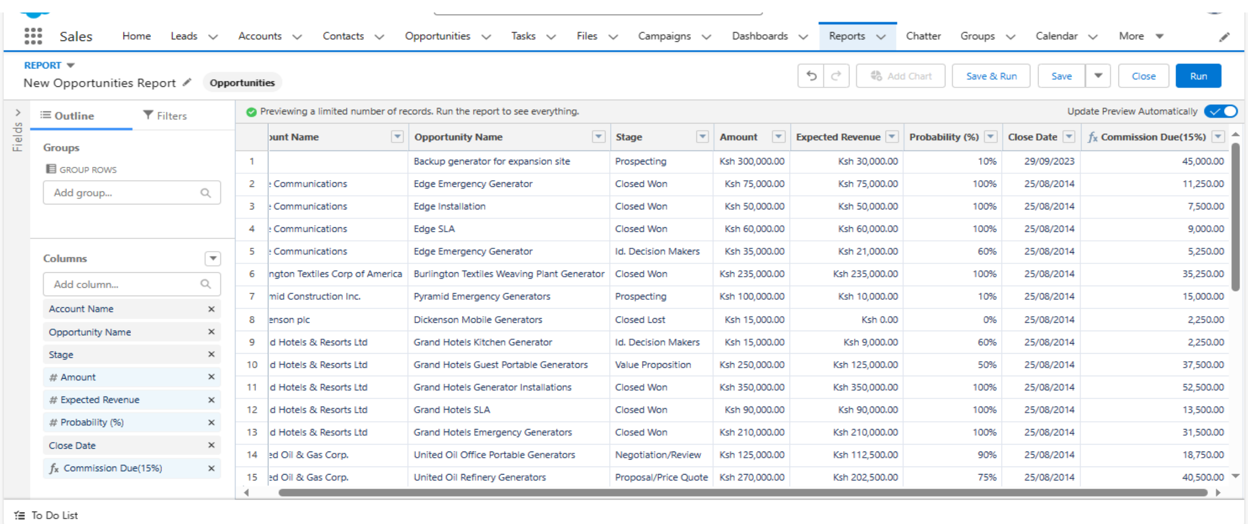
TASK 4: Data Analytics Management and Productivity

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.

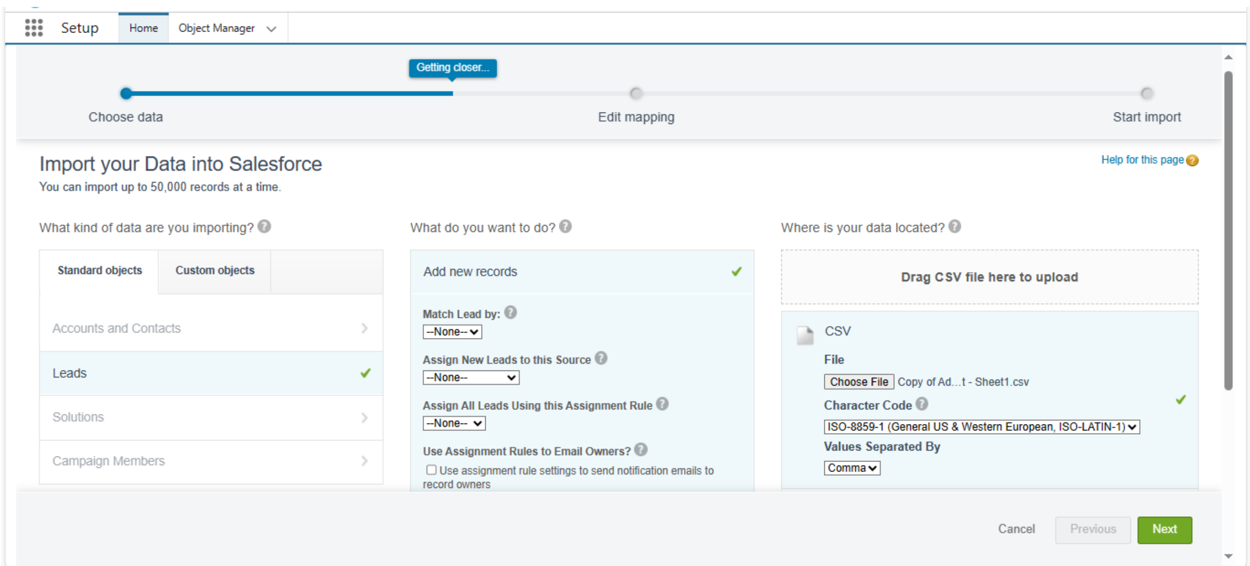


A Commission Due column is created with values corresponding to 15% of the opportunity amount (The last column below).

