



February 2021
Salesforce Best Practices - Long Version

1. Data Integrity

- a. Remove all duplicates before importing data
 - 1. It is easier to remove duplicates from a spreadsheet than merging them in Salesforce.
 - 2. The Import Wizard will attempt to merge duplicate accounts, contacts and leads but you will stand a better chance of a clean import if you clean them yourself.
 - 3. The Data Loader, or Excel Connector, will not attempt to merge any duplicates.
- b. Compare data already in Salesforce before importing more
 - 1. Use the Excel Connector or Apex Data Loader and V-lookup to compare new records against existing records before importing.
 - i. If you have fewer than 10,000 records of the type you want to import, export matching information (like email, phone, company, name, etc. along with the Salesforce record ID.
 - ii. Then do a V-lookup from your import sheet to your exports to see if any return an ID as a match.
 - 2. Consider using a third party app from the AppExchange if you regularly import records and you have too many for the above to be practical.
 - i. Apps like RingLead or Dupe Blocker will check your list against your database before import and flag duplicates.
- c. Do a small import first
 - 1. Import 5-10 records first to make sure they uploaded as expected before importing all records.
 - 2. Be sure to check that zip codes and phone numbers are formatted correctly and that the data is in the right fields.
 - 3. Email addresses must be in a valid email format or the record will not import.
 - 4. Excel CSV files will drop the leading zero in zip codes so pay special attention here.
 - 5. If they all look good, then you can do the main import.
 - i. Be sure that the first imported records are removed from your main list before importing them or you may end up with duplicates.
- d. CSV files do not save formatting

1. After formatting columns for Number, Date, or Zip Code, save the CSV but keep it open when importing or formatting (like leading zeros in zip codes) will be lost.
 - i. Use Excel's special formatting for zip codes and dates.
 2. Date formatting is different for the import wizard and the Data Loader.
 - i. For the import wizard, refer to this [Salesforce knowledge article](#).
 - ii. For the Data Loader, refer to [this Salesforce knowledge article](#) and [this Salesforce Developer Documentation page](#).
 - a. The Data Loader articles also cover time zone differences that you should be aware of.
- e. Use validation rules to maintain your data structure
1. By using validation rules, you can enforce data formatting such as requiring one field when another contains a certain value.
 2. Validation rules are enforced when importing records and can cause individual records to fail upon importing.
 - i. Consider deactivating the validation rules for the object you are importing/updating records on until the import/update is complete.
 3. Validation rules are enforced when Workflows, Flows and Processes run.
 - i. Test your validation rules against these processes.
 4. Consider using the ISCHANGED function on the key field to avoid inadvertent errors.
 - i. For example, on a rule requiring a field when an Opportunity Stage is changed, add ISCHANGED(StageName) to the validation formula.
 5. Be sure to test your rules against all scenarios.
 - i. If you create a rule that says a picklist cannot be changed, what happens if there are blank values in existing records?
 6. Be sure to let your users know when you create new rules so they know what to expect when you activate them.
 7. Salesforce has a list of sample validation rules that you can use as a start or to get ideas from.
 - i. Search for "Examples of Validation Rules" in Salesforce help for the help topic of the same name.
- f. Use "Required Fields" where needed, but don't overdo it
1. On certain objects, required fields may be necessary, such as Phone or Status fields, but if you make every field required, records may not be created or false data may be entered.
 2. It is generally best to use a validation rule to make a field required if the field is not required when the record is first created. For example,

- some custom Opportunity fields may only be required and applicable when the Opportunity reaches a specific stage.
3. Universally required fields (setting the “Required” attribute when creating the field) can prevent a record from being imported if not populated.
- g. Use reports to check data integrity on a regular basis
1. Create reports for your different objects and include the fields that are most important to you. Sort by those columns to do a spot check on their utilization.
 2. For Enterprise and above, you can use free apps from the AppExchange to tell you how complete records are or how much a field is used.
 - i. Field Trip and Percent Complete are both free and will give you a wealth of information on how Salesforce is being utilized.

