



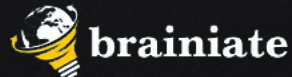
salesforce

MVP

Simplify Your Salesforce Org in 6 Steps

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Part 3 | Data Architecture

Use this workbook to organize your notes while completing this unit

Workbook for Part 3 – Data Architecture

Step 1

Identify all objects used in Salesforce

For each object, we need to define:

- › What's it for?
- › Is it needed?
- › Is it duplicated?
- › What kind of data is stored in it?
- › Who should have access to it?

Step 2

Identify all record types on each object

- › What record types do we have on this object?
- › Do users understand the differences between the record types?
- › Are different record types justified?
 - Do they warrant distinct page layouts or visibility restrictions?
 - If not - why are they record types?
- › Perhaps you're not currently using record types, but you should - in order to help provide a dedicated page and provide tighter visibility restrictions on specific records.

Step 3

Evaluate all fields on each object

- › What are they?
- › What type of data is expected to be stored in it?
- › Field formatting (date, number, phone number, email address, picklist, etc)
- › Field level security settings?
- › To what extent are they populated?
- › Do users consider some of these fields to be irrelevant clutter on the screens?
- › Dependent picklists?
- › Validation rules?
- › If lookup fields - filters on available options?

Step 4

Evaluate all page layouts associated with each object

- › How many page layouts are there?
- › Are they all assigned? Are any unused and can be safely deleted?
- › Are the page layouts optimized?
- › Does the placement of fields and sections on the screen make sense to your users? Are they needed?
- › Lightning record page layouts
 - Are the pages optimized?
 - Are we properly utilizing tabs, quick links, path, activities and Chatter? If not - should we be using these features?
 - Are we properly utilizing report charts, list views on the lightning record page layouts? If not - should we be using these features?
 - Are we properly utilizing dynamic lightning components? If not - should we be using this feature?

Step 5

Review all automation associated with each object

- › Validation rules
- › Workflow rules
- › Process builder
- › Lightning flows
- › Approval processes

Critical questions for the Salesforce Admin:

- › Do you understand each of these pieces of automation?
- › Are you familiar with the business processes associated with these pieces of automation?
- › Are these automation rules still relevant? Should they be updated to match the current business processes?
- › If there are any inactive automation components, can we safely delete them without someone asking us to later revive them? Why shouldn't we delete them?

Free apps to help with this evaluation

- › [Optimizer](#)
- › [Octopus](#)
- › [Config Workbook](#)
- › [Field Trip](#)

Links to additional resources to better understand some of the concepts covered in this unit:

Object Management:

- › [Workflow rules](#)
- › [Process builder](#)

Field Management:

- › [Salesforce Docs](#)
- › [Trailhead](#)

Record Types:

- › [Tailor Business Processes to Different Users](#)
- › [Considerations for Creating & Updating Record Types and Picklists](#)
- › [Create Record Types](#)
- › [Edit Picklists for Record Types and Business Processes](#)
- › [Limitations for Creating and Updating Record Types and Picklists](#)
- › [Managing Multiple Business Processes](#)
- › [Create Multiple Business Processes](#)

Validation Rules:

- › [Salesforce Docs](#)
- › [Trailhead](#)

Lookup Filters:

- › [Salesforce Docs](#)
- › [Trailhead](#)

Roll-Up Summary Fields:

- › [Salesforce Docs](#)
- › [Trailhead](#)

Formula Fields:

- › [Salesforce Docs](#)
- › [Trailhead](#)

Automation:

- › Lightning Flow
 - [Salesforce Docs](#)
 - [Trailhead](#)
- › Process Builder
 - [Salesforce Docs](#)
 - [Trailhead](#)
- › Workflow
- › Approvals



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