

PROJECT 1

IT CUSTOM OBJECT



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PHASE I

The IT department has relied for the last 6-7 years on an excel file to track their inventory. This method was effective as the company was small with barely 45-50 employees. But with recent business growth, with staff members between 150-170, using a spreadsheet is no longer practical and accurate. The IT department needs to have all their existing data uploaded into Salesforce (not to track inventory). As a brand-new Admin (new hire), the IT Vice President has requested you to attend to a discovery meeting and assigned you to lead this implementation.

The Finance team was also invited to attend as they have requirements for this project. Their goal is to be able to track the life cycle of each item so the amortization can be reported accurately in the company's financial statements and reports. Taking notes in this meeting is key for success. On the first meeting with the IT director and the help desk team, it was specified with the new custom object they want to be able to upload into salesforce the following data:

- IT inventory Name
- Make: DELL, IBM, Server, Apple
- Type: Laptop, Printer, Server, Monitor
- Model:
- Description:
- Encrypted: YES, NO
- Assigned To

The IT director also wants to be able to track / trace the life cycle of each item to be able to make decisions to either extend (purchase) additional warranty or let the warranty expire:

- Life Cycle: New, Mid-Warranty, Close to Warranty Expiration, Warranty Expired

The corporate controller (finance) specified that they want to be able to track the payment methods, the life cycle of each item, purchase price or retail value, and purchase dates. Also, to be able to track status which will give his team the ability to amortize the company's inventory. The following information was also provided:

- Payment method – Visa, MasterCard, AMEX, PO
- Status: New – In Stock, Assigned, Spare, Donated, Scrapped
- Life Cycle: New, Mid-Warranty, Close to Warranty Expiration, Warranty Expired
- Retail value:
- Purchase date:
- Warranty Expiration Date:

You have an immense project ahead. Your task is to build a custom object that meets the IT department / Finance needs and requirements. The name of the new custom object will be IT Inventory. All the new created custom fields are required (except the Assigned To field due to

license limitations). It is also requested to build a report by status containing the grand total of the inventory, along with a dashboard displaying the Life cycle of the entire inventory displaying the dollar value of each cycle. There is a Phase II, and III, but this is the start for a long-awaited solution.

As an awesome salesforce administrator, you can provide a demo in the sandbox (developer org) within 2-3 business days, and then via change sets (only in a sandbox environment) deploy the new custom object into Production. In Addition, the IT department has sent you their most updated excel file to be uploaded into Salesforce.

The above scenario happened in a real business setting in the Health Care Industry. The project was completed successfully. Now, it is your turn to demonstrate your skills, and to be challenged to gain real life experience in the ecosystem. You are highly encouraged to document your progress as it can be used for your portfolio. Also, if so, you desire, you can record in video format to showcase your project and share it with prospective employers.

DISCLAIMER: To protect the identity and privacy of the participating personnel, their names are omitted.

PHASE II.

- Upload IT data in SF via the Data Import Wizard.
- Build a report and Dashboard.
- Add tracking History, Notes & Attachments under related tab. HINT: Page-Layout
- Build a flow to change Status: ASSIGNED to Life cycle: Mid-Term.

PHASE III. Create a PowerPoint presentation explaining:

- a) The overall purpose of the object.
- b) The major steps you took to create the object.
- c) How users at the IT Dept and Finance will benefit from the object's existence?
- d) A quick analysis of the dashboard data, and how this data will help the IT department and the finance team to make data driven decisions?
- e) Video record (screen recording) your PPT presentation and submit for evaluation.
Please submit it via Jira.

PHASE I – For testing, you may enter you own laptop information or PC unit. Please see the below page layout and use it to position each field:

IT Inventory
FZ Mac

Related

Details

IT Inventory Name	FZ Mac	Owner	Federico Zacarias
Type	Laptop	Assigned To	Federico Zacarias
Make	APPLE	enCrypted	YES
MODEL	MacBook Pro	Status	ASSIGNED
Description	Apple MacBook Pro 16-inch 2.4GHz Eight-c Touch Bar with integrated Touch ID sensor 16-inch (diagonal) LED-backlit display with IPS technology 64GB of 2666MHz DDR4 onboard memory 8TB SSD1 720p FaceTime HD camera AMD Radeon Pro 5500M with 8GB of GDDR6 memory	Life Cycle	Close to Warranty Expiration
Retail Value	\$1,450.00	Purchase Date	7/5/2021
Payment Method	VISA	Warranty Exp	11/27/2022

COMPACT LAYOUT:

IT Inventory
FZ Mac

Assigned To
 Federico Zacarias

Status
ASSIGNED

MODEL
MacBook Pro

LIST VIEWS:

IT Inventories
All

New Import Change Owner Printable View

5 items • Sorted by IT Inventory Name • Filtered by All it inventories • Updated a few seconds ago

Search this list...

☐ IT Inventory N...

Status

Assigned To

MODEL

Make

Life Cycle

Warranty Exp

NOTE: Via Jira, please submit your own (similar above) screen shots as proof that Phase I is completed.

