Addendum: Salesforce Customization Process

1. Customization requests are routed to The System Administrator.
2. As a rule, these requests are related to budgeted initiatives (which are laid out in the project plan), not ad-hoc.
3. They are approved or denied by the Salesforce Committee (The System Administrator, Trainer, QA Manager, Digital Marketing Manager, and Project manager with the Executive Sponsors providing executive oversight). Flat out denials are unlikely and would definitely be run by the Executive Sponsors. In most cases, there is a negotiation involved to find the most useful solution that fits into the overall Salesforce capabilities and planning.
4. The System Administrator works with the requestor and the committee to implement.
5. The Lead trainer trains.

There are two key concepts that need to be considered when customizing Salesforce:

1. **The overarching goal is to manage constituents. The types of interactions that we have with constituents are attributes of those relationships.** Therefore, customizations should take place at deeper levels than the parent account type or contact type. They should be implemented as options that better define relationships or track information associated with them. For example, it is unlikely that we will ever add an additional account type, and possible that we will remove the "funder" type and track information about funders in a different manner, such as under the "Relationship to Goodwill" selection. The consultant, who created that type, questioned whether it belonged there.

2. **We base our customizations on Salesforce logic. We do not bend Salesforce logic to support our model** (beyond what's been done to support tracking individuals)**.** So, for example, it might logically seem that, if we were customizing the tracking of material donors, we would want a "Donations" tab. But we will modify the existing Opportunities tab, as Salesforce has default reporting assumptions based on use of that tab.

Overall, since Salesforce is a multi-user, multi-purpose system, changes to the functionality and appearance have to be considered on a broader level than how they serve any particular project. In addition to the agency oversight on each customization, the limitations of Salesforce have to be considered. There is a limit on the number of customizations that can be made. And, at the current time, we have a maximum of 50 user licenses (see note below).

Customizations primarily have to be requested of the system developer, as that person knows the most about what can be done and what should or shouldn't be done. Since customizations have repercussions for data entry, reporting and training, they need vetting and discussion by the appointed advocates for each function. This insures that any changes made will be properly designed to support the usage of the system.

The representatives on the committee as of this writing are:

System Development: The System Administrator
User Input: The Digital marketing Manager
Reporting: The Quality Assurance Manager
Training: The Lead Trainer

Requests can be made directly to The System Administrator. The System Administrator will not implement them until they have been discussed by at least three of the committee members (Since I'm the fifth committee member, I can fill in for a missing perspective, if required. This would be in cases where we are either under a limited time frame, or the magnitude of the request isn't severe).

The System Administrator never makes changes without testing them first in a "sandbox" copy of our installation, so all changes are thoroughly tested and feedback can take place without disrupting business use.

Only three people have rights to perform customizations: The System Administrator, Database Administrator and Project manager.