**Items Affected:**

Roles

Profiles

Page Layouts

Future

**Roles:**

The role hierarchy in Salesforce has been simplified to help everyone work through their day to day with limited to no interruption due to hierarchy structure. This will allow for smoother interaction within opportunities as well as cases (when cases are more heavily utilized). From an administrative standpoint the role transition will be huge. Currently we have 187 different roles within our Salesforce instance, of which we are shrinking down to 2 roles for DealChicken operations. Sales will continue to have multiple profiles, but with the new format that is still being worked on for Sales, for every 20 roles we currently have, there will be only 2 roles for. This is going to allow for smoother transitions as they happen or as we need to grow we have a solid framework in place to allow for clear and concise decisions to be made.

**Profiles:**

Another key step to cleaning up our Salesforce instance is cleaning up Profiles. Profiles state what you can and cannot see in terms of pages, page layouts, fields, and how you generally interact with the system. We’ve found numerous times that this is an issue and from an administrative standpoint, impossible to manage. That is why come this release the current 25+ profiles used within DealChicken will be canned into 1 (yes 1) profile. This will allow for uniform collaboration among users, as well as create a standard template for how we interact with the system. This step will also allow for better support for our teams, with less time spent on the back end figuring out what profile/pages you use and making sure that all changes are quick and correct for all.

**Page Layouts:**

The final big piece for this release is that of Page Layouts. Page Layouts tie directly into the profiles and depending on what profile you used to have, it determined the page layout that you saw. On numerous occasions we found users within the same group that had different page layouts and this cut into productivity and caused confusion when looking at someone else’s Salesforce. To eliminate any issues and streamline the process new page layouts have been setup that take everything everyone needs for day to day operations and presents it in a clean fashion. Currently we have over 12 + page layouts just for Operations, and if you haven’t guessed before you can now, they’re all going away for a single page layout. This uniformity has been viewed and accepted by multiple parties within DealChicken Operations and we feel confident you’ll be pleased with the new layout and continue to do excellent work.

**Future:**

Everything being done for this release is to make way for some real exciting things lined up for the coming months. It’s only once some of the simpler things are cleaned, that we can move forward with the real excitement that will allow for you all to use Salesforce like never before. Stay tuned!

Sincerely,

Andrew