PHASE II INSTRUCTIONS

Congratulations on making it this far. Now, it is time to start with Phase II. Before uploading any data into Salesforce, we need to ensure that the text fields have the correct specifications to avoid any issues during the upload process. Please see the following:

Description: Long Text Area

Long Text Area Options

Visible Lines 7

Length 4,500

IT Inventory Name: Text – Length 80:

IT Inventory Name

Name

Text(80)

MODEL: Text – Length 100:

MODEL

MODEL__c

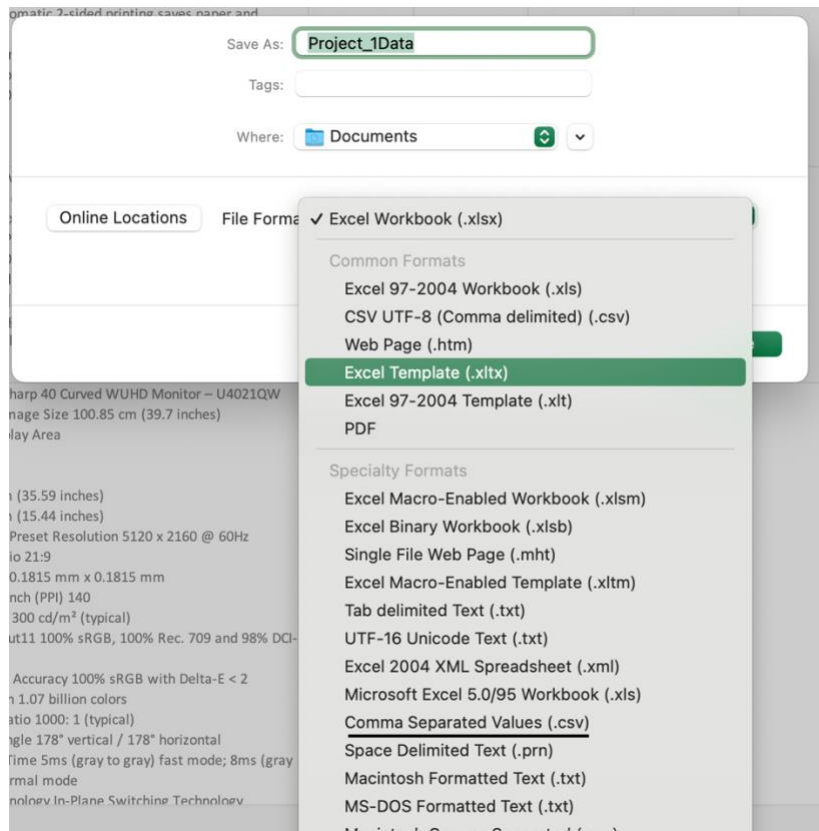
Text(100)

NOTE: The above procedures will help you to avoid an ERROR message in your upload reports.

Also, Build the FLOW LAST

EXCEL FILE. Please follow these instructions:

a) Open the provided excel file and save as: csv format:



REPORTS. Create 2 summary reports each with the following specifications:

a) By Life Cycle:

REPORT ▾
IT Inventories Life Cycles *IT Inventories*

Previewing a limited number of records. Run the report to see ev

Life Cycle ↑	IT Inventory: IT Inventory Name
New (3)	LT091
	LT092
	LT093
Subtotal	
Mid-Term (7)	CEO Office Printer
	LT080
	LT081
	LT082
	CEOs Laptop

Fields >

Outline ▾ Filters 1

Groups

GROUP ROWS

Add group...

Life Cycle x

GROUP COLUMNS

Add group...

Columns ▾

Add column...

IT Inventory: IT Inventory Name x

Status x

IT Inventory: ID x

Assigned To x

MODEL x

Make x

Description x

Retail Value x

enCrypted x

Payment Method x

Warranty Exp x

b) Status:

Sales Home Opportunities ▾ Leads ▾ Tasks ▾ Files ▾ Accounts

REPORT ▾
New IT Inventories Report *IT Inventories*

Previewing a limited number of records. Run the report to see

Status ↑	IT Inventory: IT Inventory Name
ASSIGNED (16)	LT054
	LT055
	LT056
	LT057
	LT058
	LT059

Outline ▾ Filters 1

Groups

GROUP ROWS

Add group...

Status x

GROUP COLUMNS

Add group...

Columns ▾

Add column...

