

INSANELY USEFUL

DIY Tips to Keeping an Impressive

SALESFORCE® ORG

A Salesforce® Admin's must-have guide complete with best practices, step-by-step how-tos, protips, worksheets, and a free data health check.

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UNDERSTANDING BUSINESS PRACTICES & DATA

ask yourself...

- ? How do Sales, Marketing, Services, and Management work together?
- ? What data is critical in each of these operational units?

best practices

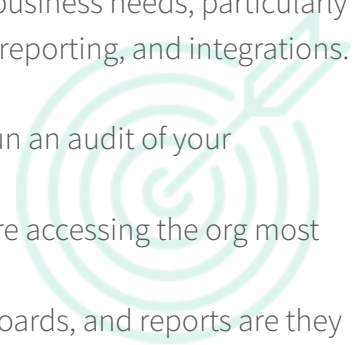
Data is a resource, just like the technological infrastructure and the humans who staff and run your business. As you manage your Salesforce org, it is critically important to understand the role data plays within various business units at your organization. It's unlikely that each unit is accessing and utilizing the same data in the same way. Given that, as a data steward, it may be your responsibility to understand the business and operational procedures of each unit.

The best way to get a handle on how various units access and use the data stored in your Salesforce org is to spend some time going through the day-to-day activities of each unit. Seek to understand what they do and how they do it, and how your data resources support those efforts. With this knowledge in hand, you can best ensure that your Salesforce org is

structured to align with business needs, particularly in terms of permissions, reporting, and integrations.

It's also a good idea to run an audit of your Salesforce org.

- Check which users are accessing the org most frequently.
- What records, dashboards, and reports are they using?
- Which units manage integrations that run with Salesforce?
- What job tasks rely on Salesforce within each unit?
- What Salesforce functions is each using to work with the data set?



AUTOMATED REPORTS & DASHBOARDS

ask yourself...

- ❓ What information do I access on a regular basis?
- ❓ What information do I need to provide to various teams on a consistent basis?

best practices

Data is a critical, if not the most critical, resource in your business operations. You and your various business units need to access that information, and the information needs to be presented in different ways.

Salesforce is typically one of the central repositories of an organization's data resources. You can easily set up automated reports and dashboards so that

the data analyses you need are readily available without having to configure and reconfigure reports every day, week, month, year. With a little effort at the start, you can make your data even more valuable with reports and dashboards. Salesforce has a full range of reporting abilities, including wizards to make those reports easy to configure, schedule, and automatically deliver to stakeholders in your organization.

DATA ENTRY POINTS

ask yourself...

- ? Where is my data coming from?
- ? Is the data clean before it comes in?

best practices

You may have data coming into Salesforce from many different sources. Imports, web entries, manual entries, and/or marketing automation systems, to name just a few possibilities. Keep in mind the following:

- Where is your data coming in from? This is important when it comes to keeping your data clean and up to date.
- How do you intend to use the data and what purpose it serves to your organization?
- What type of records do your sources create? Are they leads? Contacts? Accounts?
- Knowing your internal business processes is key to ensuring that the data coming into Salesforce is being entered and utilized in a way that will best suit your individual and team goals.

Make sure that data coming into Salesforce is clean.

This can mean properly formatting a file prior to import, or researching your data entry sources to ensure the accuracy of the data coming in. Data coming into Salesforce from any source could potentially be a duplicate of a record that you already have in Salesforce. Ask yourself if the newer data coming in is more valuable than what you already have on record. Or, perhaps you regularly keep your existing Salesforce data clean and know that to be the best source. Knowing the state and quality of your data will help you determine whether to update your existing records or to eliminate a new record when a duplicate record is detected.

Clean data is critical to making sure that you create and maintain good relationships with your clients. If your source data is bad, so is your business. Bad data can lead to embarrassing and unprofessional situations.



protip

Make an effort to maintain data quality by creating policies that standardize, as much as possible, how new data is brought into Salesforce, and how existing data is updated. Consider standardized fields and pick list options. Think about auditing individual fields to keep things as uniform as possible.

USERS & PERMISSIONS

ask yourself...

- ❓ How are users separated from a security standpoint?
- ❓ Am I regularly maintaining my Active and Inactive Users?

best practices

When evaluating how you can best secure your data from erroneous updates, or when needing to limit access to proprietary internal or client information in your Salesforce org, creating separate permission profiles is imperative.

