



Sharin Pix

ActiveCampaign >

 Cirrus Insight®

Drawing diagrams
Engaging clients
Delivering results

deck & resources

Ian Gotts
Elements.cloud
@iangotts



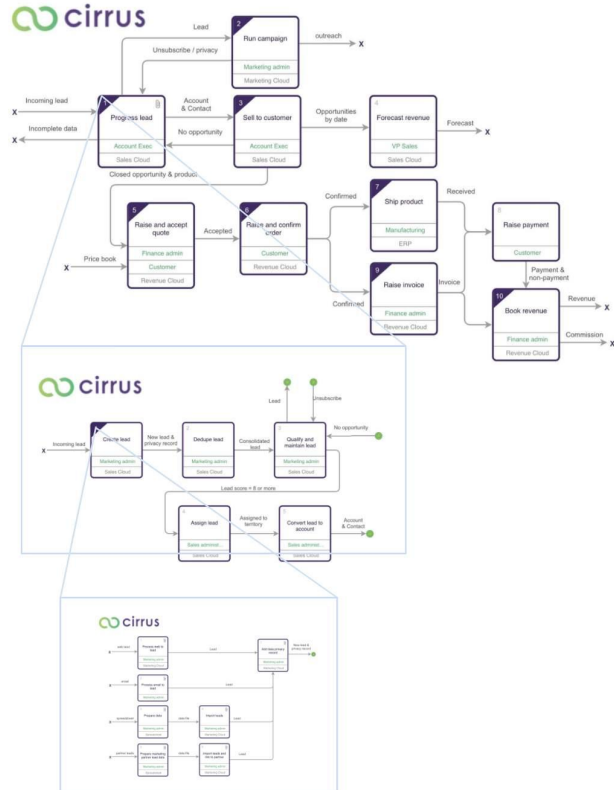
Salesforce UPN for Business Analysts and Salesforce Diagrams for Architects



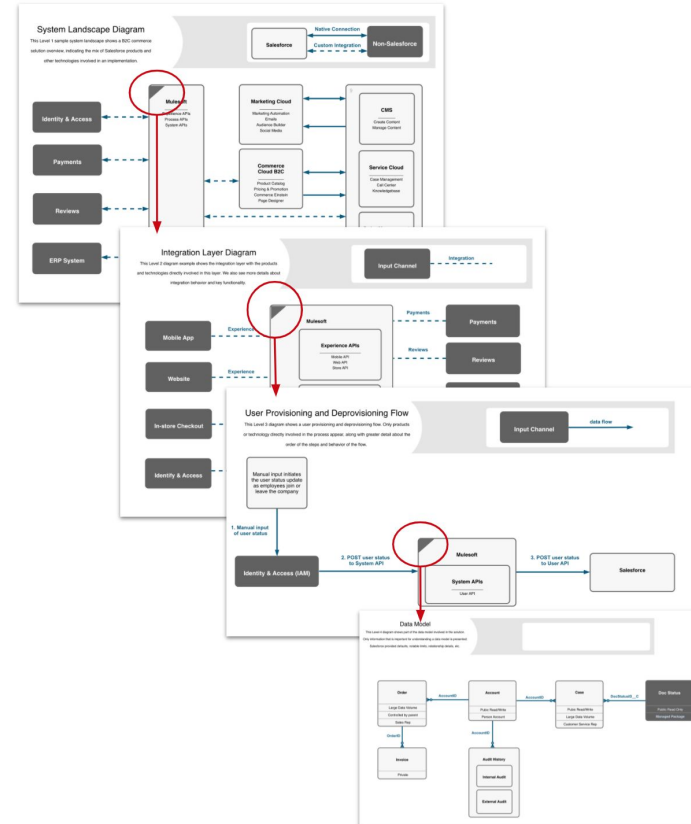
Whilst not everyone enjoys documenting what we are about to build or what we have built, we all understand the value of walking into a well documented Org.



