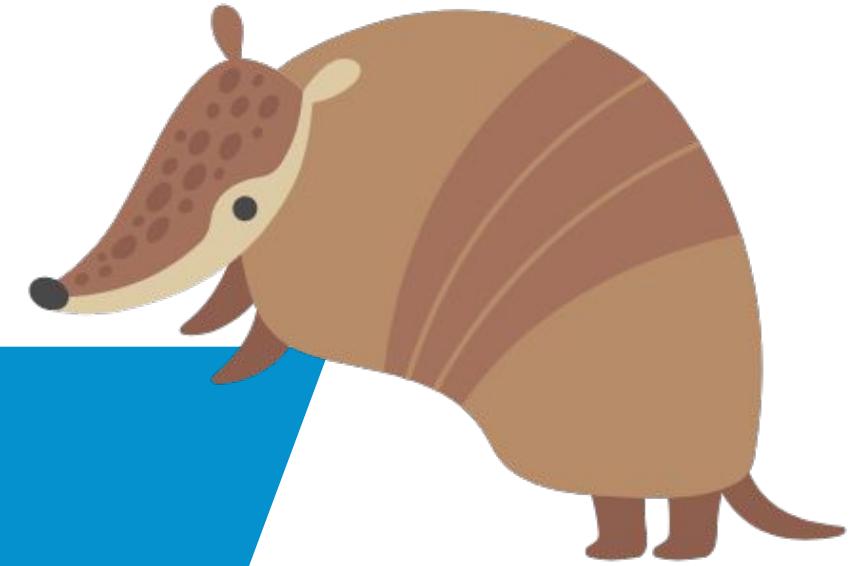




10 Favorite Admin Apps



Presentation by
Matt Kaufman

OUR SPEAKER



Matt Kaufman
CEO, MK Partners
@the1mattkaufman

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airSlate

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Gold Sponsors



Gearset



ePOSly

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Download Slides



Process

- Search through social media, blogs, and community sites
- Catalog AppExchange listing details and reviews
- Ask trusted colleagues and personal Experience



