114

salesforce admin
BEST PRACTICES

for salesforce admins. by salesforce admins.

> " To get the most out of Salesforce, you first need to **UNDERSTAND YOUR SALES PROCESS** inside and out, **REFINE IT**, and then develop Salesforce to **DRIVE IT**.
>
> -NICK, U.K.

> ## Use Salesforce for as much **data management** as you can.
> —SHAWN, U.S.

Get reports right for your organisation. It will encourage users to use the system if they get something useful out.
–JOHN, U.K.

Develop a process, document it, and follow it. Every month iterate what you're doing and why…then adapt.
–LAUREN, U.S.

Garbage in, garbage out. **Clean data rules all.**
–NAM, U.S.

Humans make things messy…don't ever expect a well-formulated process and flow to function a particular way as a result.
–NICOLE, U.S.

Visualize everything. Pencil to paper before configuring!
—SURESH, U.S.

#sfadmintips

ARCHITECTURE FIRST.
The design needs to be right from the start.

-ANDREW, U.S.

Don't let the villagers run the village. Gather feedback, determine validity of requests, and be the admin/developer.
–LEANNE, U.K.

Your company needs at least **one admin to do Salesforce stuff 50-70% of the time**. There is so much to learn and offer, and you need time for that.
–KAREY, U.S.

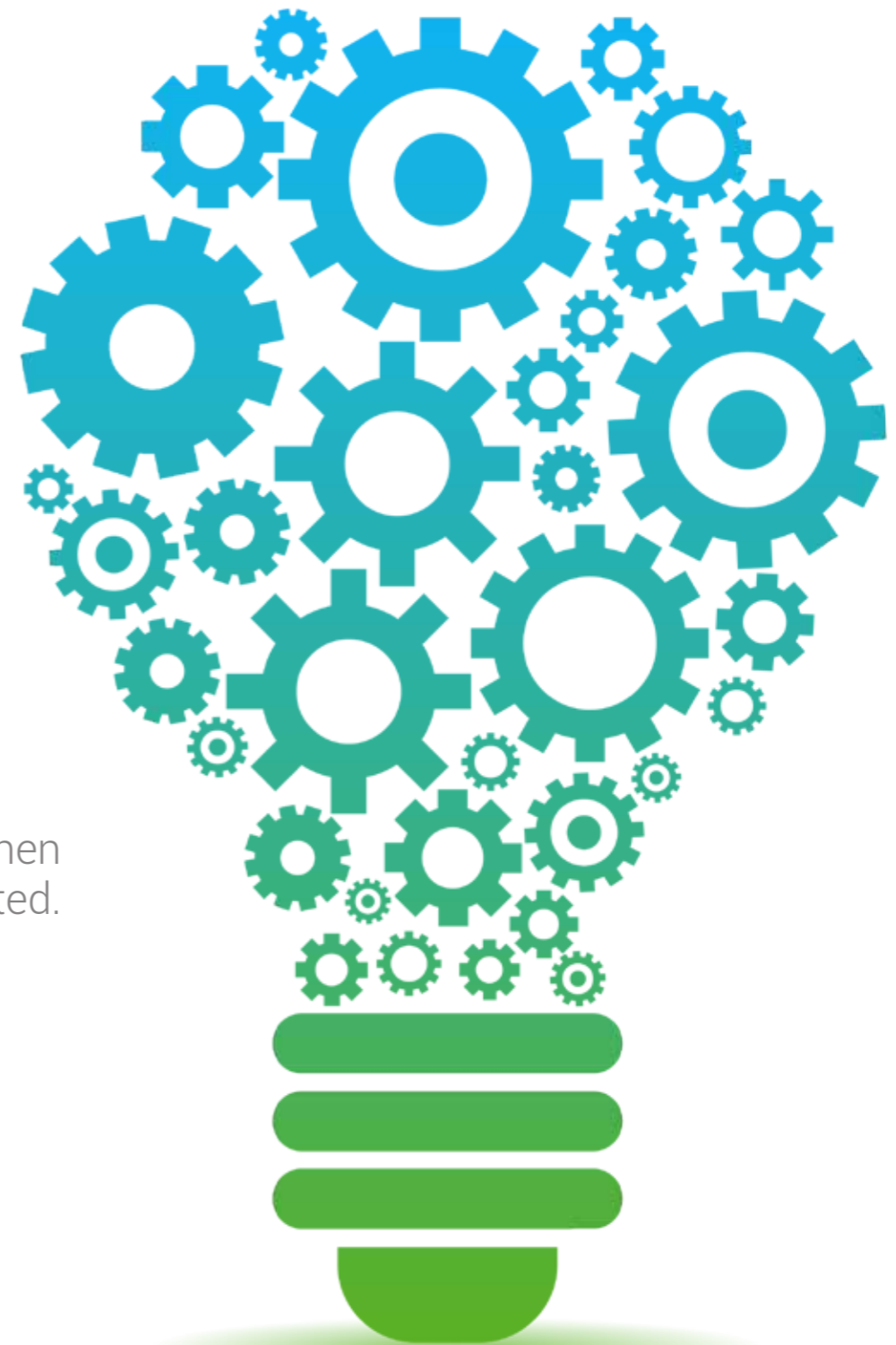Work on ways to **engage your organisation**. When they see what Salesforce can do, they'll be very excited.
–MIKE, U.K.

