

Toolz

Power Tools for Admins

from

effeXoft

committed to be effective

Data Alerts User Guide

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For current and all previous versions, please refer to:

<http://www.fffexoft.com>

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1. Introduction

Data Alerts is an exception based alerting tool. It is one of the tools in the Toolz package from Effexoft.

Keeping a constant eye on data is an important and very stressful task for Salesforce Administrators.

Data keeps changing for various reasons and checking the data proactively for any inaccuracies is a very critical task. Data Alerts tool in Toolz makes it an easy task.

Salesforce Administrators can create any number of Data Alerts using this tool. And each Data Alert can send an email message to one or more recipients.

Toolz package is listed on AppExchange at:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX>

2. Who can manage Data Alerts?

A certified Salesforce Administrator with the help of this User Guide can be able to manage and maintain Data Alerts tool.

Effexoft recommends Salesforce Administrators who has a knowledge of SOQL (Sequential Object Query Language) to manage and maintain the Data Alerts tool. If you are a Salesforce Administrator but if you do not have an idea of SOQL, then, you can consult your Salesforce Developer. Or learn SOQL from Salesforce Trailhead.

This document provides an example of SOQL statement.

3. Data Alert Use Cases

1. Alert email only when needed.

Data Alerts tool is used for checking the data on a scheduled basis and generate an alert email only when there is an issue.

Here is a business case from the Sales department. VP of Sales at Billion Galaxies LLC., wants to make sure that all of their accounts should have a website. The Salesforce Business Analyst told her that it is not possible make the website a mandatory field because they sometimes get a list of Accounts from their marketing team and some of those accounts may not have a website. The Business Analyst said that the BDR team will research and enter the website on any Account where it is missing. The BA assured the VP of Sales that by end of the day every day, all their Accounts will have a website.

The VP of Sales then requested an email alert to be sent daily in the morning at 8 AM if there are any accounts without a website.

Then the BA requested the Salesforce Administrator to setup a report listing Accounts without a website and asked that report to be emailed to the VP of Sales at 8 AM on all weekdays.

The Salesforce Administrator did the same and then the VP of Sales started getting an email every week day at 8 AM. The VP of Sales checked the email for few days and the email containing the report always had zero accounts. The VP of Sales then asked the BA if she can an email only when there is at least one account in the report.

The BA then suggested the Salesforce Administrator to start using Data Alerts tool from Toolz package.

Data Alerts tool sends an email notification only when needed. You are going to see how to setup this Data Alert later in this document.

2. Manage multiple Data Alerts

In large Salesforce implementations where there are several applications, ability to check data issues proactively is an important task. Data Alerts tool lets you create hundreds of Alerts.

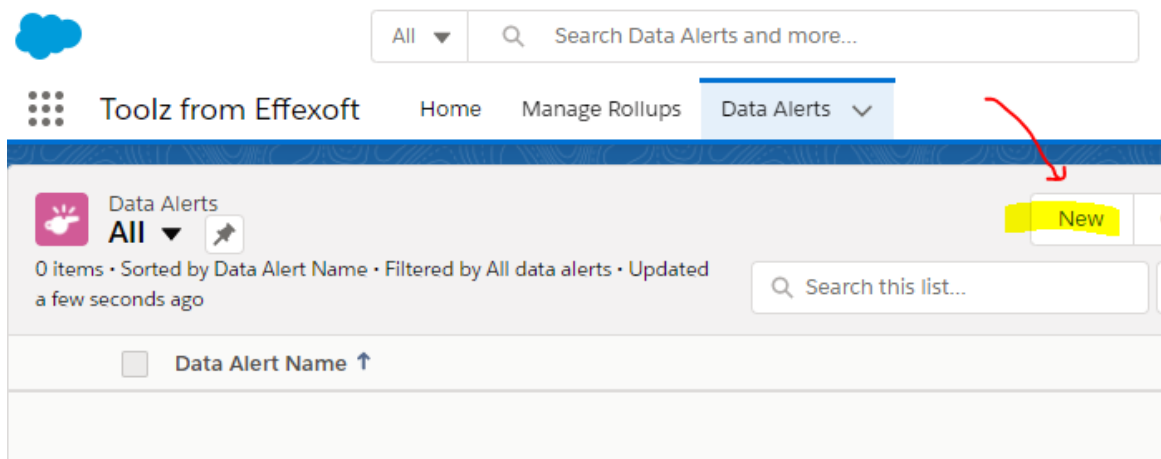
4. Get ready to setup your first Data Alert

If you are here, you must have installed Effexoft's Toolz package from Salesforce's AppExchange and followed the installation instructions from **Toolz Installation Guide**. If you need help with Toolz installation, please refer to Toolz Installation Guide from Effexoft's website or from Toolz listing page on Salesforce AppExchange:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX>

5. Setting up your first Data Alert

Now let us setup our first data alert "Accounts without Website". Go to "Data Alerts" tab. And click "New" button to create a Data Alert.



