

Enhancement Manager for Salesforce® Support Documentation

About Enhancement Manager for Salesforce®

Enhancement Manager for Salesforce® is a free, unmanaged package application. Developed by Redpath Consulting Group, the app documents, manages and tracks your Salesforce roadmap and user support tickets directly in the Salesforce platform.

Enhancement Manager comes with one, lightweight custom object that gives Salesforce users the ability to submit Enhancement Records, update and track their progress.

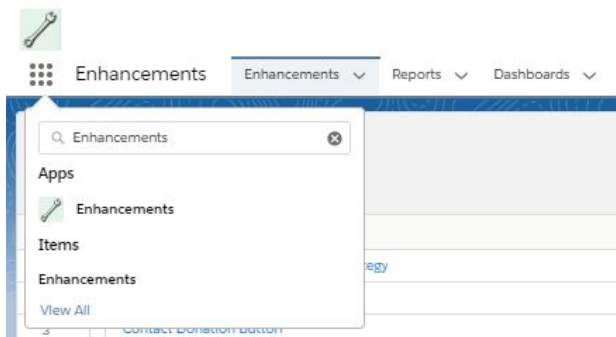
The **Enhancement Manager Dashboard** visualizes your Salesforce Enhancement Roadmap, guides Salesforce project discussions and gives you a single view to review documentation of completed work.

Enhancement List Views and Reports allow you to easily sort, update, and manage Enhancement requests.

Getting Started with Enhancement Manager

Install Enhancement Manager into your Salesforce instance [this link](#).

After installing the app, navigate to the “Enhancements” App from the Salesforce App Launcher:





Simplify | Accelerate | Transform

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Enhancement Record

Create an Enhancement Record to track Salesforce ideas, questions, issues and to-dos.

The screenshot shows the Salesforce 'Enhancement Record' interface for a record titled 'Accounts no Contacts'. The interface includes a top navigation bar with 'Enhancements', 'Reports', and 'Dashboards' menus. A search bar is located in the top right. The record details are displayed in a card view with a progress bar at the top showing stages: Submitted, In Review, Approved (highlighted), In Progress, User Acceptance, Rejected/Withdrawn, and Completed. A 'Mark EM Stage as Complete' button is visible. The main content area is divided into two columns. The left column contains fields for 'Type' (Task), 'Enhancement Name' (Accounts no Contacts), 'EM Description' (157 HH Accounts with no Contacts), 'EM Solution', 'Area' (Data Model), 'Due Date' (7/15/2020), 'Priority' (High), and 'Request Management' (EM Stage: Approved, Approved By: Stephanie King, Assigned To, Request Support, Estimated Hours: 7). The right column contains 'Files (1)', 'Notes (0)', and a 'Chatter' feed. A 'Share' button is highlighted in the Chatter feed. Numbered callouts (1-6) point to specific elements: 1 points to the 'Type' field, 2 points to the 'Approved' stage in the progress bar, 3 points to the top right navigation icons, 4 points to the 'Files (1)' section, 5 points to the 'Notes (0)' section, and 6 points to the 'Share' button in the Chatter feed.

1. Fields

Enhancement Request Details

- Type - Categorize Enhancement Request Records
 - Feature Request: ideas to expand and improve Salesforce functionality
 - Bug/Error: log error messages or similar malfunctions
 - Question: ask questions about Salesforce functionality
 - Data Problem: log data issues encountered in the system
 - Task: Record a Salesforce maintenance task to-do
 - RISK: Note a project Risk when it arises; what complications or factors may affect timelines and plans for your Salesforce Enhancement roadmap? Discussions and resolutions of noted Risks can be managed and mitigated here.

- Enhancement Name: Brief title of Enhancement need
- EM Description: Detailed description of the idea or issue
- EM Solution: Record of the decisions, solutions, & customizations used to resolve the Enhancement Request. This field serves as a form of DOCUMENTATION of work done in your Salesforce system!
- Area: Tag/Descriptor used for grouping with like requests (ie. “Opportunities”)
- Priority: Set a priority to ensure that higher priority items get first attention
 - Note that if Stage=CRITICAL, an email alert is sent to the Assigned User*
- Due Date: Set a due date to place Enhancement Request on your Salesforce “Roadmap”. Due dates may be updated as needed to manage roadmap and next steps
- URL: If there is a record or report URL that illustrates or supports the Enhancement Request, enter it here

Managing Enhancement Request Records

- EM Stage: track progress on the Enhancement Request, from Submitted to Completed.
 - Submitted: Default stage when an Enhancement Request is created
 - In Review: Assigned User or Admin has taken a first look, and may have entered initial notes
 - Approved: Decision-maker has approved the Enhancement Request for work
 - In Progress: Assigned User is working on the item
 - User Acceptance: Assigned User indicates that item is believed “Complete”. User Acceptance items will be displayed on the Enhancement Manager Dashboard - these are “on deck” to be marked complete. At the next review meeting, UA items should be reviewed as needed: demo, discussion, etc. If all parties agree that the item is complete, it is marked complete. If additional work is needed, take notes in Chatter and move the stage back to “In Progress.” Update the Due Date if appropriate.

- Rejected/Withdrawn: Decision maker has indicated that action will not proceed on this item. Ideally, include a note as to why this decision is made.
- Completed: This Enhancement has been delivered.
- Assigned to: Salesforce User responsible for taking action on this item. May be changed throughout the life cycle of the request if different users take the lead at different stages.
- Request Support: When this box is checked, an email alert is sent to the Assigned User*
- Estimated Hours: This number field can optionally be used to estimate effort and budget for future project work
- Approval Date: Automatically populated when Stage="Approved"
- Approved By: Automatically populated when Stage="Approved"
- Completed Date: Automatically populated when Stage="Completed"

2. Path

A visual representation of the "Stage" picklist; can be used to update the Stage with a quick click.