2. General Setup

- a. Too many fields clutter up the page
 1. A page with many fields becomes unwieldy. Run reports regularly to see which fields are empty. Do you really need them?
- b. Not enough fields can hurt you
 1. Be sure you have the fields available for the data. A second email address in a Description or Note field is about worthless.
- c. Use the right field for the job
 1. A number field is great for calculations or formulas but it will have comma separators. This will not work for a five digit account number.
 2. A text field will hold dates but it will not be able to do any calculations on the date.
 3. Utilize picklists whenever possible to standardize data.
 - i. There is less of a chance for error if the values are already present.
 - ii. Leverage global Picklists for custom picklists which apply to multiple objects.
 - iii. The picklist option “Restrict picklist to the values defined in the value set”, checked by default, ensures users cannot override defined picklist values.
- d. Page layout is important for ease of use
 1. Arrange fields in a logical format with proper sections and standardize them across all your pages and objects. It makes finding and entering data much easier.
 2. For fields that are required or have validations, avoid placing them lower on long pages. It makes it easier to find errors when saving records.
- e. Organize related lists properly
 1. Try to keep the related lists the same across all objects with the

- intention that the most used should be closer to the top.
- £. Lay out your Roles and Profiles before implementing them
 1. Improper Role or Profile assignments can lead to frustration and/or data security issues.
 2. The role hierarchy in Salesforce will not always match your company's hierarchy.
 - i. The Salesforce role hierarchy is intended to be used for record visibility and reporting purposes.
 - ii. Managers will see all records owned by users that report to them but those users below them may not be able to see records owned by users in the same role.
 - iii. Leverage Sharing Settings to open up record visibility across Role groups.
 3. Profiles determine administrative and general permissions that users have (like creating public reports or custom fields) as well as object access.
 4. In Enterprise edition and above, clone the standard profiles and assign users to them, not the standard profiles. Standard profiles no longer have access to custom objects.
 5. Avoid creating too many Profiles with minor differences.
 - i. Use Permission Sets instead.
 6. Support users should probably not have the permission to delete leads or campaigns if they are even allowed to view them.
 - g. Plan before creating custom objects
 1. Sometimes, a new section and a few fields on the detail page will meet your requirements but if you find yourself creating five of the same field (like lookup fields to the same object) because you might need them for some records, then a custom object would be a better solution.
 2. Utilize custom objects when you want to link multiple records to one record or when you need a new data table.
 3. Master/detail fields will allow for roll-up summary data from your custom object to the master object.
 4. You can have two master/detail links per custom object like a custom object called Time Cards that tracks hours against cases and contracts.
 - i. Then you can see the total hours on each case as well as the total hours for all cases on the contract.
 - h. Map your custom Lead fields properly
 1. Each custom field you create should be mapped to the same custom field on the Account, Contact, or Opportunity page or that data will be lost when the lead is converted.
 2. If you have converted leads that have custom fields that were not mapped before they were converted, you can still get that data.
 - i. Create a new custom report and choose the "Leads with

- converted lead information” report type.
- ii. Run the report with the contact, opportunity, and/or account ID’s and your needed fields.
- iii. Export the report and then use the Data Loader or Excel connector to update your contact, opportunity, or account records.

3. General Usage

- a. When using the Global Search, you can search all objects or select which objects you’d like to search
 - 1. The Global Search Results page will display the top results grouped by object.
 - 2. Use the left sidebar to narrow down the results to single objects, which will then allow you to refine your search even further.
- b. Create a new record from its related record
 - 1. When creating a new contact, go to their account and use the New button. When creating a new opportunity, go to the contact and use the New button. This will fill in the linking information for you and eliminate the possibility of associating to a wrong record.
- c. Remember your Recycle Bin
 - 1. If you delete a record, you have 15 days to restore it from the Recycle Bin.
 - 2. The Recycle Bin is available in Classic through the left side of the Home Screen, or through the App Launcher in Lightning.
- d. Utilize List Views
 - 1. On almost every tab, you can create your own list views that will filter on any field you have access to on that object.
 - 2. Administrators should create public list views and set the visibility so that only the users that need the views can see them.
 - 3. Limit the “Manage Public List Views” permission on custom profiles so only designated users can create these, keeping the lists clean and uncluttered for your users.
 - 4. Editing and Mass Editing in list views can save your users time when working multiple records. NOTE: inline editing in list views can only be done when list views are filtered for a single record type.
- e. Utilize Help when needed
 - 1. A question mark symbol at the top right of the page can be used to pull up Salesforce help articles.
- f. Customize your tabs to meet your needs
 - 1. Tabs, such as Home, Contacts and Reports, are a primary way to navigate within Salesforce. If you cannot easily find the tab you need, using Salesforce can become difficult quickly. You can open the App Launcher (grid of dots located at the far left of the navigation bar) to