Salesforce UPN



Salesforce Diagrams



Salesforce UPN

Salesforce Diagrams

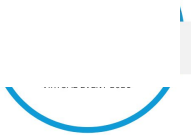
AUDIENCE: End users, Architects, Management, Regulators

PURPOSE: Validate requirements, streamline processes, deliver training, regulatory compliance

LEVELS: As many as you want

NOTATION: Simple building block

TRAINING: Trailhead



Salesforce UPN

AUDIENCE: End users, Architects, Management, Regulators

PURPOSE: Validate requirements, streamline processes, deliver training, regulatory compliance

LEVELS: As many as you want

NOTATION: Simple building block

TRAINING: Trailhead

Salesforce Diagrams

AUDIENCE: Business Analysts, Developers, End users

PURPOSE: Solutions design, documenting architecture, integrations, and data models

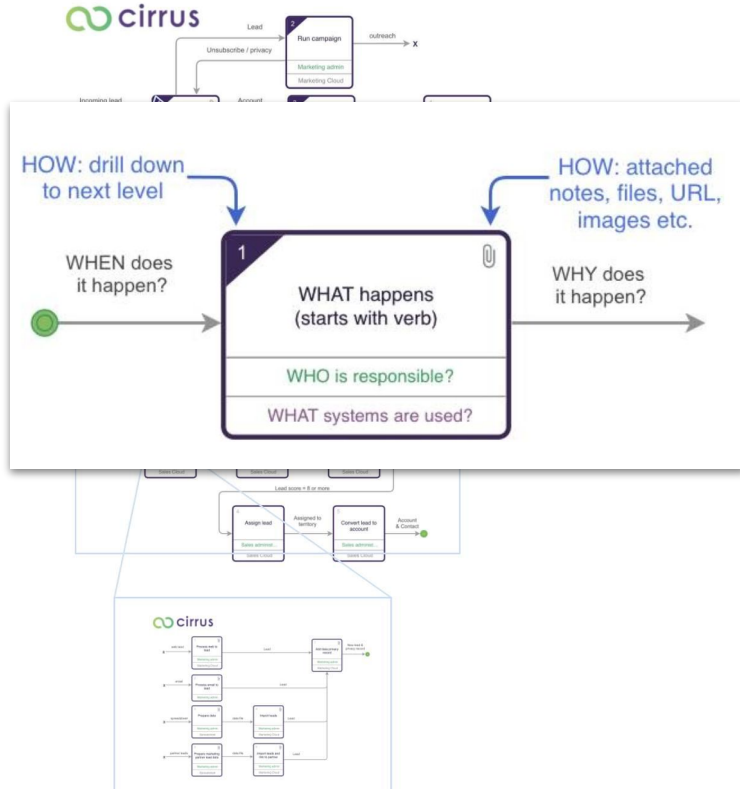
LEVELS: 4. Each has specific purpose

NOTATION: Standard terminology

TRAINING: architect.salesforce.com



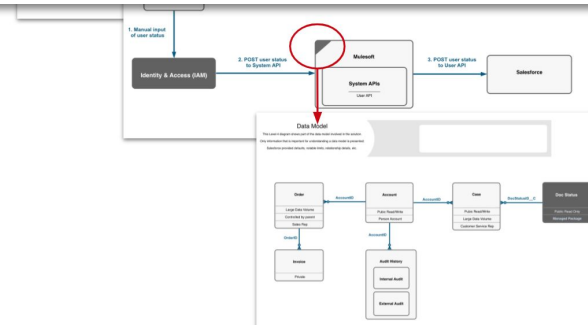
Salesforce UPN

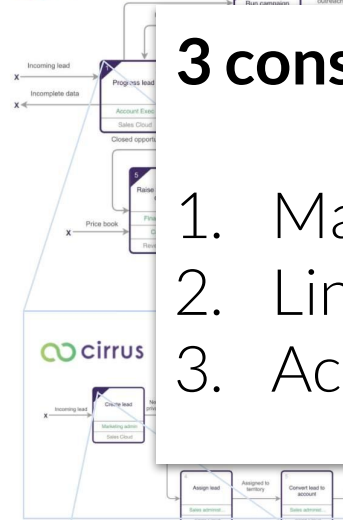


Salesforce Diagrams



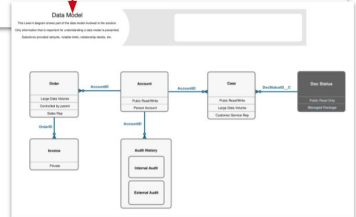
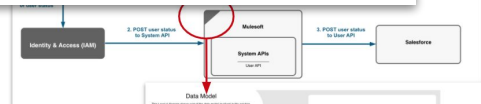