When new users join your team, and as you assign profiles and roles, take into consideration:

- The level of expertise each user has
- What their level of clearance should be
- Which objects they will be working on
- What their overall role in Salesforce will be

You will also be determining which applications within Salesforce (or that work with Salesforce using an API) your users will be accessing.

Each integrated application typically also has permission requirements that must be considered as well as potential admin requirements when installing and setting up.

Maintenance of your users is a necessary ongoing process. As new users come on, roles may change. New profiles may be needed and user permissions may need to be updated. As users leave your organization, remember to set their user IDs inactive and restrict login access to your org as a routine procedure. As you make users inactive within your org, all historical data that was tied to the user is retained. But, the user also remains tied to active records within Salesforce. Reassignment of records to new, active users is a good step to making sure that your client data is up to date.

get it done

To manage users and user profiles, go to → **Setup** → **Administration Setup** → **Manage Users**.

USER LICENSE AUDIT

ask yourself...

- ❓ How many user licenses are available in my org?
- ❓ How are those licenses configured and being used?

best practices

For every licensed user on your Salesforce org, you pay a quarterly or annual fee to Salesforce. Further, each of those licenses has some level of access to your data set.

It's critical to ensure that you have the correct number of user licenses to fit your needs and that the licenses you have are actually being used. It's financially wasteful to overbuy and under-allocate user licenses. Remember, licenses can be purchased on-the-fly from Salesforce when you need them, so there is no reason to keep extras available in your org for future need. Additionally, be sure that all licensed

users actually need to access the Salesforce platform and that they are using it. Salesforce offers various types of licenses that can be assigned according to need at your company.

Also important is to ensure each license is properly configured with a profile and permissions that are appropriate to the individual role in the organization. In other words, not every user of your Salesforce org should have a System Administrator profile. Take the time to understand what each of your users needs to do with your Salesforce data and create and assign profiles and permissions that are appropriate.

Number of Users	Recommended Admins
1 - 30 Users	< 1 Full-time Admin
31 - 74 Users	1+ Full-time Admin
75 - 149 Users	1 Senior Admin; 1 Junior Admin
150 - 499 Users	1 Business Analysts; 2-4 Admins
500 - 750 Users	1-2 Business Analysts; 2-4 Admins
> 750 Users	Depends on variety of factors



