

Venturelytic

Admin Manual



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1. Salesforce Resources

Salesforce has a very extensive overview of online resources that you can utilize to support your users as best as possible to solve their business challenges. We encourage you to get familiar with the following resources:

1. Trailblazer Community: the central place for everyone using the Salesforce platform to learn, connect and give back together. From here, you can also access the extensive help documentation available.



2. Trailhead: a dedicated learning environment for any type of user of any kind of Salesforce product, that encourages you to acquire new skills on the Salesforce platform on a step by step basis.

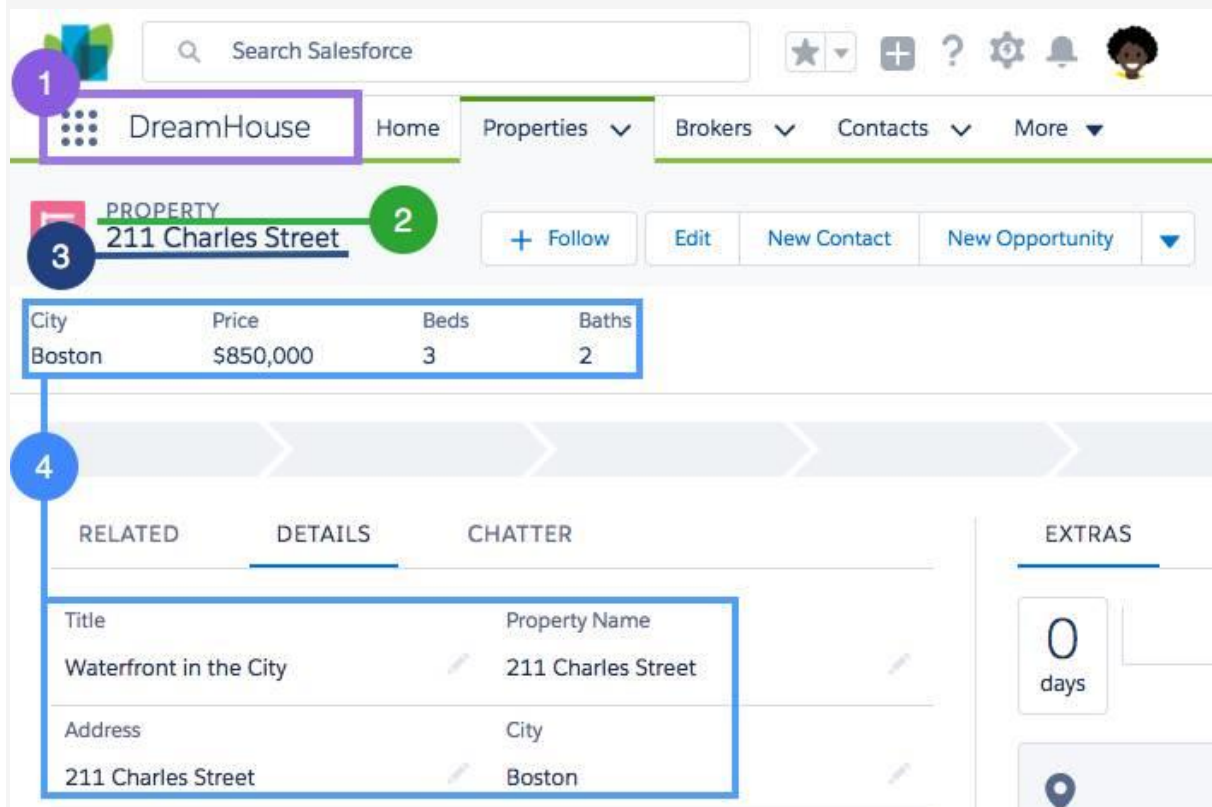


You can manage all these Salesforce support resources with your Trailblazer.me account, which is your unified profile across the Salesforce ecosystem. With Trailblazer.me, you have one place to manage your settings and can access multiple Salesforce-related sites with one login.

2. Salesforce Terms

As an admin of Venturelytic, it is important to understand the basics of the Salesforce platform. There are a few terms that are used throughout this guide that you should know about. Salesforce illustrates this with an own example used at Trailhead:

Let's take a look at a page from the DreamHouse app to define some of its important elements and how they relate to the database.




The screenshot shows the Salesforce DreamHouse app interface. Numbered callouts identify key elements:

- 1:** The App Launcher (grid icon) in the top left corner.
- 2:** The object name 'PROPERTY' and the record name '211 Charles Street'.
- 3:** The record details table showing fields like City, Price, Beds, and Baths.
- 4:** The 'DETAILS' tab and the related fields table showing Title, Address, Property Name, and City.

City	Price	Beds	Baths
Boston	\$850,000	3	2

Title	Property Name
Waterfront in the City	211 Charles Street
Address	City
211 Charles Street	Boston

1. An **app** in Salesforce is a set of objects, fields, and other functionality that supports a business process. You can see which app you're using and switch between apps using the App Launcher ().
2. **Objects** are tables in the Salesforce database that store a particular kind of information. There are **standard objects** like Accounts and Contacts and **custom objects** like the Property object you see in the graphic.
3. **Records** are rows in object database tables. Records are the actual data associated with an object. Here, the 211 Charles Street property is a record.
4. **Fields** are columns in object database tables. Both standard and custom objects have fields. On our Property object, we have fields like Address and Price.