Criteria

1

Makes Admin Life Easier

2

Easy to Self-Install and Self-Setup

3

Low Impact on Salesforce Org

4

Value for the Money

5

Support and Ongoing Development

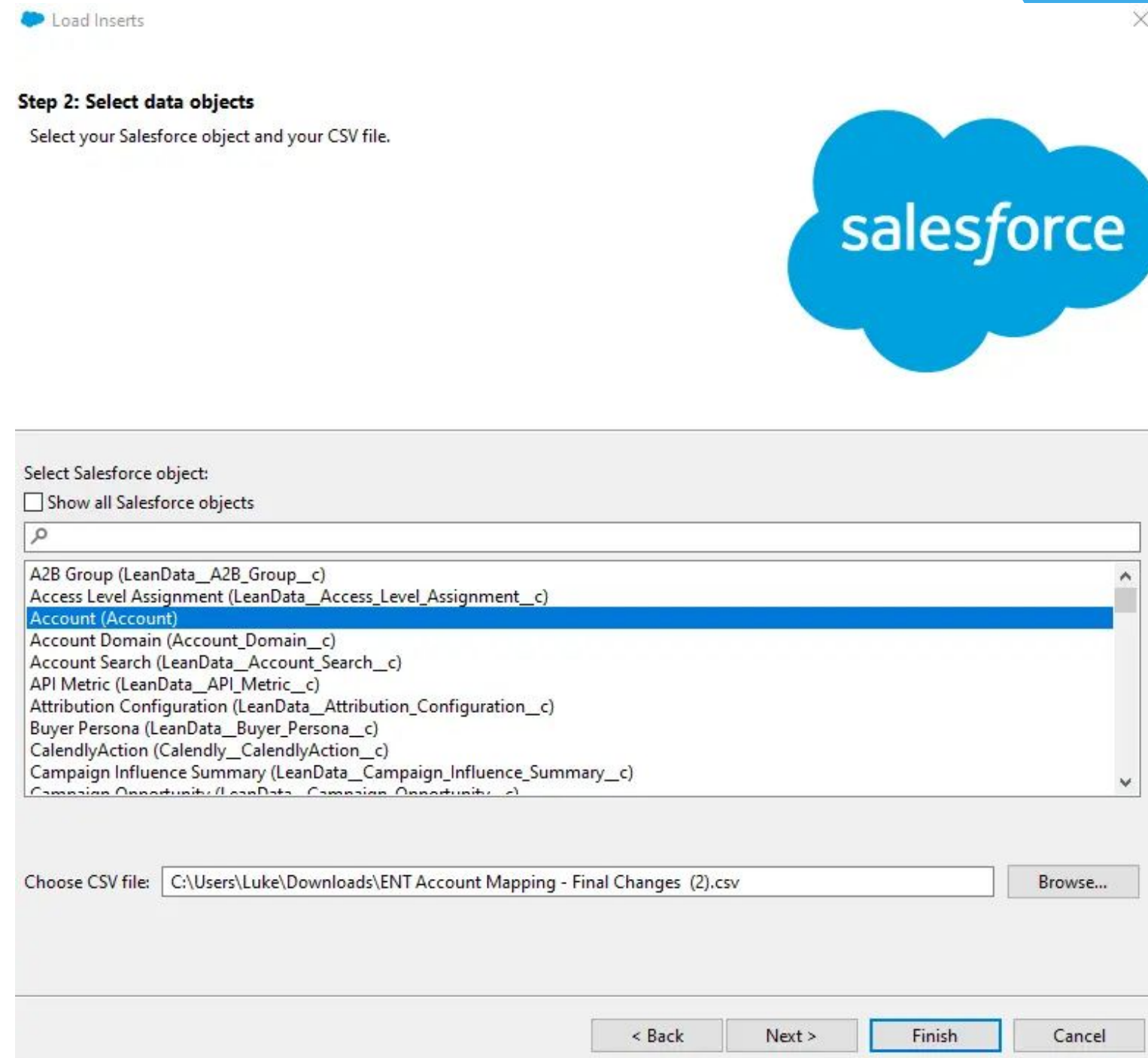
Salesforce Dataloader

The OG Dataloader

What we love:

- Free
- Simple to configure
- Limited only by your internet and computer
- Configuration can be saved for reuse
- Can be scheduled/automated
- Running on a Cloud VM for faster performance and freeing you to walk away while still running

<https://developer.salesforce.com/tools/data-loader>



Load Inserts

Step 2: Select data objects
Select your Salesforce object and your CSV file.

salesforce

Select Salesforce object:
☐ Show all Salesforce objects

A2B Group (LeanData__A2B_Group__c)
Access Level Assignment (LeanData__Access_Level_Assignment__c)
Account (Account)
Account Domain (Account_Domain__c)
Account Search (LeanData__Account_Search__c)
API Metric (LeanData__API_Metric__c)
Attribution Configuration (LeanData__Attribution_Configuration__c)
Buyer Persona (LeanData__Buyer_Persona__c)
CalendlyAction (Calendly__CalendlyAction__c)
Campaign Influence Summary (LeanData__Campaign_Influence_Summary__c)
Campaign Opportunity (LeanData__Campaign_Opportunity__c)

Choose CSV file: C:\Users\Luke\Downloads\ENT Account Mapping - Final Changes (2).csv Browse...