If it can be automated, **it should be automated.**
–JON, U.S.

Do as much with **configuration** as you can. **Avoid customization** as much as possible!
–NICOLE, U.S.

Make sure your users really understand **the terms and language of Salesforce**. Otherwise, you're going to have problems. 🐦

-JULIA, U.S.

Make the **most of the Sandboxes** available to develop a well structured Development, QA, and UAT process.
-MARK, U.K.

Use the forum! Great place to go for tips and advice. Ask questions on the forum. Quick and great responses.
-JENNIFER, U.S.

Sit down with your business units and **go through their processes. Automate** as much as you can for them using workflows, etc.
-DENISE, U.S.

Don't set up your own Salesforce database; **let a Salesforce pro handle it.** Pay the extra money. Do whatever it takes to not set it up yourself.
-KIM, U.S.

Workflow rules
saved my life.
-JACKIE, U.S.

"
If you're struggling with Salesforce, 80% of the time the problem is not the system; it's the **lack of internal processes**.
-ELENA, CANADA
"

Take the time to **LEARN THE INS AND OUTS** of Salesforce, and show your users so that they see it as a **VALUE**, not a **BURDEN**.

-SARAH, U.S.

Standardize, standardize, **standardize!**
-SUE, U.S.

Only let users have access to the features they need to use. Giving users access to features they don't need introduces **unnecessary questions and opportunity for user errors**.
-ANGIE, U.S.

Use **custom buttons** to pre-populate data from Master record into Child record.
-CRYSTAL, U.S.

Get away from the traditional use of Email and Tasks and **embrace using Salesforce**.
-THOMAS, U.S.

Use **descriptions** when creating fields.
-RICK, U.S.

Work at it **a little every day**.
-LONNIE, U.S.

#sfadmintips

Try to automate and enforce whatever you can. Trusting humans to follow processes is risky and may be error prone.

-YAIR, ISRAEL

> **Learn** (mine data),
> **grow** (report trends), **train**
> (improve), **repeat**.
> -DAVID, U.S.

Make training fun and interactive. Host periodic open discussion groups for people to ask How-To questions.
-REBECCA, U.S.

Go to **Dreamforce!**
-JENNIFER, U.S.

If you don't have it already, **add a custom link** to your Account page using http://www.google.com/search?q={!Account_Name} to allow users to Google that customer/prospect in one click.
-RICHARD, U.S.

Incomplete info and missing details will **render reports useless**.
-ANDREW, SAUDI ARABIA

If it's not in Salesforce,
it doesn't exist.
-JASON, U.S.

> ## You must be PASSIONATE and a "LITTLE BIT CRAZY" to follow your own ideas and do things differently.

-AMIT, AUSTRIA

Use Chatter Topics.
They make life much easier.
–JEFF, U.S.