New Data Alert creation screen will look like this. Enter a name for the Data Alert. Enter Dynamic SOQL. This is the most important field.

The query entered in this screenshot returns the list of Accounts without a website. The query should always have the ID field at the beginning after “Select”. If you forget to enter ID field, you will get an error message.

A data alert can be made active or inactive at anytime.

If there are many accounts without a website and if you wish to receive the list of those accounts by their source, you can select “Summary” checkbox and enter the field name “AccountSource” in the Summary Field Name.

If you check Summary checkbox but did not enter any field name in the Summary Field Name field, you will get a warning message.

If you have a report containing the list Accounts without a website, you can enter the report link in the “Report Link” field. It will be sent to the data alert recipients in the email.

New Data Alert

Information

*** Data Alert Name** 

Accounts without Website

Last Alert At 

Date

Time





Dynamic SOQL 

Select ID, Name, Type, AccountSource from Account where website = Null

Record Details 

☒

Report Link 

Reference Link 

Owner

 Venkata PBO Kunisetty

Is Active 

☒

Summary 

☒

Summary Field Name 

AccountSource

*** Frequency Type** 

Always

Frequency x Factor 

Cancel

Save & New

Save

Please note that you must specify Frequency Type of the Data Alert. If you want to run this alert every time the Data Alert is executed, you can select “Always”. There are several other options you can choose from. For some of the Frequency Type options, Frequency x Factor field is also required.

Data Alerts will make sure you enter all the required fields before you hit save.

Record Details ⓘ ☒ Report Link ⓘ Reference Link ⓘ 	Summary Field Name ⓘ AccountSource * Frequency Type ⓘ Always ▼ Frequency x Factor ⓘ
---	--

Cancel

Save & New

Save

When you click on “Save”, the Data Alert will be saved if there are no errors.