Another important term that's hard to capture in a picture is **org**. Org is short for organization, and it refers to a specific instance of Salesforce. The image here is taken from DreamHouse's org. Your company can have one or multiple orgs.

This specific Trailhead can be found at:

https://trailhead.salesforce.com/content/learn/modules/starting_force_com/starting_intro

3. Administrator and Super User Roles

The administrator

The Salesforce administrator—or “admin” is a Salesforce user with system administration duties and other super powers. Admins are responsible for setting up Salesforce for their organizations and making sure it runs smoothly.

Admins have special permissions. For example, they can add user accounts and specify what people can see and do in Salesforce. For more information, take a look at:

https://help.salesforce.com/articleView?id=sf.basics_understanding_administrator.htm&type=5

The Super User

Venturelytic works closely with its client’s admins. In larger teams, it might be helpful to have more than one user with super powers. Therefore, Venturelytic created Super Users, or, as Salesforce calls them, delegated admins.

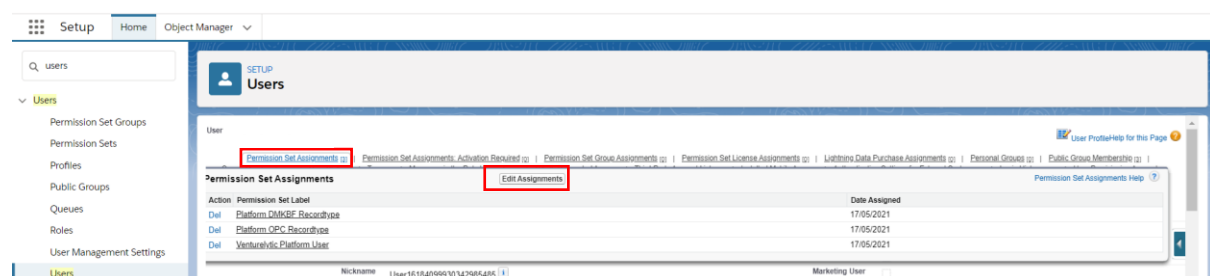
These delegated admins have a set of additional rights compared to regular users, such as:

- Create and edit users
- Change organization-wide list views
- Manage and customize custom objects¹

Assigning a Super User

The admin can create a Super User by following these steps:

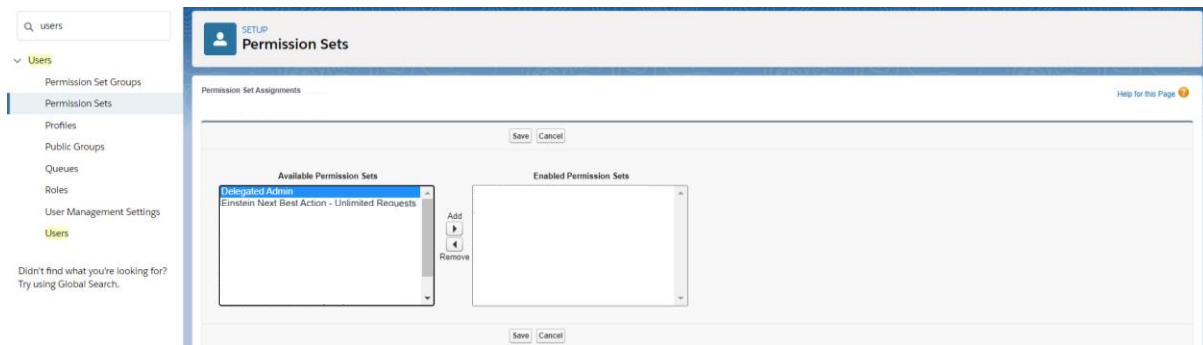
1. Navigate to Users in the Setup
2. Click on the particular user that you want to make a Super User
3. Hoover over the “Permission Set Assignments” button on the top left of the user profile, and click on “Edit Assignment”



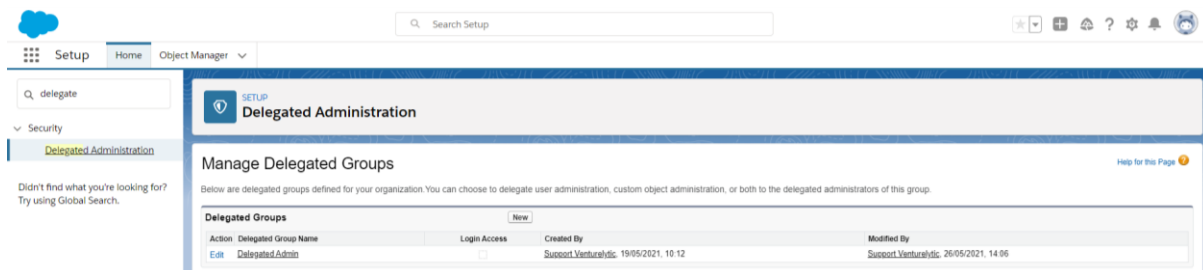
¹ Custom objects are objects that Venturelytic create to store information that's specific to your company or industry, and not standard Salesforce functionality. The objects Account and Contacts are standard Salesforce objects and, therefore, can only be edited by the admin. For more information, take a look at the following Trailhead:

https://trailhead.salesforce.com/content/learn/modules/data_modeling/objects_intro

