

# ISOLVIT, INC.

CRMREPOS

CRMDOCS

DOC Help

DOC Compare

DOC Export

DOC Surf

DOC Refresh

DOC Write



# ADMINISTRATOR CHALLENGE

## ▶ SFDC 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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# SFDC Users

- ▶ Help Screen based on Department or Business Type
- ▶ Empower Users (individual or Profile) to manage Content Help Text
- ▶ Help screen at Page Layout Level
- ▶ Help Screen at Field Level
- ▶ Help Screen for Field's relationship (same layout)
- ▶ Help Screen at Picklist Values level
- ▶ Help Screen for Related Information
  - ▶ Object
  - ▶ Fields
- ▶ Multi-Language Help screen
- ▶ Currently SFDC store Description in One Language ONLY

## keeps track of all the moving parts

- ▶ Complete inventory system
- ▶ Easy Surfing using relationship building top-bottom, bottom-up, horizontal
- ▶ Accountability for every item/object
- ▶ Security Access View
- ▶ Continuity: Complete Documentation
- ▶ Compare Two Functions Within one Instance
- ▶ Complete Compare between two instances
- ▶ Management Views
- ▶ Compliance
- ▶ Outside Data Links
- ▶ File Sharing Repository
- ▶ Export All: Excel, MS-Word

Meet Joe.



He's our CRM  
Administrator.

# Administrator

## ▶ Admin Documentation for:

- ▶ Objects
- ▶ Page Layout
- ▶ Fields
- ▶ Picklist
- ▶ Weblink
- ▶ Cascading Picklist
- ▶ Record Type
- ▶ Validation
- ▶ Workflow
- ▶ Trigger
- ▶ Apex Class
- ▶ Profile
- ▶ Data Sources

## ▶ Compare Two Items Within one Instance:

- ▶ Page Layout (including Related Information)
- ▶ Workflow
- ▶ Record Type
- ▶ Trigger
- ▶ Validation Rules
- ▶ Apex Class
- ▶ Profile

## ▶ Complete Compare between two instances

- ▶ Dashboard View; All and individual object
- ▶ Differences
- ▶ Exist in one but Missing from other

## ▶ Export All: Excel, MS-Word

*“The first rule to tinkering is to save all the parts.” ~ Paul Erlich*

## Management

- ▶ Holistic View
- ▶ Easy Surfing: Blueprint, Relationship and comparison
- ▶ Assuring/Access Compliant Documentation (Multi-Language if Applicable)
- ▶ Process Auditing by Profile
- ▶ Data Access Review

## Compliance

- ▶ Complete documentation
- ▶ Security Access Monitor: who has access to what
- ▶ Usable Metadata Export: Excel, MS-Word by function

# Administrator






## Outside Data

- ▶ Data received from another system
- ▶ Data sent to another system
- ▶ Document: process, contact, schedule, etc....
- ▶ Document: objects and Fields



## File Sharing Repository

- ▶ File Documentation upload/download
- ▶ The file linked from the Page Layout
  - ▶ Help Info
  - ▶ Specialized form
- ▶ Description for each file
- ▶ Secured Environment

## Field

Edit SFDC Field
View Detail
List Layouts
View Validation
Record Type List
View Record Type
 Record Type Details
View Workflow Details
 Workflow Details
View Trigger
 Trigger Details
View Apex Class
 Apex Class Details
Report List
Report Details
View Feed
 Feeds Details
View Picklist
Edit SFDC Picklist

## Object

 Fields Help
Edit SFDC Object/Info
View Object
Fields Listing
Layout Pages
Related Information
Record Type
Workflow Rules
Validation
Triggers
Cascade Picklist
Access Permission
 Access Permission
Refresh Object

## Instance

Objects Record
Page Layouts
Related Information
Record Type
Workflow
Validation Rules
Object Triggers
Apex Class
Profiles
Users
CRM Reports
CRM Dashboards
Feeds In/Out
Upload Help File
Edit Master Templates
Manage CRM Help Access
CRM Access Log
Refresh CRMDocs
Refresh History



# Export

- ☑ Objects as Displayed
- ☑ Objects + Fields + Info + Lang: All
- ☑ Objects + Fields + Info + Lang: en\_US
- ☑ Picklist + Lang: All
- ☑ Picklist + Lang:en\_US
- ☑ Objects + Fields + Layout + Info
- 📄 Access Permission Detail
- ☑ Access Permission List
- 📄 Workflow Details
- ☑ Workflow List
- ☑ Profiles Layout
- 📄 Record Type Details
- 📄 Triggers Details
- ☑ Workflows Help
- 📄 Workflows Details
- ☑ Workflow List
- 📄 Feeds Details

- ☑ Fields List (as Displayed)
- ☑ Fields+Info+Lang:en\_US
- ☑ Fields+Info+Lang:All
- ☑ Picklist + Lang: All
- ☑ Picklist All: en\_US
- ☑ Fields+Layout+Info+Lang:en\_US
- ☑ Profile+Layouts
- ☑ Workflow
- 📄 Layout Details
- 📄 Workflows Details
- ☑ Reports List
- 📄 Reports Details
- ☑ Dashboard List
- 📄 Dashboard Reports

- ☑ Layouts Help
- 📄 Layout Detail
- ☑ Profile+Layouts
- 📄 Validations Details
- ☑ Triggers Help
- 📄 Triggers Details
- ☑ Record Type Help
- 📄 Record Type Details
- ☑ Apex Class Help
- 📄 Apex Class Details
- 📄 Profiles Details
- ☑ Profiles List
- ☑ Related Help
- ☑ Related List

# MORE INFORMATION

- ▶ Contact the isolvIT Team for more information:

Farid Zaarour, Software Engineer

+1 (508) 838-7725

[fzaarour@isolvIT.net](mailto:fzaarour@isolvIT.net)

Joseph Zaarour, Directory, Marketing

+1 (508) 838-7708

[jzaarour@isolvIT.net](mailto:jzaarour@isolvIT.net)



# RESOURCES

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