Create **naming and data entry conventions**.
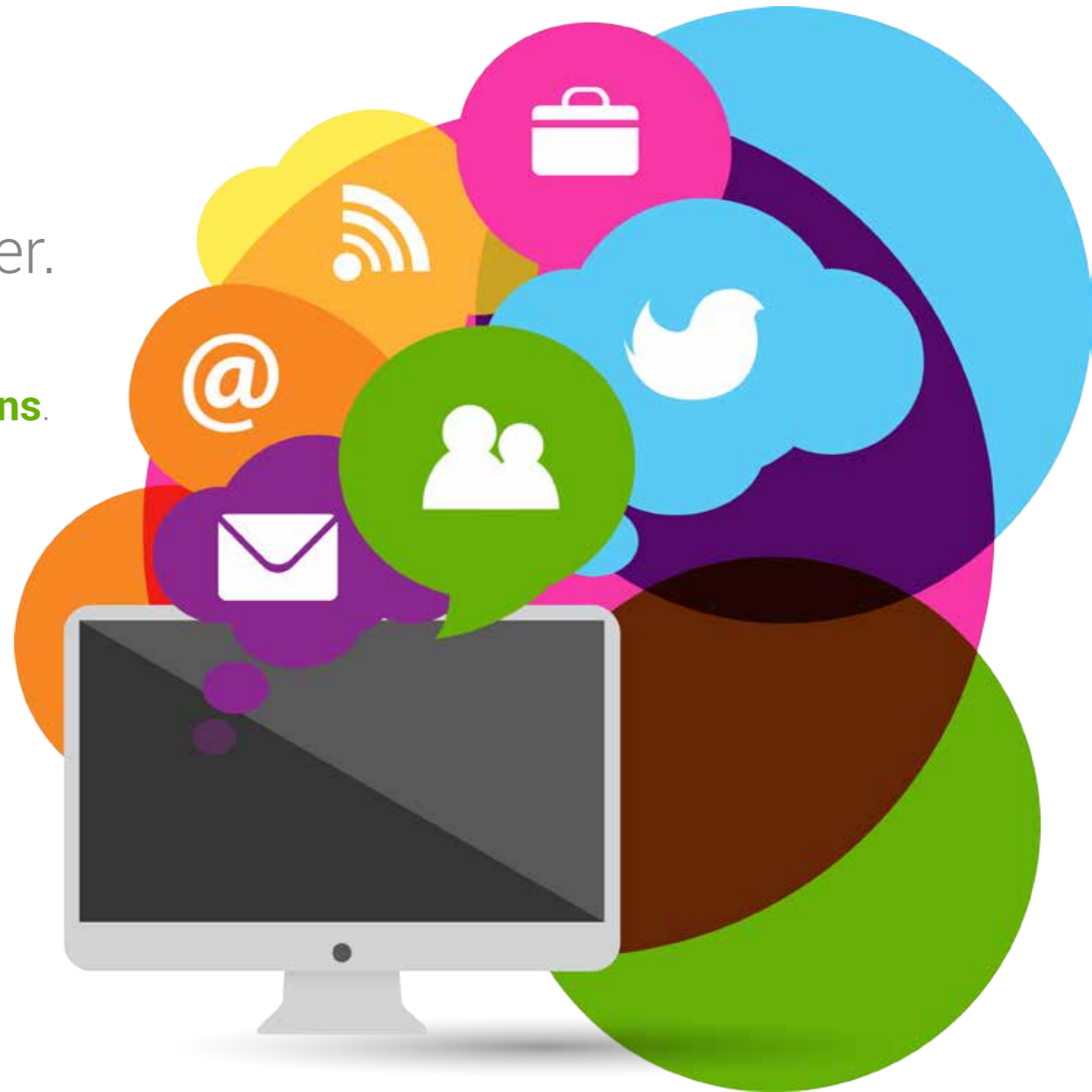–MAURA, U.S.

Don't be afraid to ask questions to Salesforce support, the community or colleagues, even if you are the Salesforce Admin. Everyone is willing and interested in helping so that Salesforce can work **better for everyone**.
–EMILY, U.S.

Never use **multi-select picklists**.
–DALE, U.S.

#sfadmintips

Constant training and devoting resources to learning ARE CRITICAL TO THE SUCCESS of a Salesforce instance.

-BRIAN, U.S.

A CRM is only as good as what **you put into it**.

-ROBIN, U.S.

Define your business needs very completely, **and then you will know what questions to ask**. Whatever it is, there's a good chance someone has developed an app or add-in for it.

-ANDREA, U.S.

Always use a **sandbox** prior to any integration.

-RAMAN, U.S.

Continually train your users by sending monthly or quarterly tips and best practices. They will never remember half of what they learned in training their first week with the company.

-SOON, U.S.