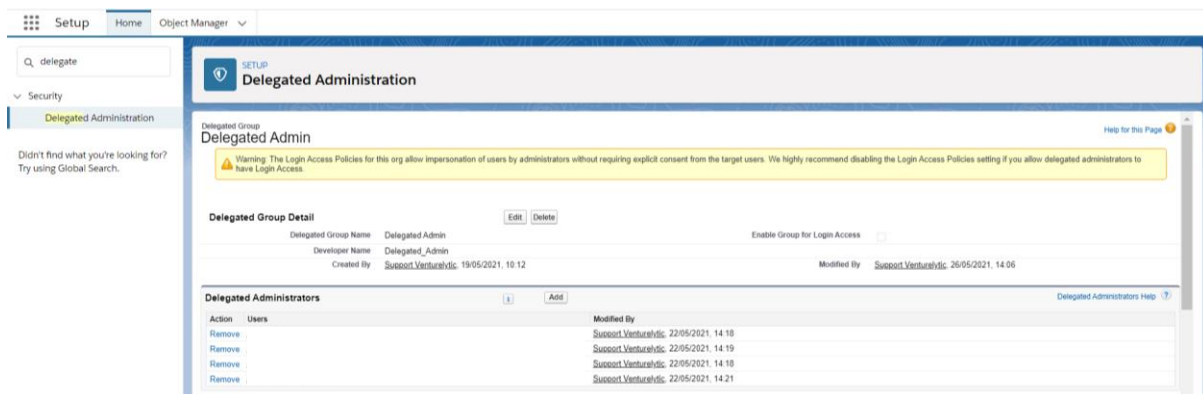
4. Select the "Delegated Admin" permission set and add that to the Enabled Permission Sets. Click Save.



5. Use the search pane on your left to navigate to the "Delegated Administration" title.



6. Add the particular user to the list of Delegated Administrators.

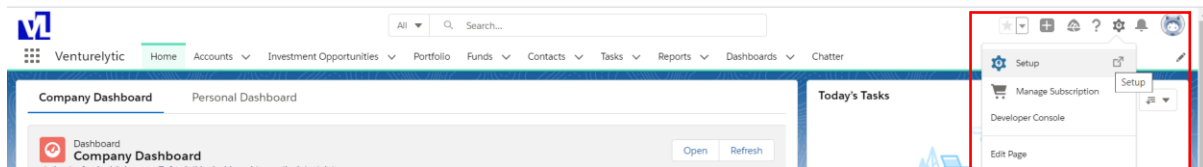


7. Now, you're finished. The assigned users are now Super Users.

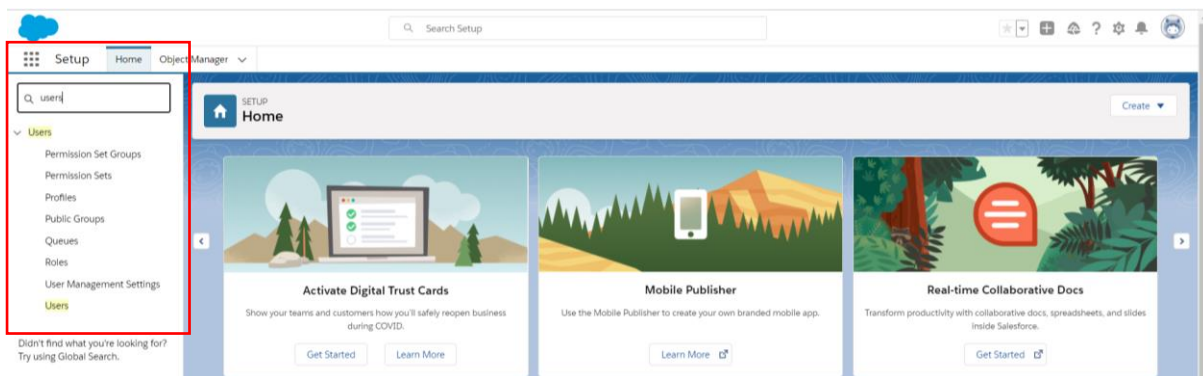
4. User Management

For admins in Venturelytic, the most important aspects of user management are listed below, together with the Salesforce documentation for more specific instructions:

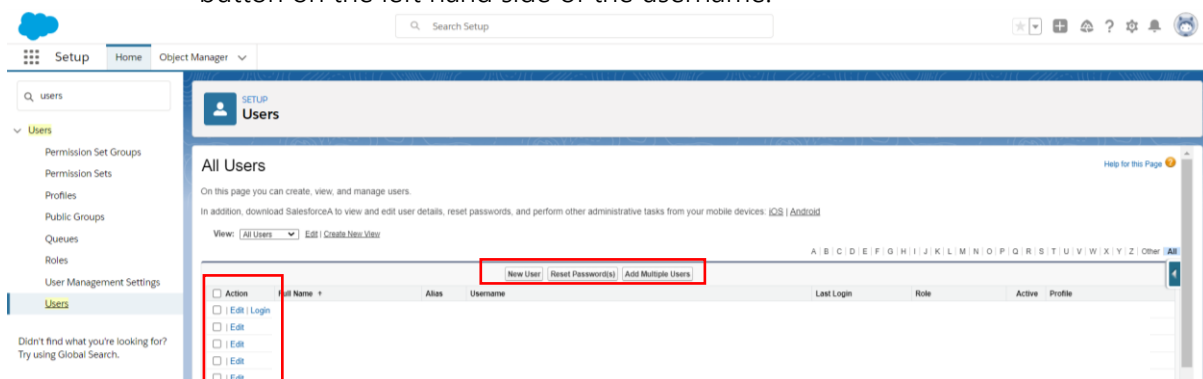
1. Creating users
 - i. Navigate to Setup on the top right of your screen