Data Alert
Accounts without Website

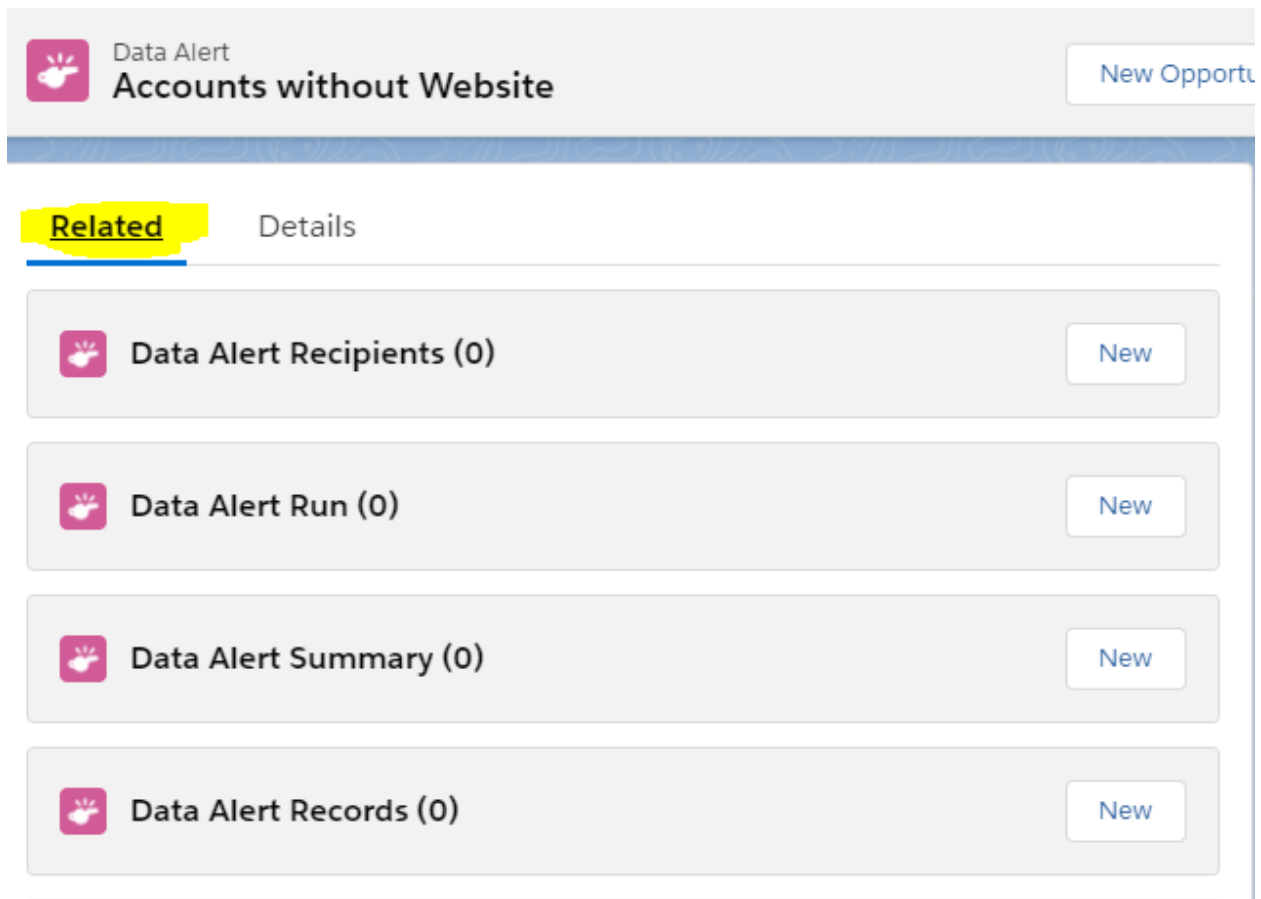
Related

Details

Data Alert Name Accounts without Website	Owner  Venkata PBO Kunisetty
Last Alert At ⓘ	Is Active ⓘ ☒
Dynamic SOQL ⓘ Select ID, Name, Type, AccountSource from Account where website = Null	Summary ⓘ ☒
Record Details ⓘ ☒	Summary Field Name ⓘ AccountSource
Report Link ⓘ	Frequency Type ⓘ Always
Reference Link ⓘ	Frequency x Factor ⓘ

 System Information

Yay, you created your first data alert. Now, let us look at the “Related” tab. You can see Data Alert Recipients, Data Alert Run, Data Alert Summary and Data Alert Records. All of them have zero records in them. If there are no Data Alert Recipients, then, whoever executes the Data Alert, they will get an email. If you create one or more Data Alert Recipients, then, only those recipients will get the data alert emails.



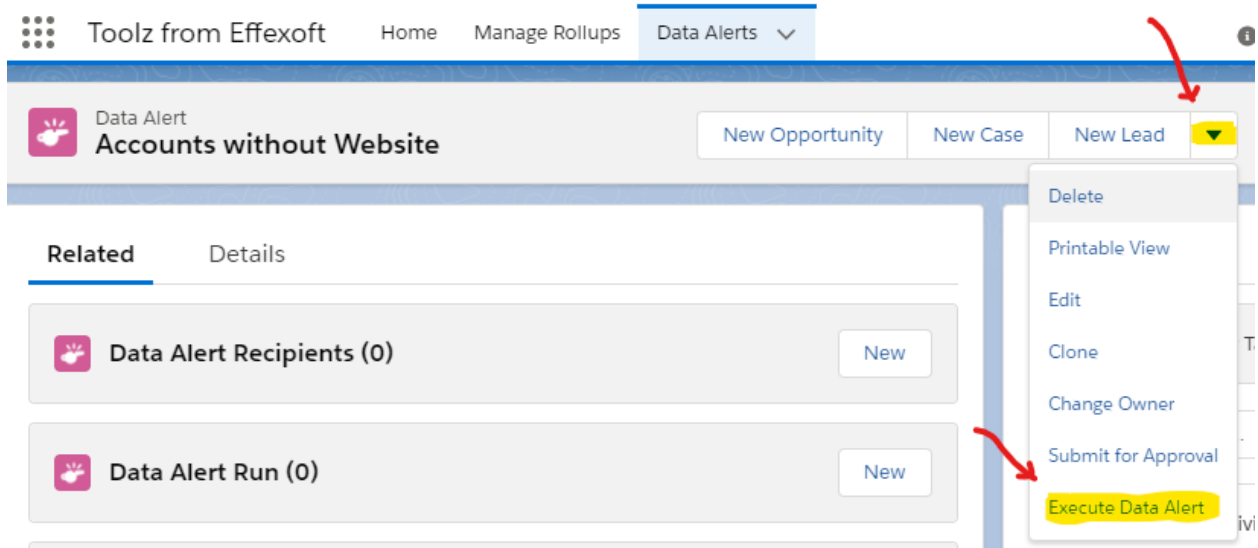
The screenshot shows a web interface for a 'Data Alert' titled 'Accounts without Website'. At the top right is a 'New Opportunity' button. Below the title bar, there are two tabs: 'Related' (highlighted in yellow) and 'Details'. Under the 'Related' tab, there are four light gray rectangular boxes, each containing a pink icon with a hand, a text label, and a 'New' button. The items are: 'Data Alert Recipients (0)', 'Data Alert Run (0)', 'Data Alert Summary (0)', and 'Data Alert Records (0)'.

