

Felixio Data Completeness Monitor Walkthrough Guide

This walkthrough explains how to use every feature of the **Felixio Data Completeness Monitor** application. Follow each section step-by-step to understand how to configure, track, and improve data completeness across Salesforce.

1. Applications Overview

The solution focuses on **Data Completeness** to help organizations monitor and improve data quality.

Data Completeness

- Helps administrators configure objects, default and record type–based field configurations.
- Supports defining completeness rules separately for different record types.
- Measures data completeness and provides insights through dashboards and charts.
- Enables users to identify missing or incomplete data by record type and improve overall data quality.

2. Launching the Data Completeness App

Steps to Launch

1. Go to the **App Launcher**.
2. Search for **Data Completeness**.
3. Open the app.

Available Tabs

The **Data Completeness** app contains the following tabs:

- **Home**
- **Data Completeness Configuration**

Workflow Order

- Before any charts or metrics appear on the **Home** tab, administrators must first configure objects and fields in the **Data Completeness Configuration** tab.
- This configuration defines which objects, default or record type–based fields, and weights are used to calculate data completeness.
- Without this setup, the Home dashboard will not display any data.

2.1 Data Completeness Configuration

This section allows administrators to configure data completeness by selecting the relevant objects, defining required fields, and assigning weights to each field based on its importance.

This configuration is essential — without it, the Home dashboard cannot calculate completeness scores and will display no data.

The configuration supports two levels:

- **Default configuration** – Applies to all records of the selected object.
- **Record Type–based configuration (optional)** – Allows separate field configurations for specific record types within the same object.

If a record type–based configuration is defined, the system uses that configuration for records of that record type. Otherwise, the default configuration is applied.

2.1.1 Creating a New Completeness Configuration

1. Click the **New Configuration** button in the top-right corner of the **Data Completeness Configuration** tab
2. **Select Object Name**
 - Choose the Salesforce object to evaluate (e.g., Account, Contact, Lead).
3. **Enter Minimum Required Weight (%)**
 - Score threshold for marking the object as “complete.”
4. **Select the Active Checkbox** (optional)
 - Only active configurations are used when calculating completeness.
5. **Default Field Configuration (Applies to all records)**

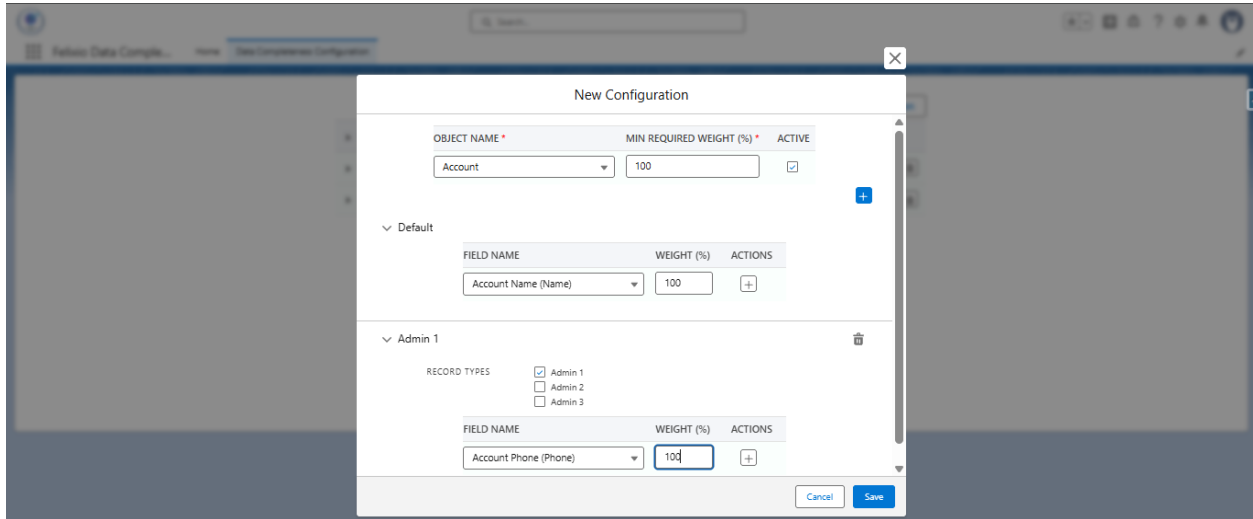
Under the Default section, configure fields that should be evaluated for all records of the object:

- Select **Field Name**
 - Enter **Field Weight (%)**
 - Add as many fields as required
6. **Record Type–Based Configuration (Optional)**

If the object contains record types, administrators can optionally configure separate completeness rules for specific record types.