- view all apps and objects that you have access to.
- 2. You can click the pencil icon at the far right of the navigation bar to customize the tabs and navigation bar for the app that you are currently using.
- 3. Remember that each time you switch applications in Salesforce your tabs will change. For example, the tabs you see in the Sales app will be different than the tabs you see in the Call Center app. So you may want to customize tabs for each application you use.
- g. Use the Private folders wisely
 - 1. If you create a template, report, or dashboard and save it in Private, no one but you will be able to view it including system administrators.
- h. Associate Notes and Files to Cases & Opportunities
 - 1. When adding Notes and Files in Salesforce, add them to the appropriate case or opportunity instead of the contact or account record. If you have parent cases and child cases and are not sure which to associate with, choose the parent case. If you associate Notes and Files to the contact or account they may become hard to find over time as more and more Notes and Files are added to the contact or account.

4. Activity Management

- a. Create Tasks or Events from related records at the lowest level in the relationship
 - 1. For example if you are creating a task associated with an Opportunity be sure to create the task in the Opportunity object rather than in the Account record, or a Contact record, associated with the Opportunity.
 - i. This way, the linking is automatically populated and you reduce the chance of relating to a wrong record.
- b. Log a call during or right after the call
 - 1. If you wait until the end of the day or week to log your calls, not only do you run the risk of forgetting something, but your co-workers will not have access to that information if needed.
- c. Utilize sharing on the Salesforce calendar
 - 1. You can add other users' calendars by clicking the gear icon and Add Calendar to the right of "Other Calendars" on the Calendars tab sidebar.
 - 2. You can also share your calendar with other users and create new calendars from Salesforce objects.
- d. Utilize Activity List Views
 - 1. There is a view called "Delegated Activities" that allows you to see all tasks you have assigned to others. Utilize this to follow up on them.
- e. Utilize the filter in the "Today's Tasks" component on the home page.
 - 1. The filter allows you to see today's tasks, my tasks, overdue tasks,

- tasks completed in the last 7 days, and delegated tasks
- 2. This component is on the home page by default and can be added back to it if it has been removed

5. Lead Management

- a. Set up Matching and Duplicate Rules in your org to avoid creating Leads (and any other records) that already exist. You can configure your duplicate rules to alert users of potential duplicates when creating or editing records. You can also choose whether or not users should be allowed to create the new record when they have been alerted of potential duplicates.
- b. Be sure to understand the lead conversion process
 - 1. Converting leads that are not properly qualified can actually hurt you more than help you, causing your sales reps to spend time pursuing sales that may not be viable.
- c. You have the option to create an opportunity when converting a lead
 - 1. There may be times when you need to convert a lead but are not ready to create an opportunity. Utilize this option instead of creating an opportunity that is not valid.
- d. Maintain your leads
 - 1. Stale leads should be purged or followed up with so your list does not get too unwieldy.
- e. Lead Source
 - 1. The standard “Lead Source” picklist is normally used in conjunction with the standard “Campaign” lookup field when creating new leads either manually, from web-to-lead, or in bulk uploads. The “Lead Source” would be the top category like Trade Show, Web, Mass Email, etc. Then the “Campaign” lookup field can link the lead to the actual campaign when it is created. It is customary to hide the two fields in the web-to-lead form with pre-populated information (like Lead Source = Web & Campaign = Mass Email Feb2011) so that the information is then reportable. You would use a different form for each source and campaign combination. When creating leads manually or bulk uploading, these fields would need to be manually specified. If you use the same web-to-lead form on multiple pages for different campaigns, then the above model will not work. You will need to use a dynamic lead source with a custom field to track the data by URL or some other means. This would need to be passed through to Salesforce by either a 3rd party provider or by code on your web page.

6. Opportunity Management

- a. Be sure to understand the sales process
 - 1. Your sales stages directly affect your sales pipeline and forecast. Be sure you are using sales stages that everyone can agree on.
- b. A Close Date should never be in the past
 - 1. The “Close Date” is your best estimate of when you expect to close the sale. This will change as you work the sale. It should never be set in stone as it affects your sales pipeline.
 - 2. Consider creating a “Wall of Shame” report of all opportunities with a close date in the past, grouped by opportunity owner. Set it to be emailed to your sales reps once a week and let peer pressure do the rest.
 - 3. Automation can also be created to email reps when their opportunities’ close dates are approaching
- c. Keep your opportunities up to date
 - 1. An opportunity that has sat for a week or more without a firm follow-up time set is most likely going to be lost. You should record at least one activity per week (or more) per opportunity, even if it is just an update email.
- d. When using line item Products, be sure to utilize the Quotes feature
 - 1. Send your customers Quotes with line items. This gives them something tangible to get their budget approved for the sale.