Don't over think things. Use configuration, not code whenever possible. If you have to code something, you're probably over complicating it.
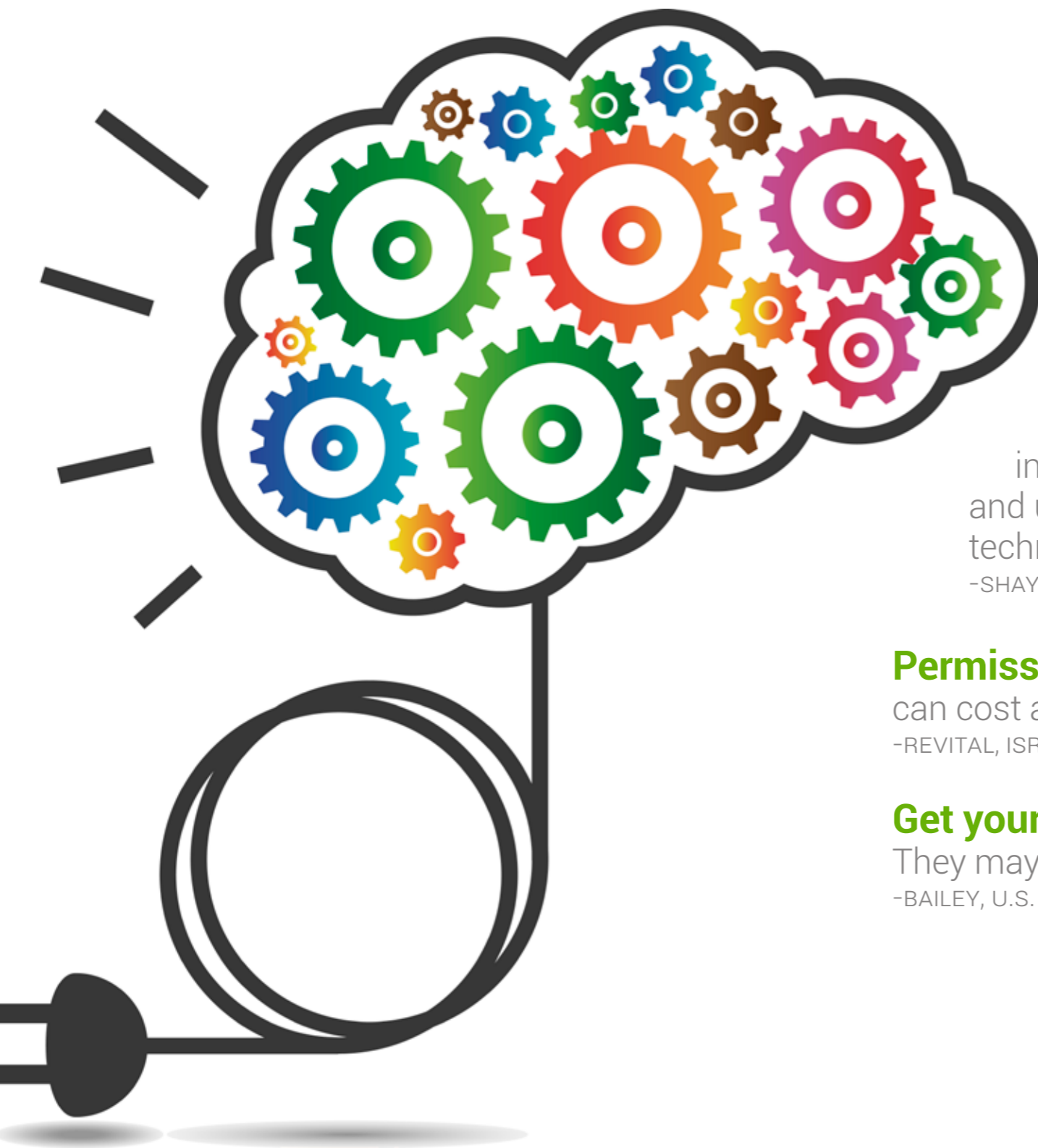
-FRANK, U.S.

Give it a go.
You can't break the system
by trying new ways to
manipulate and report data.
-ROBYN, AUSTRALIA

Document everything. Your replacement needs to know.
  –MARY, U.S.

Do your best to **understand standard functionality instead of customizing it.** Always deploy the simplest version possible first, and make incremental improvements based on feedback and usability testing. Save yourself immense technical debt and future frustrations.
–SHAYNE, U.S.

Permission sets are everything. One little misuse can cost a week of fixing.
–REVITAL, ISRAEL

Get your users' input before integrating new things. They may not even want it!
–BAILEY, U.S.

Become certified!
–MELANIE, U.S.

Reporting is only as good as the data it is reporting on, so PUT IN GOOD DATA.

-RICHARD, U.S.

Learn how to use report features, like running reports for contacts with no email, or some other vital feature to continue to make your database more viable.
-CLARK, U.S.