 - Select the required **Record Type**
 - Add fields and assign weights specific to that record type
 - These rules will apply **only to records belonging to that record type**
 7. Click **Save**

Your configuration is now stored and will drive all completeness calculations.



2.1.2 Viewing, Editing, or Deleting Configurations

From the list view:

- Click the **arrow icon** displayed before the object name to expand the record and view its configuration details.
- Click the **Edit icon** to update the object settings, field weights, or activation status.
- Click the **Delete icon** to permanently remove a configuration.

Any changes made are applied immediately and will directly affect dashboard completeness calculations.

2.1.3 Enable & Disable Enforcement

The Enforcement feature allows administrators to control whether data completeness validation is actively enforced on an object during record creation and update.

Enable Enforcement

If an object does **not yet have enforcement enabled**, you will see the **Enable Enforcement** button.

When you click **Enable Enforcement**:

- A trigger is enabled for that object.
- Completeness rules become actively enforced.
- All new and updated records will be validated against your configuration.

Use this when you are ready to move from **monitoring data quality** to **actively enforcing it**.

Disable Enforcement

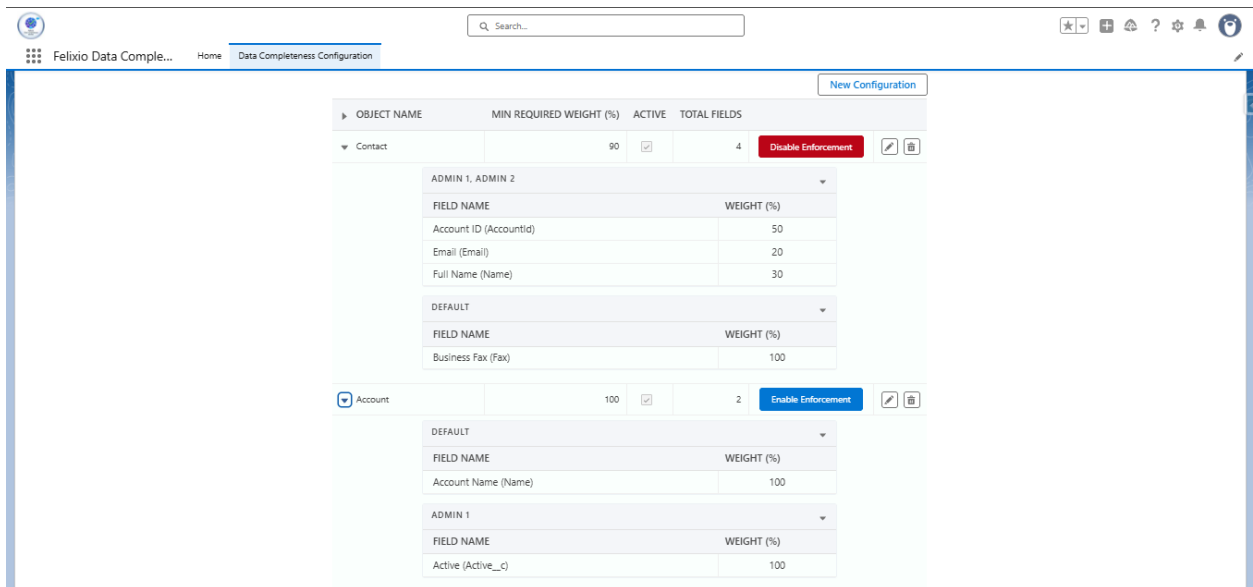
If enforcement is already active, you will see the **Disable Enforcement** button.

When you click **Disable Enforcement**:

- The trigger is deactivated for that object.
- Completeness validation will no longer block record saves.
- Dashboards and scorecards will continue to show completeness insights, but without enforcement.

This is useful during:

- Testing phases
- Configuration changes
- Temporary flexibility for users



2.2 Home Tab — Dashboard

After completing the required configurations, navigate to the **Home** tab.