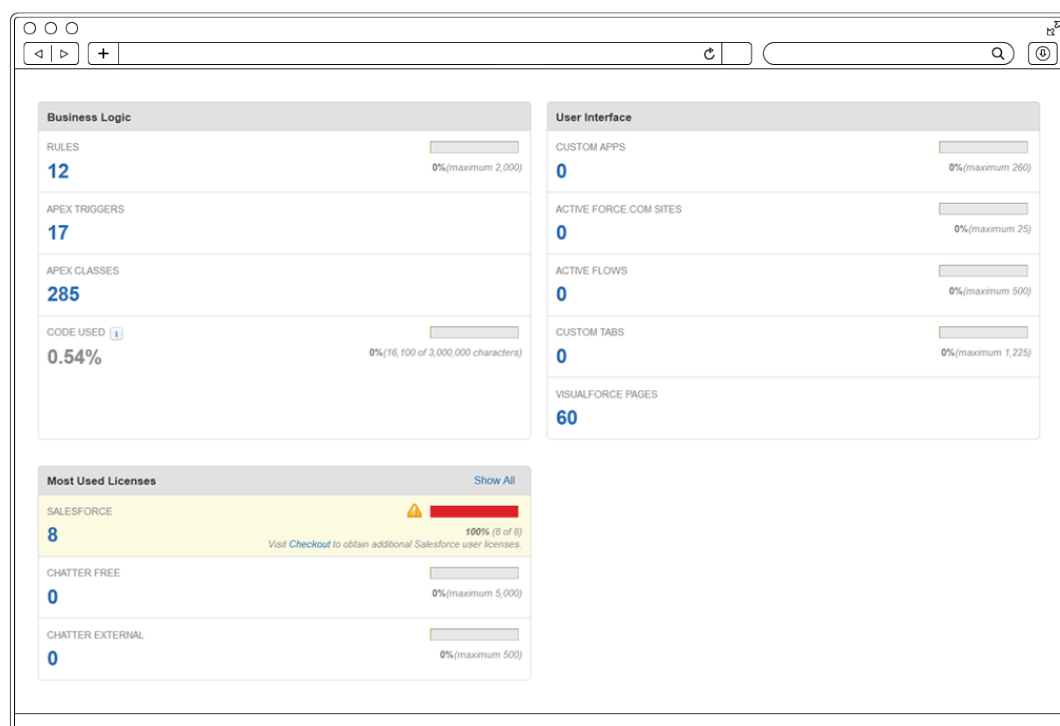
protip

It's highly unlikely that everyone at your business needs a Salesforce license. For example, if your execs only need a monthly report, run the report yourself and deliver it rather than pay for a license.

USER LICENSE AUDIT CONT.

get it done

Check the number of user licenses available in your org: → **Setup** → **System Overview**. Your license count will be listed under “Most Used Licenses.”



Check how the licenses are allocated: → **Setup** → **Administration Setup** → **Manage Users** → **Users**. Here you can see a list of active licensed users and their assigned profiles.

Analyze and manage user profiles, roles, and permission sets: → **Setup** → **Administration Setup** → **Manage Users**

PASSWORD POLICIES

ask yourself...

- ❓ What are the current password policies for my Salesforce org?
- ❓ How do my password policies align with best practices?

best practices

Accessing systems in any organization is a critical business need. Protecting those systems and ensuring proper security procedures are in place is equally critical. Salesforce enables admins to set password controls for users accessing the Salesforce org. Password controls are a simple way to add a layer of security to the Salesforce org and the data

contained therein. Admins can force a password reset for individual users or all users at any time. Further, admins can force regular password resets for individuals or for all users at regular intervals. Password history and complexity can also be set and controlled by admins.

get it done

You can view your password controls and ensure they align with your business policies here: → [Setup](#)
→ [Administration Setup](#)
→ [Security Controls](#)
→ [Password Policies](#).

Password Policies

Set the password restrictions and login lockout policies for all users.

Password Policies = Required Information

- User passwords expire in **Never expires**
- Enforce password history **3 passwords remembered**
- Minimum password length **8**
- Password complexity requirement **Must mix alpha and numeric characters**
- Password question requirement **Cannot contain password**
- Maximum invalid login attempts **10**
- Lockout effective period **15 minutes**
- Obscure secret answer for



protip

Strike a balance between system security and convenience. While you likely would not want to force a password reset every week, it may be perfectly reasonable to require a reset every 90-days.

FIELD AUDITING

ask yourself...

- ❓ How many fields have been created and how many are being used for my Salesforce objects?
- ❓ What types of fields have been created and how do they function?

best practices

The fields on your various Salesforce objects are how you keep your data organized. They provide consistency across records and make indexing and searching the database possible.

But the number of custom fields you can create is limited, and fields can also get out of hand, so it's a good idea to audit fields on a regular basis. In most circumstances, the rule of fewer is better applies when it comes to the fields on your records. If you can logically combine fields, or create broad fields that cover multiple scenarios, then it is a good idea to do so. For example, if you send out specialized

newsletters and track subscriptions to those newsletters, instead of using a check box field for each individual newsletter, use a single multi-select picklist field that includes all of the newsletters.

It's also important to be aware of the types of fields you use and the properties of those fields. Number fields can only include numbers, not characters. System Determined fields are read only and cannot be modified by a user. And so on. Be sure the fields you use and create can accommodate the data you will need to insert into those fields.



protip

Track the history of key fields on critical objects in your org. For example, you may want to track the history of ownership changes, or status changes. Salesforce lets you track this information, but you do need to configure your org to do so.

FIELD AUDITING CONT.

get it done

Fields are configured and tracked on the object pages: → **Setup** → **App Setup** → **Customize** → **Object** → **Fields**. For each object, you can check the number of fields, their type, and their names and labels. You can edit and create new addition fields as needed. To set Field-Level Security and/or View Field Accessibility, click the field label hyperlink.

For Lead fields, be sure you have mapped those fields to the Contact and Account fields, or you will lose data when converting leads. See the “**Lead Custom Fields & Relationships**” section of the Lead field page and select the **Map Lead Fields** or the **Field Dependencies** buttons.