Item	Count	Action
Data Alert Recipients	0	New
Data Alert Run	0	New
Data Alert Summary	0	New
Data Alert Records	0	New

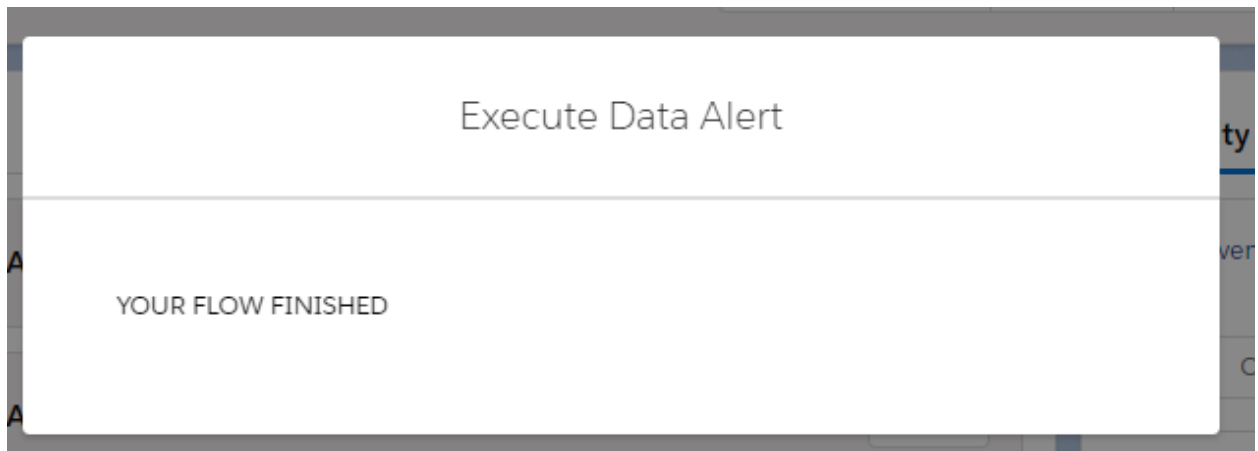
Now that you created your first data alert, let's execute it and see how it works.

6. Execute your first Data alert

On the Data Alert page, you may have several buttons. You can see all the buttons if you click on the little down arrow icon on the right side. You can see “Execute Data Alert” button.



Go ahead and click on the button. If it executes successfully, you will see the following message.



If you close the message box and refresh the Data Alert page, you can see a screen similar to the following.

When the data alert runs, a Data Alert Run record gets created. It will tell you how many Accounts in your system do not have a website. In this example here, it says 26 records. Not bad.

You can also see that there are 5 summary records. It indicates that there are 5 different types of accounts by their AccountSource with in those 26 accounts found missing a website.

You can also see there are 26 records got created in the “Data Alert Records” section.


Data Alert
Accounts without Website

Related
Details


Data Alert Recipients (0)
New


Data Alert Run (1)
New

DAR ID	Record Count	Emailed At	Created Date
DAR-009	26	1/17/2021 6:01 PM	1/17/2021 6:01 PM

[View All](#)


Data Alert Summary (5)
New

Data Alert Summary: DAS ID	Data Alert	DAR ID	Summary Field
DAS-027	Accounts without Website	DAR-009	NAMI Member Database
DAS-028	Accounts without Website	DAR-009	Package Installation
DAS-029	Accounts without Website	DAR-009	Web
DAS-030	Accounts without Website	DAR-009	External Referral
DAS-031	Accounts without Website	DAR-009	Employee Referral

[View All](#)


Data Alert Records (6+)
New

Data Alert Record: DARec ID	Data Record ID	Field 1	Field 2
DARec-133	0012E00001q5MEaQAM	Suminder Kaur	
DARec-132	0012E00001q5KpQAe	Aberdeen Group	

If you do not want to store the records in the Data Alert Records section, then you can uncheck the “Record Details” checkbox in the Data Alert.


Data Alert
Accounts without Website

Related
Details

Data Alert Name
Accounts without Website

Last Alert At ⓘ
1/17/2021 6:01 PM

Dynamic SOQL ⓘ
Select ID, Name, Type, AccountSource from Account where website = Null

Record Details ⓘ
☒

You can uncheck the checkbox and execute the Data Alert once again to see how that works.

If you do not want to store the summary records, you can uncheck the Summary checkbox as well.

Related	Details
Data Alert Name Accounts without Website	Owner Venkata PBO Kunisetty
Last Alert At 1/17/2021 6:01 PM	Is Active ☒
Dynamic SOQL Select ID, Name, Type, AccountSource from Account where website = Null	Summary ☒
Record Details ☒	Summary Field Name AccountSource

7. Add Data Alert Recipients

Now that you tested your data alert, let's add your VP of Sales, your Business Analyst and your BDR Manager as recipients to the data alert. As a Salesforce Administrator, you may also add yourself as a recipient at least for a couple of days to ensure everything is working well.

Come back to "Related" list and click on "New" button next to Data Alert Recipients.

 Data Alert
Accounts without Website

New Opportunity

Related Details

 Data Alert Recipients (0)

New

Enter name of the recipient and the email address.