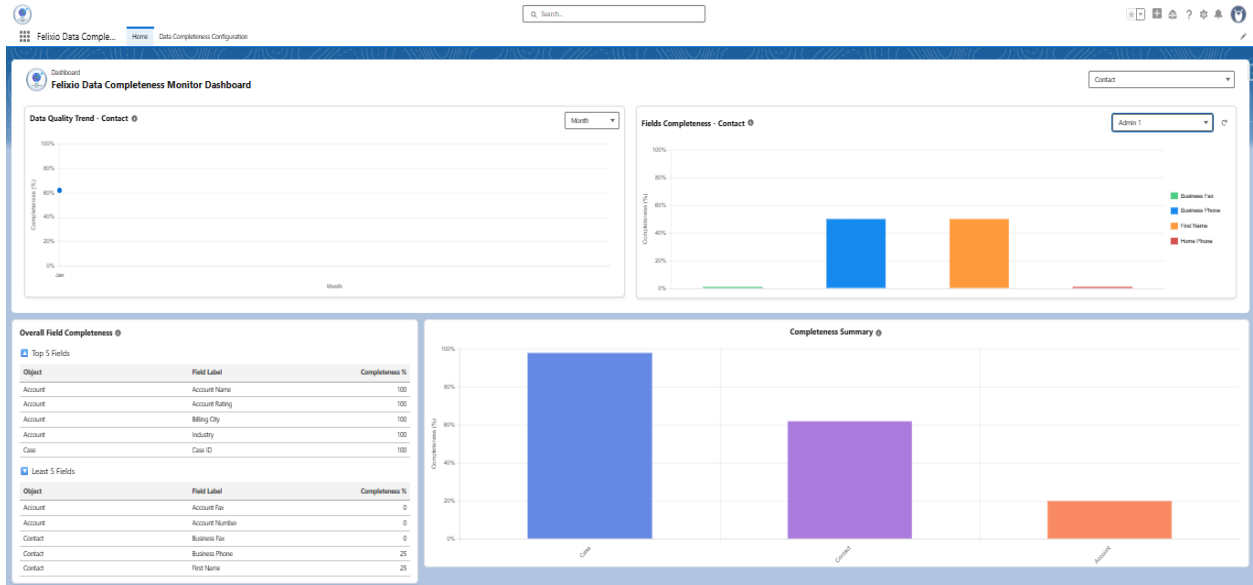
The Home tab acts as the **central dashboard** for the Data Completeness app. It provides a clear, visual overview of how complete and reliable your data is across configured objects and fields.

All charts on this page are **dynamic** and update based on the selected object and the latest data calculations.

At the top-right you will find:

- **Config Object Selector**

Allows you to choose the object you want to analyze (such as Account, Contact, Lead, or Opportunity). All charts on the page update based on the selected object.



2.2.1 Data Quality Trend

Purpose:

This chart helps you understand **how data completeness improves or declines over time** for a selected object. It is especially useful for tracking the impact of data cleanup activities and process improvements.

How it works:

- **Y-axis** → represents the overall data completeness percentage.
- **X-axis** → represents time, displayed by **Month or Year**, based on user selection.
- The chart uses stored **Trend Summary Records** to maintain historical completeness data.
- **Data Source** → The trend data is generated by a **scheduled flow that runs automatically every day at 12:00 AM**, which calculates and stores the latest completeness metrics.

How to use:

1. Select an object from the object selector.
2. Click **Refresh** to load the latest data.
3. Use the **Month/Year** filter to switch between detailed or high-level trends.
4. Hover over any data point to see the exact completeness percentage for that time period.

2.2.2 Fields Completeness

Purpose:

This chart shows **how well each configured field is populated** for the selected object, making it easy to identify data gaps at the field level.

How it works:

- Each bar represents one configured field.
- The height of the bar reflects the percentage of records in which the field contains a value.
- The values displayed are based on the most recent completeness calculation.
- If a record type is selected, the chart displays field completeness based on the record type-specific configuration (if available). Otherwise, the default configuration is used.

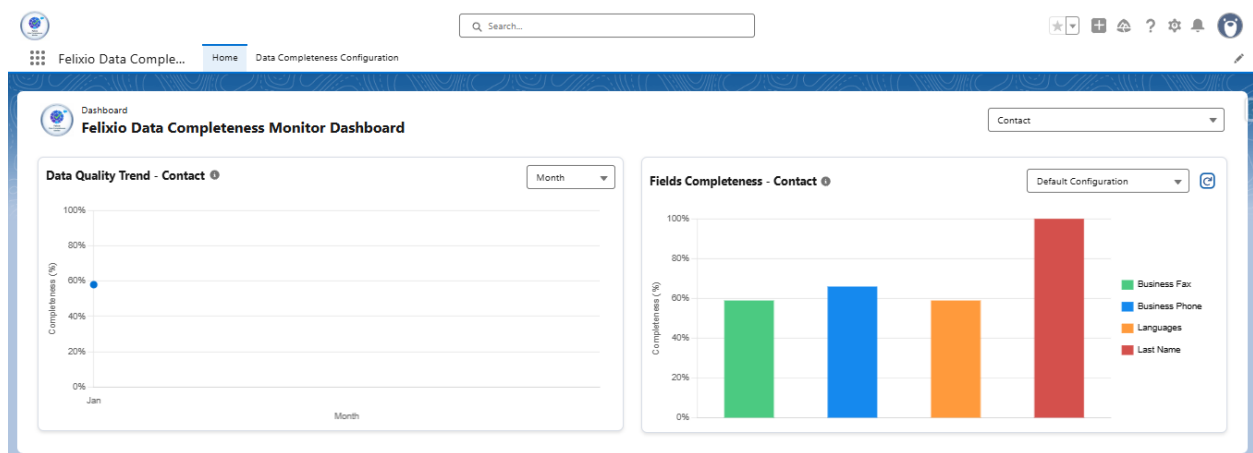
Data Calculation Logic:

