

# ISOLVIT, INC.

CRMREPOS

CRMDocs

DOC Surf

DOC Help

DOC Export

DOC Compare

DOC Refresh

DOC Write



# ADMINISTRATOR CHALLENGE

- ▶ New Functionalities developed in Sandbox: needed to be pushed to Production
  - ▶ Documenting New Functionality and Metadata Changes
  - ▶ Changes Review on Sandbox
  - ▶ Documenting the Metadata Changes on Production during Sandbox Development Period
  - ▶ Interactive Analysis and comparison
- ▶ Company Restructuring or merging: departments/Groups or simplify the process Analysis Comparison between different Functions within one instance in:
  - ▶ Page Layout + Related Information
  - ▶ Workflow
  - ▶ Record Type
  - ▶ Apex Trigger
  - ▶ Validation Rules
  - ▶ Apex Class
  - ▶ Profile



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# COMPARE BETWEEN TWO INSTANCES

# MAIN VIEW

- ▶ Clickable list of Affected Objects with Changes

- ▶ Object Record
- ▶ Field
- ▶ Picklist
- ▶ Web-Link
- ▶ Validation Rules
- ▶ Apex Trigger
- ▶ Layout
- ▶ Record Type
- ▶ Profile Master
- ▶ Apex Class
- ▶ Report
- ▶ Dashboard

- ▶ List Name, Count, differences, in 1 and 2:

- ▶ Object Record
- ▶ Object Trans
- ▶ Field
- ▶ Field Trans
- ▶ Picklist
- ▶ Picklist Trans
- ▶ Web-Link
- ▶ Web-Link Trans
- ▶ Layout
- ▶ Layout Section
- ▶ Layout Fields
- ▶ Layout Fields Trans

(continue)

- ▶ Layout Related
- ▶ Layout Related Trans
- ▶ Layout Related Fields
- ▶ Record Type
- ▶ Record Type Trans
- ▶ Record Type Picklist
- ▶ Record Type Layout Picklist
- ▶ Validation Rules
- ▶ Validation Rules Trans
- ▶ Validation Rules Fields
- ▶ Workflow Rules
- ▶ Workflow Criteria
- ▶ Workflow Trigger

- ▶ Workflow Trigger Field
- ▶ Workflow Actions
- ▶ Workflow Actions Alerts
- ▶ Workflow Actions Alerts Recipients
- ▶ Workflow Actions Field Updates
- ▶ Workflow Actions Flow Action
- ▶ Workflow Actions Flow Action Param
- ▶ Workflow Actions Knowledge Publishes
- ▶ Workflow Actions Outbound Messages
- ▶ Workflow Actions Outbound Messages Fields
- ▶ Workflow Actions Tasks
- ▶ Workflow Actions Tasks Fields
- ▶ Workflow Actions Tasks Trans
- ▶ Profile Master
- ▶ Profile App Visibility
- ▶ Profile Apex Class Access
- ▶ Profile Custom Permissions
- ▶ Profile External Data Source Access
- ▶ Profile Field Level Security
- ▶ Profile Layout Assignments
- ▶ Profile Login Hours
- ▶ Profile Login IP Range
- ▶ Profile Object Permissions
- ▶ Profile Apex Page Access
- ▶ Profile Record Type Visibility
- ▶ Profile Tab Visibility
- ▶ Profile User Permission
- ▶ Apex Trigger
- ▶ Apex Class
- ▶ Apex Class Fields
- ▶ Dashboard
- ▶ Dashboard Reports
- ▶ Report
- ▶ Report Columns
- ▶ Report Filter
- ▶ Report Boolean
- ▶ Report Sort

# Dashboard View

Clickable: Compare View, View each Object, Export List (XLS), All Views (DOC)

## Object Record

- ▶ Object Label
- ▶ Object Name
- ▶ Checked Boxes for:
  - ▶ Objects
  - ▶ Translation

## Field

- ▶ Object Label
- ▶ Field Label
- ▶ Field Name
- ▶ Type
- ▶ Checked Boxes for:
  - ▶ Picklist
  - ▶ Weblink
  - ▶ Fields
  - ▶ Translation

# Dashboard View

Clickable: Compare View, View each Object, Export List (XLS), All Views (DOC)