You can leave Last emailed at field. This field will be entered by Data Alerts whenever the data alert is executed and an email is sent to the recipient.

New Data Alert Recipient

Information

* Recipient Name

Complete this field.

* Data Alert ⓘ

* Email ⓘ

Last Emailed At ⓘ

Date

Time

Cancel

Save & New

Save

8. Check your email for the Data Alert notification

You should see an email something like the following:

Data Alert - Accounts without Website - 26 records Inbox x

Venkata PBO Kunisetty via coy9kj5m0f7dyq0m.176fqgrfzplb9jlh.znll0m7.2e-no8uuau.na91.bnc.salesforce.com to me ▾

Data Alert: Accounts without Website
Records Found: 26

Summary

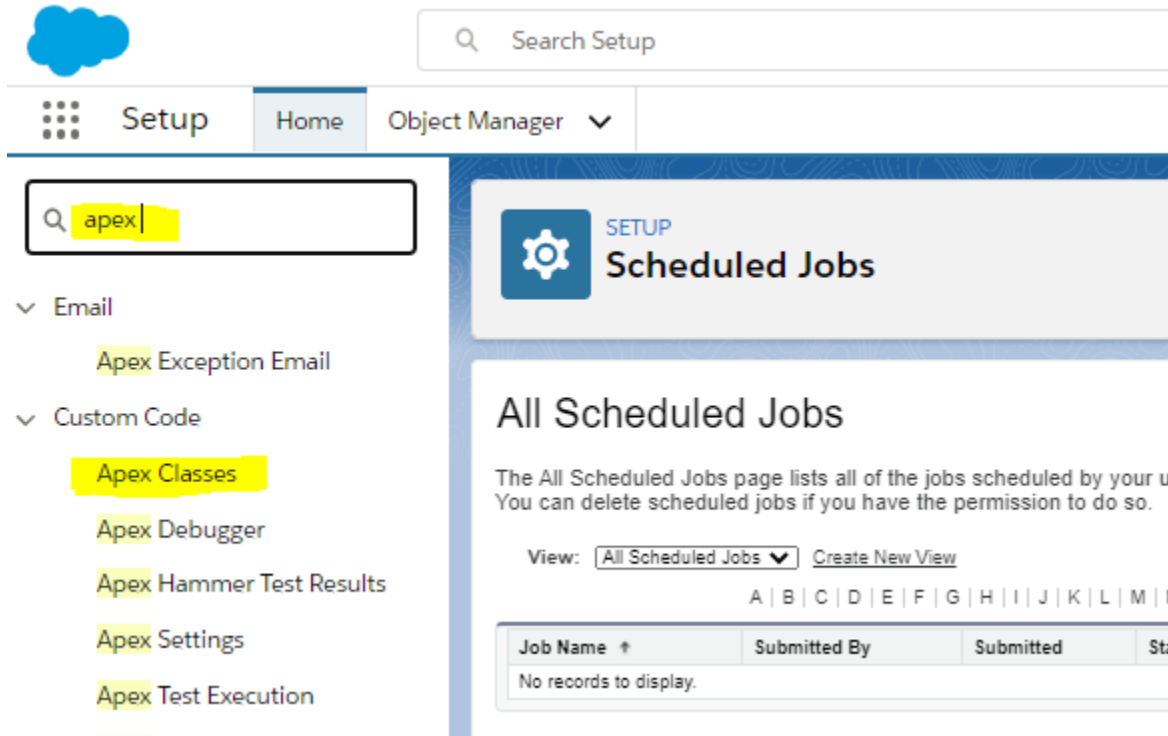
AccountSource	Record Count
NAMI Member Database	6
Package Installation	1
Web	1
External Referral	1
Employee Referral	1

Record Details

Record ID	Name	Type
0012E00002SWvrBQAT	Pepsi	Customer
0012E00002SWvpeQAD	Goya	null
0012E00002SX6L8QAL	American Beef Packers, Inc.	Customer
0012E00002SX0QeQAP	Wotiz Meat Co.	Customer

