**SF Indicators – Sydney Community Sprint**

**Day 1 Notes – 15/11/2023**

Goals for this Sprint:

* Test documentation and suggest improvements/edits/additions to content and structure.
* Test set up process and suggest improvements to UI.
* In regard to planned developments for SF Indicators: consider existing solutions and tools which may either negate need for particular development, or be useful learning tools to assist process (i.e. no need to reinvent the wheel / work smarter not harder etc.) – for example [Righteous Lightning Actions](https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FMpajUAD)
* Document set up process for Indicator Item Extensions
* Add ideas to Wiki.

Overview: what did we achieve today?

* We ran through what Salesforce Indicators are, and what the next steps are.
* We learnt about plans to develop panels and grids.
* Individually, we followed steps for installation & set-up and noted our challenges and feedback as we went.
* We came together after lunch and shared our feedback on Installation process and Indicators Set-up Process.

Plans and Goals for Day 2:

* Research existing tools which may inform new developments/negate need for particular developments.
* Test and document steps for Indicator Item Extensions set-up.
* Think of use cases that could be used for sample items.
* Write Recipes

***Following along the installation and set-up documentation, what did you find wrong/hard/easy?***

*Basic Install Instructions feedback:*

* Basic install was fine, worked smoothly – aside from prompt to select type of account that you are trying to install (developer or sandbox?)

\**Question*\* Should there be a prerequisite on this page to prompt that Trailhead Playground is Developer and Scratch is Sandbox?

\**Answer*\* Yes, this would be helpful.

* Standard install process

\**Question*\* Do we need to add prompt to choose between install for “All users” or “Admin users only”?

\**Answer*\* Can’t hurt to have added detail, although most people at point of installing package will have this basic level of understanding.

* \**Idea*\* Is it possible to add hyperlink to text reference to ‘Wiki’ – hyperlink wiki page – on initial install instructions.
* One point of frustration was having to go back and find the documentation link on the Product in AppExchange after installing.

*Permissions Instructions feedback:*

* There will be some assumed knowledge in documentation – e.g. instructions won’t go to extent of providing permission set instructions.
* \**Idea*\* After Permission Step in instructions – include more info re ‘why are we here?’

\**Question*\* Why inclusion of ‘Customized permission set’ note?

\**Answer*\* the reason this lives in instructions is so there is transparency to clearly indicate level of security/risk

*Indicators Set Up feedback:*

* \**Idea*\* step by step guide would be a helpful inclusion at this point (3 step process on the tab)
* \**Idea*\* Rather than alphabetical listing – would be helpful to pre-set order to: 1, 2 3. \**Answer*\* This won’t be such an issue once Wizard is finalised but can reorder documentation based on preferred order regardless.
* Missing hyperlink on one of the 3 steps:



\**Question*\* Does process need screenshots with step by step?

\**Answer*\* This would be necessary for more of a beginner, but installing product is more of an advanced skillset, so keeping it shorter and simpler is easier to follow.

* \**Idea*\* Could add link to step by step video which includes visuals.
	+ Video process tool suggestions:
		- [Runthru](https://runthru.com/) video builder – AI will turn process with screenshots into training video with AI voiceover – close caption. Allows edits)
		- [FlashBack Pro](https://www.flashbackrecorder.com/) is another option – Like Runthru in reverse: will turn a training vid into a written process including screenshots)

\**Answer*\* There is a 17 min’ First Steps to Salesforce Indicators’ video in Trailblazer Community – too long for a first steps vid.

* \**Idea*\* Explain why to create an indicator bundle (define/explain purpose of each step briefly)

\**Question*\* Would it be better to start with creating an item, and have that item ready to add first (before bundle)?

\*Answer\* No, it’s important to be able to view indicator on the page first

\**Question*\* Is following documentation process enjoyable or is it overwhelming/difficult? \**Answer*\* Nothing in the documentation (so far) is off putting – it was enjoyable to explore features. Documentation and Recipes were helpful.

\**Question*\* Did anyone get to Extensions?

\*Answer\*: Noone got to it, but would love help with this tomorrow.

*\*Question\** How does the key fit in?

*\*Answer\** For setting up, key – gives you the visual that what you have set up is right & what you want: e.g. use it to return to your indicators page & refresh, so you can see what it looks like. For user, key – gives user information of configuration - the threshold/definitions of each iteration of icon e.g., what does grey money bags mean compared to yellow, compared to green.

* \**Idea*\* First start with bundle > then create one item > then you can view & start playing around
* \**Idea*\* Inclusion of suggestion to ‘start on paper’ included in help doc – recommendation to start by sketching this up – prerequisite of SF Indicators is that Admin setting up tool has understanding of data.

\**Question*\*: Is this more of a working style/personal preference, or is it helpful to include in guide (with mock-up sketch)?

\**Answer*\*: Helpful

* \**Idea*\*: Add a templated sample bundle with use case sample icons (available in sandbox only) 🡪 option to include as part of Installation - ‘deploy samples’.
	+ “Training Indicators” – limited bundle/item/feature combinations to demonstrate functionality – if you find one you like, you can go to it and see how it was made and tweak.
	+ “Sample Indicators” – unbundled indicators that are included in Installation Package 🡪 deploy samples as an optional addition

\**Question*\*: Would these sample items be helpful?

\**Answer*\*: Yes, if optional & only possible to deploy in Sandbox.

*Visual Notes from Day 1*

\*Start here\*

Set-Up 🡪

Wiki 🡪 Get Started with Indicator Bundle (Permissions)

\*SF Indicators Set-Up: Turn into order of creation\*

🡪 Introducing Bundles

* What is a bundle?
* Why use a bundle?
* What is an item?
* Indicator item or bundle: Which is first?

Install 🡪

Install SF Indicators 🡪

Documentation

now what?

Bundle first, then 1 item, then preview

Notes on Documentation Structure/Ideas:

* How will you use the same indicators for everyone?
	+ Different sample indicators for different use cases?

* Start with bundle 🡪 add indicator 🡪 add to page layout

H1 Home

H1 SF Indicators Overview

H2 Examples

 -Examples videos

-Installing Videos

Ask ‘what does your end user need to know at a glance?’

merge content

Reorder installing GS w/ Bundle

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**Day 2 Notes – 16/11/2023**

\**Idea*\* Rather than limiting colour selections to 16 standard colour options, leave colour selection open to support org branding etc., but provide help link to accessibility guidelines in documentation.

Accessibility guidelines

* Who can use – <https://whocanuse.com>
* Coolors – <https://coolors.co>
* Adobe Color - <https://color.adobe.com/create/color-wheel>

**Indicator Item UI Builder**

For Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_ When \_\_\_\_\_\_\_\_\_\_\_\_\_ Display \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

On Field \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Display One/All Value is Blank or 0

 Not Blank (Any Value)

Also Display in Bundle Blank or Null

 Contains \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Equals \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Not Equal to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Numeric Range \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

 Currency Range \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

 Date Range \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

For Object \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bundle \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

“Date Literals”

Lookup Values

Clone

Flow Explorer

Clone with Items

Clone

Display Item Conditions

Priority

(Contains)