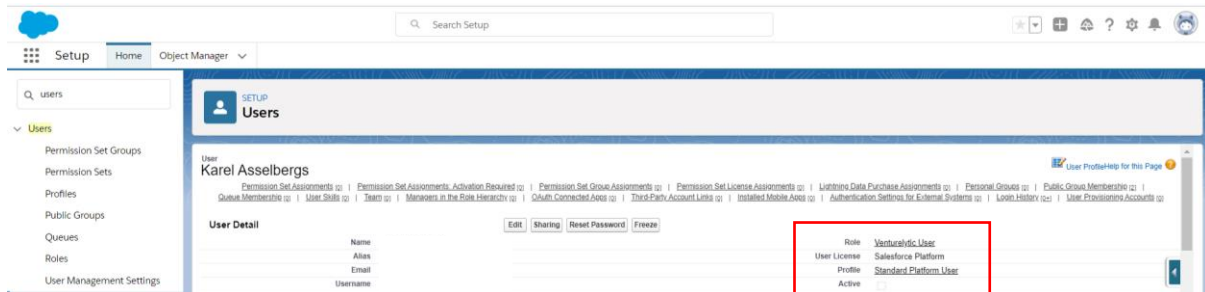
- ii. Search for "Users" in the search bar on the top left of your screen from within Setup, and click on "Users".



- iii. You have the option to create (a) new user(s) or reset password(s) from the buttons on top of the user list. If you want to edit a specific profile, the edit button on the left hand side of the username.



- iv. When creating a new user, make sure to select
 - i. "Venturelytic User" as role
 - ii. "Salesforce platform" as User License
 - iii. "Standard Platform User" as Profile



For more information on creating users, see:

https://help.salesforce.com/articleView?id=sf.adding_new_users.htm&type=5

2. Deactivating users

https://help.salesforce.com/articleView?id=sf.how_to_deactivate_users.htm&type=5

3. Resetting passwords

https://help.salesforce.com/articleView?id=sf.mc_es_reset_user_password.htm&type=5

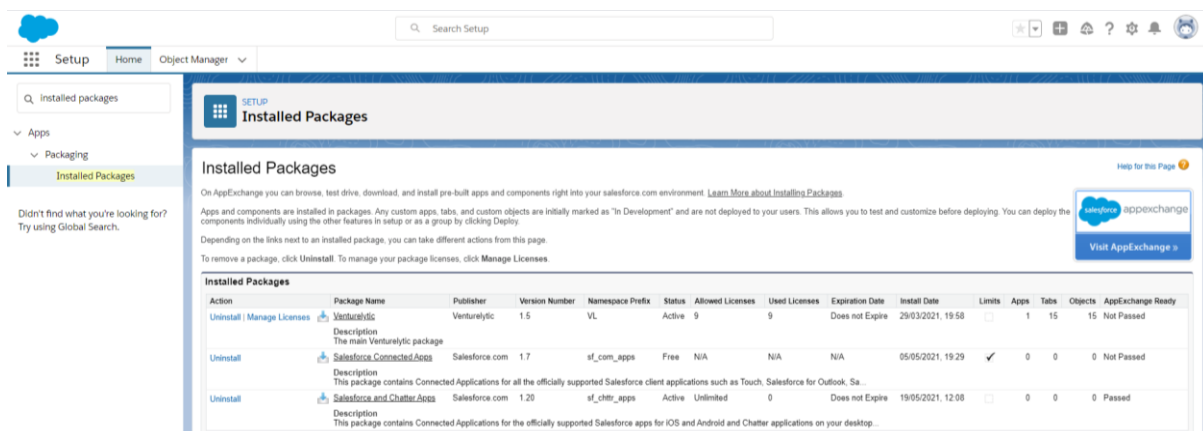


5. Add Venturelytic Package

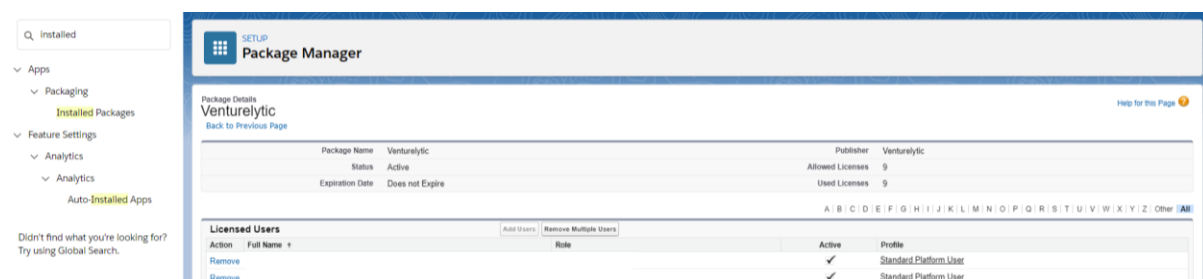
Venturelytic is a so-called “managed package” on the Salesforce platform. A managed package is a collection of application components that are posted as a unit on AppExchange that third parties other than Salesforce, like Venturelytic, can provide directly to end users.