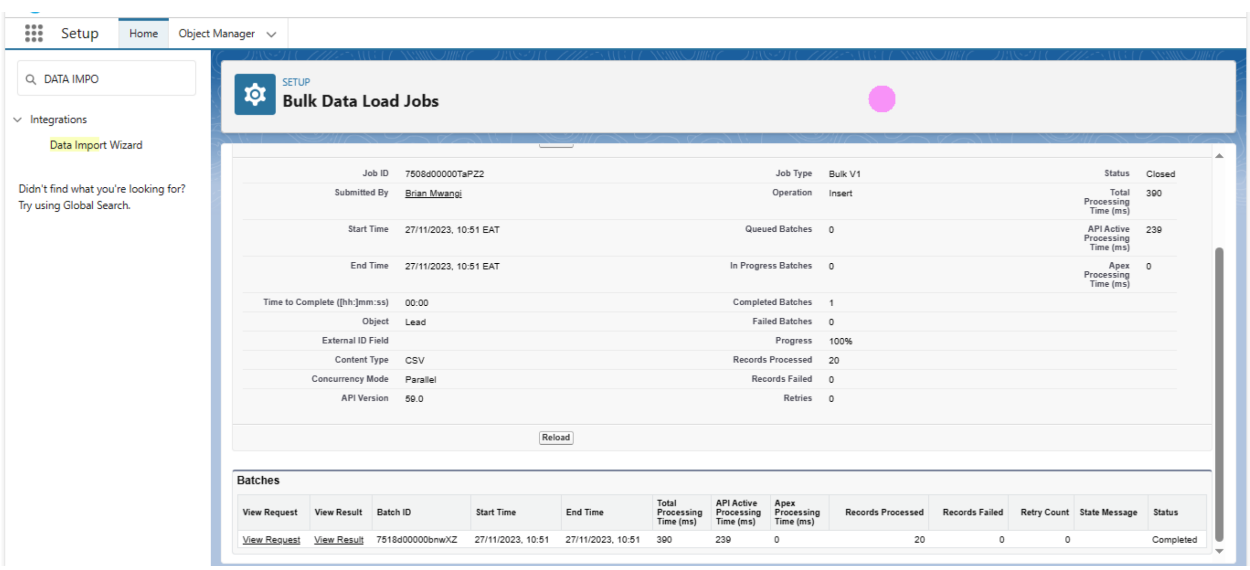


DATA IMPORT AND EXPORT

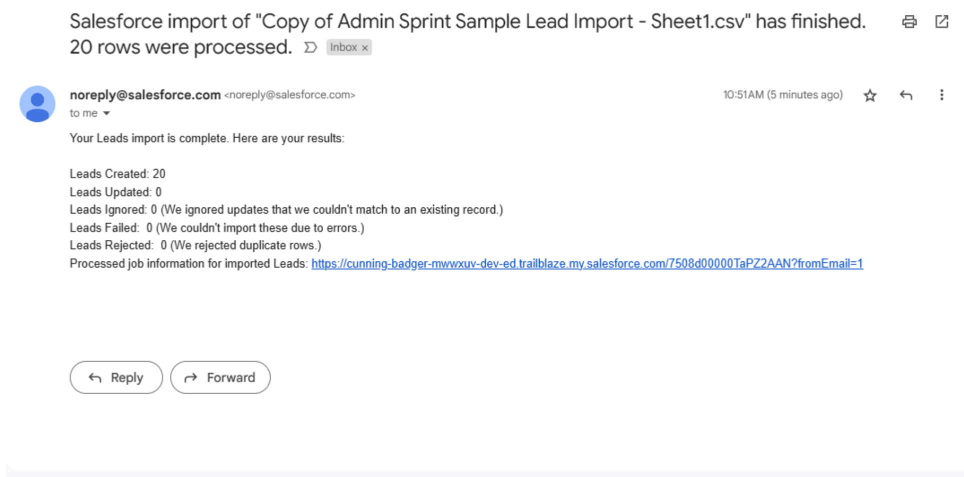
We can import data into our org using the Data Import Wizard. Specify the object we want to create these new records on, what we want to do with them and select the CSV file that contains these records. We then map the field in the file to the fields in our org and start our importation.



