

ISOLVIT, INC.

CRMREPOS

CRMDocs

DOC Surf

DOC Compare

DOC Export

DOC Help

DOC Refresh

DOC Write



ROI: Documentation

What is it GOOD FOR?

- Organizational Change: Acquisitions and Mergers, Reorganizations of Employees, Attrition / New Hires
- ‘Need to know’ vs informed workers - knowing the why’s helps people engage and follow the process (or improve it...if documented!)
- Field usage - ‘we don’t have any fields left → here are the available fields, unused fields, misused fields, fields that can be used/already available
- Process Streamlining
 - “We don’t need that field, do we? (Or do we?)”
 - “Who is involved?”
 - “Who do we ask?”
- ▶ **Consequences of not having a documented system can be costly, although, like an iceberg, most costs are hidden, but can be fatal.**
(Are YOU sailing around on the Titanic?)

ROI: LESSONS learned

- When people leave, they take their knowledge with them, and you don't always know when that might happen.
- Managers know a lot, and yet the people in the trenches (the SME's) are the people you need involved in a documentation effort.
- People don't like to write things down, but they will tell you about it - if you just know the right questions to ask.
- Documentation must keep pace with your SFDC System - If your SFDC is changing, the documentation must also change.
- If you haven't updated documentation in a long time; You can start now - undocumented systems do not get better with age.

You've been accused of documenting your SFDC system

Would they find enough evidence to convict you?

What might they find?

Structure

- List of fields used/abandoned/available..?
- List of screen layouts..?
- Any workflows..?
- Field Types..?
- What's read-only and what's not..?
- Data validation rules..?
- What about Profile and Object's access..?

Business context

- Business purpose / process..?
 - Object-level
 - Field-level
 - Page layout-level
 - Workflow-level
 - Validation
 - Trigger
 - Record Type
- Field-level end-user help..?
- Data Feeds In / Out..?
- Business Integration/timing..?
- Do you have business agreement on that..?



ADMINISTRATOR CHALLENGE

▶ User

- ▶ Access Information from SFDC
- ▶ Information about Page Layout
- ▶ Information about Related Object
- ▶ Detail information about Fields
 - ▶ Picklist
 - ▶ Weblink
- ▶ Information in Multi-Language
 - ▶ SFDC store Description in One Language ONLY
- ▶ Audit Log

▶ Power User

- ▶ Manage Information from SFDC
- ▶ Manage Page Layout Information
- ▶ Manage Related Object Information
- ▶ View Related Profile
- ▶ Access ALL functions by Field:
 - ▶ Field Metadata
 - ▶ Apex Triggers
 - ▶ Validation Rules
 - ▶ Apex Triggers
 - ▶ Workflow
 - ▶ Apex Class
 - ▶ Reports
 - ▶ Data Sources

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CLICK ONE WEBLINK FROM PAGE LAYOUT

- ▶ Access through Weblink from Page Layout
- ▶ Popup Page Layout's display as SFDC's layout
 - ▶ Page Layout
 - ▶ Related Information
- ▶ Help Screen based on Department or Business Type
- ▶ Help screen at Page Layout Level
- ▶ Help Screen at Field Level
 - ▶ Description
 - ▶ Tooltip
- ▶ Help Screen for Field's relationship (same layout)
- ▶ Help Screen for Related Information
 - ▶ Object
 - ▶ Fields
 - ▶ Sort Order
- ▶ Multi-Language Help screen
- ▶ Currently SFDC store Description in One Language ONLY

- ▶ Page Layout's display as SFDC's layout
- ▶ Popup Page Layout's display as SFDC's layout
- ▶ Page Layout
- ▶ Related Information
 - ▶ Related Object
 - ▶ Field Name

▶ Accessed by Profiles: Each Profile's View

- ▶ Metadata
- ▶ Objects access Permission
- ▶ Field Security
- ▶ Layout Assignments
- ▶ Application Visibility
- ▶ Apex Class
- ▶ Custom Permission
- ▶ External Data Source
- ▶ Login Hours
- ▶ IP Range
- ▶ Apex Page
- ▶ Record Type Visibility
- ▶ Tab Visibility
- ▶ User Permission

▶ Field content

- ▶ View content (Multi-Language)
- ▶ Edit content (Multi-Language)
- ▶ Field View:
 - ▶ Field Name in multi-language (List)
 - ▶ Content
 - ▶ Dashboard Usage (CRMDocs)
 - ▶ SFDC Metadata (Detail)
 - ▶ On Layouts (List)
 - ▶ Used by Layout-Related (List)
 - ▶ Record Type (List)
 - ▶ Used in triggers (List)
 - ▶ Used in validation (List)
 - ▶ Used in Apex Class (List)
 - ▶ Weblink Detail (if applicable)
 - ▶ Picklist (All Entries)

▶ Record Type

- ▶ Metadata
- ▶ Picklist
- ▶ Layout Picklist
- ▶ Help Information

▶ Validation

- ▶ Metadata
- ▶ Field Used

▶ Trigger

- ▶ Metadata
- ▶ Field Used
- ▶ Help Information

▶ Apex Class

- ▶ Metadata
- ▶ Fields Used
- ▶ Help Information

▶ Workflow

- ▶ Help Information
- ▶ Rule
- ▶ Criteria
- ▶ Trigger
- ▶ Alert
- ▶ Field Update
- ▶ Flow Action
- ▶ Knowledge Publishes
- ▶ Outbound Messages
- ▶ Tasks
- ▶ Workflow Fields

▶ Reports

- ▶ Report Name
- ▶ Report ID

▶ Data Sources

- ▶ Feed Info
- ▶ Fields Used

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.](#)
 - ▶ [Search for IsolvIT, Inc.](#)
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