Don't give **everyone** admin permissions.
-STEVE, U.S.

Define your business needs very completely, **and then you will know what questions to ask**. Whatever it is, there's a good chance someone has developed an app or add-in for it.
-ANDREA, U.S.

Do **one thing** at a time.
-ENRIQUE, U.S.

Quality in = Quality out
-DIANE, U.S.

Make Salesforce mandatory for **better user adaptation.**
-OLGA, NETHERLANDS

> **Pay attention to new features delivered each release. There's some GOOD STUFF IN THERE!**
>
> -JOSH, U.S.

If you expect sales people to use Salesforce, then you need to **understand the sales cycle**.
-KERI, U.S.

Make sure your initial setup is done with competent people who understand where you want to be with the instance in a few years time, otherwise you will spend a lot of time **fixing broken processes as you scale**.
-JOHN, U.S.

Salesforce is a great tool, but to optimize it you must have a **well tuned admin** with time to spare.
-COLLEEN, U.S.

Spend the time to ensure **fields and formulas are accurate**.
-BILL, U.S.

Always use a test environment and **test, test, test** customisations.
-GEMMA, U.K.

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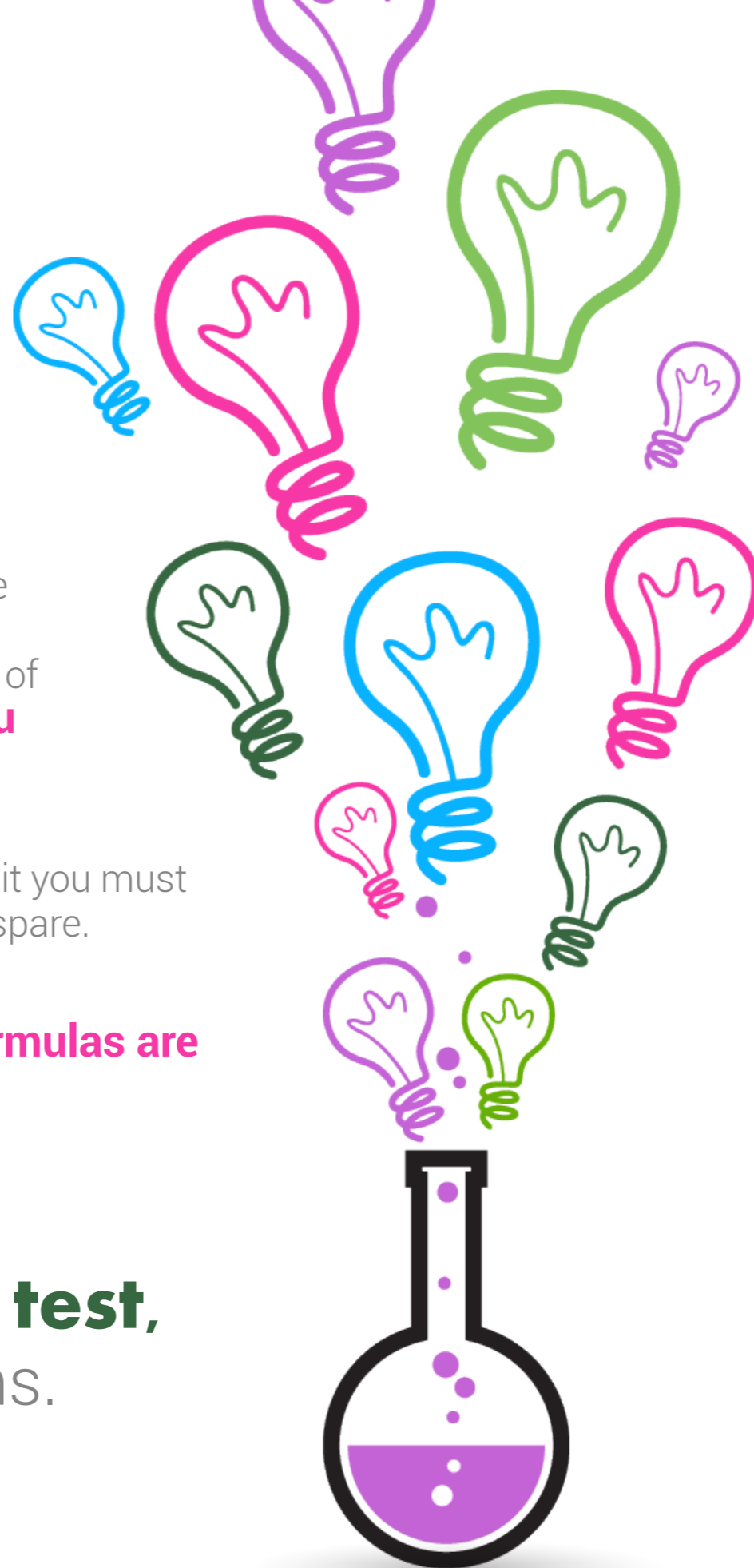
Go to **user group meetings**, get to know people, use **#askforce** on Twitter, and join the **success community**.