To track the history of selected fields, on the individual object fields page(s), first click the **Set History Tracking** button at the top of the page. Then select **Enable History**, select the fields you want to track, and click **Save**. You will also need to ensure the object history section is added to the Page Layout so that you can actually see the change history.

The screenshot shows the Salesforce interface for the 'Contact Fields' page. The page title is 'Contact Fields' and it includes a 'Set History Tracking' button. Below the title is a table of 'Contact Standard Fields' with the following columns: Action, Field Label, Field Name, Data Type, Controlling Field, Indexed, and Track History. The table lists various fields such as Account Name, Assistant Name, Asst. Phone, Birthdate, Contact Owner, Created By, Data.com Key, Department, Description, Do Not Call, Email, Email Opt Out, Fax, Fax Opt Out, and Home Phone.

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
Edit	Account Name	Account	Lookup(Account)		✓	<input type="checkbox"/>
Edit	Assistant	AssistantName	Text(40)			<input type="checkbox"/>
Edit	Asst. Phone	AssistantPhone	Phone			<input type="checkbox"/>
Edit	Birthdate	Birthdate	Date			<input type="checkbox"/>
Edit	Contact Owner	Owner	Lookup(User)		✓	<input type="checkbox"/>
	Created By	CreatedBy	Lookup(User)			<input type="checkbox"/>
Edit	Data.com Key	Jigsaw	Text(20)			<input type="checkbox"/>
Edit	Department	Department	Text(80)			<input type="checkbox"/>
Edit	Description	Description	Long Text Area(32000)			<input type="checkbox"/>
Edit	Do Not Call	DoNotCall	Checkbox			<input type="checkbox"/>
Edit	Email	Email	Email		✓	<input type="checkbox"/>
Edit	Email Opt Out	HasOptedOutOfEmail	Checkbox			✓
Edit	Fax	Fax	Fax			<input type="checkbox"/>
Edit	Fax Opt Out	HasOptedOutOfFax	Checkbox			<input type="checkbox"/>
Edit	Home Phone	HomePhone	Phone			<input type="checkbox"/>

STORAGE

ask yourself...

- ❓ How much storage is available in my Salesforce org?
- ❓ How much of that storage is being used?

best practices

Your Salesforce org comes with storage limits. Running over your storage limit can cause significant problems for how your Salesforce org functions, particularly if you also have multiple third-party integrations running. When it comes to how you utilize your data, efficiency and success are key. Don't let a storage overage negatively impact your operations.

You have some options if you are near or over your storage limit. You can always contact your Salesforce rep and quickly purchase additional storage, which does come with additional quarterly or annual fees. But before you buy additional storage, spend some time reviewing the detailed Storage Usage report.

get it done

Frequently check your data storage usage, particularly if you are close the limit:

➔ Setup ➔ System Overview.

Your storage limit and usage will be listed in the “Schema” section. If you are close to your limit, check your usage for a detailed and ranked listing of how storage is being utilized: ➔ Setup ➔ Administration Setup ➔ Data Management ➔ Storage Usage

Storage Type	Limit	Used	Percent Used
Data Storage	2.5 GB	1.6 GB	65%
File Storage	27.0 GB	398.3 MB	1%

Current Data Storage Usage			
Record Type	Record Count	Storage	Percent
Campaign Members	632,979	618.1 MB	38%
Leads	219,977	429.6 MB	26%
Tasks	175,724	343.2 MB	21%
Licenses	69,694	136.1 MB	8%
Email Messages	4,176	43.0 MB	3%
Contacts	18,724	36.6 MB	2%
Opportunities	5,797	11.3 MB	1%
Accounts	4,797	9.4 MB	1%
Cases	3,960	7.7 MB	0%
Notes	1,347	2.6 MB	0%
VR Email History Contact	842	1.6 MB	0%



protip

Free up storage by deleting or archiving old campaigns or tasks, for example.

CUSTOMIZATIONS

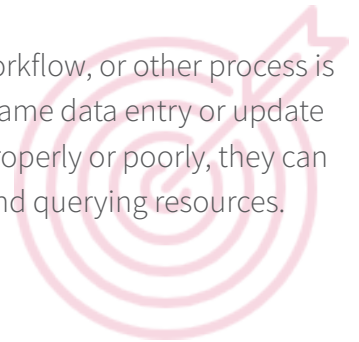
ask yourself...