< Back Next > Finish Cancel

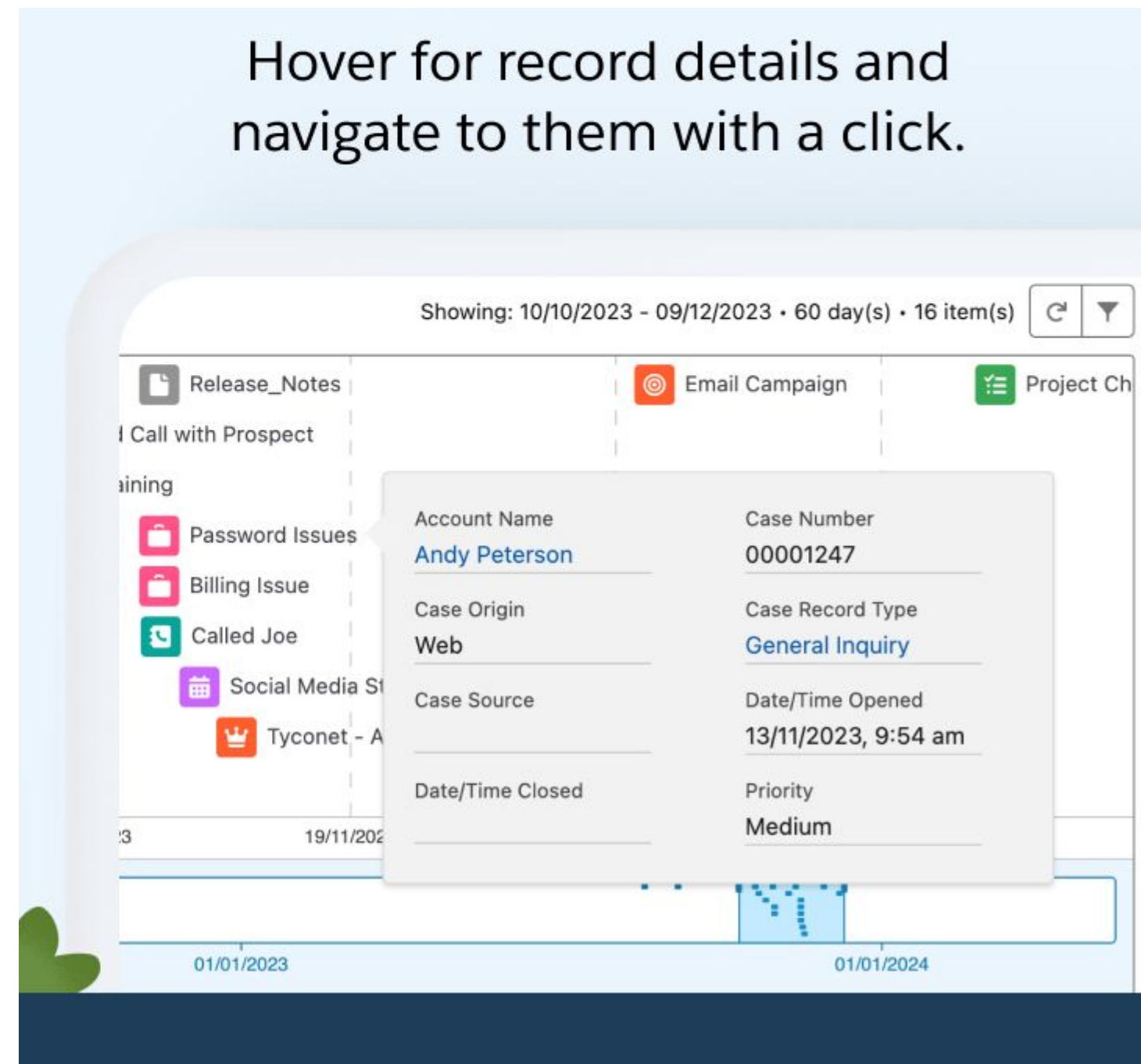


Time Warp

Visualize Related Data

What we love:

- Free
- Built by Salesforce Labs
- Accessibility Compliant
- Easy to Setup
- Looks so much better than a report