- When the total record count for the selected object is less than 10,000, completeness is calculated in real time using live data.
- When the record count is greater than 10,000, the system retrieves results from the summary object to ensure better performance.

How to use:

1. Select the required object.

2. Select a **Record Type** from the top-right dropdown to view record type–based completeness.
3. Click the **Refresh icon** to update the chart with the latest data.
4. Review the results:
 - **High bars** indicate fields that are consistently filled and well maintained.
 - **Low bars** highlight fields with missing values and may indicate the need for user training, validation rules, or data cleanup.



2.2.3 Overall Field Completeness

(Top 5 & Least 5 Across All Objects)

This section provides a **global comparison** of field completeness across every configured object in the app.

Top 5 Fields — Highest Completeness

Displays the fields that are most consistently populated across the org.

Examples:

- Account Fax → 100%
- Contact ID → 100%
- Case Type → 100%

Bottom 5 Fields — Lowest Completeness

Highlights the fields with the **lowest data coverage**, helping administrators quickly identify problem areas.

Examples:

- Opportunity → Contact ID → 0%
- Lead → Annual Revenue → 8%
- Lead → Rating → 13%

This view is especially useful for **prioritizing data quality improvement efforts** across the organization.

2.2.4 Completeness Summary (All Configured Objects)

Purpose:

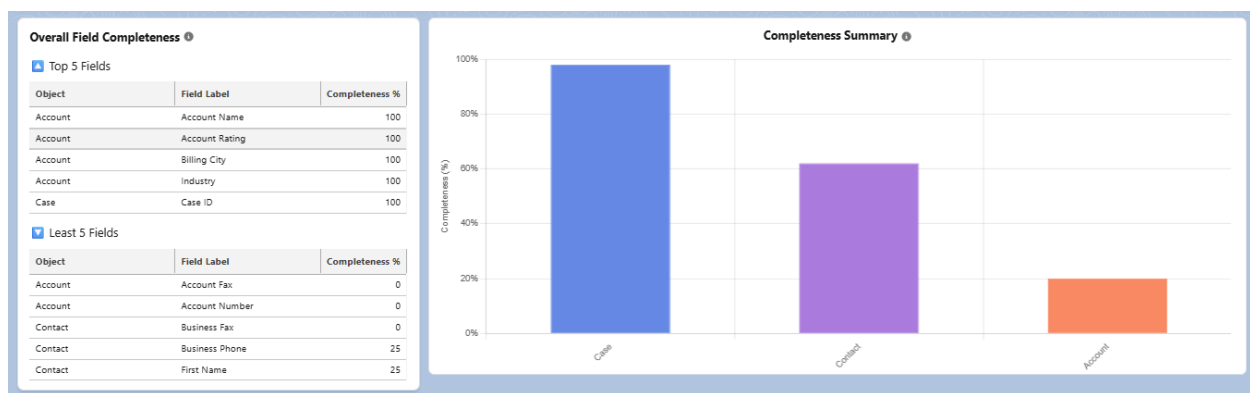
This chart provides a **high-level comparison** of data completeness across all configured objects in one view.

How it Works:

- Each bar represents a single object (such as Account, Contact, or Opportunity).
- The completeness percentage is calculated using:
 1. Configured field weights
 2. Average completeness across all records for that object
- **Data Source** → The summary data is generated by a **scheduled flow that runs automatically every day at 12:00 AM**, ensuring consistent and up-to-date completeness calculations.

How to use:

- Select a configuration object at the top.
- Click **Refresh** to update the summary.
- Compare objects to identify:
 - Objects with strong data quality
 - Objects that need additional attention or cleanup



2.3 Live Data Validation

Live Data Validation ensures that users cannot save incomplete records when enforcement is enabled.

It validates records in real time during **record creation and update**, based on the configured completeness rules.