- ❓ How do Salesforce customizations interact with my org?
- ❓ What customizations have been made in my org and how do they work?

best practices

Salesforce allows for very specific customizations within each org. Customizations can be created by using triggers, workflows, validation rules, and more. Each new customization adds automation to a process, but can also add a layer of complexity when

more than one trigger, workflow, or other process is configured to run at the same data entry or update point. If constructed improperly or poorly, they can be a drain on your CPU and querying resources.



get it done

There are various places within your Salesforce org to create and monitor workflows, triggers, and other customizations. Familiarize yourself with the options under: → Setup → App Setup.



protip

Know what workflows and rules you have configured and actively running within your org. This will make troubleshooting other potential problems with additional flows or applications a bit smoother. Eliminate any unnecessary customizations or rewrite them to be executed with the most efficiency.

INSTALLED APPS & INTEGRATIONS

ask yourself...

- ❓ What Apps and Packages are installed and running in my org?
- ❓ How do Installed Apps and Integrations interact with my org?

best practices

Along with specific customizations within your org, you are likely to have managed applications also installed that run their own customized triggers and executions. Keep in mind that the more workflows, rules, and applications you have running in your org, the more prone you are to conflicts. It's crucial to be aware of the applications that you have installed.

- Test new packages before purchasing and installing if possible (a sandbox is a great tool for testing).
- Make sure that the applications have the proper permissions assigned, and the appropriate users in charge.
- Make sure that you know where and how to get support for any applications running in your org if problems or conflicts arise.

When integrating Salesforce with another application, be aware that some external systems do not sync (or do only partial syncs) with Salesforce. For example, if you use an external accounting system that does not sync with Salesforce, and you delete a record from Salesforce, the record may not be deleted from your external system. When possible, look for systems that fully integrate with your Salesforce data. But regardless, be aware of what your external system integrations can and cannot do so that you know what manual work and processes may be required to keeping the data accurate in both systems.

get it done

Find out what apps you have installed: → Setup → App Setup → Installed Packages.



protip

Uninstall any apps when you have determined that they will no longer be used. Even packages that you are not using can be triggering processes that you may be unaware of behind the scenes.

SANDBOXES

ask yourself...

- ? I need to deploy changes to production. Should I test in a sandbox first?
- ? When was the last time my sandbox was refreshed?

best practices

A sandbox is a non-production Salesforce org. It functions just like a production org, but it is not deployed to your users and it does not directly interact with your integrated systems. Sandboxes are essentially test orgs for admins to work with—in other words, you can “play in your sandbox” without affecting or interrupting your actual business operations.

Sandboxes are a great tool for learning how to work with Salesforce, for testing new configurations like workflows and triggers, and for test driving both current and potential integrated applications.

There are two kinds of sandboxes. **Full sandboxes** are licensed sandbox orgs that can be obtained

from your Salesforce account rep. A full sandbox is a copy of your production org with all of its data and configurations. A full sandbox will give you the most realistic experience of running a Salesforce org without actually impacting production data and processes. Full sandboxes can be refreshed at regular intervals from your production instance, and configurations created and tested in a sandbox can be deployed back to the production instance.

Salesforce also makes available a number of “**Developer Sandboxes.**” These are free, limited sandbox orgs. They are not copies of your production data and configuration, but still enable quite a bit of learning and testing, and can be quite useful before making any significant changes to your production instance.

get it done

Sandboxes are managed from: → Setup → Administration Setup → Data Management → Sandboxes.

API USAGE

ask yourself...

- ? What functions and applications rely on API resources in Salesforce?
- ? How often and when are API resources required?