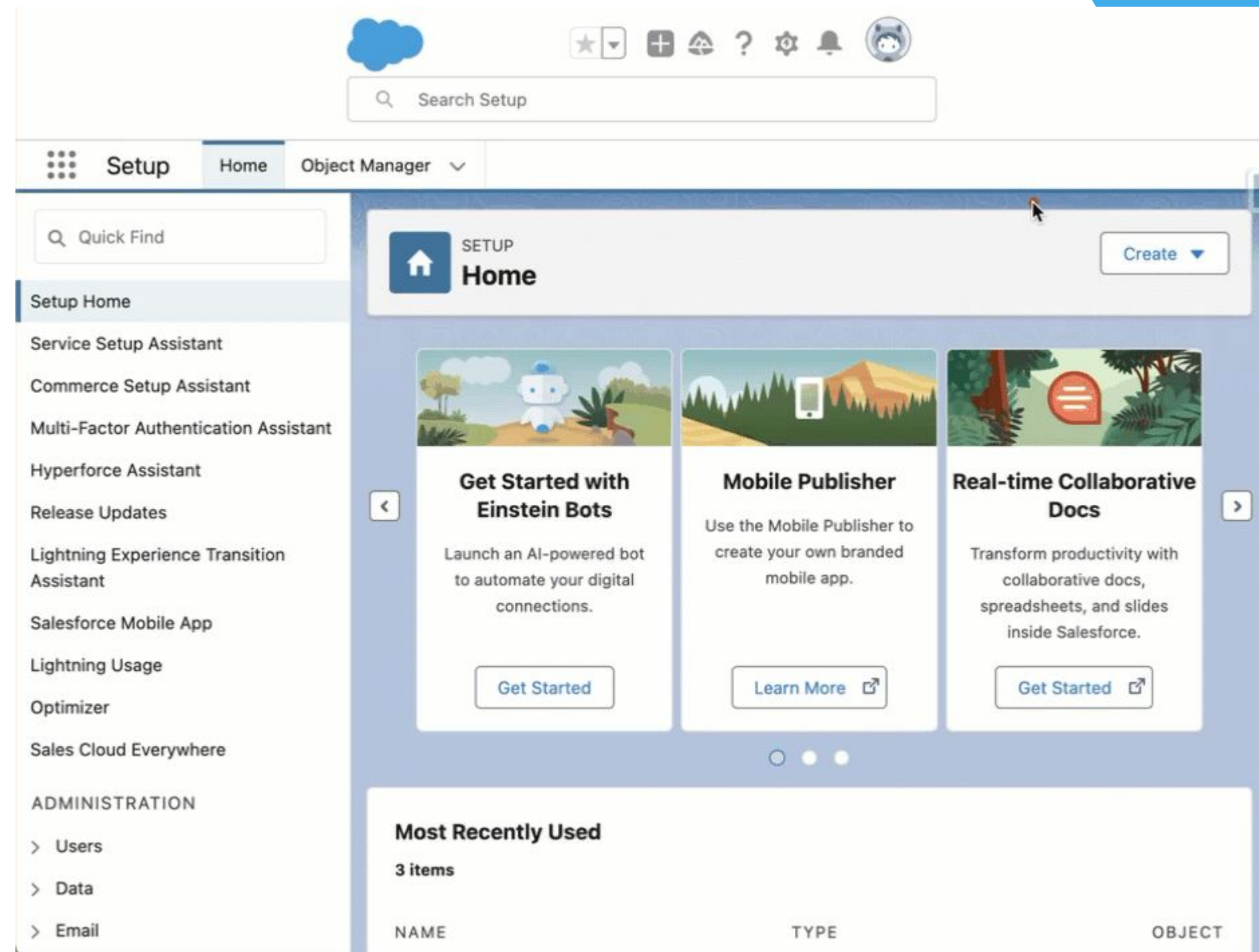
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000GXVf4UAH>

Salesforce Inspector Reloaded

Salesforce Utilities Browser Extension

What we love:

- Made specifically for Salesforce
- Fills gaps that Salesforce ignores
- Replaces multiple other apps
- Doesn't junk up your Org
- Totally FREE
- Continues to get updates