After creating a new user, the user will initially only have access to the Salesforce Platform. The client’s administrator has to perform an additional action to give users access to the Venturelytic app from within Salesforce. It can do so via the following steps:

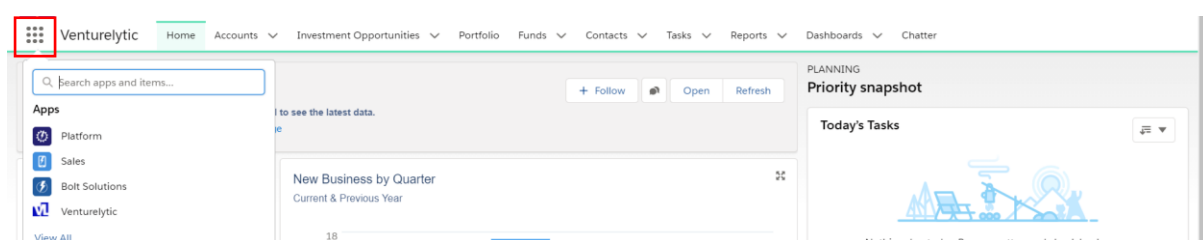
1. Navigate to Setup on the top right of the page
2. Search for “installed packages” on the left hand side of the search panel
3. Here, you find an overview of the installed packages for your org



4. Click on “manage licenses” next to the package name of Venturelytic



5. Select the users you want to give access to Venturelytic by clicking on the button “Add Users”
6. Users can now access the Venturelytic app from the App Launcher on the top left hand side of their screen.



6. Record Types

Venturelytic works with three different records types on its Account object, for the purpose of creating a custom user experience for each of these types, that all have their own role within the ecosystem of an investor.

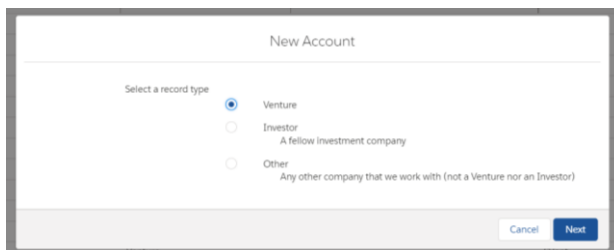
According to Salesforce documentation:

"Record types let you offer different business processes, picklist values, and page layouts to different users. You might create record types to differentiate your regular sales deals from your professional services engagements, offering different picklist values for each. Or you might display different page layouts for your customer support cases versus your billing cases."

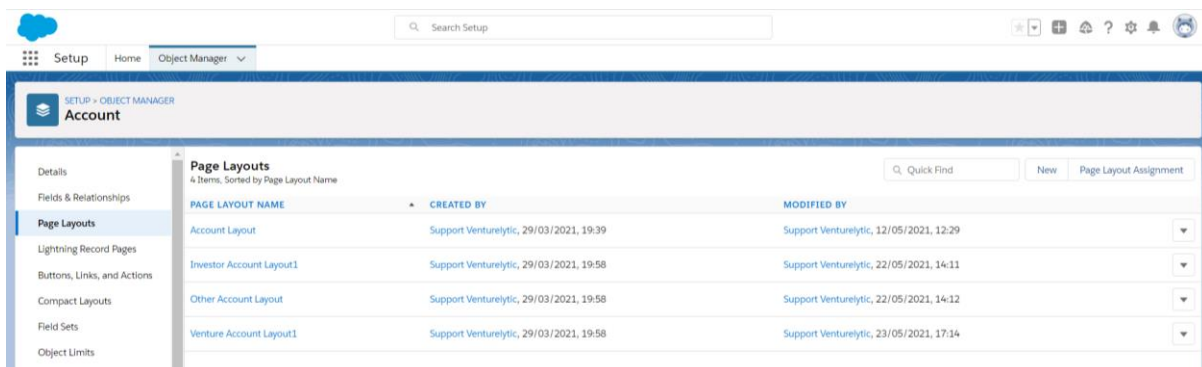
Account Record Types

Venturelytic distinguishes the following Record Types on the Account object:

1. Venture (accounts)
2. Investor (accounts)
3. Other (accounts)



Each of these record types have a different Page Layout assigned to them, as you can see in the figure below. Be aware of these record types when using the Object Manager, as explained in Chapter 7.



PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account Layout	Support Venturelytic, 29/03/2021, 19:39	Support Venturelytic, 12/05/2021, 12:29
Investor Account Layout1	Support Venturelytic, 29/03/2021, 19:58	Support Venturelytic, 22/05/2021, 14:11
Other Account Layout	Support Venturelytic, 29/03/2021, 19:58	Support Venturelytic, 22/05/2021, 14:12
Venture Account Layout1	Support Venturelytic, 29/03/2021, 19:58	Support Venturelytic, 23/05/2021, 17:14

7. Object Manager

Salesforce lets you customize the Venturelytic object model with features like custom fields and page layouts. These objects are available from the Object Manager in Setup.

