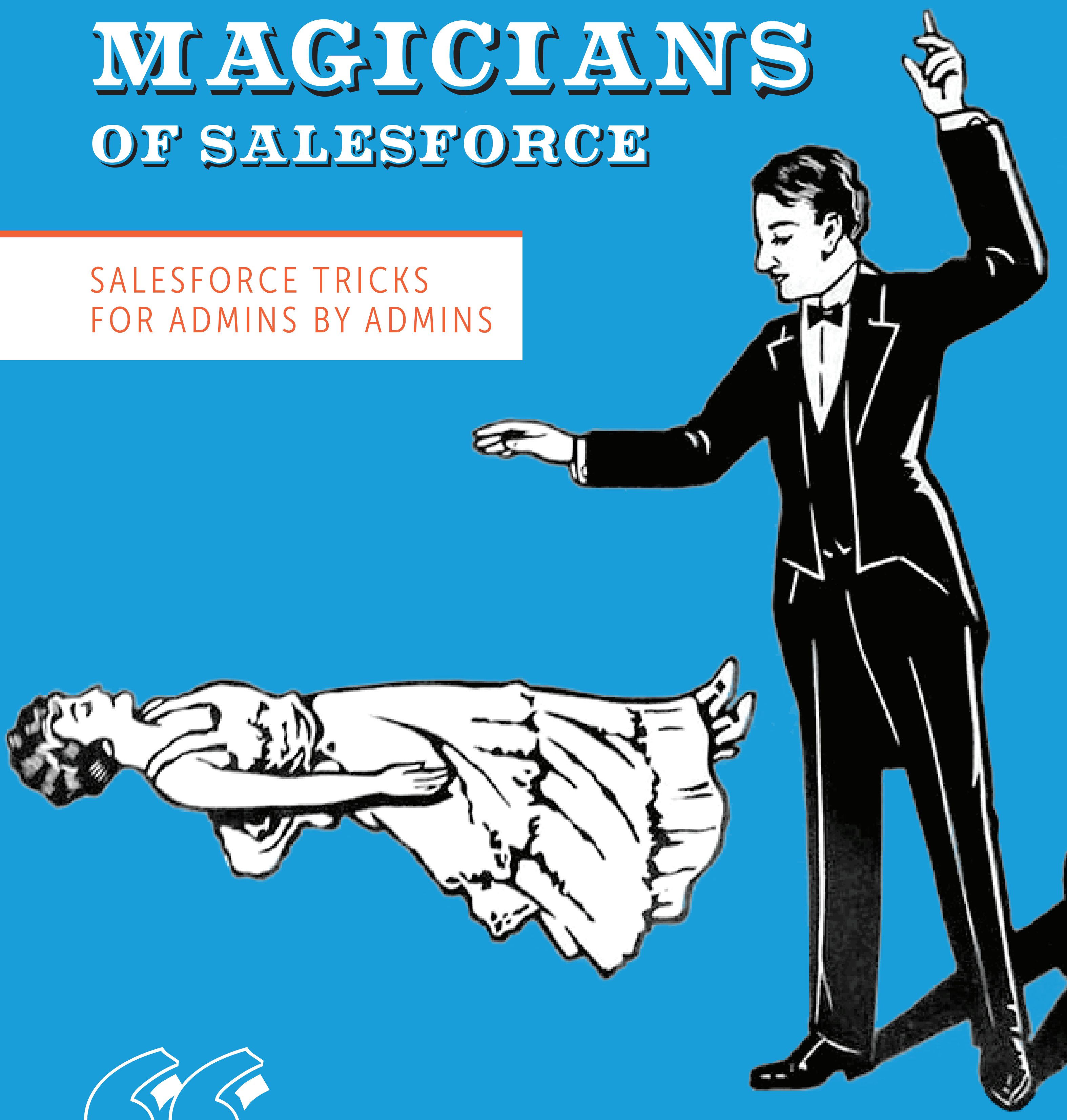
backupify

THE MAGICIANS OF SALESFORCE

SALESFORCE TRICKS FOR ADMINS BY ADMINS



And above all, watch with glittering eyes the whole world around you because the greatest secrets are always hidden in the most unlikely places. Those who don't believe in magic will never find them."

-ROALD DAHL

Raymond Teller, Penn and Teller's "silent partner," once said that the collision between what you know and what you see provides magic's greatest spark. The audience thinks they know what's happening but is surprised when something else occurs.