## Picklist

- ▶ Object Label
- ▶ Field Label
- ▶ Field Name
- ▶ Checked Boxes for:
  - ▶ Fields
  - ▶ Translation

## WebLink

- ▶ Object Label
- ▶ Field Label
- ▶ Weblink Name
- ▶ Checked Boxes for:
  - ▶ Fields
  - ▶ Translation

# Dashboard View

Clickable: Compare View, View each Object, Export List (XLS), All Views (DOC)

## Validation Rules

- ▶ Object Label
- ▶ Validation Name
- ▶ Checked Boxes for:
  - ▶ Validation
  - ▶ Translation

## Apex Trigger

- ▶ Object Label
- ▶ Trigger Name
- ▶ Checked Boxes for:
  - ▶ Apex Trigger



# Dashboard View

Clickable: Compare View, View each Object, Export List (XLS), All Views (DOC)

## Page Layout

- ▶ Object Label
- ▶ Layout Name
- ▶ Checked Boxes for:
  - ▶ Layout
  - ▶ Section
  - ▶ Field
  - ▶ Translation
  - ▶ Related
  - ▶ Related Translation
  - ▶ Related Field
  - ▶ Record Type

## Record Type

- ▶ Object Label
- ▶ Record Type Name
- ▶ Checked Boxes for:
  - ▶ Record Type
  - ▶ Translation
  - ▶ Picklist
  - ▶ Layout

# Dashboard View

Clickable: Compare View, View each Object, Export List (XLS), All Views (DOC)

## Workflow Rules

- ▶ Object Label
- ▶ Workflow Name
- ▶ Checked Boxes for:
  - ▶ Rules
  - ▶ Criteria
  - ▶ Trigger
  - ▶ Trigger Field
  - ▶ Actions
  - ▶ Actions Tasks Trans

### *Checked Boxes for (continue):*

- ▶ Actions Alerts
- ▶ Actions Alerts Recipients
- ▶ Actions Field Updates
- ▶ Actions Flow Action
- ▶ Actions Flow Action Param
- ▶ Actions Knowledge Publishes
- ▶ Actions Outbound Messages
- ▶ Actions Outbound Messages Fields
- ▶ Actions Tasks
- ▶ Actions Tasks Fields

# Dashboard View

Clickable: Compare View, View each Object, Export List (XLS), All Views (DOC)

## Profile Master

- ▶ Profile Name
- ▶ Checked Boxes for:
  - ▶ Profile
  - ▶ App Visibility
  - ▶ Apex Class Access
  - ▶ Custom Permissions
  - ▶ External Data Source Access
  - ▶ Field Level Security
  - ▶ Layout Assignments
  - ▶ Login Hours
  - ▶ Login IP Range
  - ▶ Object Permissions
  - ▶ Apex Page Access
  - ▶ Record Type Visibility
  - ▶ Tab Visibility
  - ▶ User Permission

## Apex Class

- ▶ Apex Class Name
- ▶ Checked Boxes for:
  - ▶ Apex Class

Clickable: Compare View, View each Object, Export List (XLS), All Views (DOC)

## Report

- ▶ Report Name
- ▶ Checked Boxes for:
  - ▶ Report
  - ▶ Columns
  - ▶ Filter
  - ▶ Boolean
  - ▶ Sort Order

## Dashboard

- ▶ Dashboard Name
- ▶ Checked Boxes for:
  - ▶ Dashboard
  - ▶ Report

# COMPARE WITHIN ONE INSTANCE

# Compare within the same Function

Comparison View for the changes ONLY.

Simultaneously Display View for each function

Accessed from DOCSurf®

- ▶ Page Layout
- ▶ Workflow
- ▶ Record Type
- ▶ Trigger
- ▶ Validation Rules
- ▶ Apex Class
- ▶ Profile

# MORE INFORMATION

- ▶ Contact the isolvIT Team for more information:

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# RESOURCES

- ▶ Website: <http://isolvit.net/>
- ▶ Product Briefs: <http://isolvit.net/crmsuite.html>
- ▶ YouTube:
  - ▶ [Search for isolvIT, Inc.](#)
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- ▶ Twitter: @isolvITCRM