IT Inventory: IT Inventory Name x

IT Inventory: ID x

Assigned To x

MODEL x

Make x

Description x

Retail Value x

enCrypted x

Life Cycle x

Payment Method x

Warranty Exp x

DASHBOARDS

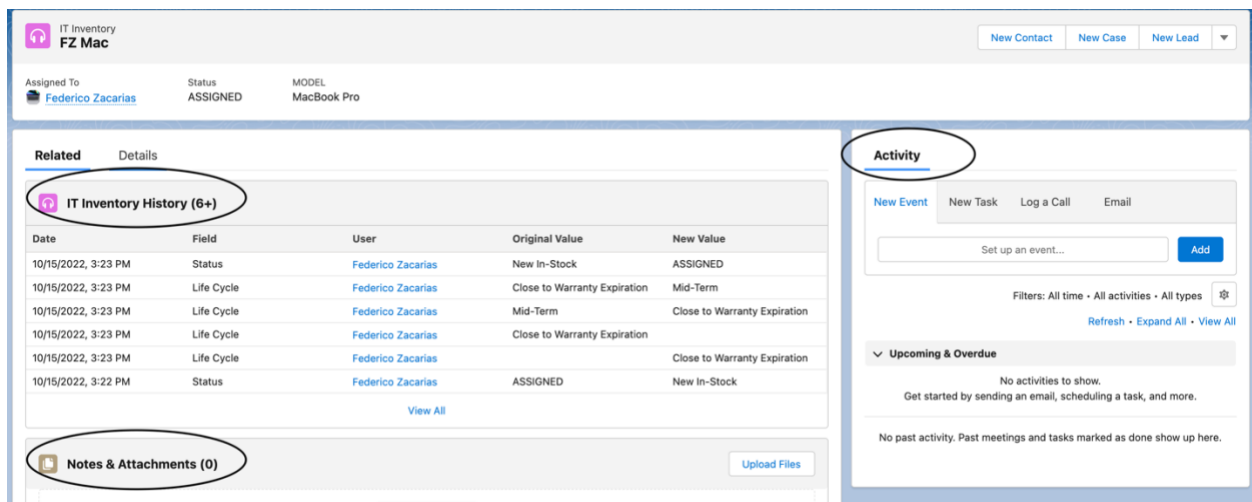
Design and create 3 dashboards with the following specifications:

- A Life Cycle breakdown with percentage, total amount per each cycle, and grand total.
- A Life Cycle breakdown with full count per cycle and how many items (inventory) exist on each.
- A status breakdown with percentage, total amount per status, and an approximate grand total.



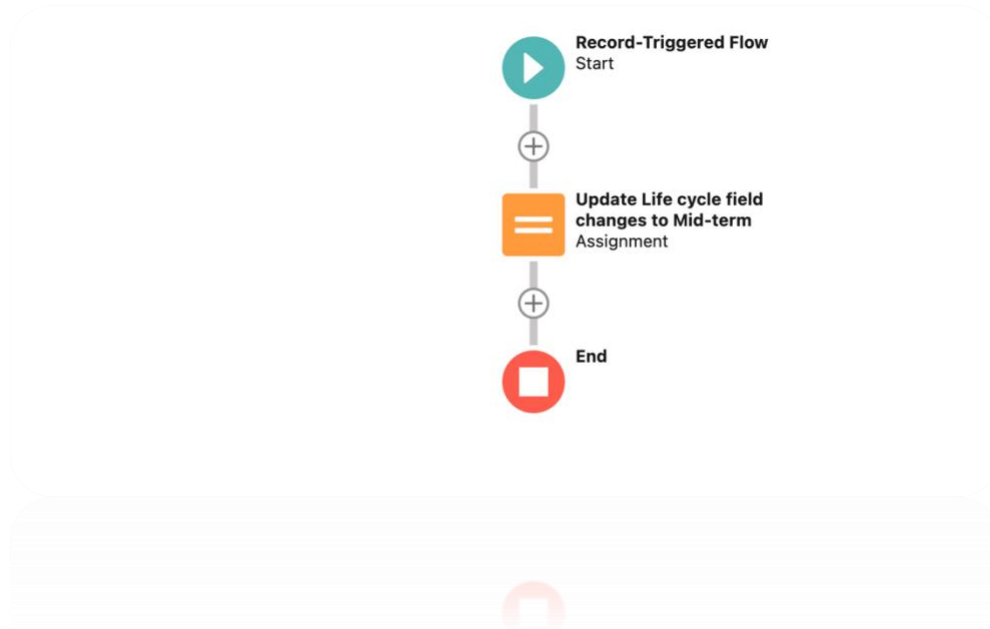
TRACKING HISTORY AND ATTACHMENTS

- Add tracking history.
- Notes & Attachments under related tab. HINT: Page-Layout.
- Activity.




FLOW IF / THEN

IF status field changes to ASSIGNED, THEN Update Life cycle field changes to Mid-term:







Edit Assignment


Update Life cycle field changes to M... (Update_Life_cycle_field_changes_to_Mi... 



Whenever status field changes to ASSIGNED then Update Life cycle field changes to Mid-term

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value
 \$Record > Life Cycle 	Equals 	Mid-Term 

 Add Assignment

✕

Edit Assignment

* Label

Update Life cycle field changes to Mid-term

* API Name

Update_Life_cycle_field_changes_to_Mid_term

Description

Whenever status field changes to ASSIGNED then Update Life cycle field changes to Mid-term

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value	
<div><div>⋮</div><div>\$Record > Life Cycle</div><div>✕</div></div>	<div>Equals</div> <div>▼</div>	<div>Mid-Term</div>	<div>🗑️</div>
<div>+ Add Assignment</div>			

Cancel

Done

IMPORTANT: Test your flow and send a screen shoot it is working via Jira.

NOTE: If you struggle to build this flow, try your best first at least 9-10 times if necessary, and after several failed attempts, please reach out for support as instructions can be provided step by step.