-SHANNON, U.S.

Simplify. Clean records make for easier sales.
–KEVIN, U.S.

Avoid multi select pick lists. **They are very difficult to report on.**
–JO-ANN, CANADA

Only go **custom when necessary**.
–MATT, CANADA

Keep your **page layouts clean**. Continuously remove fields or merge fields that don't get used.
–MARK, U.S.

When building Salesforce, one must **understand accounts and contacts structure** before anything else. I wish we did a better job internally.
–SCOTT, U.S.

When receiving user requests, **take a step back** and analyse what they really mean.
–JENNIFER, U.K.

Keep your data
CLEAN AND HEALTHY.

-ALAN, U.S.

Clean and de-dupe your data monthly. If not, you're creating **a monster headache** as you build out your database.
-CARL, U.S.

Do all the help and training you can do to **stay current on changes**.
-WENDY, U.S.

Have patience with your users.
-LEAH, ISRAEL

Organize your tabs left to right as the relationship flows. It helps people keep it straight.
-GEOF, U.S.

Marketing automation is a must!
-CAROL, CANADA

Clean data **rules my world**!
-CHRISTINE, U.S.

> **Be careful what data is IMPORTED, and make sure to have DATA CLEANSING VALIDATION RULES.**
>
> -MARY, U.S.

> Develop a **routine schedule** for data cleansing.
> —NATHAN, U.S.

Ask your co-workers what works for them. They've probably stumbled on a feature that makes the office workflow even better.
-SHELLY, U.S.

Find a **good cleansing app** for duplicates.
-YOLANDA, U.S.

Standardize an import spreadsheet that matches the fields in Salesforce.
-KELLY, U.S.

Join your **local users group**!
-MIKE, U.S.

Email to Salesforce is a great feature that lets you **save important emails** on a contact record.
-ANNA, U.S.

If you don't know the implications, **don't change the data**.
-MAX, U.S.

Invest in **processes and products to help keep your data clean**. It is worth the time. 🐦

-JAFFE, U.S.

Come up with a
standardized training module for new users.
-BRIAN, U.S.

Standardize and **train your users**. Start with clean data before the mess consumes you.
-SARAH, U.S.

Sharing settings should be properly considered when creating users and assigning profiles.
-ROB, AUSTRALIA

Make sure you know what you want to do with Salesforce **before building your database** so you don't have to reverse engineer later.
-EMILY, U.S.

Use **standard** objects.
-NAVEEN, U.S.

Be **clean**
and **accurate**.
-RENEE, U.S.

#sfadmintips

MAKE SALESFORCE WORK FOR YOU... not the other way around.

-BRIDGET, U.S.

Listen to your users.
-KIM, U.S.

Embrace **flows and process builder**. I've fallen in love. **:)**
-BRYAN, U.S.

When scrolling down a long report, click on the little drop down arrow in the middle of the screen to **freeze the headings**. Makes reading a report much easier!
-ANNAKIE, SOUTH AFRICA

Before launching Salesforce, **be forward thinking** about what info you want to have in each record, and gather it before uploading.
-C.J., U.S.

Run the **bounced emails report** and send it to your team to help clean your database.
-SUSIE, U.S.

Clean your data before importing it into Salesforce.
-KRISZTINA, GERMANY

BE PATIENT and don't force solutions.

-MITCH, U.S.

Get training and **learn how to train**.
–NATE, U.S.

Standardize your data entry for **ease of sorting and report-building**.
-ELISSA, U.S.

Add validation rules to help get good data into Salesforce from the beginning.
-JOHN, U.S.