Software applications can sometimes have the same effect. How many times have you been amazed when someone reveals a hidden capability in Excel or a Google Doc you've never seen before even though you've been using those applications forever? Why it looks like magic!

The same can be said for one of the fastest growing software applications in the world - Salesforce.com (SFDC). With annual revenue of nearly $5 billion and a growth rate of 37%, Salesforce has become one of the leaders in software innovation.

This magical application is summoned from the Cloud to perform over a billion transactions a day around the world. Even if you've been a practitioner for a while, you might not be aware of all the tricks it contains that can help you make your sales team more effective.

CONTENTS

That's where we come in.

We've conjured up a number of Salesforce expert administrators who have agreed to pull back the curtain on how the magic is performed and show you how to dazzle your team with awesome feats of SFDC sorcery.

So without further ado, we present, for your entertainment – and knowledge – the Magicians of Salesforce who will regale you with tips and tricks to allow you to make some magic of your own.

OPEN SESAME

PROFILES AND PERMISSIONS MANAGEMENT

Magicians know that every good trick begins with the setup. And so it is with SFDC. Before your users can experience the magic of Salesforce, they need access and a view tailored for their own personal needs.

"My primary responsibility as an admin is to make sure users have the correct access to Salesforce and that their page layout is optimized for them to do their jobs," says Augusto Bisda, a Solutions Architect with DemandGen. "It's crucial for them to have the correct views and appropriate dashboards and reports."

"One of the biggest challenges is setting permissions for a user that has a unique need," says Bisda. "This requires figuring out whether to create a new profile for this user or creating a permission set as an add on to the user's permission. Creating a profile for every unique set of permissions can easily get out of hand."

"One best practice I always try to stick to is when a user requests a field make sure you ask them the business case," adds Kaitlin MacKenzie, Sales Operations Manager at Applause. "Get the full story on what their pain is and how they are going to use that information. This will allow you to determine how to build out their request (field, workflow rule, validation rule, report etc.)"

One of the ways MacKenzie addresses the problem is by grouping users into teams. "We have teams all over the world using SFDC," she says. "We use different page layouts or record types for different teams. This allows us to add fields, validation rules, or workflows and distinguish which record types or layouts they should be part of. We also use fields on the user records for setting up dashboards, reports, workflow rules, and user views. These are helpful to understand what users have which permissions. This is something we constantly work on to figure out how we can better manage it."

"At Root Capital we have a Salesforce Council that meets on a bi-weekly basis," says Meghan Butler, Business Systems Analyst for the company. "This group is comprised of at least one representative from each major department that is responsible for entering and managing SFDC data. We also include some representatives that rely heavily on SFDC information but aren't necessarily entering any data into the system such as finance. The focus of the council is to facilitate cross-departmental collaboration related to our SFDC instance. As the administrator, I also use this forum to discuss more technical decisions that need to be made – changes to password policies or enabling new features, for example."

MEGHAN BUTLER
ROOT CAPITAL

As an administrator, having a solid understanding of user permissions is critical to ensure that SFDC is configured properly based on your organization's unique needs. It's also essential for providing end user support and troubleshooting issues that arise.

"User permissions in Salesforce can be quite complicated," Butler sums up. "As an administrator, having a solid understanding of user permissions is critical to ensure that SFDC is configured properly based on your organization's unique needs. It's also essential for providing end user support and troubleshooting issues that arise. One helpful resource that SFDC provides to help understand this is Who Sees What: Data Visibility How To's playlist on the Salesforce YouTube channel.

VOILA!

RELEASE MANAGEMENT

The magic of Salesforce derives from they way it constantly evolves to meet the changing needs of its users. But as we all know, change can sometimes be painful, especially if it isn't handled correctly.

According to the Salesforce Development Lifecycle Guide, one of the most productive features of the Force.com platform is that customizations can be made directly in the web user interface and become available to end users immediately. These kinds of changes do not require elaborate development tools or processes. From a release management standpoint, very little effort is required. More involved upgrades can be more complex and require tracking changes between the various environments to make sure there are no conflicts during deployment.

Just as magicians need to rehearse before they display their tricks in front of an audience, admins need time to roll out new SFDC features. Salesforce offers an ideal practice stage in the form of a tool called the sandbox.

