

7 DATA CHALLENGES FACED BY SALESFORCE® ADMINS & DEVELOPERS

Could Admins use some "Helpers?" Absolutely.

Passage Technology's Helper Suite apps extend Salesforce capabilities without coding, so admins and developers can focus on the organization's key goals.



83%
of business buyers expect companies to use new technologies to create better experiences



87%
of Salesforce customers deploy add-on applications from the Salesforce AppExchange

#1 Accessing real-time, actionable data for business processes



Whether your data is in a standard or custom object, or an AppExchange application, [Rollup Helper](#) produces results that can be used in workflow rules, validation rules, or formula fields.

#2 Enhancing workflows with the real-time data



Combine the target rollup fields that [Rollup Helper](#) calculates with workflow rules. For example, when projects go over budget or are delayed, you'll want to have access to this information at the project level to use in a workflow rule.

#3 Finding relevant information for building & running reports



[Lookup Helper](#) can relate all of the business's important information by leveraging standard Salesforce related lists and lookup hover-over capabilities. It also works with standard and custom objects.

#4 Avoid creating duplicate records and data confusion



[Lookup Helper](#) relates records based on Admin criteria, so users don't need to manually fill in lookup fields. It automatically searches for existing matches, reducing cases of users not finding the record and creating a duplicate.

#5 Managing data storage space & strategy



[Storage Helper](#) safely mass deletes data for any standard or custom object(s), helping reduce your Salesforce Data Storage costs. It backs up all of the Salesforce records that it deletes to a .csv file before the deletion occurs.

#6 Developing more efficient training & user adoption



[Prioritization Helper](#) helps uncover and prioritize usability issues inhibiting adoption when using Salesforce or any new system. It helps with user adoption by getting teams on the same page. Prioritize actions, or facilitate group decisions.

#7 Connecting all of a contact's information & records

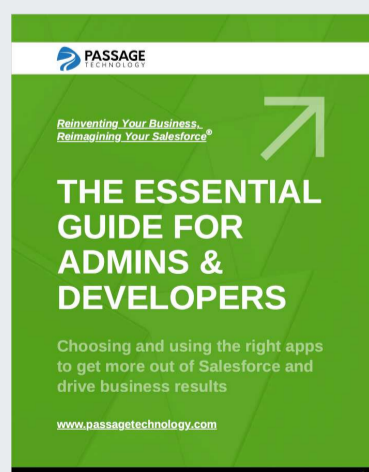


[Helper Suite](#) apps automate the Individual Object in Salesforce to compile all information about a person from their Lead, Contact, Person Account, or custom object records.

Download for Free: [The Essential Guide for Admins & Developers](#)

For more insights, check out this guide from our series: [Reinventing Your Business, Reimagining Your Salesforce](#).

www.passagetechnology.com/en/essential-guide-for-salesforce-admins-developers



Statistical Sources:
<https://www.salesforce.com/form/conf/state-of-the-connected-customer-3rd-edition/>
<https://www.salesforce.com/news/press-releases/2017/10/24/salesforce-launches-new-appexchange-a-faster-and-smarter-way-to-tap-into-the-power-of-the-worlds-leading-enterprise-cloud-ecosystem/>



www.passagetechnology.com



Individual Apps Available in the Salesforce AppExchange or [Get Bundle Pricing for Helper Suite](#)