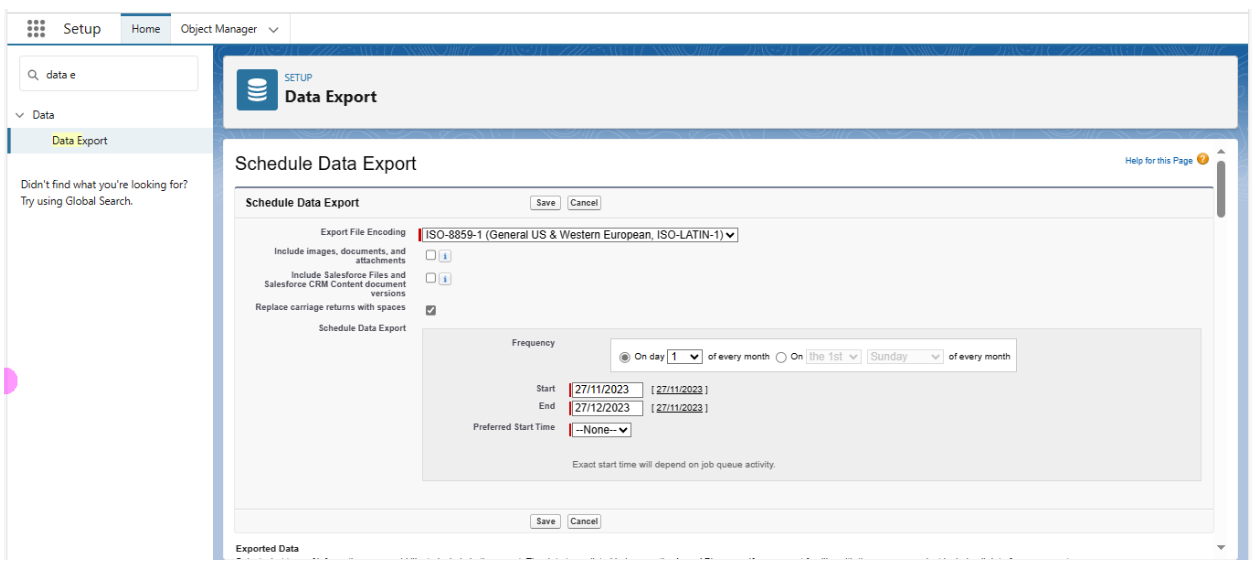
We get a summary of what was imported in the end.