As most admins know, a sandbox replicates your production organization. It contains the same configuration information - types of custom objects and fields, applications, and workflows - as your production environment. That information is then copied as a new test environment completely isolated from your production system. Operations performed in the sandbox don't affect live production and nothing done in live production affects the sandbox.

"I definitely couldn't live without the sandbox environment," says Michael Kuznetsov, manager of Marketing Operations at InsightSquared. "It's a great place to test out your crazy new ideas without jeopardizing critical production data. The real power of Salesforce lies in your ability to stretch its capabilities, tailor it to your own needs, and find new ways to glean meaning from the data. The sandbox environment helps admins learn about these exciting possibilities without worrying that they're going to unintentionally throw their data into a black hole."

MICHAEL KUZNETSOV
INSIGHTSQUARED

The real power of Salesforce lies in your ability to stretch its capabilities, tailor it to your own needs, and find new ways to glean meaning from the data. The sandbox environment helps admins learn about these exciting possibilities without worrying that they're going to unintentionally throw their data into a black hole.

This is particularly important when Salesforce upgrades to a newer version. Upgrades are scheduled during off-peak hours, and should not affect users. However, IT departments often run their batch workload at this time so it is important to avoid any conflicts.

"I conduct a release notes and new feature review session with my team and Salesforce.com," says David Pier, Director of Applications at Iron Mountain and Salesforce.com MVP. "We ensure that at least one of our full sandboxes gets the release update when available so we can test new functionality and ensure code and applications are behaving as expected."

"The first thing I do is take a look at the release notes," says MacKenzie. "I also always participate in the webinars that Salesforce offers on the new release because they typically show examples of the new features. It's always helpful to see an example in production. If there is a particular feature that I want to play around with I use our sandbox to test it out."

"The first step is reading the release notes and participating in the Salesforce Success Community Release Readiness group," Butler agreed. "When a new release is approaching, I identify which features will definitely impact us, which features won't impact us, and which features won't be imposed upon us, but that we may want to use in the future. I then communicate this information to relevant staff within the organization.

"In some cases, releases have resulted in an unanticipated project to prepare for and new features to be implemented," she continued. "As part of the release process, it's also important to make sure you pay attention to the sandbox preview release window deadlines so your sandboxes are on the correct release. I find that it is generally preferable to have your primary sandbox on the upcoming release window so you can test existing functionality - especially if you're using Apex and/or Visualforce - to ensure that nothing is going to break unexpectedly."

The lesson? Before you wave that magic wand on the latest release remember – read the instructions and test, test, test.

PRESTO CHANGO

DATA INTEGRATION/CLEANSING

The old saying - garbage in, garbage out – certainly applies when it comes to managing your data in Salesforce. In order for SFDC to work its magic, the data needs to be up-to-date and error free. For many SFDC admins, achieving that is an ongoing battle.

"The biggest challenge I face is user adoption and making sure that end users are entering data in the system in a timely fashion," says Butler. "In collaboration with the designated points of contacts within each business unit, we primarily monitor data quality and system usage using Salesforce reports. It helps us identify when users aren't using the system as intended. When possible, I use record types, page layouts, and validation rules to ensure that data is entered at the right time in the process and in the format desired.

"Salesforce doesn't provide many features that help you with data cleansing," she went on, "but using the find duplicates feature on leads, and merging accounts and contacts is very helpful.

"I rely on Salesforce user permissions and sharing settings to manage access to data in the system," Butler continued. "By default, our organization sharing settings allow all end users to view the majority of data in the system. With user permissions -profiles, permission sets, field-level security – I'm able to define specific access for users so they are only able to edit and delete data that is appropriate to their job function."

MacKenzie also identifies keeping data clean as her biggest challenge.

"We are a small team yet we manage over a million records," she says. "Salesforce allows us to create validation rules and reporting to try and stay on top of it but you can always count on sales reps to find the exceptions. SFDC allows us to email out reports so we put together exception reports or age reports that show reps if they have anything that needs updating. We use these to send to the teams to make sure they are aware of what management is looking at and that they are staying on top of their records."

Kuznetsov sees exception reporting as the key to data cleansing.

"There's no way you can possibly account for or predict every potential way your system could break," he says. "However, just like a security perimeter has a first and second line of defense, you can always use exception reporting to alert you when data has been generated or changed outside of process. Similarly, analytics tools that flag data errors are a great way to increase adoption, minimize input errors, and catch potential problems early. They can help you get some incredible value out of your Salesforce data, too."

