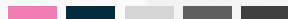


# **SHERPAFLOW**

## **GUIDE TO SUCCESS**



1



## Overview

Sherpa Flow automates and optimizes project management processes, facilitating efficient development cycles and seamless release coordination for teams. Built on the Salesforce platform, it provides a user-friendly interface for anyone with a Salesforce license.

# The Flow



# Project Kickoff



A project manager can initiate the project and assign a team to proceed with its execution

**SHERPAFLOW**  
GUIDE TO SUCCESS

Search...

Sherpa Flow Home Tasks Projects Epics Cases Releases

### Total Cases

More

**Total Cases**  
3+ Items, sorted by Case Number

**00001000**  
Contact Name: Rose Gonzalez  
Subject: [Starting generator after electrical failure](#)  
Status: Closed  
Priority: High  
Case Owner Alias: ABian

**00001001**  
Contact Name: Avi Green  
Subject: [Performance inadequate for second consec...](#)  
Status: Closed  
Priority: High  
Case Owner Alias: ABian

**00001002**  
Contact Name: Stella Pavlova  
Subject: [Seeking guidance on electrical wiring install...](#)  
Status: New  
Priority: Low  
Case Owner Alias: ABian

### Blocked Cases

More

**Blocked Cases**  
0 Items, sorted by Case Number  
Filtered by Block Reason

There's nothing in Blocked Cases yet.  
When records are added to this list view, you'll see them here.

### Recent Records

You haven't viewed any records recently.

### All

More

**All**  
0 Items, sorted by Release Name

There's nothing in All yet.  
When records are added to this list view, you'll see them here.

### Open Tasks

More

**Open Tasks**  
0 Items, sorted by Due Date  
Filtered by Closed, Recurring Parent ...

There's nothing in Open Tasks yet.  
When records are added to this list view, you'll see them here.

**SHERPANEER**  
REPAIR OF WATER PIPES



# Track Progress



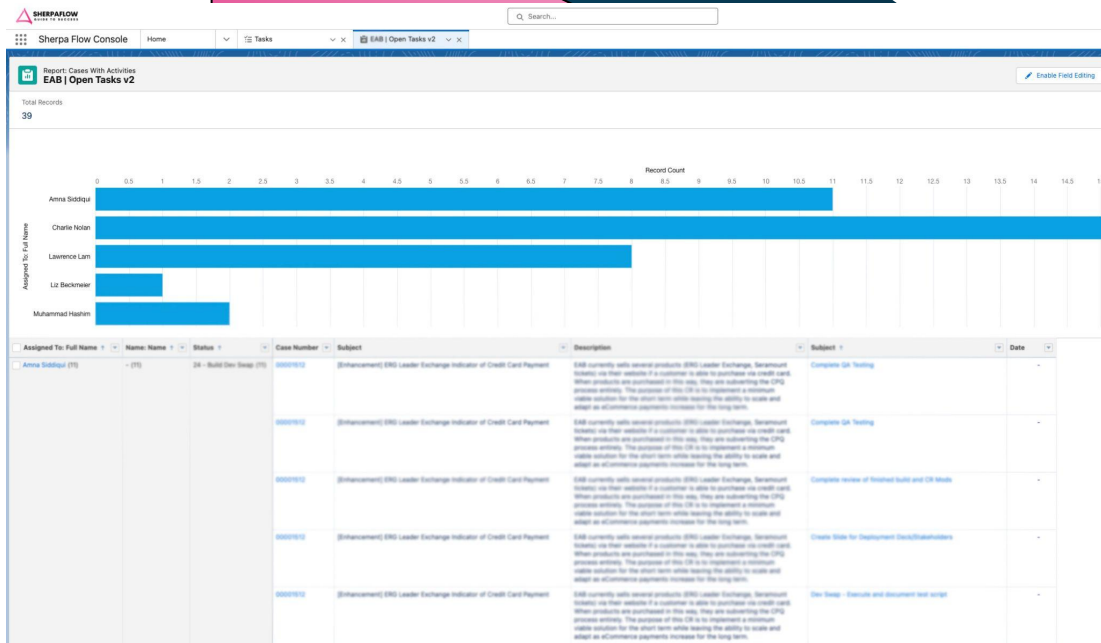
Gain clear visibility into project progress and outstanding tasks to facilitate more effective management of the overall progress

The screenshot displays the Sherpa Flow web application interface. At the top, there's a navigation bar with the Sherpa Flow logo and a search bar. Below the navigation bar, a breadcrumb trail shows 'Home > Tasks > Projects > Epics > Cases > Releases'. The main content area is titled 'Project Prototype' and features a status bar with 'New', 'Working' (highlighted), 'Completed', and 'Canceled' tabs. A 'Status: Working' label and a 'Mark as Current Status' button are also present. The 'Details' tab is active, showing fields for Project Name (Prototype), Status (New), Start Date (1/1/2024), and Description (Embark on a journey of innovation and collaboration with our latest project. Designed to inspire and drive results, this initiative promises to revolutionize how we work and create meaningful impact. With a focus on creativity, efficiency, and teamwork.). The 'Created By' field shows 'Amna S., 2/1/2024, 11:22 AM' and the 'Last Modified By' field shows 'Amna S., 2/1/2024, 12:19 PM'. On the right side, there's an 'Activity' section with filters for 'All time', 'All activities', and 'All types'. It lists upcoming tasks: 'Send Quote' (Feb 24) and 'Create Logo' (Feb 3), both with a 'View More' button. A note at the bottom of the activity section states 'No past activity. Past meetings and tasks marked as done show up here.'

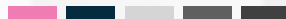
# Reporting



Centralized reporting consolidates data from various sources into a single, accessible platform, streamlining analysis and enhancing decision-making



Fully integrated with salesforce, this app will helps companies implement reliable Salesforce solutions to power their sales, revenue forecasting customer service and marketing processes. With a solid track record, our customers trust us to get the most out of all Salesforce Products





SherpaFlow is a comprehensive Project Management application tailored for the Salesforce platform. Specifically designed to streamline development processes such as requirement gathering, work item tracking, release orchestration, and IT development analytics. SherpaFlow enhances project management workflows and introduces additional customizable objects to meet specific business needs. While requiring configuration by an administrator, SherpaFlow is accessible to any user with a Salesforce license, offering a user-friendly solution for project management within Salesforce.

**Unlock the full potential of project management and Agile development within Salesforce with SherpaFlow. Contact us today to learn more and schedule a demo**

**SherpaFlow boasts a range of features aimed at enhancing project management and Agile development within Salesforce:**



**Agile Development Tracking:** Streamline Agile processes with customizable workflows and tracking functionalities.



**Release Management:** Efficiently orchestrate releases and manage project timelines.



**Case Tracking:** Utilize native case functionality augmented by SherpaFlow's enhancements for comprehensive issue tracking.



**Kanban Workflows:** Visualize and manage work items with customizable Kanban workflows, promoting transparency and efficiency in project execution.