PROJECT 1
IT CUSTOM OBJECT

By: Federico E. Zacarias
*Digital Product Architect &
Founder*

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 <u>IT Inventory</u>. 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-waited 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.
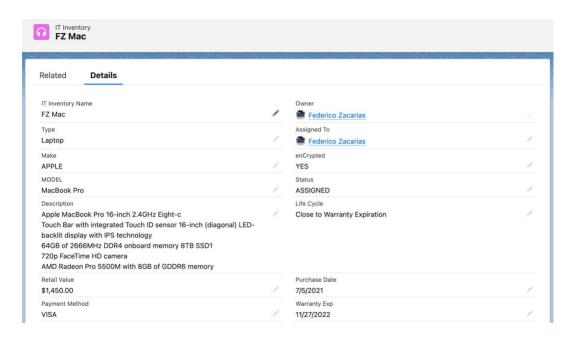
PHASE II.

- 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
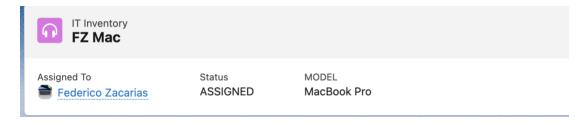- Build a flow to change Status: ASSIGNED to Life cycle: Mid-Term.

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?
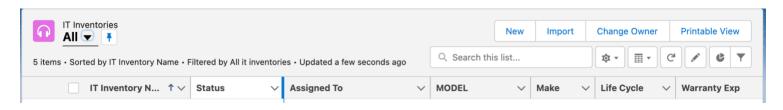e) Video record (screen recording) your PPT presentation and submit for evaluation. Please submit it via Jira.

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:

COMPACT LAYOUT:

LIST VIEWS:

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:
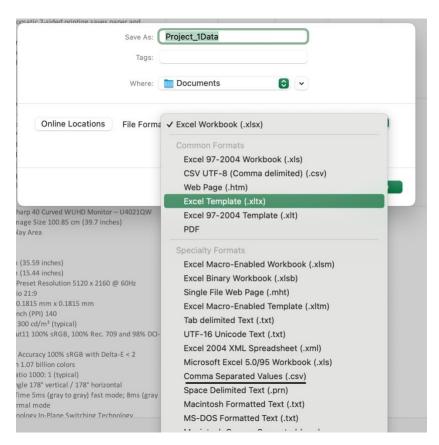
Description: Long Text Area

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.
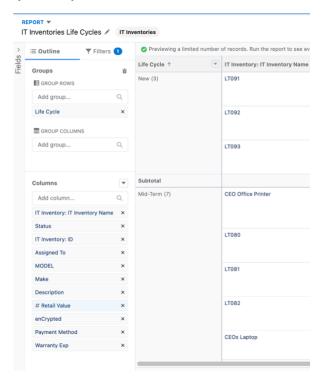
       Also, Build the FLOW LAST

EXCEL FILE. Please follow these instructions:

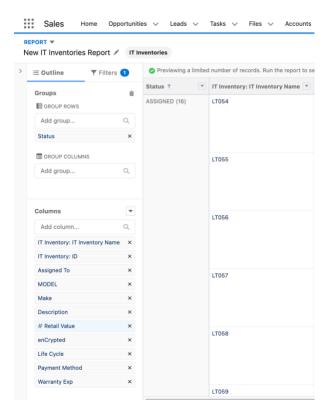   a)   Open the provided excel file and save as: csv format:

REPORTS. Create 2 summary reports each with the following specifications:
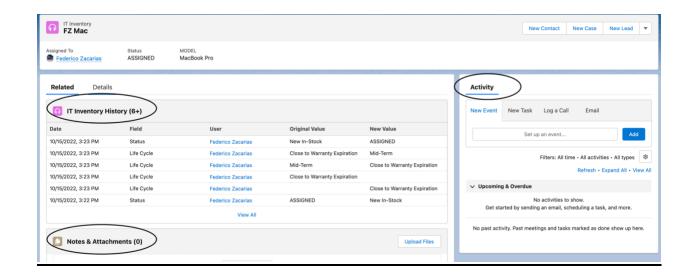
a) By Life Cycle:

b) Status:

DASHBOARDS

Design and create 3 dashboards with the following specifications:

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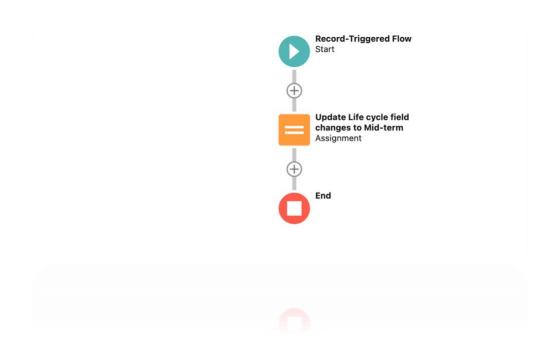c) A status breakdown with percentage, total amount per status, and an approximate grand total.
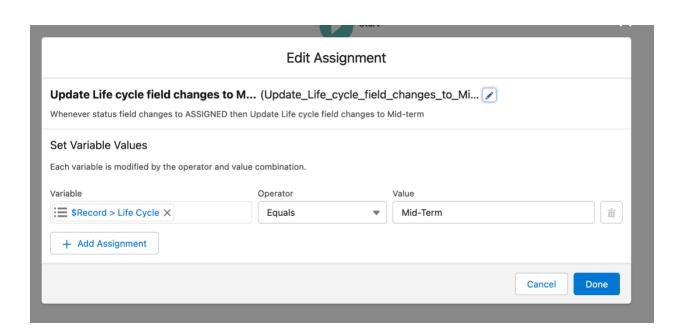

TRACKING HISTORY AND ATTACHMENTS

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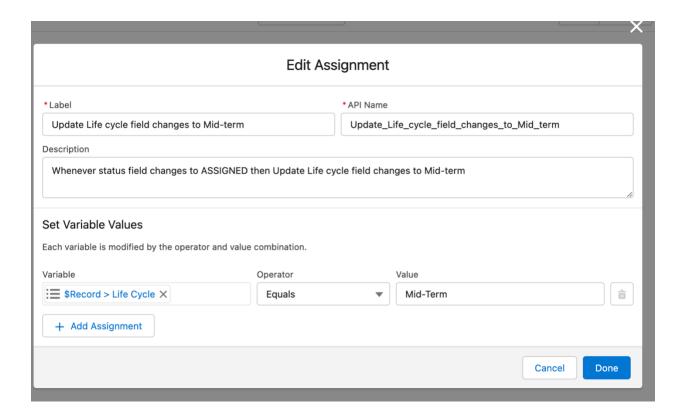c) Activity.

FLOW IF / THEN

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

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.