

Salesforce Governance: Background

1.0. Purpose

- 1.1. This document includes background information that constitutes essential prerequisite for the actual Salesforce governance document. It is strongly suggested that this background document be read prior to the actual governance document.

2.0. Definitions

- 2.1. *App*: Short for application. A Collection of components such as tabs, reports, dashboards, and screens that address specific business needs. Salesforce provides standard apps, which can be further Configured (“Declarative” in Salesforce terminology) and Customized (“Programmatic” in Salesforce terminology).
- 2.2. *AppExchange*: The marketplace of other-party Apps. Some of them are free, while others are against payment.
- 2.3. *Editions*: Bundles of Salesforce products and services, each geared toward a different set of business needs. All Salesforce editions share the same look and feel, but they vary by feature, functionality, and pricing. More details at [Edition](#)¹. The two most important Editions for the State of Maine:
 - **Enterprise**: Meets the needs of large and complex businesses. It provides advanced customization and administration tools in order to support large-scale deployments. Enterprise Edition also includes access to Salesforce Application Programming Interfaces.
 - **Unlimited**: Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
- 2.4. *Object*: A template for a specific type of information that is considered a unit (or building block) in Salesforce. For example, the Case Object stores information about citizen inquiries. For each Object, the Org (see definition below) has multiple, specific records. Salesforce comes with lots of standard objects, but it allows the creation of custom Objects as well.
- 2.5. *Org*: Short for Organization, i.e., a deployment of Salesforce that has a defined set of licensed users. An Org is provided with any purchase of Salesforce. Depending on purchase price, agreements, etc., a customer may have multiple Orgs, including production, development, test, etc. Orgs are where the Apps live. Deciding on building within an existing Org, or building a new Org, is a consequential decision; More guidance on this is provided in the actual Governance document. Once the Edition has been determined, licenses drive what users can do, and how many users can work within the Org.
- 2.6. *Record*: A collection of fields that store information about a specific item of a specific type. A record is an Object, such as a Contact, Account, or Opportunity.
- 2.7. *Release*: Salesforce releases new products and features three times per year, and identifies the releases by seasons: Winter, Spring, and Summer, along with the calendar year. Example: Winter '20. For every Salesforce release, the Salesforce release notes include new features and products that are generally available, or in

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https://c1.sfdcstatic.com/content/dam/web/en_us/www/documents/pricing/DS_SalesCloud_EdCompare.pdf

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beta release. The release notes also describe all changes to existing features and products.

- 2.8. *Salesforce Applications*: Salesforce includes Apps for Customer Relationship Management, ranging from sales force automation to partner relationship management, marketing, and customer service.
- 2.9. *Lightning Platform*: The Platform as a Service (PaaS) built into Salesforce. Developers can create and deliver any kind of business application on demand, aided by built-in tools.
- 2.10. *Salesforce.com Community*: Provides training, support, consulting, events, best practices, and discussion boards.
- 2.11. *Salesforce Lightning*: The current user interface, as opposed to the legacy “Classic”.

3.0. Basic Concepts

- 3.1. Salesforce is considered a combination of SaaS (Software as a Service), primarily, but not exclusively, for the Customer Relationship Management function, and a Platform as a Service (PaaS) for other functions not explicitly identified by the vendor. Salesforce provides a self-contained operating environment that is used to deliver the entire user experience, including the content, its presentation, and management capabilities. Salesforce is responsible for the security of the “bottom” layers, including physical, environmental, and infrastructure. Whereas it is a shared responsibility for the security of the “top” layers, including the actual user application.
- 3.2. The platform is maintained in the cloud, meaning no on-premises hardware is required to work with Salesforce. Different clouds are available, at a cost, to provide additional features.
- 3.3. Each cloud product represents a pre-set platform and tools. Depending on the needs of the project, one product may better fit the needs better than the others. Each project should consider those needs to identify and select the appropriate product. Examples include [Sales Cloud](#)², [Service Cloud](#)³, [Marketing Cloud](#)⁴, [Experience Cloud](#)⁵, etc.
- 3.4. When requirements go beyond what Configuration (“Declarative” in Salesforce terminology) can offer, Customization (“Programmatic in Salesforce terminology) may be resorted to, using a proprietary coding language called [Apex](#)⁶. More guidance on this is provided in the actual Governance document.
- 3.5. [Unmanaged versus Managed Packages](#)⁷: In general, Salesforce allows two kinds of apps in the AppExchange, which forces different kinds of choices downstream. An unmanaged package is usually open-source, whereas, a managed package is usually for a fee, and offers additional features for users.

² <https://www.salesforce.com/products/sales-cloud/overview/>

³ <https://www.salesforce.com/products/service-cloud/overview/>

⁴ <https://www.salesforce.com/products/marketing-cloud/overview/>

⁵ <https://www.salesforce.com/products/community-cloud/overview/>

⁶ https://developer.salesforce.com/docs/atlas.en-us.apexcode.meta/apexcode/apex_dev_guide.htm

⁷ https://help.salesforce.com/articleView?id=sharing_apps.htm&type=5

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4.0. License Management

- 4.1. Salesforce is driven by licenses. It is important to understand the Salesforce Edition and Products, license count, and license types. All these variables come together to determine the pricing through the State's current reseller, Carahsoft. The Licensing decision starts with selecting the Edition. The most popular choice is the Enterprise Edition. The Unlimited Edition provides everything in the Enterprise Edition, plus additional support. There are various kinds of [Lightning Platforms](#).⁸ There are various kinds of [Users](#).⁹
- 4.2. When scoping the cost of licensing for a Salesforce solution before moving it to scale, the ultimate Salesforce licensing is complicated, and a full discussion of the vast number of conditions presents to be beyond the scope of this paper. The best means of arriving at the proper licensing mix is to hold a detailed discussion with the Implementation Partner at the inception of a project. The good news is that it is indeed possible to start small while projecting when to buy additional licenses downstream. Although pre-buying may lock the pricing upfront and be attractive, it is still *not* recommended to pre-buy beyond reasonable downstream projections.

5.0. Training

- 5.1. One of the best features of Salesforce is the free training portal: [Trailhead](#).¹⁰ It includes training products not just for developers and administrators, but business users and project managers as well.

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⁸ https://c1.sfdcstatic.com/content/dam/web/en_us/www/documents/pricing/salesforce-platform-pricing-editions.pdf

⁹ https://help.salesforce.com/articleView?id=users_understanding_license_types.htm&type=5

¹⁰ <https://trailhead.salesforce.com/en/home>