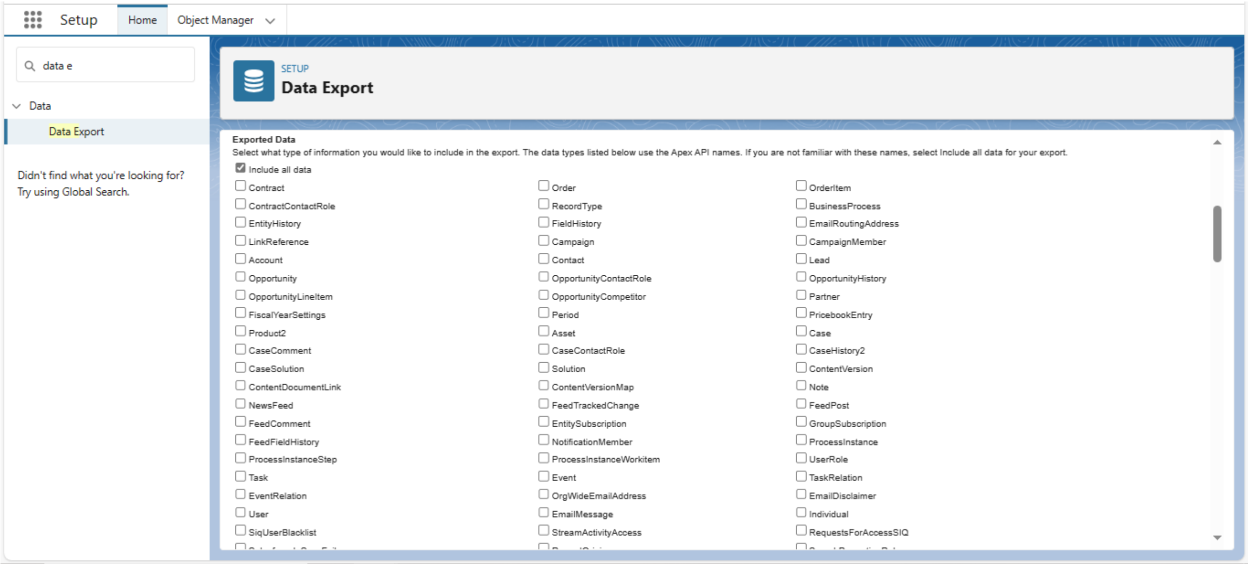
I also got an email, confirming that the importation was successful.



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 Entreprise 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.



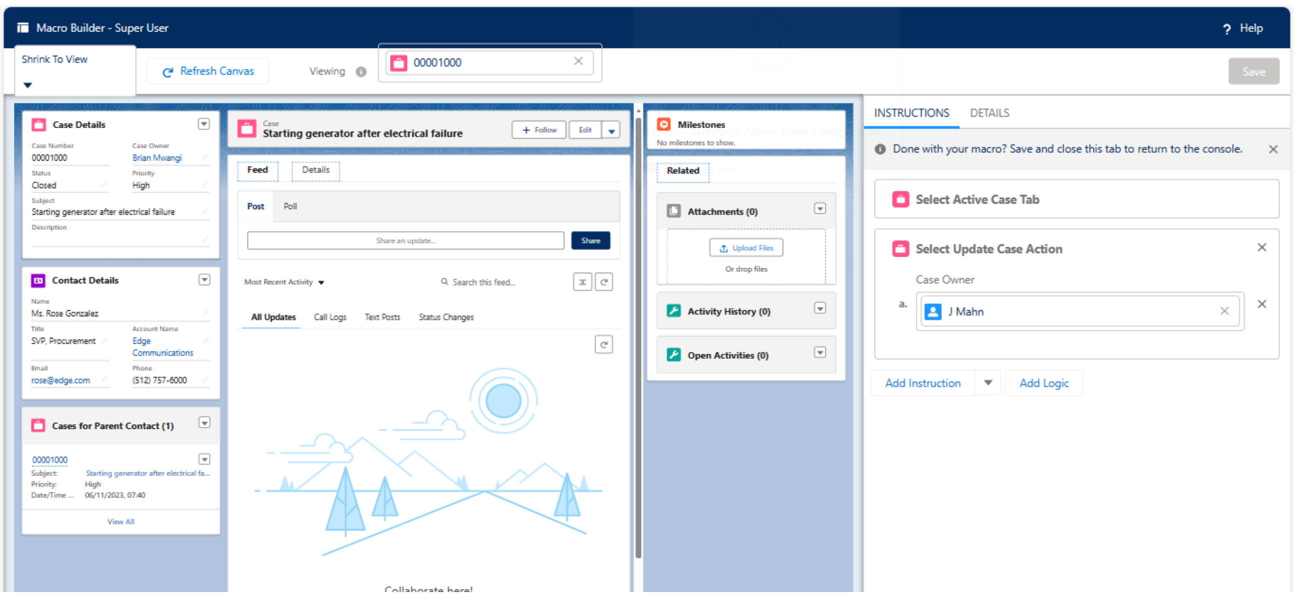
Importance of Data Export in Salesforce(Source: ChatGPT):