best practices

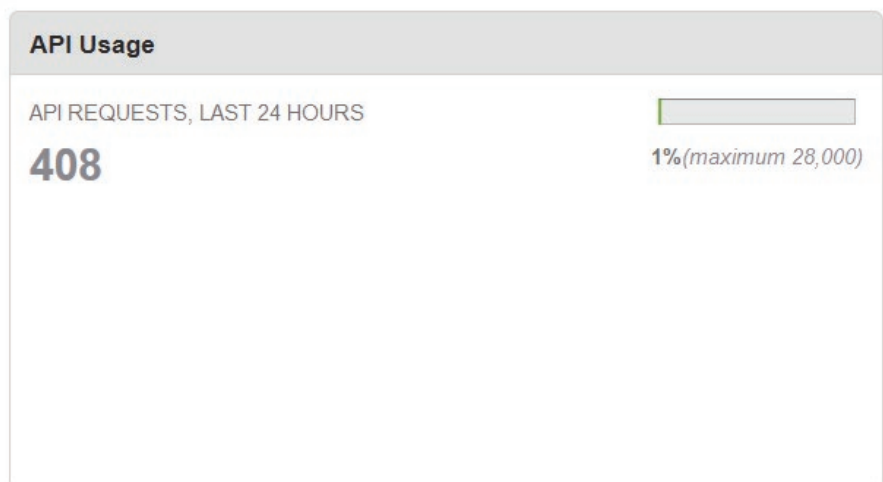
API resources are required for various Salesforce functions and external integrations. It's important to know that API resources are not unlimited in a Salesforce org. Each Salesforce org has a finite number of allowed API calls within a 24-hour period of time. Those resources do refresh every 24 hours. But within any 24-hour window, they are limited.

API resources are refreshed on a rolling basis until and unless your various processes actually hit the limit within a 24-hour period. If your org hits its daily limit of resources, Salesforce will prevent any rolling refreshes until a full 24-hours has passed and the resources have fully refreshed.

get it done

View your total 24-hour API resource limit as well as a real time measure of usage at: → **Setup** → **System Overview**. Look for the section labeled “API Usage.”

See a detailed analysis of what apps, processes, and users are using API resources at: → **Reports** → **Administrative Reports** → **API Usage Last 7 Days**.



protip

Use this information to throttle and schedule processes as needed to ensure no critical jobs fall short of necessary API resources and negatively impact your business operations.

NETWORK ACCESS

ask yourself...

- ? What IP addresses are whitelisted in my org?
- ? How can I manage network access?

best practices

To avoid unwanted access from external sources into your Salesforce org, security measures can be put in place to restrict outside access and block any potential unwanted activity that is not coming from a trusted source.



get it done

Network security often requires the use of a Salesforce security token (→ **Setup** → **Personal Setup** → **My Personal Information** → **Reset My Security Token**). But some orgs do not use security tokens and may require a higher level of security. When security is restricted, you may need to configure trusted third party IPs as trusted sources. You will need to obtain the valid IP addresses or range from the third party so that it can properly be configured in your Salesforce org. Once configured, traffic from these sources will be allowed to access Salesforce securely. But, if not whitelisted, traffic will be blocked.

To check current whitelisted IPs, or to whitelist a new valid IP address (or a range of IP addresses), go to → **Setup** → **Administration Setup** → **Security Controls** → **Network Access**. Occasionally, access must also be set at the Administrator profile level under Security Controls as well.

GRANTING SUPPORT ACCESS

ask yourself...

? How do I grant Support Login Access?

best practices

There are times when you need support and assistance with your Salesforce org. You may need assistance directly from Salesforce Support, or from the support teams from a vendor whose products and integrations you have running in your org. Salesforce makes it possible to grant “Support Login Access” to Salesforce Support or to a vendor who

has a licensed product installed in your org. “Support Login Access” is controlled by the Salesforce admin at your organization. It gives limited login access to those you grant it to. Support personnel with Support Login Access can log into your org, see its configuration and setup, and run diagnostic tests and logs, but they cannot download any data.

get it done

Granting Support Login Access is a safe and secure way of enabling the support personnel you select to access your org on an as-needed basis. It is NEVER a good idea to email or share your Salesforce user ID and/or password. Instead, grant Support Login Access: → **Setup** → **My Personal Information** → **Grant Login Access**, or, → **Your ID** → **My Settings** → **Personal** → **Grant Account Login Access**.

ACHIEVING HIGH DATA QUALITY

ask yourself...

- ❓ What is the quality of my data?
- ❓ How many duplicate records are in my org?