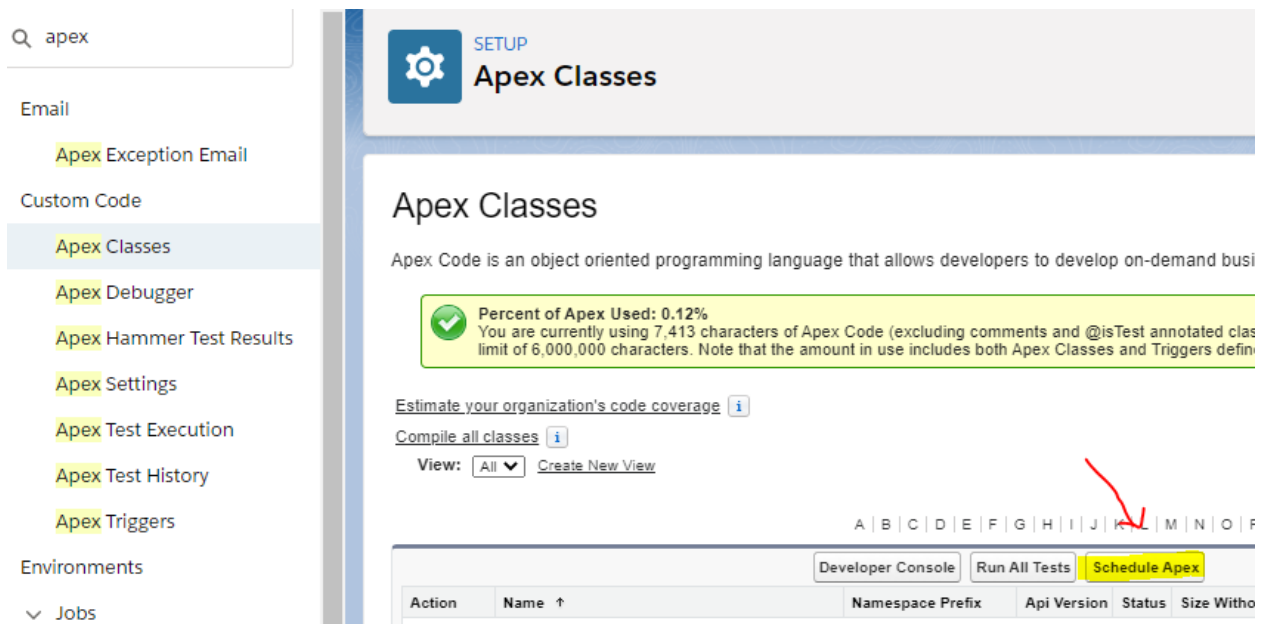
9. Schedule a Job

Now it is time to schedule a Data Alert job. Go to setup and search for “apex”. Click on “Apex Classes”.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'apex' entered. Under the 'Custom Code' section, 'Apex Classes' is highlighted. The main content area is titled 'Scheduled Jobs' and shows 'All Scheduled Jobs'. Below this, there is a table with columns: Job Name, Submitted By, Submitted, and Status. The table currently displays 'No records to display'.

Click on “Schedule Apex” button.



The screenshot shows the Salesforce Setup interface for 'Apex Classes'. The left sidebar has a search bar with 'apex' entered. Under the 'Custom Code' section, 'Apex Classes' is highlighted. The main content area is titled 'Apex Classes' and shows a summary of Apex Code usage. Below this, there is a table with columns: Action, Name, Namespace Prefix, Api Version, Status, and Size. The 'Schedule Apex' button is highlighted in the table.

Enter Job name such as “Data Alerts at 8 AM Weekdays”. Then click on magnifying glass symbol next to “Apex Class” field.

Schedule Apex

[Help](#)

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on monthly interval.

Select “DataAlert_Schedulable” job from the list.

Name	Namespace Prefix	Api Version
COA_CustomerAOVScheduler	CHANNEL_ORDERS	38
COA_CustomerOrderProductBatchScheduler	CHANNEL_ORDERS	40
COA_ProcessDetailsAutoRenewScheduler	CHANNEL_ORDERS	38
COA_UpdateRenewalDateOnCustomerScheduler	CHANNEL_ORDERS	37
COA_UpdateVersionOneProductsScheduler	CHANNEL_ORDERS	38
DataAlert_Schedulable	Toolz	49
RollupCalculateJobSchedulable	Toolz	37
RollupJob	Toolz	37
ScheduledDeleteCMALogs	sfcma	34
ScheduledNotificationSender	sfcma	36

Then enter/ select when you would like to run the job. Click on the Save button to create a Scheduled Job.

Save Cancel

Job Name Data Alerts at 8 AM Weekd.

Apex Class DataAlert_Schedulable

Schedule Apex Execution

Frequency ☒ Weekly ☐ Monthly

Rekurs every week on

☐ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☐ Saturday

Start 1/17/2021 [1/17/2021]

End 2/17/2021 [1/17/2021]

Preferred Start Time 8:00 AM ▼

Exact start time will depend on job queue activity.

Save Cancel

Please note that whenever the scheduled job runs, it will run all of the Data Alerts, if you have more than one active Data Alert.