How It Works

When a user creates or edits a record:

- The system checks whether the object has an **active Data Completeness configuration**.

- Validation applies whether the configuration is:
 - Default (object-level), or
 - Record Type–based (if configured).
- Validation runs during:
 - **Before Insert** (on record creation)
 - **Before Update** (on record edit)

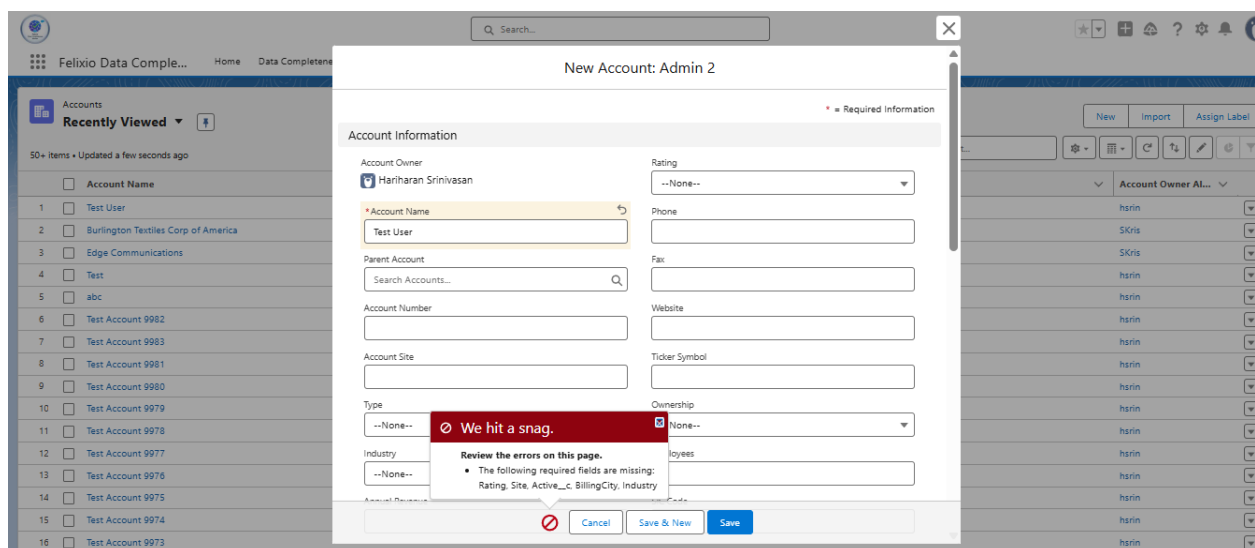
User Experience

If the record does not meet the configured rules:

- The record will **not be saved**.
- A validation message is displayed showing **which fields must be completed**.

Example:

“Please complete the following fields before saving: Billing City, Industry.”



2.4 Record Detail Page – Completeness Scorecard

The **Completeness Scorecard** is a Lightning component that displays **record-level data completeness** directly on an object's record page (such as Account, Contact, or Opportunity).

It helps users immediately understand how complete an individual record is and which fields still require input.

2.4.1 Adding the Scorecard to a Record Page

Follow these steps to add the Completeness Scorecard component to a record page:

1. Open any record for the required object (for example, an **Account** or **Contact** record).
2. In the top-right corner of the record page, click the  **Setup (Gear) icon**.
3. Select **Edit Page**.
This opens the **Lightning App Builder** for that record page.
4. From the **Components** panel on the left, locate **RecordDetailPageScorecard**.
5. Drag and drop the component into the desired section of the page layout.
6. Click **Save**.
7. Click **Activate** (if prompted) and assign the page to the appropriate app, profile, or org default.

Once activated, the scorecard will appear on all records using that Lightning record page.

2.4.2 What the Scorecard Displays

Overall Record Completeness (%)

- Displays the **total completeness percentage** for the current record.

- The score is calculated based on:
 - Configured fields
 - Field weights
 - Whether each field contains a value

This gives users a quick, at-a-glance understanding of how complete the record is.

Field-Level Completeness

- Lists individual configured fields for the object.
- Indicates whether each field is:
 - **Complete** (value present)
 - **Partially complete** (value present but weighted lower)
 - **Missing** (no value)
- Helps users quickly identify exactly which fields need to be filled to improve the record's completeness score.

Configuration Dependency

- The scorecard works **only when a Data Completeness configuration exists** for the object.
- If no configuration is found:
 - The component displays an informational message prompting the user to create a configuration for that object.
 - No completeness score is calculated until the configuration is set up.

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javascript:void(0)
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