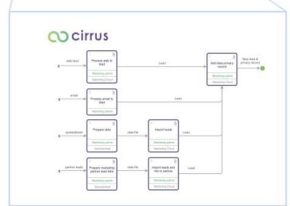
- Level 1: The big picture. The systems landscape
- Level 2: A piece of the whole. A subset of the landscape
- Level 3: Process or interaction view.
- Level 4: The data model of the objects involved



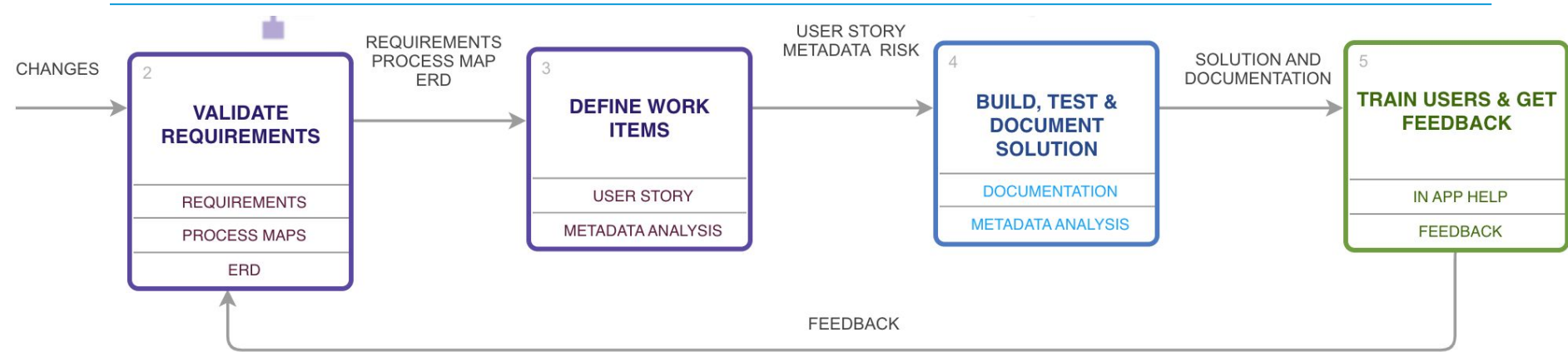


3 considerations for all diagramming

1. Management of hierarchy of diagrams
2. Linking and connecting to other assets
3. Access rights, collaboration and versioning



You need both Salesforce UPN and Salesforce Diagrams



Salesforce UPN
Salesforce Diagrams

Salesforce UPN
Salesforce Diagrams

Salesforce UPN
Salesforce Diagrams

Salesforce UPN



Using Salesforce UPN with 'difficult' clients



Salesforce UPN

Trailhead:

[Business Process Mapping](#)

Blog: [UPN and when to use it](#)

Salesforce Diagrams

architect.salesforce.com

[Building Salesforce Diagrams](#)

Blog: [Salesforce Diagrams and when to use it](#)

Blog: [3 considerations](#)

Playground and examples of UPN
and Salesforce Diagrams:
[elements.cloud/playground](#)



Sharin Pix

ActiveCampaign >



deck & resources



THANK YOU!

IAN GOTTS
ian@elements.cloud
@iangotts