The following activities are most used by Venturelytic Admins:

1. Creating custom fields
2. Change existing fields
3. Adding fields to the Page Layout
4. Creating or changing picklist values

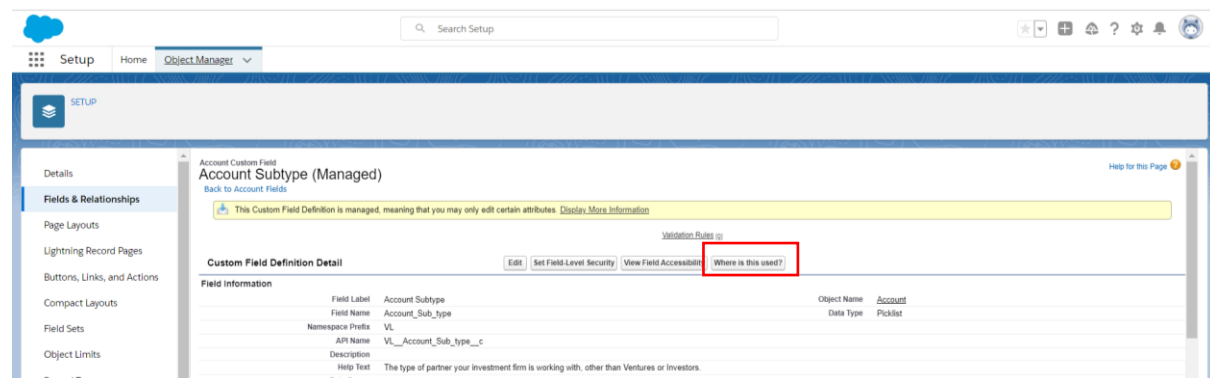
Creating Custom Fields

There is extensive documentation available on the creation of custom fields. The following Trailhead walks you through:

<https://trailhead.salesforce.com/en/content/learn/modules/custom-fields-quick-look/create-a-custom-field>

Change Existing Fields

Names, values and formulas of existing Venturelytic fields can be changed by an admin. When changing these fields, we strongly advise you to always check where these fields are used within Venturelytic, in order to prevent you from making changes that affect other features within Venturelytic as well, such as reports. In order to do so, click on the “Where is this used?” button when standing on a particular field of choice.



Adding Fields to Page Layout

Page Layouts in Salesforce allow you to customize the design of detail pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom object's detail and edit page.

The following Trailhead walks you to the Page Layout feature of Salesforce and allows you to create custom page layouts on objects such as Accounts or Investment Opportunities.

https://trailhead.salesforce.com/en/content/learn/modules/lex_customization/lex_customization_page_layouts

Be aware that Venturelytic has multiple page layouts for the Account object, since it works with three different record types.

Change Picklist Values

As referred to in the section on Changing Existing Fields, you have the opportunity to change values of existing fields to bring them in line with your internal processes. Salesforce created a specific step by step instruction process that helps you changing values of fields with a picklist type in particular.

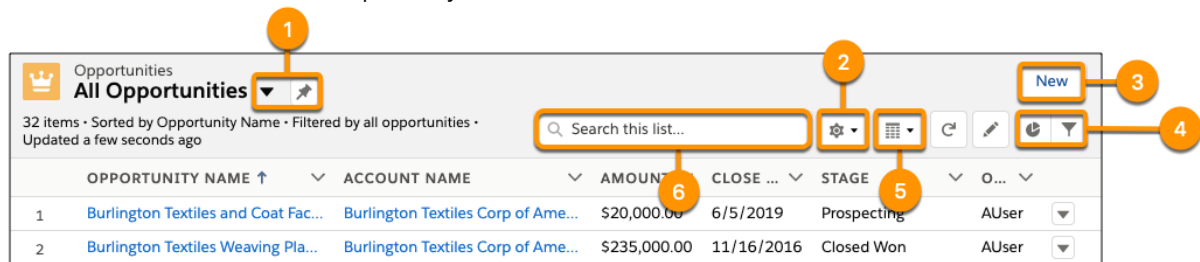
https://trailhead.salesforce.com/en/content/learn/modules/picklist_admin/picklist_admin_manage











8. List Views

When you need an easy, intuitive way to sort, prioritize, and analyse your Venturelytic records, check out list views. List views help you get organized and make the most out of your records, without having to create and run reports. You can even edit data quickly right from your list. And once you've found a list view you use all the time, you can pin it for even easier access.

Salesforce summarizes the options you have with list views as follows:



- Select a list view from the dropdown menu. Pin a list with  to set it as your default (1).
- Edit, delete, or create a list view using the List View Controls menu  (2).
- Create records directly from a list view (3).
- View a list in different ways. Visualize list view data using charts with  and refine which records are displayed using filters with  (4).
- Depending on the object, you can switch between the standard table view , the Kanban view , tile view , and split view  (5).
- Search a list view for the data you need (6).

Note: users can only edit records inline (within the list views), IF there is a filter set on the "Record Type" field.