KAITLIN MACKENZIE

APPLAUSE

There is typically a lot of manual work you need to do to integrate but once you have done that and have the right tools in place then mapping and migrating is relatively easy. You want to have a goal of setting it up so that you don't have to manage it after that – just focus on monitoring.

"There are many data-cleansing applications available," said Pier. "...But at the end of the day, your data will only be as good as what you put in the system. It's ultimately up to you and your organization to define processes, identify data stewards, and implement a model of data governance. In many cases, the technology is secondary."

Integrity problems can also arise when integrating data into Salesforce from the many other systems in use within an organization.

"The key thing to keep in mind when integrating multiple system data is to be very thoughtful about what system is the 'system of record'," says Kuznetsov. "Most businesses, like ours, have a ton of overlapping, complementary, and interconnected systems. If you're not careful, data can get lost or overwritten as it passes from one system to the next. The only way to avoid this is to carefully document your internal data-flows and to be incredibly aware about how your systems interact, and which is 'the boss' - or 'system of record.'"

DAVID PIER

IRON MOUNTAIN

It's ultimately up to you and your organization to define processes, identify data stewards, and implement a model of data governance. In many cases, the technology is secondary.

Bisda feels managing data integration comes down to using Cloud connectors like Boomi, the AppExchange apps specific to the application or developing your own integration. Handling API's can be another struggle for admins managing Salesforce. Butler has a specific process for dealing with such integration.

"If another system is able to automatically create or update Salesforce data using an API, I create a dedicated user for that system so that I can easily tell that a record was created or modified by that particular system rather than a person," she says. "For these dedicated users, they are assigned to the System Administrator profile and I set it so the password never expires to reduce the likelihood that the live integration will stop working due to access restrictions.

"When Salesforce data is simply being used by another system," Butler continues, "but the data is being manually exported/imported into a different system, the most important thing is to ensure that all stakeholders are aware of and agree to any system changes (e.g., changing pick list values, eliminating a field). In some cases, I have also created formula fields that reinterpret data from Salesforce so it is readily available for exporting in the exact format desired."

MacKenzie describes a more strategic plan for dealing with the data integration issues.

"The first thing we do is sit down with the users of the system and understand how they are using it," she says. "Then we speak to the leaders and understand what we are trying to accomplish. Before you do any of the work you need to have a plan and understand the goal. There is typically a lot of manual work you need to do to integrate but once you have done that and have the right tools in place then mapping and migrating is relatively easy. You want to have a goal of setting it up so that you don't have to manage it after that – just focus on monitoring."

PICK A CARD, ANY CARD

INTEGRATING SFDC TOOLS

Every magic show features an array of props whether it be a magic hat, interlocking rings, or a box to saw a lady in two. Salesforce has a dazzling array of add-on tools to help make you a more efficient and productive SFDC admin.

Bisda recommends Marketo's Sales Insight or Eloqua's Profile to provide users more insight on lead activities by allowing reps to see the emails, web visits, and form submissions associated with a lead, directly from the layout. He also says data append tools such as Leadspace come in handy.

"Dataloader.io is a godsend for fixing data in your instance," say Kuznetsov.

"And of course Insightsquared, which enables Salesforce users to do cross-object and historical reporting to take their company to the next level of data-driven decision making."

Pier suggests DocuSign for simplifying and automating the contract/agreement process, Conga for document generation and Dupeblocker + DemandTools for keeping your data clean.

"We couldn't live without DemandTools," says MacKenzie. "It allows us to easily reassign records to people or group (you have the ability to round-robin assign) and to mass update records. Distribution Engine is a lead rotating tool that is cutting edge. They allow us do so much more than we used to be able to with alerts and rules. There is also an analytics piece to it. And S4G Automatic Currency Updater is another "set it and forget it" tool - my favorite - that pulls in the currencies that we sell in every day for multi-currency management. I never think of this tool since it just works and runs in the background but it allows our forecasting to always be accurate as exchange rates fluctuate."

Butler is also a fan of DemandTools. "This is an alternative to the Salesforce data loader and it is free for nonprofits. It helps me make data updates in mass much faster than I could otherwise. I can also save scenarios that I use frequently."

"Rollup Helper is an app we purchased to address two identified needs," Butler goes on. "We were running out of roll-up summary fields on an object and roll-up summary fields/formula fields are not accessible to other systems via an API. Now we are able to automatically summarize more data and have this data available in other systems. I no longer have to tell my users that we can't summarize data on opportunities because we ran out of roll-up summary fields.