There are lots of **apps in the AppExchange** which make life easier.
–SANJEEV, INDIA

Communication and engagement of the users are key to increase user adoption.
–GLENDA, AUSTRALIA

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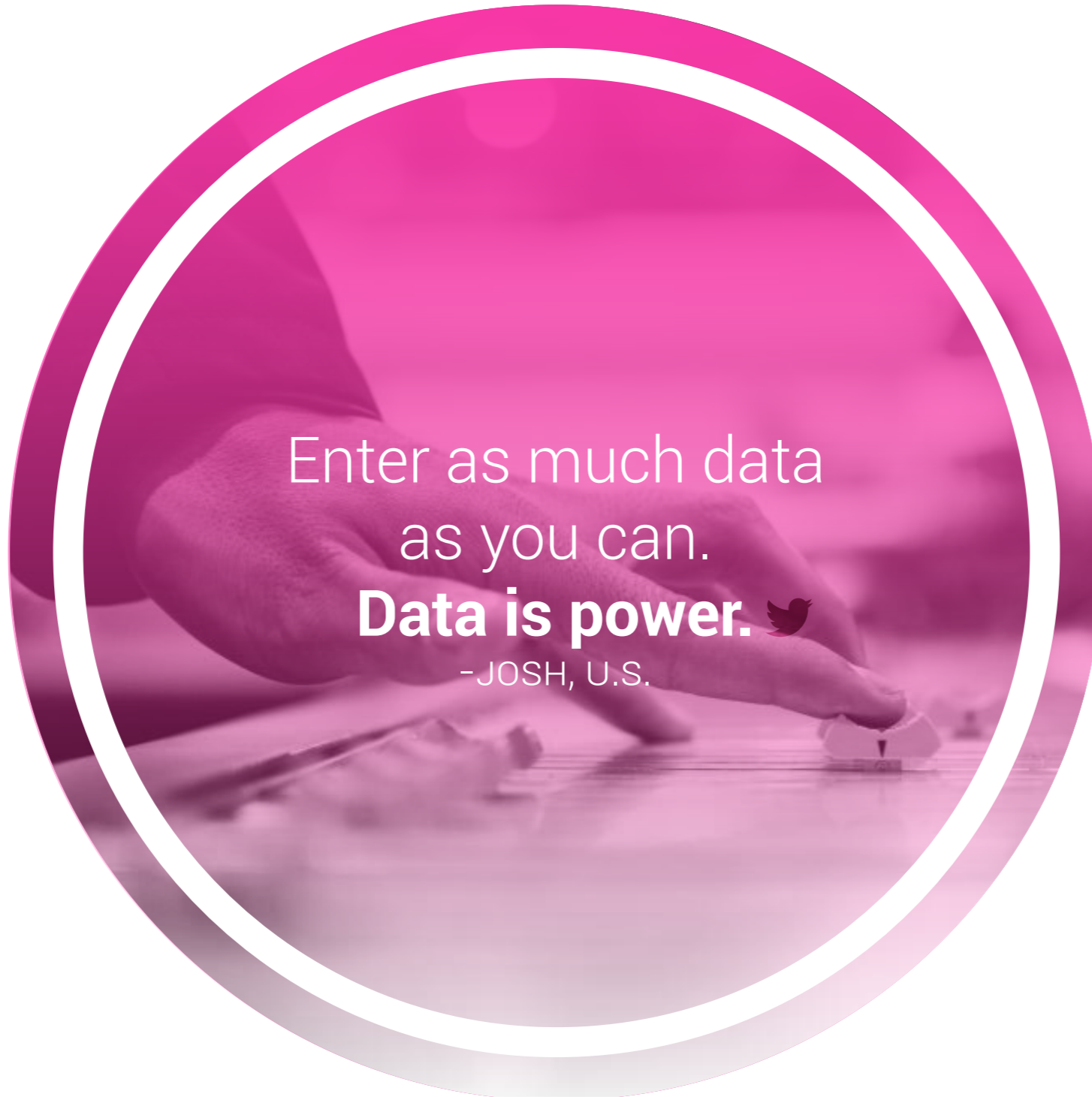
Enter as much data as you can. **Data is power.**
-JOSH, U.S.

Data is vital.
Keep it clean.
-KAPIL, GERMANY

The **SFDC community is vibrant**. Always check there first when you have a question.
-STEPHANIE, U.S.

Data integrity is key.
-ANDREW, U.S.

Always **search the database for existing records** prior to data entry! Utilize the wildcard search in case it is spelled differently.
-NICK, U.S.