<https://chromewebstore.google.com/detail/hpijlohoihegkfehhibgggnkbjhoemldh>

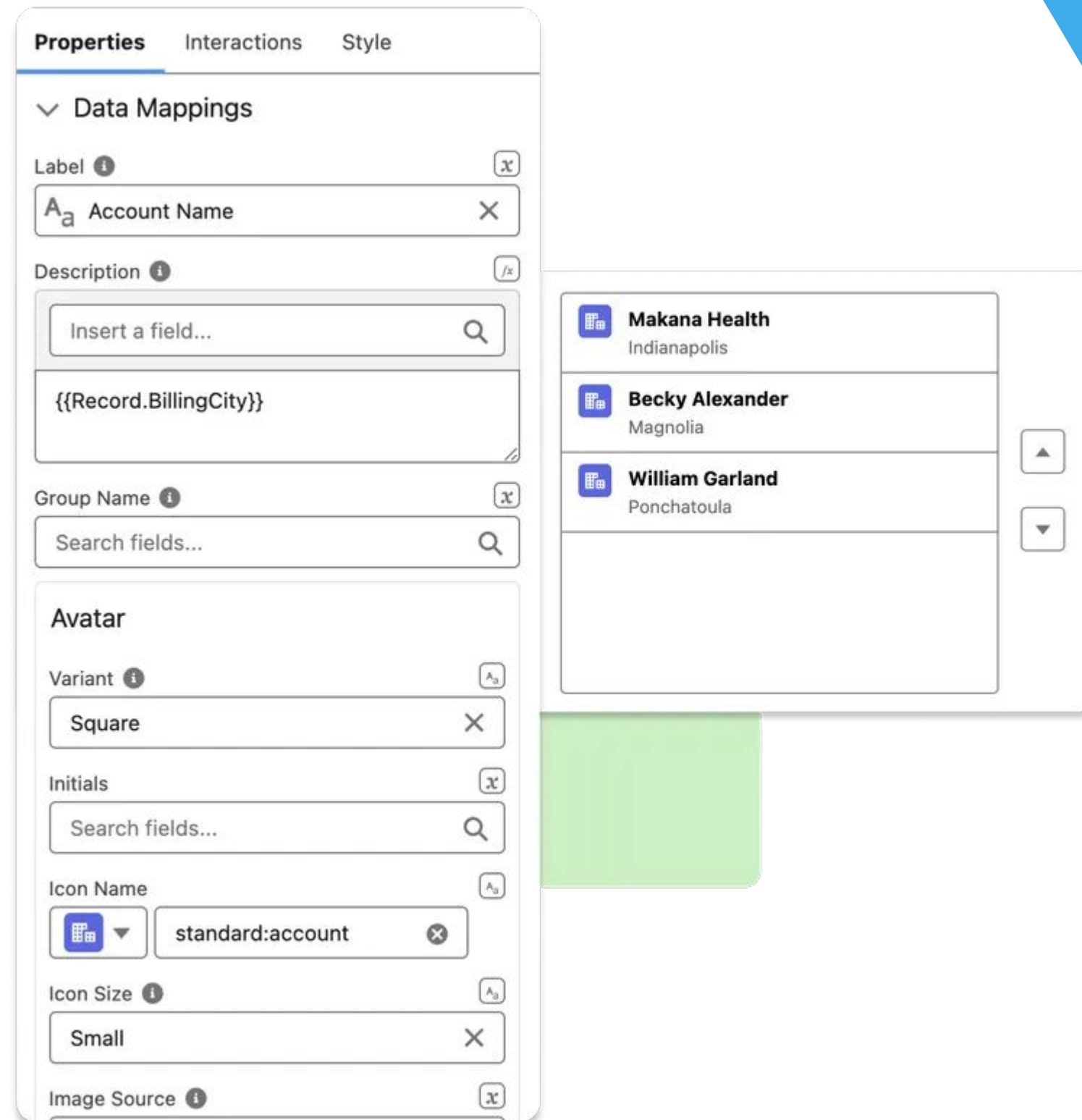
Avonni

Point-and-Click Salesforce Screen Designer

What we love:

- Made specifically for Salesforce
- So Easy To Use
- Functional Free Tier
- Nonprofit Discounts
- Stays up to date with releases!

<https://www.avonni.app/>



Cuneiform for CRM

Measure Org Health

What we love:

- Free for Core CRM
- In Depth Data Analysis
- In Depth Metadata Analysis
- Amazingly Thorough Documentation
- Designed for Admins

⚡ Profiled Fields: Filtered Records (30+)								
30+ items • Sorted by Profiled Field Display Label • Filtered by Record Type • Updated a minute ago								
	Field Result Key ▾	Profiling Stat... ▾	Profiled Field Display Label ↑ ▾	Data Type ▾	Total Filte... ▾	Total Filter... ▾	Total Filter... ▾	Has Defa
1	PRF-0378	SUCCESS	Account Empty Fields (Empty_Fields__c)	STRING	9,930	100.00%	4.24%	<input type="checkbox"/>
2	PRF-0379	SUCCESS	Account Fax (Fax)	PHONE	6,985	70.34%	70.34%	<input type="checkbox"/>
3	PRF-0380	SUCCESS	Account ID (Id)	ID	9,930	100.00%	100.00%	<input checked="" type="checkbox"/>
4	PRF-0382	SUCCESS	Account Name (Local) (NameLocal)	STRING	0	0.00%	0.00%	<input type="checkbox"/>
5	PRF-0381	SUCCESS	Account Name (Name)	STRING	9,930	100.00%	65.94%	<input type="checkbox"/>
6	PRF-0383	SUCCESS	Account Number (AccountNumber)	STRING	7,537	75.90%	75.90%	<input type="checkbox"/>
7	PRF-0384	SUCCESS	Account Phone (Phone)	PHONE	7,882	79.38%	79.38%	<input type="checkbox"/>
8	PRF-0385	SUCCESS	Account Rating (Rating)	PICKLIST	8,125	81.82%	0.03%	<input type="checkbox"/>
9	PRF-0386	SUCCESS	Account Site (Site)	STRING	7,641	76.95%	10.06%	<input type="checkbox"/>
10	PRF-0387	SUCCESS	Account Source (AccountSource)	PICKLIST	9,619	96.87%	0.04%	<input checked="" type="checkbox"/>
11	PRF-0388	SUCCESS	Account Type (Type)	PICKLIST	9,739	98.08%	0.10%	<input checked="" type="checkbox"/>
12	PRF-0389	SUCCESS	Annual Revenue (AnnualRevenue)	CURRENCY	9,930	100.00%	89.03%	<input type="checkbox"/>
13	PRF-0390	SUCCESS	Billing City (BillingCity)	STRING	7,694	77.48%	4.62%	<input type="checkbox"/>
14	PRF-0391	SUCCESS	Billing Country (BillingCountry)	STRING	7,324	73.76%	0.02%	<input type="checkbox"/>
15	PRF-0392	SUCCESS	Billing Geocode Accuracy (BillingGeocodeAcc...	PICKLIST	0	0.00%	0.00%	<input type="checkbox"/>
16	PRF-0393	SUCCESS	Billing Latitude (BillingLatitude)	DOUBLE	0	0.00%	0.00%	<input type="checkbox"/>
17	PRF-0394	SUCCESS	Billing Longitude (BillingLongitude)	DOUBLE	0	0.00%	0.00%	<input type="checkbox"/>
18	PRF-0395	SUCCESS	Billing State/Province (BillingState)	STRING	8,816	88.78%	0.52%	<input type="checkbox"/>
19	PRF-0396	SUCCESS	Billing Street (BillingStreet)	TEXTAREA	7,768	78.23%	78.16%	<input type="checkbox"/>

