

Project Milestones

Improve the Salesforce Solution for Digit Learning

In this document, you'll find an example of milestones to follow for delivering your project. You'll see:

- The part of each deliverable that corresponds to each milestone.
- Recommendations for accomplishing each milestone.
- Common issues and errors to be aware of.
- The estimated progress on the whole project.
- Helpful external resources for each milestone.

These milestones are only suggestions: you are not required to complete them in this order. Please note:

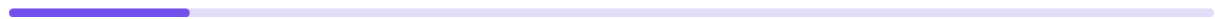
- The project progress for each milestone is a guideline but will vary depending on your pace.
- The milestone deliverable refers to your expected output at each step. You are not required to complete all of these deliverables to validate the project; you will only be evaluated on the final ones.

General Recommendations

This is your first project where you get into the details of Salesforce. This project and the next focus on Salesforce administration. You'll start to familiarize yourself with how Salesforce works in this project. Then, combined with the coding fundamentals you'll learn in projects 4 through 6, you'll be prepared to develop Salesforce code in the rest of the path!

Milestone #1: Prepare for Your Tasks

15% progress




 **Milestone deliverable:** Plan with key steps to implement the solution

Recommendations:

- Before starting the Salesforce implementation, complete all of the trailheads to understand the problem and build an efficient solution.

- Break the project requirements into several key steps, such as data schema, automations, data, and reporting.
 - You can use a spreadsheet or project management tool like Trello.
- For each key step:
 - Read all the requirements from the email exchanges and interview notes.
 - Note specific sentences from the requirements that can be converted into tasks.
 - Order the tasks by timeline: task #1, task #2, etc.
 - Group the tasks by the milestones you've come up with above.
 - Write down a Salesforce solution for each task identified.
 - Specify which Salesforce tool you'll use, e.g., Object Manager, Process Builder, Validation Rules.

 **Issues to be aware of:** Make sure you understand all of the project requirements before starting your work.

- You will waste time and may have to redo work if you try to implement a solution without reading the interview notes and going through the existing code and all of the trailheads.
- While we recommend that you wait until Milestone #5 to write the audit document, you may decide to begin writing at this milestone.


Resources:

- [Learn Project Management Essentials from Walden University | \(salesforce.com\)](https://www.salesforce.com/learn/project-management-essentials/)

Milestone #2 : Install the App

20% progress



 **Milestone deliverable:** Successfully deployed app into Salesforce (= salesforce.org)

 **Recommendations:** Use Workbench to deploy the app.

 **Issues to be aware of:** Don't forget to follow the deployment guide provided in the project.


- Not having the correct configuration during deployment will lead to failure.


Resources:

- [Workbench \(developerforce.com\)](https://developerforce.com)


Milestone #3 : Upload the Data to Salesforce

25% progress

 **Milestone deliverable:** Data related to mentors, students, and trainings successfully uploaded to the app in Salesforce.

 **Recommendations:** Any Salesforce data upload tool fits this need.

- If you're unsure which tool to use, go for the standard Salesforce Data Import Wizard for simplicity.

 **Issues to be aware of:** Make sure to follow all the steps prior to uploading data into Salesforce, especially cleaning up and preparing the external CVS data.


Resources:

- [Data Management | Salesforce Trailhead](#)


Milestone #4 : Implement the Project Solutions

75% progress

 **Milestone deliverable:** All requirements for the application


 **Recommendations:** Use the tasks list you made in milestone #1 and deliver each item one by one.

- Remember, the key steps for implementing the project solutions include data schema, automations, data model, and reporting.
 - Review the order of the tasks within each solution.
- Identify whether you need to change the data model to accommodate a particular automation.
- Ensure that the data created is valid by putting data validation in place before insertion or update.
- Review the solution direction with your mentor prior to implementation to improve efficiency.

 **Issues to be aware of:** A common trap is to start automations before having a consistent data schema, which leads to redoing work.

- Make sure you build the solutions in a logical order, for example:

- Data schema (or model definition)
- Automations + data model
- Reports & dashboards
- Reports & dashboards should be the last step after the implementation is complete to have correct reporting data .


 **Resources:** Go back through all of the trailhead resources for this project that you read initially in milestone #1.

Milestone #5 : Write the Audit and Analysis Documents

90% progress

 **Milestone deliverable:** Two documents:

- The audit document of the old application.
- The qualitative and quantitative analysis of the optimizations for each of the key user problems.

 **Recommendations:** For the audit document, use the template document in the project.

- In the audit document, analyze the existing application before the solution you implemented.
 - Make sure you address every user need from the interview notes.
- You've already done the hard work of analyzing the application in Milestone #1!
 - Now you just need to write down your analysis (if you haven't done so already).
- Analyze your implemented solution in the qualitative and quantitative analysis document.
 - Use numerical data to show how much each solution improves a particular problem (stated in the audit document).


 **Issues to be aware of:** Don't confuse the goals of the two documents.

- The audit document looks at the original application.
- The qualitative/quantitative analysis looks at the application after you've improved it.

Milestone #6 : Put the Code Into the Package Manager and Make Screenshots

100% progress

 **Milestone deliverable:** The URL of the unlocked package and the screenshots of the updated application

 **Recommendations:** While the student can use any Salesforce package creation tool, the simplest one is the Package Manager UI tool

- In Salesforce, navigate to Setup → Apps → Package Manager.
- Click on New.
 - Give a name to your package.
 - Click Save.
- Click Add to select the resources to include.
- Select Component Type and choose the respective component that you've developed for the Digit Learning App.
 - Add it to your package.
 - Check if all components for the app are present.
- Click Upload.
 - Give a version name and number.
 - Leave all other default settings.
- Get the generated URL via "Installation URL."

Issues to be aware of:

- Don't forget to take screenshots of the app after you've updated it!
 - The screenshots should show the objects and fields you've created and their relationships.
- You can upload multiple versions of the same package in case you forgot to add a component.

Project complete!

Tell us what you think! This document is a new resource we give you to help you with your project. Take [this 3-minute survey](#) to give us your feedback so that we can improve it!