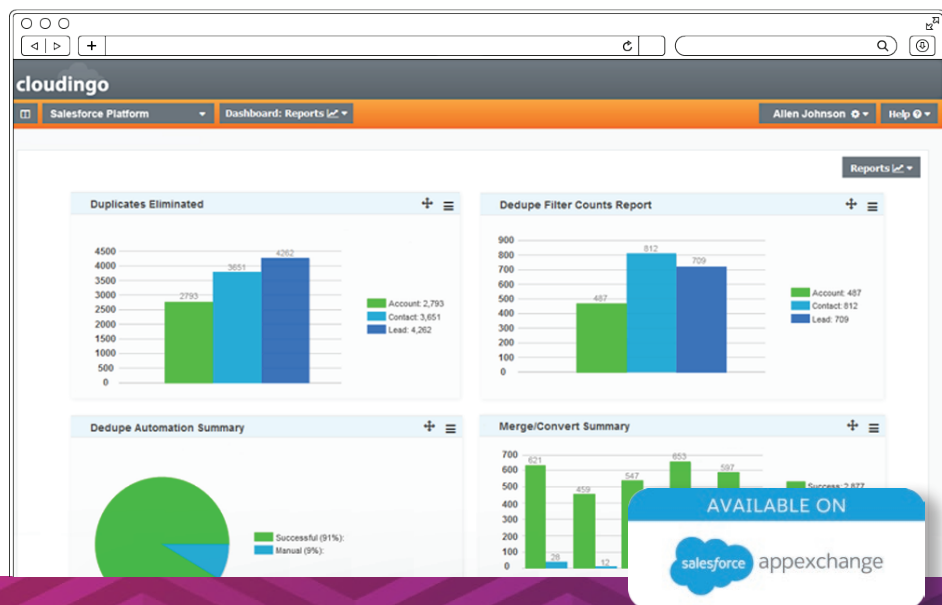
best practices

Duplicate data is the main source of poor data quality. When the quality of your data is low (incomplete, duplicated, old, outdated) then reporting suffers, sales and marketing suffer, and the efficiency of IT operations suffers. Consider the value of your data. Think about how much time and effort went into just collecting the data.

Decide on a deduplication program that has the flexibility to analyze duplicate matches from a variety of angles and based on a variety of data points. It should also give you enough control to merge duplicates according to your business rules. Ongoing deduplication must be quick and easy to accomplish, and it must be able to maintain clean data on a continual basis as data changes.

get it done

Use a data cleansing app like Cloudingo to get rid of duplicates that already exist in your org. With Cloudingo you can quickly profile your data to get a count of how many duplicates are in your org and effortlessly merge them without losing any important data or relationships. Further, you can dedupe any .csv file against records already in Salesforce before importing.



protip

Use Cloudingo alongside its free sister app, DupeCatcher, to prevent duplicate records from entering Salesforce. Available on the Salesforce AppExchange.

DIY WORKSHEET

Understanding Business Practices & Data

How do Sales, Marketing, Services, and Management work together?

What data is critical in each of these operational units?

Automated Reports & Dashboards

What information do I access on a regular basis?

What information do I need to provide to various teams on a consistent basis?

Data Entry Points

Where is my data coming from?

Is the data clean before it comes in?

Users & Permissions

How are users separated from a security standpoint?

Am I regularly maintaining my Active and Inactive Users?

DIY WORKSHEET CONT.

User License Audit

How many user licenses are available in my org?

How are those licenses configured and being used?

Login History

Are my licensed users actually using Salesforce?

Am I paying for user licenses for people who never, or rarely use Salesforce?

Password Policies

What are the current password policies for my Salesforce org?

How do my password policies align with best practices?

Field Auditing

How many fields have been created and how many are being used for my Salesforce objects?

What types of fields have been created and how do they function?

DIY WORKSHEET CONT.

Storage

How much storage is available in my Salesforce org?

How much of that storage is being used?

Customizations

How do Salesforce customizations interact with my org?

What customizations have been made in my org and how do they work?

Installed Apps & Integrations

What Apps and Packages are installed and running in my org?

How do Installed Apps and Integrations interact with my org?

Sandboxes

I need to deploy changes to production. Should I test in a sandbox first?

When was the last time my sandbox was refreshed?

DIY WORKSHEET CONT.

API Usage

What functions and applications rely on API resources in Salesforce?

How often and when are API resources required?

Network Access

What IP addresses are whitelisted in my org?

How can I manage network access?

Granting Support Access

How do I grant Support Login Access?

Achieving High Data Quality

What is the quality of my data?

How many duplicate records are in my org?