<https://peernova.com/platform/cuneiform-for-crm/>




Mambo Merge

Simple File Generation

What we love:

- Free Tier
- Nonprofit Discounts
- Simple to setup and use
- 100% Native
- No custom objects included
- Extendable with Flow and LWC
- Friendly Support

<https://mambomerge.com>

 **Mambo Merge Routine Wizard**


✓

✓

Merge Data

Templates

Preview the data that will be merged with the templates. Related Lists show at most the first five records. If the current page is a record, this record are shown below. Otherwise, all available merge fields for the selected object are shown without values.

 Name: Burlington Textiles Weaving Plant Generator

[] Merge Field	Value
> \$Organization	
> \$User	
> Account	
{{AccountId}}	0018c00002AXR6IAAH
{{Address_3__c}}	525 S. Lexington Ave Burlington, NC 27215 USA
{{Amount}}	USD 1,363,000.00
{{CampaignId}}	
{{CloseDate}}	2022-12-09
{{Contact__c}}	0038c00002n1zMfAAI
> Contact__r	
{{ContactId}}	0038c00002n1zMfAAI
> CreatedBy	
{{CreatedById}}	0058c000009uCE6AAM

Back

Cancel

Full Speed Edition, Spring '24 Release, Version 2.3.12
Your Full Speed Edition trial switches to Free(style) Edition in a month on 2024-05-22.