For more information, check out the following resources to create or change list views for your organization:

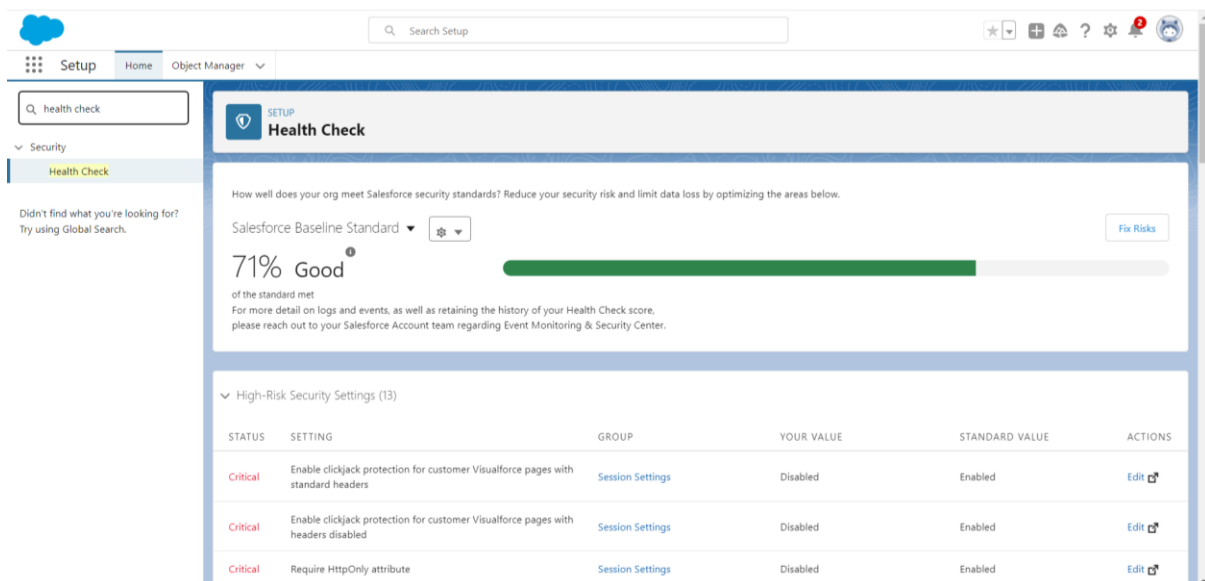
- https://help.salesforce.com/articleView?id=sf.basics_understanding_list_views_lex.htm&type=5
- https://trailhead.salesforce.com/en/content/learn/modules/lex_customization/lex_customization_list

9. Security

For an in depth overview of the security measures Venturelytic clients could take, see the [Trust Guide](#) on our Customer Success Portal.

Two of the most practical measures administrators could take are:

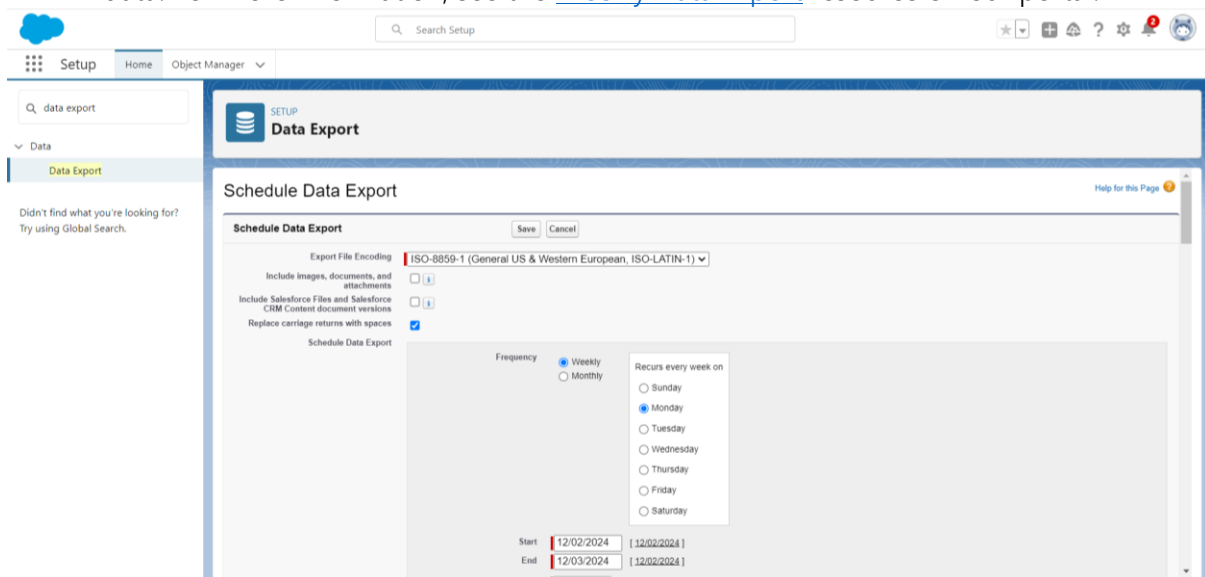
1. Creating a workflow around the Salesforce's "Health Check" feature. Our advice: Plan in a recurring meeting with the person within your organization responsible for IT, to walk through the security settings.



The screenshot shows the Salesforce Health Check interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. The left sidebar shows the 'Security' section with 'Health Check' selected. The main content area displays the 'Health Check' status as '71% Good' with a green progress bar. Below this, there's a section for 'High-Risk Security Settings (13)' with a table listing various settings.