7. Case Management

- a. Be sure to have a well-defined case management process
 - 1. Poor case management can actually hurt you more than poor sales management. Once you have that customer, keep them happy.
- b. Touch your cases daily
 - 1. Customers want to know that they have not been forgotten. Be sure to either set a time to contact them (and do not miss it) or send them an update daily to let them know that you are still working on it.
- c. Keep detailed case notes
 - 1. Someone else may have to contact the customer on your case. Make sure they have all the information you have so the customers do not have to repeat themselves.
- d. Only close a case with the customer’s approval
 - 1. Once the case is resolved, ask the customer if it is OK to close it. They should be the one to tell you that it is resolved.
- e. Utilize Escalation and Assignment rules to your best advantage
 - 1. Escalation rules will keep you from failing on your Service Level Agreements with your customers and Assignment rules will make sure that the best person is assigned to the case based on your criteria. Think these through well before implementing them.

- f. Have a fail-safe
 - 1. A process should be in place so that if a support person cannot make it to work, their cases and appointments are still handled.
- g. Set up your Knowledge Base logically
 - 1. A proper knowledge base can save you and your customers considerable time. Be sure to use categories so that your solution articles are easy to find.
- h. Utilize the Self Service Portal, Communities, , Web-to-Case, or Email-to-Case
 - 1. There are times when a customer will want to log a case, or send an email, without calling you. Utilize these features and decrease your handle time.
- i. Know the status of all open cases
 - 1. A service manager (or a lead support rep) should have a report that they run daily to check on the status of all open cases. This will help spot poor support reps as well as stalled cases and help to promote customer goodwill.
- j. Utilize profile or validation rules to limit editing case fields
 - 1. Once a case comment is saved, only an administrator (or support manager) should be able to edit it. Other fields may apply as well depending on your support process.
- k. Utilize picklists whenever possible
 - 1. Use picklists instead of text fields to limit selections and ensure data integrity. Picklist values are also better to report on.

8. Email Templates and Settings

- a. Double check your templates before using them
 - 1. Have another set of eyes check your templates for spelling and grammar errors before using them. This ensures a proper business image.
- b. Organize your templates logically
 - 1. You should have folders for your different (lead, case, contact, sales) templates so that they are easy to find. Utilize folder permissions so that support reps do not have access to lead templates for example.
 - 2. With the introduction of Lightning, we now have both Classic Email Templates and Lightning Email Templates. Classic templates must be stored in Classic Email Template folders (accessed through Setup), while Lightning Email Templates have their own folders (accessed via the App Launcher).
 - 3. Enable Folders and Enhanced Sharing in Setup to allow users to create and share Lightning Email Template folders.
- c. Utilize merge fields properly
 - 1. A merge field pulling opportunity information will not populate if you

send it from a case. Be sure your merge fields are proper for where the template is going to be used.

- d. Standardize your templates
 - 1. Use Letterhead and signatures to standardize (and brand) your email templates. This will give you a better public image.
 - 2. Lightning Email Templates use Enhanced Letterheads, which can be accessed and created via Enhanced Letterheads in the App Launcher.
 - 3. If you are providing attachments with your templates, load the files in a Documents folder (ensuring they are externally available) and then link to them from the template(s). This allows you to update the document, and all templates using it will then use the new version. NOTE: the Documents folder is only accessible in Salesforce Classic. Use Files in Lightning if possible.

9. Sales Forecasting

- a. Set your Role Hierarchy properly before setting up your Forecast Hierarchy
 - 1. This allows for proper roll-up of forecasts and allows you to set forecast managers.
- b. Assign quotas realistically.
 - 1. A quota that is unachievable can damage morale more than push sales. Be realistic in the quotas and make sure that the sales reps agree with them.
- c. Be sure to have a well understood sales process
 - 1. Your sales stages directly affect your sales pipeline and forecast. Be sure you are using sales stages that everyone can agree on.
- d. A Close Date should never be in the past
 - 1. The “Close Date” is your best estimate of when you expect to close the sale. This will change as you work the sale. It should never be set in stone as it affects your sales pipeline and forecast.