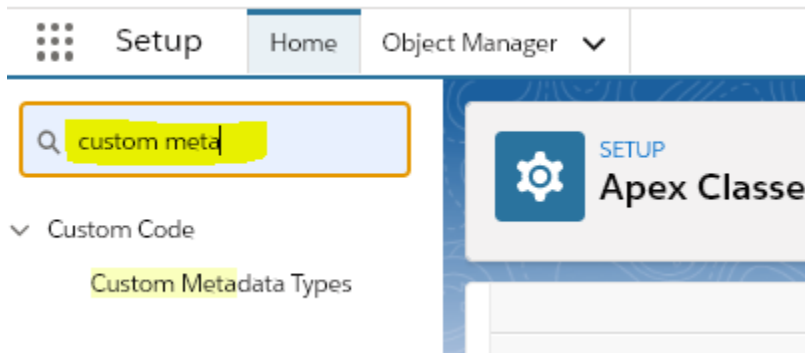
You can create multiple Data Alert Scheduled jobs, let's say at 8 AM, 10 AM, 2 PM and 6 PM.

Even if you have a scheduled job 4 times a day, you may specify one of the Data Alerts to run once in a week, and one Data alert once a month.

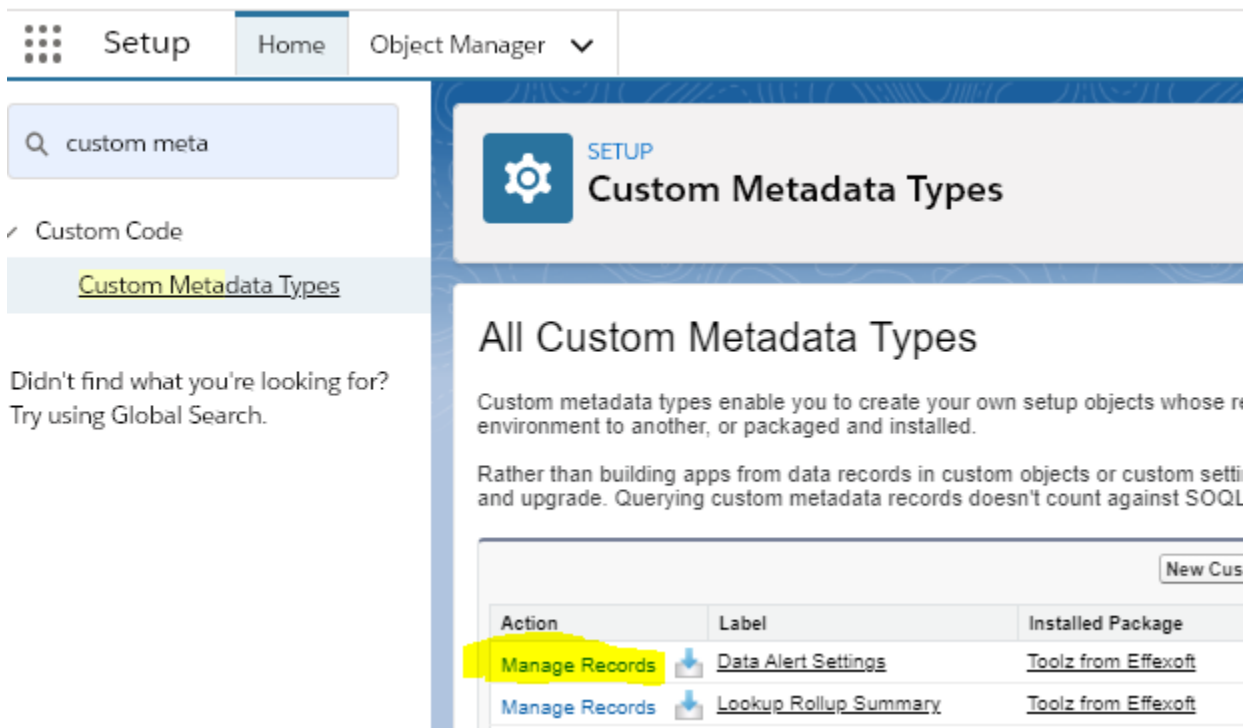
You can change the Frequency Type on each Data Alert.