TOP 9 TIPS

1. Take the one-week Admin 201 course to learn how it all works.
2. Keep re-assessing the security model. What made sense then might not now.
3. Identify the stakeholders and understand how they use the data in the system.
4. ALWAYS disable the Quick Create menu in the User Interface settings. This causes more data quality issues than it is worth.
5. When available, use the description fields provided to you in the Setup Menu to describe how a component (e.g., field, record type) is being used and whether there are any dependencies that should be considered when making changes.
6. Set up different profiles for different roles and responsibilities so users only see - and can edit - what they need.
7. Don't forget the AppExchange. If you have a problem, there's likely a solution on the AppExchange and it's probably free!
8. Engage in the community
9. Never stop learning.

"Field Trip allows you to analyze what percent of records have data in a particular field," Butler continues. "It's much faster than trying to do the same analysis in Excel. I primarily use Field Trip to determine whether a field is being used or whether it can be eliminated."

NOW YOU SEE IT, NOW YOU DON'T

DATA SECURITY

Everybody loves a good disappearing act - except when it comes to your data. There is still concern surrounding data security for cloud-based applications and SFDC is not immune. However, securing your data doesn't rely on hocus-pocus, but rather depends on a structured, disciplined program.

SFDC asserts that it is built with a solid foundation of security to protect both your data and integrated applications. It also provides the ability to implement your own security measures that best suit the structure and needs of your organization. Salesforce does stress that securing your data is your responsibility as well as that of SFDC. They can protect your data from unauthorized access from outside your organization but you need to safeguard it from inappropriate usage by your users.

"I rely on several native Salesforce security control features involving password policies, session settings, network access, activations, and login access policies," says Butler.

"Avoid using shared accounts - accounts where multiple people log in with the same credentials," offers Kuznetzov. "ESPECIALLY between humans and system integrations. Shared accounts make it impossible for you to tell who did what, which erodes accountability and endangers data security. Also, if an employee leaves and you need to cycle your passwords, you may break the authentication between your connected apps."

MacKenzie says the security process begins right from the start of any engagement.

"One thing I always make sure is in place is that when a deal is won or lost that it is locked," she says. "I use a validation rule so that the only ones who can edit an opportunity once it is closed is the Salesforce admins. This does two things. It enforces reps to be deliberate when they are closing out a deal because they know they can't go back and update and it also allows us to secure all historical data and no one can change it by accident."

Object level security with SFDC is achieved through a process referred to as CRUD (Create-Read-Update-Delete). Salesforce explains that CRUD settings are applied at the profile level and can be used to restrict the actions that users can take on each type of standard and custom object. An example use of CRUD would be to remove the ability for a custom "auditor" profile to update, create, or delete any Account record.

"I think the combination of being able to manage CRUD on profiles and permission sets works well," says Bisda. "CRUD on profiles allows an admin to set the level of permissions for each object for a group of users while CRUD on permission sets allows the same on the user level."

AUGUSTO BISDA
DEMANDGEN

CRUD on profiles allows an admin to set the level of permissions for each object for a group of users while CRUD on permission sets allows the same on the user level.

"We started using the enhanced profile user interface overview page," adds MacKenzie. "The search capability is really helpful to see CRUD access for specific objects."

SFDC has configured field-level security (FLS) similarly to CRUD but allows administrators to define the profiles that can see and write to most fields of standard and custom objects. Example uses of FLS would be to make the expected revenue field of the opportunity object invisible to all profiles outside of sales and management.

"I use field-level security to see which profiles are able to view and edit a particular field," says Butler. "At the profile or permission set level, I can control the CRUD access for a particular object. Within native Salesforce, I use a list view within the profiles page to compare and update permissions at the profile level. I also use a free third party app called PermComparator to compare specific permissions across users, profiles, and permission sets.

Regardless of the tools you use, a sound security protocol is based on an organization wide commitment to strict controls and vigilant oversight.

PULLING A RABBIT OUT OF A HAT

DATA BACKUP

There is a quiver of trepidation when the audience sees a rabbit put into a box then disappear as the magician passes a magic handkerchief over it. The angst lasts only briefly, as the rabbit quickly reappears, snatched out of the nearby magic top hat.