10. Report Management

- a. Utilize report folders to manage your reports
 - 1. As your company grows, you will continue to build reports. Use folders to maintain order and permissions on who should view or edit them.
- b. Use the Report Description field
 - 1. A report with a vague title is useless to someone else (or you six months later if you forgot what it was for) so use the description field so all users will know what it is for.

- c. Keep the reports simple
 - 1. Only use the fields needed. Too many fields make the report hard to read and it takes longer to populate the data.
- d. Use well thought out filter criteria
 - 1. You may need to use and/or statements to avoid falling into the trap of “Closed = True and Closed = False” or “Created date = Tomorrow”. Neither of these will return any results.
- e. Export as a “Formatted Report” to retain groupings and filter details
 - 1. If you have a report with grouping, use the “Formatted Report” option when exporting to preserve this grouping when exporting.

11. Dashboard Management

- a. Utilize dashboard folders to manage your dashboards
 - 1. As your company grows, you will continue to build dashboards. Use folders to maintain order and permissions on who should view or edit them.
- b. Set the Running User properly
 - 1. The Running User controls what data is available in a dashboard for all viewers. A system administrator can see more data than a standard user but if the running user is set to the standard user, the system administrator will only see data that the standard user can see.
 - 2. The Running User can be set in Lightning by navigating to the dashboard, clicking the gear icon to the left of Save, then choosing the user in the View Dashboard As section.
- c. Keep dashboards separated
 - 1. As a general rule, it is best to only have one object per dashboard. This means that sales, support, and activity management should each have their own dashboards.
- d. Remember the “Refresh” button
 - 1. Unless you have dashboards scheduled to refresh, they are static and must be manually refreshed or you will be looking at old data.
- e. Customize your home page
 - 1. In Lightning, the Home tab can be customized by going to the gear icon at the top right while viewing the Home page.
 - 2. You can add dashboards, report charts, or numerous other components to the Home page.

12. Workflow and Automation

- a. Be careful with field updates
 - 1. When designing field updates, be careful not to overwrite previous data.

- b. Field updates work from the one to the many in most cases
 - 1. A field update cannot populate a field on an account from a contact but it can populate a field on all contacts from an account.
 - 2. You can create a workflow field update on the opportunity that updates a field on the account but be careful with these since a second opportunity may overwrite the account update from the first opportunity.
- c. Workflow emails will not log an activity
 - 1. To log an activity from a workflow email, you will need to create a second action to create a task as closed when the workflow is triggered.
- d. A user cannot be deactivated if they are part of a workflow
 - 1. Be sure to remove a user from all workflow actions before attempting to deactivate them.
 - 2. Keeping a spreadsheet of all users and the rules (workflow, assignment, escalation, approval, etc.) they are associated with will help when deactivating a user.
- e. Email alerts can become bothersome
 - 1. Think out your email alerts well before implementing them. Too many and they will start to be ignored.

13.Desktop Integration

- a. The first Outlook sync with Outlook Integration & Lightning Sync should be done with an empty folder
 - 1. If you sync with a full Outlook folder, you will most likely end up with duplicate records in both Salesforce and Outlook. By syncing with an empty Outlook folder, Salesforce will populate the Outlook folder with associated data from Salesforce so you will only have one copy of each record and each Contact will be associated with the appropriate Account.
- b. Associate emails properly
 - 1. When sending and adding from Outlook using the Outlook Integration, be sure to also associate the email to the proper account, case, or opportunity.

Yet, one more Best Practice:

Have you ever wanted to deactivate a user in Salesforce but were not able to because they were part of a case escalation rule, an email alert, an assignment rule, or an approval process?

If you've been in this situation and you have a sizable Salesforce instance then you know that you've got to hire Jim Rockford or Thomas Magnum to figure out exactly which case



escalation rules, email alerts, assignment rules and or approval processes need to be modified before you can deactivate the user. But fictional private investigators from television shows don't know Salesforce so you've got to figure it out on your own (or call StarrData), and you probably have more important things to do.

So what do you do? For larger companies, or those that have many of these processes, we recommended that you create a spreadsheet of the users and the processes that they are attached to. Then when you need to deactivate a user you can search your spreadsheet for the user name and match it to the process that needs to be modified.

Keep in mind that if the process notifies a queue or group, the user will need to be removed from those as well.

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