10. Review / Change settings

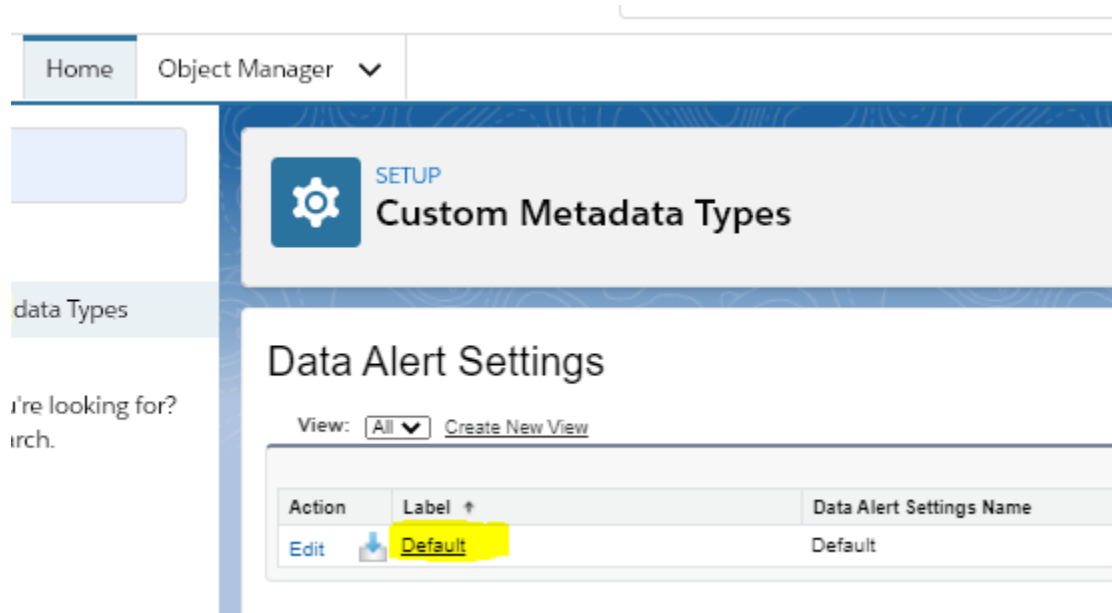
Now let's review Data Alert settings. Go to Setup and search for "Custom Metadata Types". Click on "Custom Metadata Types".



Click on "Manage Records" link next to "Data Alert Settings".



Then, click on “Default” link.



Review settings in the “Data Alert Settings Detail” page. For example, you can uncheck “Create Run Record when No Result” checkbox, if you do not want to create a Data Alert Run record when there are no results in the Data Alert.

Data Alert Settings (Managed)



[Back to List: Custom Apps](#)

This Data Alert Settings is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Data Alert Settings Detail

[Edit](#) [Clone](#)

Label	Default	Protected Component	
Data Alert Settings Name	Default	Namespace Prefix	Toolz
Auto Delete Run Data	☒	Limit Records	1,000
Auto Delete Run Data x Factor	30	Email when No Result	☐
Create Run Record when No Result	☒	Email after Batch Job	☒

11. List of Objects in Data Alerts

This section lists all the objects in the Data Alerts tool. This can help Salesforce Administrators to customize Data Alerts further according to their needs. There are 5 objects in the Data Alert tool. They are listed here.

1. Data Alert

Object API Name: Toolz__Data_Alert__c

Data Alert is defined and stored in this object. A data alert should always contain an SOQL query. Several validations are performed against a data alert record before it gets stored or whenever it is updated. Look at the Data Alert Object section below for field level details and validations.

2. Data Alert Recipient

Object API Name: Toolz__Data_Alert_Recipient__c

This object is a child object on the Data Alert object. The list of alert recipients are listed in this object.

3. Data Alert Record

Object API Name: Toolz__Data_Alert_Record__c

Data records retrieved from the Data Alert Query are stored in this object.

4. Data Alert Run

Object API Name: Toolz__Data_Alert_Run__c

A record is created in this object whenever a Data Alert runs.

5. Data Alert Summary

Object API Name: Toolz__Data_Alert_Summary__c

Summary information about each Data Alerts run is stored in this object.

12. Customization

Salesforce Administrators can feel free to add additional fields on any of the 5 objects if needed.

13. Common Mistakes

1. Dynamic SOQL should always have ID as first field.

Dynamic SOQL should always start with ID field. For example:

Select ID, Name, Type from Account where website = Null

The following SOQL statements will result in an error:

Select Name, Type from Account where website = Null

14. Support

Effexoft provides support from the following channels for Toolz application.

1. Knowledge Base link on Toolz package listing page on AppExchange

Toolz package is listed on AppExchange at:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FABeMUAX>

Requirements

Salesforce Edition **Enterprise, Unlimited, Developer, Performance**

Other System **No additional system requirements**

Support

Knowledge Base
Terms and Conditions

Additional Information

Package Name **Toolz from Effexoft**

2. Email Support

Please send an email to support-toolz@effexoft.com if you have any questions related to Toolz package.

Effexoft will respond to all emails within 48 hours or two business days.

3. Reviews section on Toolz package listing page on AppExchange

AppExchange is a Salesforce managed portal and it provides a “Reviews” section to interact with App Developers. Effexoft responds to any question / review posted on the Toolz package page in the AppExchange.

Effexoft appreciates feedback from all the users. If you have trouble working with Toolz, please email us at support-toolz@effexoft.com instead of leaving a comment in the reviews section.

4. Support for Enterprise Customers or Partners

Please contact your Account executive at Effexoft for any customization support or complex implementation, enhancement requests.

15. Enhancements and Feature Requests

Feel free to send us an email at support-toolz@effexoft.com if you would like to have an enhancement or a new feature in the Data Alert tool or in the Toolz package. We would love to add enhancing and adding more features / tools to Toolz package.