You can go through a similar scenario with your data. You fear it's lost but then suddenly – abracadabra!- you have it back thanks to a solid backup plan. The key is to make sure when you reach into that top hat, you have something there to pull out.

"We download the weekly exports SFDC gives you natively and store them somewhere secure," says Pier. "For sensitive data, consider replicating your objects/tables to another database outside of SFDC. Most importantly, have a disaster recovery plan."

"Since we have a small Salesforce database, weekly database export is sufficient," says Bisda.

Larger organizations with significant volumes of data may need more.

"Our Salesforce data is automatically backed up everyday by Backupify," says Butler. This makes my life a lot easier to know that a snapshot of our data is always available. It also decreases the window of time in which data could potentially be compromised without a history of the changes completed. In addition to Backupify's services, I run the weekly data export offered natively by Salesforce and save this export in our organization's file system. Once a month, I also use the Force.com IDE in Eclipse to perform a backup of our organization's metadata."

MacKenzie has also found the benefits of using a third party provider for backup services.

"We used to export all data once a month and save it to a drive," she says. "We then started using Backupify who solely focuses on backing up data. It is backed up every week and what is so great is that once it's set up you can forget about it. We get an email each Monday giving us the status of the backup. The UI is extremely easy to use and understand. It's nice knowing that I have someone worrying about our data. It's one less thing I need to worry about."

Despite the innumerable skills a talented admin can call upon, it's clear that effectively managing Salesforce requires more than wizardry. It takes hard work, commitment and dedication to ensure this valuable tool - which is fast becoming indispensable – is delivering the results needed in an increasingly competitive marketplace.

With that...and into a puff of smoke...we bid you adieu.

EXPERTS' FAVORITE FEATURES

Augusto Bisda
The customization feature of Salesforce such as field/object creation, page layout design, view design, triggers, schedule jobs, Visualforce pages.

David Pier
Permission sets. Thank you Adam Torman.

Kaitlin MacKenzie
I could not live without Workflow rules. It gives the ability to create triggers to non-coders. I want Salesforce to be smart and workflow rules allow me to do that for all my users.

Meghan Butler
Being able to login as any user! It allows me to better respond to requests and troubleshoot issues if I can see exactly what they are seeing. [I also love the Force.com Quick Access Menu and use it all day everyday.]

Michael Kuznetsov
There's a ton to be gained from learning about how Triggers can make your Salesforce instance work magic. Whether it means stamping a date when your lead reaches a crucial stage, or automatically keeping your competitors out of the calling queue, Triggers are the perfect way to get more from Salesforce.com and pull a rabbit out of the magician's hat that is your Salesforce install. And-- don't be afraid! There are some great resources for learning Apex online and the Salesforce community is very friendly to beginners.

OUR PANEL

AUGUSTO BISDA

Augusto Bisda is a DemandGen Solutions Architect with extensive knowledge of application development and best-in-class solutions. As an expert Salesforce developer, Augusto sets a high quality for excellence and continues to exceed that bar on a day-by-day basis.

DAVID PIER

David Pier is the Director of Applications at Iron Mountain where he currently manages the organization's global CRM/applications strategy and implementation. David is a 3-time Salesforce.com MVP and co-leader of the Boston User Group, which is one of the largest in the world.

MICHAEL KUZNETSOV

Michael Kuznetsov manages the Marketing Operations team at InsightSquared, where he has helped drive 500% annual lead growth by pushing Salesforce.com to the limit. InsightSquared, the #1 Salesforce Analytics Solution, has helped hundreds of Salesforce customers run their companies by the numbers.

KAITLIN MACKENZIE

Kaitlin MacKenzie is the Manager of Sales Operations at Applause, an app quality company that helps thousands of customers launch apps that win. She spends her day looking at data in order to make the business more predictive and of course, loves geeking out with other Salesforce admins. She began her career in the world of sports with the Fenway Sports Group, but then fell in love with Boston's startup technology scene and hasn't looked back. She earned a BS in Business Management from Babson College with a concentration in entrepreneurship and was captain of the women's varsity lacrosse team.

MEGHAN BUTLER

Meghan Butler is Business Systems Analyst at Root Capital, a nonprofit social investment fund that grows rural prosperity in poor, environmentally vulnerable places in Africa and Latin America. Prior to Root Capital, Meghan earned a Master's in Public Administration at the University of Vermont with an emphasis on complex governance networks.