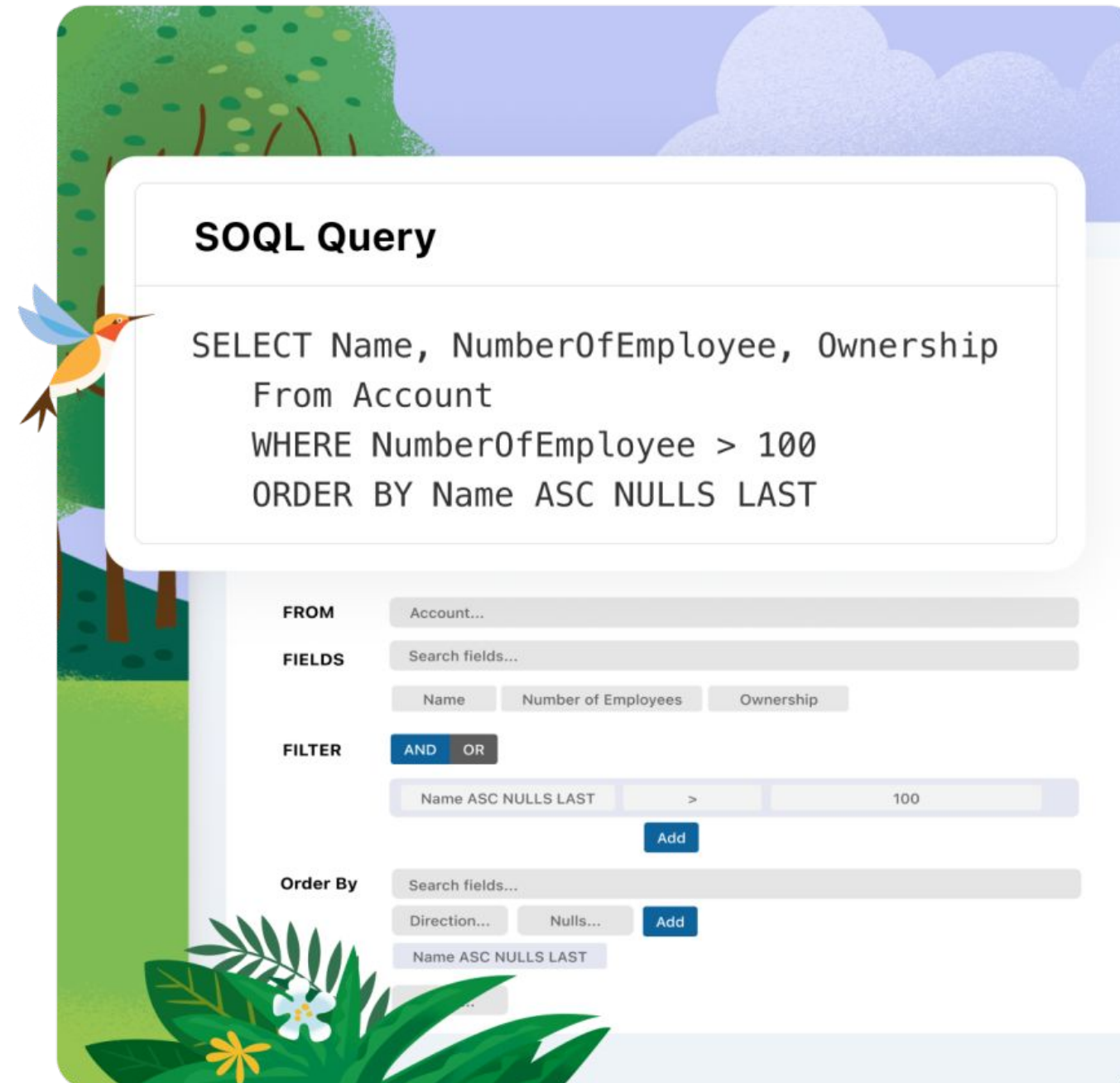
Salesforce CodeBuilder

Cloud Based VS Code and Salesforce CLI

What we love:

- Included with Salesforce
- No Install needed
- Backup your Metadata
- Easily find causes of Error Messages
- Query Builder UI
- Includes AI or add our own
- Save and Run Apex Scripts for regular processes

<https://www.salesforce.com/platform/code-builder/>



Pharos

Logs all errors in your Salesforce

What we love:

- Free Tier
- Easy to Setup
- Catches errors as they happen
- Admin Focused
- Friendly Support Team
- Provides you with data to justify your time (or hiring more help)

The screenshot displays the Pharos interface, which is designed for monitoring and managing Salesforce errors. The interface is divided into several sections:

- Left Panel:** Contains two summary cards. The top card, titled "Todays User Impact", shows a large green number "1". The bottom card, titled "Todays Data Impact", shows a large green number "0". Both cards have tabs for "All Time", "Today", and "More".
- Top Center Panel:** Displays an issue summary for "ISS-00936". It includes a "Summary" section with the text "Error Occurred: This error occurred when the flow tried to create records: REQUIRED_FIELD_MISSING: Required fields ...". Below this is a status bar with tabs for "New", "Triaged", "Actioned", "In Progress", "In Review", and "Completed". The current status is "New". There are buttons for "+ Follow", "Create Ticket", "Link Issue", and "Mark Duplicate". A "Mark Status as Complete" button is also present.
- Center Panel:** Shows a flow diagram under the "Debug" tab. The flow starts with a "Run Immediately" button, followed by a "Request for Proposal Screen" step, then a "Create Opportunity Create Records" step, and finally an "End" step. A table above the flow diagram lists occurrences: "LOG-149598" occurred on "October 9, 2024" by "Pharos Admin".
- Right Panel:** Contains a "Details" section with fields for "Category", "Flow", "Functional Area", "Opportunities", "Priority", "Assigned To", and "Regression". Below this is a "Logs (5)" section listing five log entries. Each entry includes a log ID (e.g., "LOG-149598"), a summary, the date and time it was created, and the type of error (e.g., "Screen Flow").