DATA HEALTH CHECK

Check the health of your data using Cloudingo. Start a 10-day free trial, no obligations and no credit card! In just ten minutes you will see stats about your data so you can fill in the numbers below.



available on AppExchange

or at cloudingo.com

Deduping Using Cloudingo	Totals
How many duplicate Leads are in my org with the same email and last name ?	
How many duplicate Contacts are in my org with the same email and last name ?	
How many duplicate Accounts are in my org with the same account name ?	
How many Leads are in my org that match existing Contacts ?	
How many Leads have a Company Name that matches an Account ?	

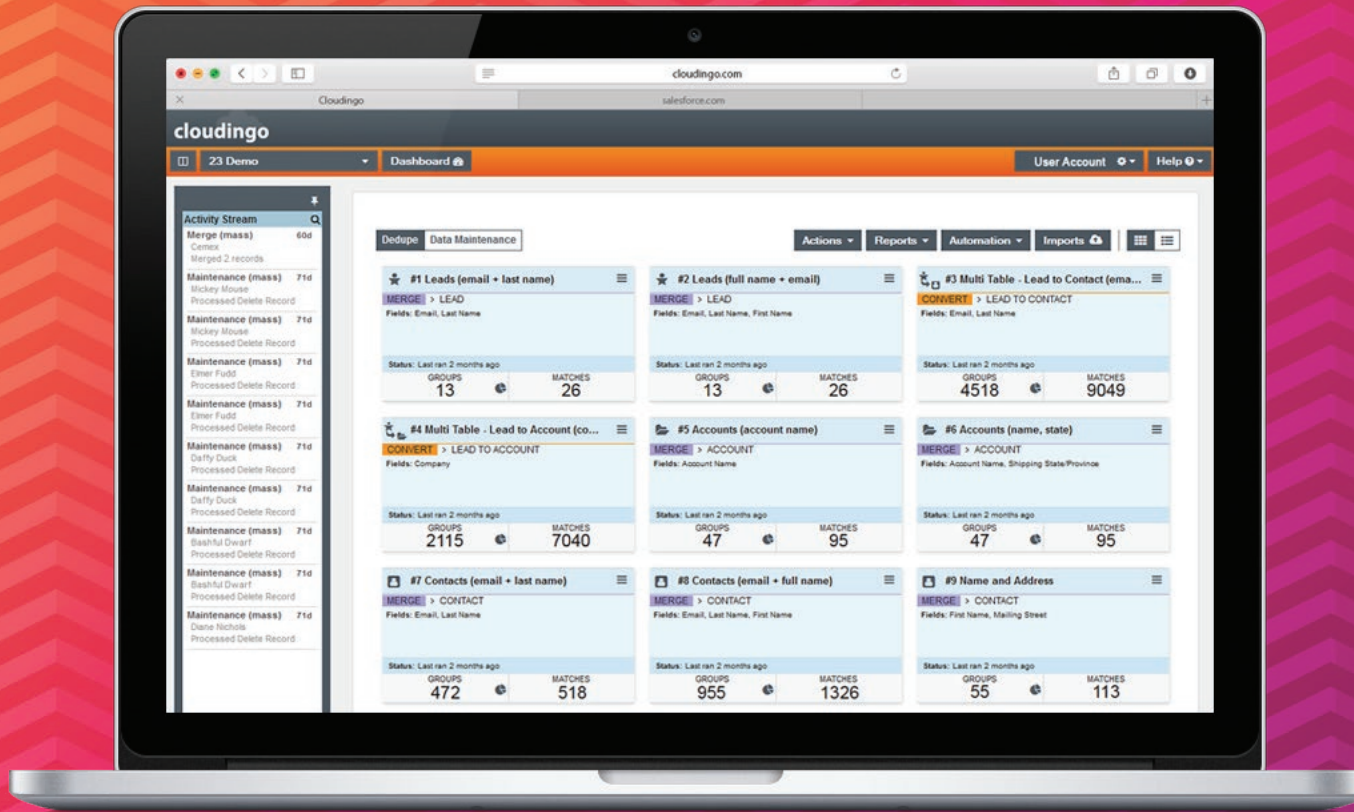
$$\frac{\text{Number of Duplicate Leads}}{\text{Number of Total Leads}} = \text{Percentage of Bad Leads} \%$$

$$\frac{\text{Number of Duplicate Contacts}}{\text{Number of Total Contacts}} = \text{Percentage of Bad Contacts} \%$$

$$\frac{\text{Number of Duplicate Accounts}}{\text{Number of Total Accounts}} = \text{Percentage of Bad Accounts} \%$$

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