Keep it **simple**.
-YAEL, ISRAEL
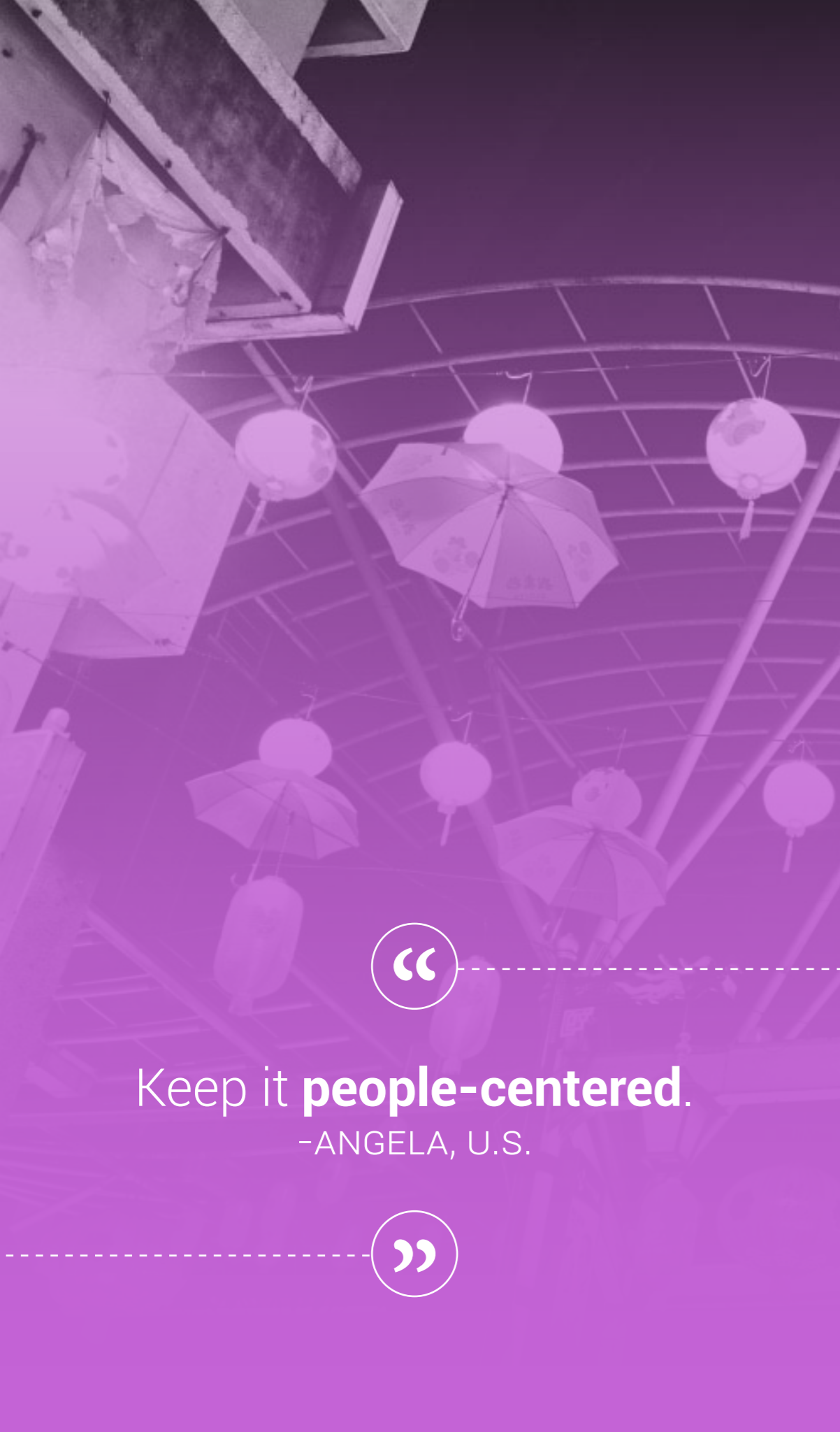
Keep it **people-centered**.
-ANGELA, U.S.

Make your Salesforce instance the best it can be with **clean, reliable data**.

✓ Find duplicate records in your existing database and easily dedupe from a simple dashboard

✓ Auto-merge, mass merge, or manually merge duplicates without data loss

✓ Choose from prebuilt filters or create your own

✓ Cleanse import files before the data reaches Salesforce

✓ Maintain data with features such as mass update, mass delete, geocoding, address validation and standardization

How many dupes are lurking in your data?
Find out with a free 10-day trial!

cloudingo™.com

makers of **DupeCatcher**
by Symphonic Source

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better, more productive place.