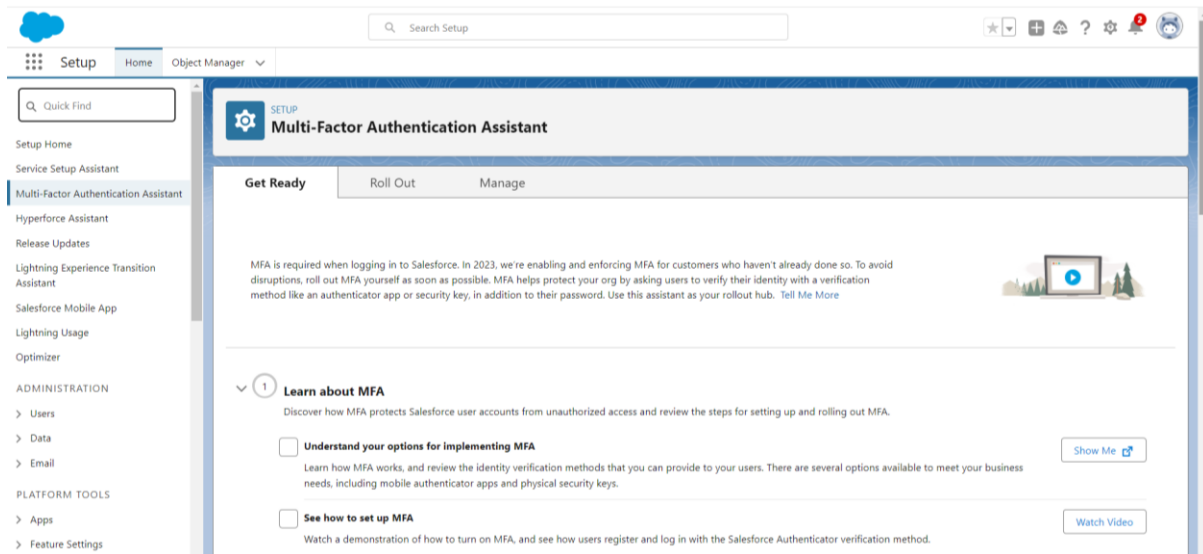
STATUS	SETTING	GROUP	YOUR VALUE	STANDARD VALUE	ACTIONS
Critical	Enable clickjack protection for customer Visualforce pages with standard headers	Session Settings	Disabled	Enabled	Edit
Critical	Enable clickjack protection for customer Visualforce pages with headers disabled	Session Settings	Disabled	Enabled	Edit
Critical	Require HttpOnly attribute	Session Settings	Disabled	Enabled	Edit

2. Create a Data Export Schedule, allowing you to periodically export your most important data. For more information, see the [Weekly Data Export](#) resource on our portal.



The screenshot shows the Salesforce Data Export interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. The left sidebar shows the 'Data' section with 'Data Export' selected. The main content area displays the 'Schedule Data Export' form. The form includes options for 'Export File Encoding' (ISO-8859-1), 'Include images, documents, and attachments' (checked), 'Include Salesforce Files and Salesforce CRM Content document versions' (checked), and 'Replace carriage returns with spaces' (checked). The 'Frequency' is set to 'Weekly', and the 'Start' date is 12/02/2024 and the 'End' date is 12/03/2024.

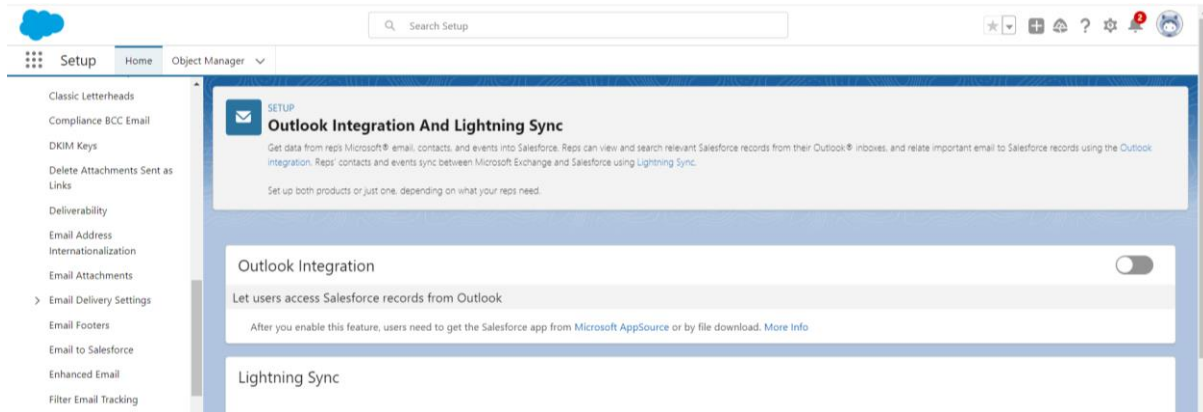
Last but not least, if you haven't done already, make sure to roll-out Salesforce's multi-factor authentication.



For more measures, please take a look at Venturelytic's Trust Guide.

10. Manage Email Integration

Admins are able to set-up and manage Salesforce's integrations with your email providers. Please take a look at our articles on setting up an [Outlook](#) and [Gmail](#) integration for your org.



11. Venturelytic Support

Questions that admins and key users cannot answer within their funds, can be submitted via our Customer Success Portal. Venturelytic will think along with you on the challenge at hand.

You can find our portal [here](#) or via our website.