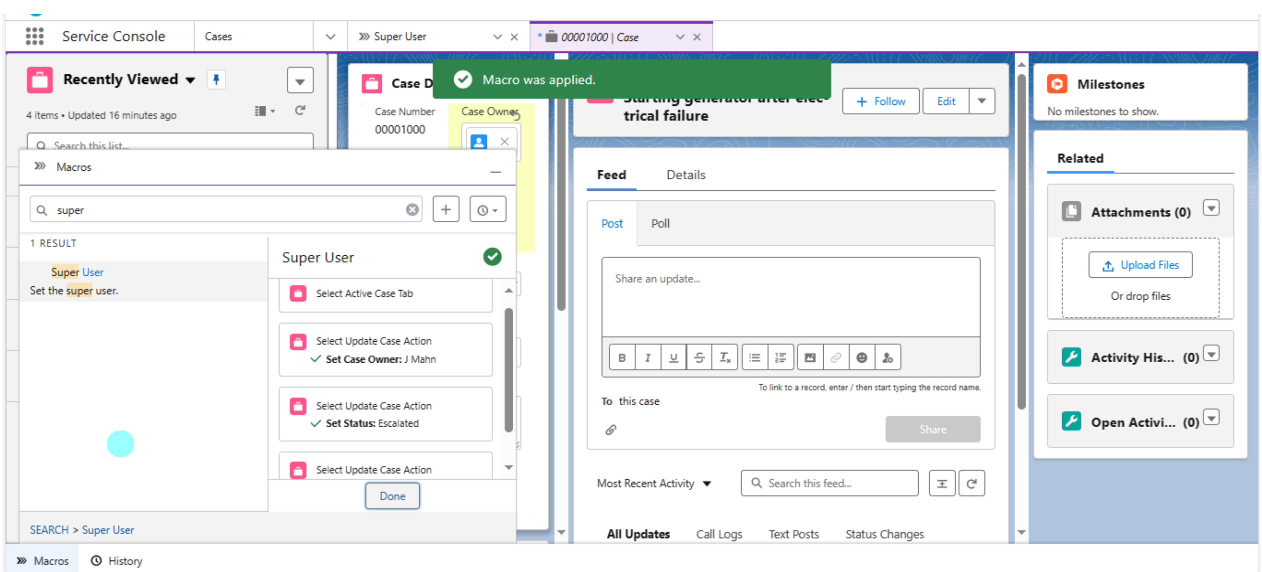
- *Data Backups:* Regular data exports serve as a crucial element of your data backup strategy. In case of accidental data loss or corruption, having recent exports allows you to restore your data to a specific point in time.
- *Data Archiving:* Data exports facilitate data archiving efforts. By regularly 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

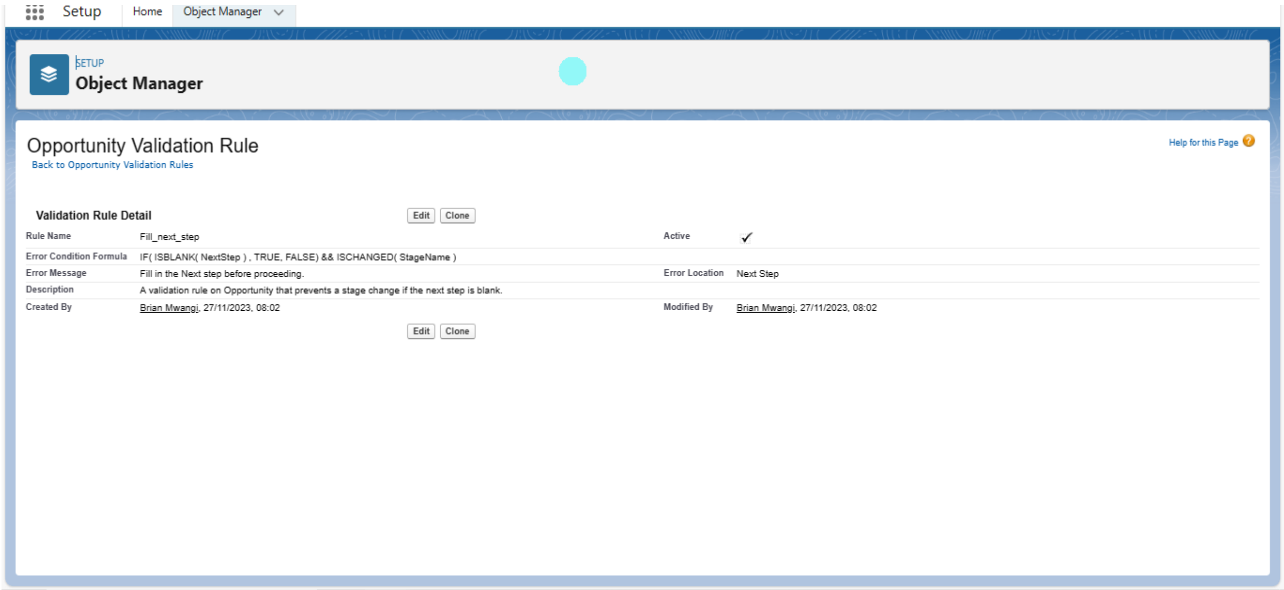
Macros are automated sequences of actions that allow users to perform repetitive tasks with a single click. These actions can include updating fields, creating records, or sending emails. They are useful in streamlining and expediting common processes, such as updating the status of a record or logging 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.