<https://pharos.ai>



HappySoup

Metadata Dependency Analysis

What we love:

- 100% Free
- Open Source
- Exports to Excel
- Detailed User Instructions

<https://happysoup.io/>

The screenshot displays the HappySoup.io web application interface for an Impact Analysis. The header shows the logo and a menu icon. The main section is titled 'Impact Analysis' and contains a helpful tip about metadata dependencies. Below this, there are input fields for 'Metadata Type' (set to 'Objects & Custom Settings/Metadata Types') and 'Metadata Name' (set to 'Opportunity'). A 'Choose your toppings' section includes a checkbox for 'Object in Metadata Types'. A search button labeled 'Where is this used?' is positioned below the input fields. The interface features three view options: 'Tree View' (selected), 'Table View', and 'Chart View'. At the bottom, there are buttons for 'Download package.xml', 'Copy (Excel)', and 'Copy (csv)'. An 'Expand All' button is also present. The main content area shows a tree structure under the 'Opportunity' metadata type, listing several ApexClass dependencies: AccountHandler, AccountTests, CreateQuoteCommunityFormController, CreateQuoteCommunityFormControllerTest, and OpportunityHelper.

HappySoup.io

Impact Analysis

If you know where a piece of metadata is used (i.e what depends on it), you will know what could break if you make changes to it. [Learn more](#)

Metadata Type:

Choose your toppings: ☐ Object in Metadata Types ?

Metadata Name:

[Where is this used?](#)

Tree View Table View Chart View

[Download package.xml](#) [Copy \(Excel\)](#) [Copy \(csv\)](#)

[Expand All](#)

Opportunity

- ApexClass (17)
 - [AccountHandler](#)
 - [AccountTests](#)
 - [CreateQuoteCommunityFormController](#)
 - [CreateQuoteCommunityFormControllerTest](#)
 - [OpportunityHelper](#)



DevOps/Testing Tools

Automate Manual Processes

What we love:

- Makes Deployments Easier
- Automates Manual Testing
- Free and Paid Options
- Governance reduces breakages
- Levels up your skills and experience
- Tracks changes to your org
- Finds Bugs earlier

*What we don't love:

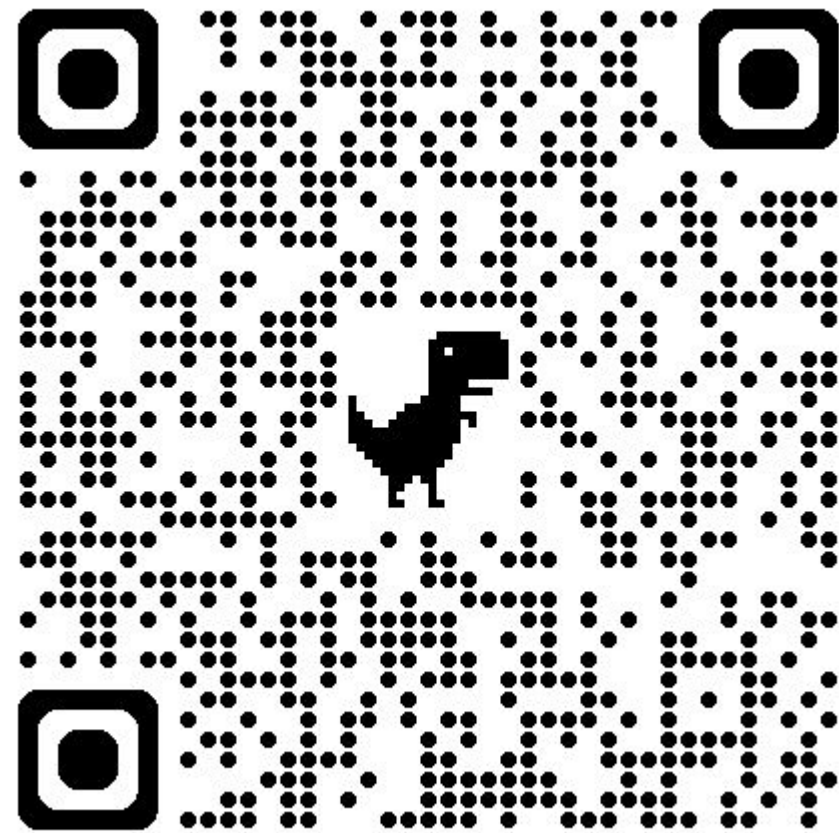
- Super Complex to Initially Setup

- <https://github.com/marketplace/actions/salesforce-deployment-action>
- <https://gearset.com/>
- <https://www.copado.com/>
- <https://provar.com/>
- <https://dws-global.com/salesforce-test-automation/>
- <https://www.tricentis.com/>



What's your favorite app?

<https://forms.gle/C9UGW5L5vZXHKkpD8>



Thank You!

Matt Kaufman

Founder and CEO, MK Partners

@the1mattkaufman

Questions?