3. Mark Complete

Use this "Quick Action" button to efficiently update Solution notes and mark Stage=Complete.

4. Files

Attach files as needed to support an Enhancement request. I.e. Data spreadsheets, etc.

5. Notes

Used only rarely, if there is a need to enter especially wordy or heavily formatted commentary supporting an Enhancement Request.

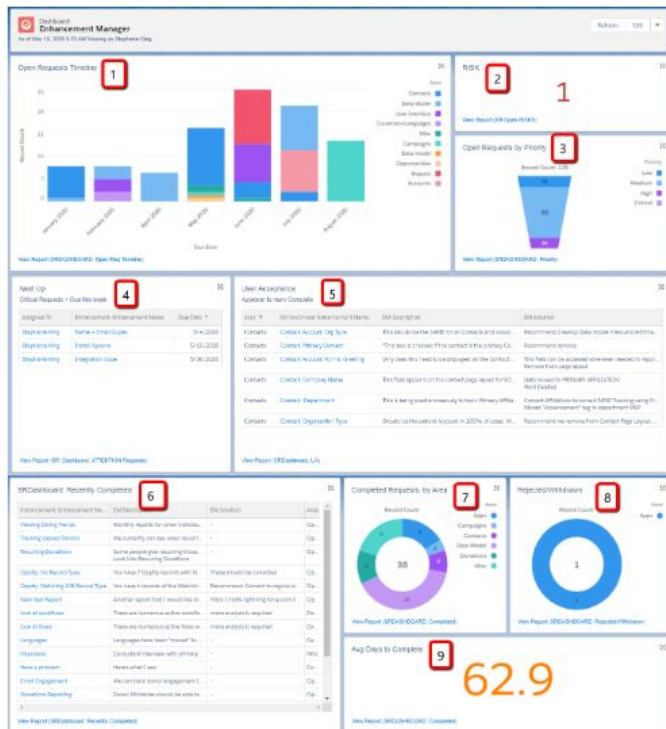
6. Chatter

Use Chatter generously to support progress on Enhancement Requests! Use Chatter to ask questions, tag relevant users, document decisions, etc. The chatter record then serves as a lasting record of all discussions that support the resolution of an Enhancement Request.

**To review and enable automation features, find and activate the "Enhancement Manager" Process Builder.*

Enhancement Manager Dashboard

Use the Enhancement Manager Dashboard to understand your Salesforce Enhancement “Roadmap,” to see what needs to happen next, to drive the conversation at enhancement project status meetings, and to review the progress and history of your Salesforce org.



1. Open Requests Timeline

This is your Salesforce Roadmap! Enhancement Requests are grouped by MONTH and AREA, showing you your areas of focus over time, and how much is on your plate.
[Click report link to review time estimates]

2. RISK

This metric is a count of how many unresolved RISKS have been noted. If this number is not ZERO, these are a high priority for attention!

3. Open Requests by Priority

This funnel chart gives a birds eye view of OPEN Enhancements by PRIORITY level.

4. Next Up: Critical Requests + Due This Week

This is the TO DO list! Assigned Admins and other users this list do identify the next thing they should do to stay on track. It shows any item which is marked CRITICAL, or which is due in the next 10 days, or which is overdue.

5. User Acceptance: Approver to Mark Complete

This table is the go-to resource to kick off your next Enhancement progress status meeting. These are the items which the Assigned User as marked as “User Acceptance,” indicating that they are ready to demo or explain the new function, solution, etc. If all stakeholders agree, mark each item complete! If there are new contingencies or followups identified, move the item back to “In Progress.” At the end of a successful status meeting, this table is empty!

6. Recently Completed

This table shows items that have been marked complete in the last 10 days.

7. Completed Requests: by Area

This Donut chart shows the total number of completed items, grouped by area. Click “View Report” or on a Specific area to review a report of completed work. This functions as a living form of system documentation!

8. Rejected/Withdrawn

Shows the total number of Rejected/Withdrawn items, all time.

9. Avg Days to Complete

This Metric shows the average number of days between Enhancement Request Created Date and Completed Date.

Enhancement List Views

Basic List Views on the Enhancements tab allow quick sorting and in-line editing of Enhancement Requests, such as

- Updating Due Dates to sculpt your Roadmap
- Editing Area tags for consistency
- Updating Stages and Priorities to manage a project

Use a KANBAN layout for an easy way to manage Enhancements (i.e., view Enhancements Requests grouped by PRIORITY with total ESTIMATED HOURS. Drag and Drop Enhancement records to different priority groups to meet budgeting constraints for Salesforce work.)

The screenshot displays the Salesforce Enhancements interface in a Kanban layout. The top navigation bar includes 'Enhancements', 'Reports', and 'Dashboards'. The main view is titled 'All Open by Priority' and shows 82 items. The Kanban board is divided into four columns based on priority: Critical (4 items), High (12 items), Medium (47 items), and Low (19 items). Each column contains several enhancement cards, each with a title, a due date, and an area tag. A red arrow points to a card in the Low priority column titled 'Automatic Campaign Member s...' with a due date of 7/15/2020 and area 'Data Model'.

Enhancement Reports

The Enhancement Manager Report folder contains the Enhancement Manager Dashboard reports, as well as three additional basic reports for viewing Enhancements through different lenses:

EM: Open Requests	Review all open requests by AREA
EM: Open Requests by Priority	Review all open requests by Priority
EM: Recently Completed / User Acceptance	Use this report to review recent work: Recently Completed or UA Items

Questions about Enhancement Manager for Salesforce? Contact Redpath Consulting Group at www.redpathcg.com/contact.