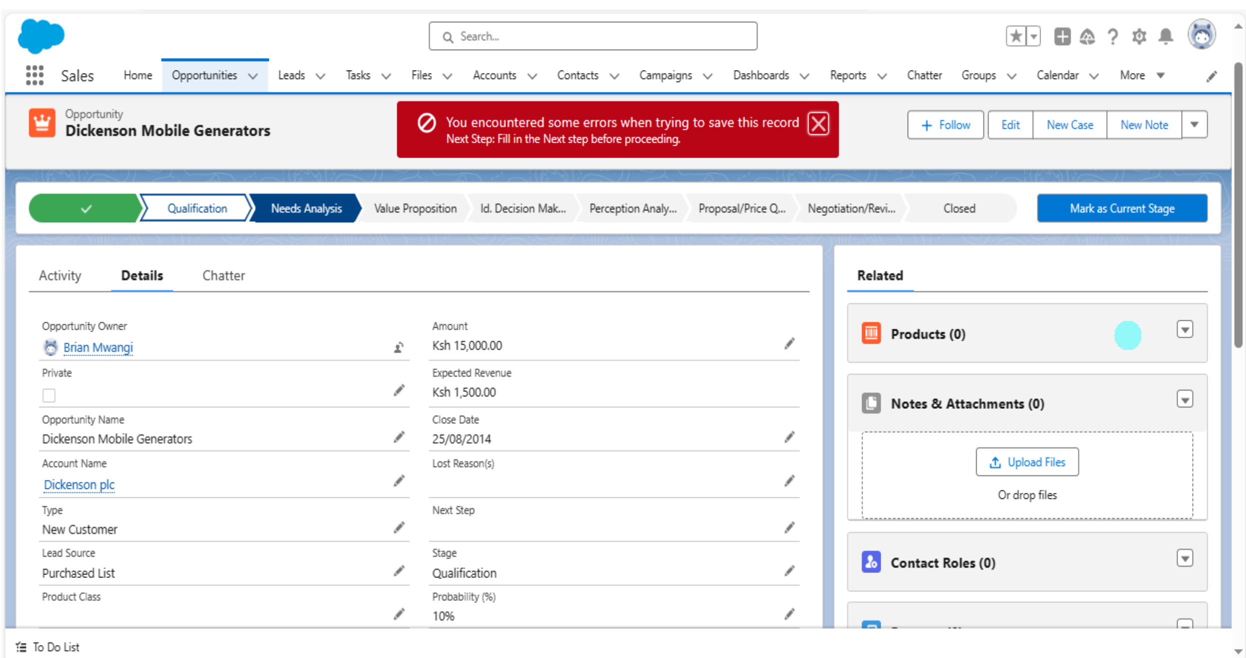


VALIDATION RULES

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.



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.



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 ssignment 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 inorder 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.