

SDG Starter Pack

ABOUT

This Starter Pack adds objects to the Salesforce Org to enable data capture of activity related to United Nations (UN) Sustainable Development Goals (SDGs).

This starts at the top level with the “Goals” object, which has “Targets” and then “Indicators” object which relate to the SDG Goals, Targets and Indicators.

Linked to these objects we have introduced the Outcome object which allows you to enter an Outcome which is expected or has been delivered against a Goal, Target or Indicator. (Note that there is automation which ensures that the Goal is always linked, even if its linked at a lower level, i.e. target or Indicator). Each Outcome can have a number of measures which are expected as part of the outcome.

INITIAL SETUP

Before you start, you need to be aware that when this package is installed, it will create a Remote Site entry for the UN Statistics API, which is located here: <https://unstats.un.org>

It is recommended that you always test the deployment within a Sandbox before installing to Production.

If you are happy with this change, please follow the instructions below:

1. Go to the AppExchange page [page to be added here once published]
2. Click **Get It Now**
3. Login with your credentials if asked and then confirm that you want to provide access to the UN Statistics API.
4. Wait for the confirmation email to confirm that the package is installed
5. Once installed, assign permissions as required (see Permissions section below)
6. The admin user with the SDG Admin Permission Set assigned, can then navigate to the SDG Admin app > SDG Administration tab, then click on the Start Sync button.
7. Add lookup fields to the SDG Outcome object for objects you want to connect. This could be objects like Opportunities, Applications etc. Add one lookup field for each object you want to connect to the Outcomes.
 - a. Note that the related lists for Outcomes which are created on each object will need to be reviewed on the relevant page layout so that you can see the relevant columns you want to see.

PERMISSIONS

The package deploys two Permission Sets, which are as follows:

- SDG Admin
 - This provides full permission to all SDG Starter Pack objects
 - Allows users with this permission to run the flow and start the sync with the UN Statistics API.
- SDG User
 - Assign this permission set to users who need to create Outcomes and Measures but also get read access to the SDG data.

Assign the permissions to the required users as required.

Automation / Flows

There are several flows which are deployed within the package which ensure that all Outcomes and Measures are linked correctly, along with SDG data is synchronised.

Most of these can be left as is, although one which is deployed as deactivated is the weekly sync flow. Within the Setup > Flows area, you can find a flow called “SDG - Weekly SDG Information Checker”. This can then be activated if you want to enable a weekly sync with the UN Statistics API to upsert SDG information in your org.

If you do not want to have the weekly sync running in your org and prefer to run the sync manually when you want to, then repeat step 6 of the initial setup whenever you want to upsert SDG data.